DYNAMICS 365 · COPILOT

Bill Pay powered by Copilot

Proactive patient billing on the platform you already use.

PATIENT BILLING TODAY

Patient financial responsibility continues to grow. Yet for most healthcare organizations, the billing process remains largely reactive. **Statements go out, and teams wait for patients to respond.**

01 INBOUND VOLUME

High volumes of routine balance and payment calls.

02 AGING BALANCES

Balances age while statements go unread.

03 COMPLIANCE EXPOSURE

Outreach depends on each staff member applying HIPAA, PCI and consent requirements on every call.

THREE CHALLENGES THE REACTIVE MODEL CREATES

How it works

Eligibility, disclosure and verification before every conversation.

01 · BALANCE POSTS

A patient-responsibility balance posts in Dynamics 365.

02 · ELIGIBILITY

The agent confirms consent, contact preferences and account status.

03 · OUTBOUND CALL

It then places the call.

04 · DISCLOSE, THEN VERIFY

It discloses that it's automated and verifies identity before any account details.

Patients resolve their way

Pay during the call
Secure payment gateway

Text-to-pay link
Sent to the mobile on file

Speak with staff
Transfer with full context

Every staff member receives full context from the agent. When queues are long, patients can schedule a callback instead of waiting.

CONTROLS ENFORCED BY DESIGN

- Card data is handled entirely by the payment gateway.
- Consent and opt-outs apply to every contact.
- Every outcome is recorded back to Dynamics 365.

THE RESULT

- **Reduce inbound volume.** Fewer routine inbound calls.
- **Accelerate collections.** Faster time to payment.
- **Strengthen compliance.** Staff focused on the cases that require their expertise.

NEXT STEP

See **Bill Pay powered by Copilot** run against your own billing workflow in Dynamics 365.

BOOK A 30-MINUTE DEMO

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