



Diagnostic Eye Center Improves Payment Experience for Patients, Practice, and Co-managing Optometrists

Practice chose CoFi to facilitate convenient, compliant patient payments to multiple providers involved in surgical procedures.



STEPHANIE LOZANO, O.D.
Practice Administrator

We recently interviewed Stephanie Lozano, O.D., Practice Administrator at Diagnostic Eye Center, to gain her perspective on using CoFi. A CoFi customer since November 2021, the ophthalmologists at Diagnostic Eye care for patients throughout greater Houston and work with many optometrists to co-manage surgical patients. The practice chose CoFi because of the value it delivers to its patients, its co-managing ODs, and the efficiency of its staff.

Practice Details

- 6 doctors
- Nearly 100 co-managing optometrists
- CoFi customer since November 2021



"With CoFi, we just create an invoice, select the procedure they're going to have, who the co-managing OD is, and, because all of this is pre-loaded, the right fees for each party go onto the invoice automatically."



"We have our entire network of about 100 co-managing ODs onboarded to CoFi."

Q & A with Stephanie Lozano, O.D.

1. How did you handle co-management payments prior to using CoFi?

Our co-management process has always been oriented around compliance. We've always had the co-managing optometrist collect their own fees for their services in their offices – at the post-operative visit. The feedback from the ODs was that this was "tough." The patient had paid our office and the ASC in the weeks prior, and now, at the OD's office, they are confronted with another payment. Our optometry colleagues told us that collections moment often was difficult.

2. What were some of the pain points you were looking to address with CoFi?

In short, nobody liked the previous process. The patients didn't like it – it was just confusing. Patients don't understand why they're paying 3 different places for a simple cataract procedure, or 2 places for LASIK. The ODs didn't like it; in fact, there were many times when they would forego collecting the post-op fee. And we really didn't like it because it was hard for our counselors to explain everything to the patients and to maintain a spreadsheet of what each OD is charging the patient for each procedure. So, while it was compliant, it was very frustrating for everyone.

3. How has using CoFi addressed those shortcomings?

CoFi is so much easier all around.

We have our entire network of ODs onboarded to CoFi (about 100). The important thing with respect to compliance is that the ODs set their fees and collect them directly from the patient. With CoFi, we just create an invoice, select the procedure they're going to have, who the co-managing OD is, and, because all of this is pre-loaded, the right fees for each party go onto the invoice automatically.

We don't have to explain CoFi to the patient at all. We also don't have to explain nearly as much about how much they're paying and to whom. We just tell the

patient, "You're going to be paying \$X to us and \$Y to your optometrist, and we're going to process both of those payments right now." It just makes sense to our patients.

4. How has CoFi been received at your practice?

Our staff has loved CoFi. It's taken a step out of their process. Before, they would communicate to the OD office what procedure, lens, and other technology were involved and what the OD would need to collect from the patient at the post-op visit. With CoFi, the OD practice can see all of that information, plus the date of the surgery, the surgeon, etc. And the patient's payment to the OD is already processed. It's just very transparent and it eliminates that whole communication step – it's a lot more efficient for both practices.

5. What were you concerned about with respect to getting started with CoFi? And how did that turn out?

One worry I had at the beginning was whether we'd be able to get all of our co-managing ODs onboard. But CoFi has a great team and has been great working with our team. We have our entire network set up with CoFi, and we're finding that CoFi has become a useful differentiator for our practice as we start to engage and work with new ODs throughout our market.

6. What would you say when recommending CoFi to a colleague?

We've found processing payments through CoFi to be easier than before. Because CoFi is browser-based, our counselors can print or send an invoice to the patient, take the payment right there, whether they're with the patient in person or on the phone, and get them a receipt immediately. They don't need to leave or put the patient on hold to get over to the card terminal. When it comes to premium procedures, a lot of what we're doing is selling technology and an overall experience. Patients are spending thousands of dollars, so if we can give them a better payment experience, too, that's something they appreciate, and it supports what we're trying to do.

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