

FOR OFFICE MANAGERS AND PRACTICE OWNERS

Dental Payment Plan Vendor Checklist

Compare the day-to-day work, reporting and terms behind each option.

How to use this

- 1 Choose three vendors for the same use case.
- 2 Ask each vendor the same questions.
- 3 Score fit only after checking the details.

Vendor comparison

Write facts, not sales claims

What to compare	Vendor 1	Vendor 2	Vendor 3
Plan setup and terms			
Eligibility rules			
Autopay consent and disclosures			
Card on file and ACH			
Failed payment retries			
PMS posting and reconciliation			

Vendor comparison, continued

Use the same standard for all three

What to compare	Vendor 1	Vendor 2	Vendor 3
Daily deposit reports			
Patient portal and texts			
Staff training and support			
Pricing and fees			
Contract length			
Data security			

Questions to ask on the demo call

- | | |
|---|---|
| ☐ Who sets plan terms and approves exceptions? | ☐ What reports help reconcile deposits? |
| ☐ What does staff do when a payment fails? | ☐ What training is included for new staff? |
| ☐ How do payments post back to the PMS? | ☐ What support hours and response targets apply? |
| ☐ What does the daily close process look like? | ☐ How can the practice export its data? |

Vendor 1 score

_____ / 10

Vendor 2 score

_____ / 10

Vendor 3 score

_____ / 10



Practice Pays helps dental offices run in-house patient payment plans.
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