

DSO Financing Rollout Checklist



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Evaluating and standardizing patient financing across your locations

Use this quick checklist when evaluating a financing partner, standardizing an existing program, or auditing how consistently it's being used across your locations.

1. The financing model

- ☐ Matches patients against multiple regulated lenders in one application, not a single lender decision
- ☐ Soft-inquiry eligibility check, with decisions typically available in real time

2. Consistency across locations

- ☐ Same financing option and process at every location, not office to office
- ☐ One point of contact for questions spanning multiple locations

3. Compliant training

- ☐ Required for every team member, including new hires, before offering financing
- ☐ Standardized language (“check eligibility,” “see what you qualify for”), never a promise of approval

4. Oversight and reporting

- ☐ Leadership can see financing usage and case-acceptance impact across all locations
- ☐ Regular compliance audits and a clear escalation path for questions

5. Ready to scale

- New locations can be added without renegotiating individual lender relationships
- Defined cadence for reviewing performance and ROI with your financing partner



Ready for a change? Talk to a Wellfit Expert Today.

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