Front Desk Best Practices

Lynne Y Gratton, CPPM
PCC 2015 Users' Conference
Front Desk Best Practices

Overview

- Take Away
- Front Desk Best Practices
- Pre Visit
- Visit Date
Front Desk Best Practices

• What is the Take Away?
  – Learning the importance of the front desk and best practices.
  – Tools to help
Front Desk Best Practices

- Goals for the front desk
- Customer service
- Telephones
- Keep them busy
- Oversight
Front Desk Best Practices – Goals

- Great customer service
- Generate clean claims from a demographics standpoint
- Increase time of service payments
- Reduce the amount of collections after the visit
Front Desk Best Practices – Customer Service

- First impressions count
- Get rid of the glass
- Greet patients immediately
- Work as a team, help each other with overflow
- Separate sick and well waiting rooms
Front Desk Best Practices – Customer Service

• Wait for a response before putting someone on hold
• Discuss significant billing issues in private
  – Have at least one billing staff with an office near the front
• Do not discuss other parents/patients at the front desk
Front Desk Best Practices – Phones

- Move phone triage away from the front desk
  - Allow front desk staff to focus on verifying demographics, insurance, collecting payments
  - Use phone system to appropriately route calls
  - For staff on phones, use headsets
Front Desk Best Practices – Keep Them Busy

- There should be no down time at the front desk
- If things slow down, have them work on recall lists
  - Call patients overdue for well visits, Asthma checkups, ADHD checkups, flu shots, etc.
Front Desk Best Practices – Oversight

- Track how much recall they are doing
- Track copay collection rates
- Track collections for past due balances
- Set goals and reward staff for achievements
Front Desk Best Practices – Pre-Visit

The processes used prior to when a patient comes in will impact the quality of your claims, increase TOS payments, and help reduce the amount of collections needed.

In short the Front End functions drive the revenue cycle.
Front Desk Best Practices – Pre-Visit

- Scheduling
- Appointment Verification
- Eligibility Verification
- Eligibility Using Partner
- Billing Department Prep
Front Desk Best Practices – Pre-Visit Scheduling

Verify demographics!

Verify insurance!

Copay & Balance reminder

Update demographics easily with F6

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Front Desk Best Practices – Pre-Visit Scheduling

• New Patient Process
  - Who collects insurance information over the phone?
  - F4/F7 can be configured to bring you directly to eligibility and the policy program
  - Remind them to bring their insurance card and copay
Front Desk Best Practices – Pre-Visit Scheduling

• Points to make during appointment verification
  – Verify date, time, and visit reason
  – Verify insurance plan, subscriber, start date, and end date
  – Remind patient
    • to bring in their insurance card
    • payment for expected copay & outstanding balances
Front Desk Best Practices – Pre-Visit
Appointment Verification

Appointment Verification

- Why?

- When?

- How?
Front Desk Best Practices – Pre-Visit Appointment Verification

• What to verify during reminder calls
  - Date, time and visit reason
  - Insurance plan, subscriber, start/end dates
  - Reminders
Front Desk Best Practices – Pre-Visit
Eligibility Verification

Eligibility Verification

- Why?

- When?

- How?
Front Desk Best Practices – Pre-Visit Eligibility Verification

- Partner's elig program
  - Auto eligibility overnight
  - Update policy information as needed through elig, especially copays!
  - Use notes for the front desk to see at checkin
  - Eligibility for visits more than two days away?
Front Desk Best Practices – Pre-Visit
Billing Dept Prep

- Develop a financial policy you share with parents.
- Develop guides to educate patients about insurance responsibility.
- Understand basic information about patient insurance plans and share with the front desk.
  - When you sign a contract with a new insurance, inform the front desk.
Front Desk Best Practices – Same Day Visits

• Scheduling
  – Verification
  – Reminders

• Eligibility
  – Real time with elig if possible
  – Check online/via phone as needed
Front Desk Best Practices – Day of Visit

- Patient Check In (checkin)
- Posting Charges (checkout)
- Clean claims
Front Desk Best Practices – Day of Visit checkin

• Why use checkin?
  – Most Common Clearinghouse Claim Rejection Reasons can be avoided by properly using the checkin program
  – TOS payments
# Front Desk Best Practices – Day of Visit

**checkin Demographics**

<table>
<thead>
<tr>
<th>Name</th>
<th>Birth Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pebbles</td>
<td>Apr 24, 2003</td>
</tr>
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</table>

**Flintstone**

<table>
<thead>
<tr>
<th>Name</th>
<th>Age</th>
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<tbody>
<tr>
<td>Williams</td>
<td>10 years</td>
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**Status**

- Problem, Adoption

**SSN**

- 828-74-6104

**School**

- Bedrock Central

**Chart #**

- 2755

**Patient Lives with Wilma Flintstone (#1981)**

<table>
<thead>
<tr>
<th>Status</th>
<th>Home Phone</th>
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<tbody>
<tr>
<td>CONFIDENTIAL</td>
<td>802-555-0194</td>
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**15 Quarry Lane**

<table>
<thead>
<tr>
<th>City</th>
<th>Work Phone</th>
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<tbody>
<tr>
<td>Winooski</td>
<td>802-555-0197</td>
</tr>
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**State**

- VT

**Zip Code**

- 05404

**Email**

- stones@HannaBarbera.com

**Bills Sent to Fred Flintstone (#1980)**

<table>
<thead>
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<th>Status</th>
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</thead>
<tbody>
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<td>Billing Problem</td>
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**1400 Rock Road**

<table>
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<tr>
<th>City</th>
<th>Work Phone</th>
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<tbody>
<tr>
<td>Winooski</td>
<td>802-555-0146</td>
</tr>
</tbody>
</table>

**State**

- VT

**Zip Code**

- 05404

**Email**

- stones@HannaBarbera.com

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Front Desk Best Practices – Day of Visit
checkin Demographics

Pat PCC (#3336)  Checkin - Additional Demographics  Step 2 of 5
First Name: Pebbles  Born: Apr 24, 2003
Last Name: Flintstone  Age: 10 years
Physician: Mark Williams, M.D.  Sex: Female
Status: $$$ Problem, Adoption

Ethnicity: Not Hispanic or Latino
Race: White

Preferred Language: English
Other Language: Spanish

Contact Name Method

Patient Confidential Contact
Mailing Address
X Cell Phone: 802-391-1234
Work Phone
Home Phone
Text
E-mail
No Preference

Meaningful Use anyone?
Front Desk Best Practices – Day of Visit checkin Eligibility

Are there notes to review?

Verify eligibility has already been checked

On demand eligibility check

On-Demand eligibility report available by pressing F6
Front Desk Best Practices – Day of Visit

checkin Eligibility

• Make sure eligibility has been verified
• Relationship code for child or self
  – Online eligibility systems do not ask for patient relationship to subscriber. Real time eligibility requires this be correct or the insurance will not return a response.
Checkin - Policies
Pebbles Flintstone

<table>
<thead>
<tr>
<th>Copay Insurance Company</th>
<th>Certificate #</th>
<th>Group #</th>
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<tr>
<td>15.00 Aetna HDHP $15</td>
<td>34DFJH</td>
<td></td>
</tr>
<tr>
<td>20.00 Cigna PPO $20</td>
<td>24958JD</td>
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<tr>
<td>10.00 (Expired) Aetna USHC HMO $10/2</td>
<td>BG6571296</td>
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<tr>
<td>20.00 (Expired) Aetna USHC HMO $20</td>
<td>BG4582164</td>
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<tr>
<td>20.00 (Expired) BCBS $20 Custom Blue</td>
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Press the Right Arrow Key for More Information

Aetna HDHP $15 / Aetna / Aetna HDHP
PO Box 981106
El Paso, TX 79998-1106
Payor ID: 60054
Phone:

SUBSCRIBER
First: Birth: Start: 05/30/2012
Last: Sex: Female
Address: 1400 Rock Road Reln: Child

Contact Patty Leduc at 1-800-345-1284 ext 111134 for specific patient billing questions.

Is policy information accurate and up to date?
Front Desk Best Practices – Day of Visit

checkin Policies

- Always get a copy of their insurance card
- Verify subscriber information
Front Desk Best Practices – Day of Visit

check in Copays

Expected copay

Copay notes and primary policy

Previous personal balance or credit

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Questions about a past due balance?
- Use F4 to Show Details

<table>
<thead>
<tr>
<th>OUTSTANDING CHARGES:</th>
<th>PRIMARY DIAG</th>
<th>PROV</th>
<th>AMOUNT</th>
<th>PERS DUE</th>
<th>INS DUE</th>
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<tbody>
<tr>
<td>05/01/12 Flintstone, Pebbles</td>
<td>V20.2</td>
<td>Case</td>
<td>95.00</td>
<td>7.00</td>
<td>0.00</td>
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<tr>
<td>Well Child 5-11 yrs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/20/12 Flintstone, Dino</td>
<td>372.30</td>
<td>Davi</td>
<td>79.00</td>
<td>15.00</td>
<td>64.00</td>
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<tr>
<td>OV Expanded Focus</td>
<td></td>
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</tr>
<tr>
<td>12/20/12 Flintstone, Pebbles</td>
<td>372.30</td>
<td>Davi</td>
<td>79.00</td>
<td>15.00</td>
<td>64.00</td>
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<tr>
<td>OV Expanded Focus</td>
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</tr>
<tr>
<td>TOTAL AMOUNT DUE</td>
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<td></td>
<td>37.00</td>
<td>128.00</td>
<td></td>
</tr>
</tbody>
</table>
Front Desk Best Practices – Day of Visit

checkin Copays

- Make sure to collect the proper copay amount, sick vs. well
- HSA Accounts
- Credits appear as a – instead of a CR as part of the balance

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Front Desk Best Practices – Day of Visit checkin Copays

- Store and process credit card payments online
  - Get authorization from the family to charge their credit card for outstanding balances
  - Flag their account
- Use a secure web service
  - PaySimple (paysimple.com)
  - PayPal

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Front Desk Best Practices – Day of Visit checkout

• Schedule next appointment
• Missed appointments
• Proper insurance configuration
• checkout screens pre-set by visit reason
• SNAP codes
• Clean claims
• Account for all visits
Front Desk Best Practices – Day of Visit checkout

• Schedule next appointment
  – Make sure your schedule is out at least 6 months so you can schedule younger children easily, 1 year is better, 13 months ideal!
Front Desk Best Practices – Day of Visit checkout

• Track missed appointments
  – Charge for missed appointments and make sure that is part of your financial policy
  – When you post a missed appointment fee in Partner, make sure it is configured to automatically mark the appointment missed in Patient Inquire (inquire)
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Front Desk Best Practices – Review

• Visit Date
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Front Desk Best Practices

• Questions?