Front Desk Best Practices

2013 Users Conference
7/17/13
Tim Proctor (tim@pcc.com)
Goals For This Session

- Help you understand:
  - The **best way to use PCC's tools** we've designed for the front office
  - How the front office functions really **drive your revenue cycle**
- Share examples of the best (and worst) front desk practices
- Open discussion forum
- Your goals for today's session?
Front Desk And The Revenue Cycle

Goals:

- Generate clean claims
- Increase time-of-service payments
- Reduce the amount of collections needed later

Pre-visit and time of visit strategies
Pre-Visit – Appointment Verification

• Why?
  – To avoid missed appointments

• How?
  – notify program
  – srs or chart report
  – Other third party software?

• When?
  – 24 to 48 hours before appointment
Pre-Visit – Eligibility Verification

• Why?
  – To avoid claim rejections and costly billing followup

• How?
  – elig program
  – Online or by phone

• When?
  – 1-2 days before appointment
Pre-Visit – Eligibility Verification

- Use elig to track verification even if PCC does not have a connection to the payor

Pediatric Software Just Got Smarter. Your Practice Just Got Healthier.
• Elig notes appear in checkin so use them to communicate billing info to checkin staff
This is an update of information already on file for your children. Please look over and make any necessary changes. This will be done on a yearly basis.

**RESPONSIBLE PARTY INFORMATION:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Lives With:</td>
<td>Tim Proctor</td>
<td>1 Main St</td>
<td>Winooski</td>
<td>05404</td>
</tr>
<tr>
<td>Send Bill To:</td>
<td>Tim Proctor</td>
<td>1 Main St</td>
<td>Winooski</td>
<td>05404</td>
</tr>
<tr>
<td>SSN#:</td>
<td>Employer:</td>
<td>Other parent (if not above)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**PHONE NUMBERS:**

<table>
<thead>
<tr>
<th>Home Phone</th>
<th>Work Phone</th>
<th>Cell Phone</th>
<th>Emp Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>800-722-7708</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**PRIMARY INSURANCE INFORMATION:**

<table>
<thead>
<tr>
<th>Subscriber Name</th>
<th>Group#</th>
<th>DOB of Cardholder</th>
<th>Ins. Co. Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abby Proctor</td>
<td>121212</td>
<td>11/21/09</td>
<td>BCBS Federal $20 Full MC</td>
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</tbody>
</table>

**SECONDARY INSURANCE INFORMATION:**

<table>
<thead>
<tr>
<th>Subscriber Name</th>
<th>Group#</th>
<th>DOB of Cardholder</th>
<th>Ins. Co. Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Please add siblings below)

<table>
<thead>
<tr>
<th>Active Children</th>
<th>DOB</th>
<th>Gender</th>
<th>Primary Ins</th>
<th>ID#</th>
<th>Relation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abigail Proctor</td>
<td>11/21/09</td>
<td>Female</td>
<td>BCBS Federal</td>
<td></td>
<td>Child</td>
</tr>
<tr>
<td>Samuel Proctor</td>
<td>12/18/09</td>
<td>Male</td>
<td></td>
<td></td>
<td>Child</td>
</tr>
</tbody>
</table>

I certify that I, or my dependents above, have insurance coverage as indicated above and assign directly to Picate Pediatrics, PA all insurance benefits, if any, otherwise payable to me for services rendered. I understand that I am financially responsible for all charges whether or not paid by insurance. I hereby authorize the use of this signature on all insurance submissions as well as to release information necessary for the payment of claims.

**Signature**

Date Signed

Staff Initials

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Sample Account Demographics Form

- Contact PCC Support if you want this
Time-of-Visit – Checking In

- You'll want to record these for MU and PCMH
Time-of-Visit – Checking In

- Look for notes left for you by billing staff
- Also check eligibility for all same-day appointments
Time-of-Visit – Checking In

Is policy information accurate and up to date?

SUBSCRIBER
First:
Last:
Address: 1400 Rock Road
Winooski, VT 05404

Birth:
Sex: Female
Reln: Child

Payor ID: 6005
Phone:

Contact Patty Leduc at 1-800-345-1284 ext 11134 for specific patient billing questions.

Next Step Scroll Backward Scroll Forward Edit Policy Insert Policy Move Policy Delete Policy Expire Policy
Time-of-Visit – Checking In

Checkin - Copay and Balance

Step 5 of 5

***** COPAY: $15.00 *****

Copay Note: They have a HDHP make sure to collect $$
Policy: Aetna HDHP $15

***** PERSONAL BALANCE: $37.00 *****

Account: Fred Flintstone (#1980)

AGEING
PER: 0.00 0.00
INS: 0.00 0.00
Med: 0.00 0.00

CREDIT: 0.00

BALANCE
37.00
128.00
0.00

Previous personal balance and credit

Expected Copay
Copay notes and primary policy

Finish Checkin
Show Detail
TOS Payments
Print

Physician's Computer Company

Pediatric Software Just Got Smarter. Your Practice Just Got Healthier.
Time-of-Visit – Copays and Past Balances

- Don't collect copays for well visits unless you know for sure they have one
  - Save your billing staff the headache: Partner can and should be configured to expect a copay for sick but not for well
  - Add a copay note or insurance plan note for the patients and/or plans you know have a well copay
Time-of-Visit – Copays and Past Balances

<table>
<thead>
<tr>
<th>Date</th>
<th>Name</th>
<th>Diagnosis</th>
<th>Provider</th>
<th>Amount</th>
<th>Pers Due</th>
<th>Ins Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/01/12</td>
<td>Flintstone, Pebbles</td>
<td>V20.2 Well Child 5-11 yrs</td>
<td>Case</td>
<td>95.00</td>
<td>7.00</td>
<td>0.00</td>
</tr>
<tr>
<td>12/20/12</td>
<td>Flintstone, Dino</td>
<td>372.30 Expanded Focus</td>
<td>Davi</td>
<td>79.00</td>
<td>15.00</td>
<td>64.00</td>
</tr>
<tr>
<td>12/20/12</td>
<td>Flintstone, Pebbles</td>
<td>372.30 Expanded Focus</td>
<td>Davi</td>
<td>79.00</td>
<td>15.00</td>
<td>64.00</td>
</tr>
<tr>
<td>TOTAL AMOUNT DUE</td>
<td></td>
<td></td>
<td></td>
<td>37.00</td>
<td>128.00</td>
<td></td>
</tr>
</tbody>
</table>

- Question about a past due balance? Use <F4> to show details.
Time-of-Visit – Copays and Past Balances

- 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
Time-of-Visit – Checking Out

- Schedule next appointment (even if it's 6 months to a year out)
- Charge posting at check out?
  - Important to do if you have a lot of private pay
  - Use csedit to customize charge screens based on visit type
  - Use snap codes for bundled charge posting
  - With EHR, charges need to be “billed” by provider before you post charges
- Always mark no-shows via inquire
Handling Phone Calls

- Move phone triage away from the front desk
  - Allow front desk staff to focus on verifying demographics, insurance, collections, etc
  - Use phone system to appropriately route calls
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 Oversight

- Track how much recall they are doing
  - Track # specific appointment types scheduled by user
- Track copay collection rates
  
  srs → Billing/Collection Reports → Copay Collection Ratio
  
  - Technically not “collected at TOS” but close if you run this each week
- Track collections for past due balances
- Set goals and reward staff for achievements
Customer Service

• First impressions count
• Get rid of the glass
• Greet patients right away
• Work as a team (help each other with overflow)
• Separate sick and well waiting rooms
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
- Don't discuss other parents/patients at the front desk