

Front Desk Best Practices

2013 Users Conference

7/17/13

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Pediatric Software Just Got Smarter. Your Practice Just Got Healthier.

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 – Scheduling

Verify demographics!

SAM Search Criteria

Name	Visit Reason	PCP	Provider	Mins	L
X Pebbles Flintstone		W			0

Time Frame: _____

PATIENT: Pebbles Flintstone PA STATUS: \$\$ Problem, Adopti LAST PHYS
 DOB: 04/24/2003 CUST STATUS: CONFIDENTIAL NEXT APPT
 AGE: 10 years GUAR STATUS: Billing Problem

CUST: Wilma Flintstone GUAR: Fred Flintstone
 15 Quarry Lane 1400 Rock Road
 Winooski, VT 05404 Winooski, VT 05404

H: 802-555-0194 PERS BAL: \$ 37.00 H: 802-555-0105 PERS BAL: \$ 37.00
 W: 802-555-0197 INS BAL: \$ 128.00 W: 802-555-0146 INS BAL: \$ 128.00

PRI: Aetna HDHP \$15 CERT: 34DFJH GRP:
 SEC: Cigna PPO \$20 CERT: 24958JD GRP:

School: Bedrock Central SSN: 828-74-6104
 Alt Name: Rubble Chart #: 2755
 SS: 1 (12/18/12, Pebbles, Sick Call) CANCEL: 1 (02/11/07, Pebbles)

Schedule Inquire Find Next Relation Demo-graphics

Copay & Balance reminder

Wilma Flintstone
15 Quarry Lane
Winooski, VT 05404

Fred Flintstone
1400 Rock Road
Winooski, VT 05404

\$ 37.00

Aetna HDHP \$15
Cigna PPO \$20

Verify insurance!

Update Demographics Easily with F6

Acc

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

The screenshot shows a software interface for Patient Eligibility verification. The main window has a blue header and a light blue background. The text is as follows:

Pat PCC: 63304 Patient Eligibility

Patient: Firstname Lastname (12/31/2007)
PCP: Beverly Crusher, M.D. Subscriber: Firstname Lastname
Appointment: 04/21/09 9:10am Sick Call

PRI: BCBS HMOB\$25 CERT: 123456789012 GRP:

Notes: Status: Validated Date Verified: 04/20/09
Notes regarding eligibility status.

Eligibility Response Date: 04/21/2009 (ACTIVE)

Service: 04/21/2009
Enrollment: 12/31/2007
PROFESSIONAL (PHYSICIAN) VISIT - OFFICE
Active Coverage
MSG: REFERRAL IS REQUIRED
Auth: Yes
\$25 Individual Copayment Visit
MSG: MEDICAL CARE - PRIMARY CARE (OB/GYN), NURSE PRACTITIONER
\$35 Individual Copayment Visit
MSG: MEDICAL CARE - OTHER COVERED PROVIDER

Buttons at the bottom: Save, Scroll Backward, Scroll Forward, Edit Policies, Edit Patient, Request Elig, See Full Report, Change Status.

Annotations on the left side:

- Patient** → points to the patient information section.
- Policy** → points to the PRI and CERT information.
- User-Entered Status, Date, Notes** → points to the Status, Date Verified, and Notes fields.
- Summary of the Eligibility Reply Sent By the Carrier** → points to the Eligibility Response Date and the detailed service/coverage information.

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

- elig notes appear in checkin so use them to communicate billing info to checkin staff

Pat PCC: 2903 Patient Eligibility

Patient: Jordan Wingard (09/02/2005)
PCP: None Subscriber: Robert Wingard
Appointment: 07/12/13 10:15am Injury

PRI: Highmark PPO Blue \$10 CERT: ZAR102702446001 GRP: Win398

Notes: Status: Date Verified:

Highmark plan no longer active for Jordan. Get updated insurance.

This insurance plan is not configured to submit Eligibility Requests.

Save Scroll Backward Scroll Forward Edit Policies Edit Patient See Full Report Change Status

This is an update of information already on file for your children. Please look this over and make any necessary changes. This will be done on a **yearly** basis.

RESPONSIBLE PARTY INFORMATION:

Patient Lives With: _____ Send Bill To: _____
 Name: Tim Proctor _____ Tim Proctor _____
 Address: 1 Main St _____ 1 Main St _____
 Address: _____ _____
 City: Winooski _____ Winooski _____
 State: VT Zip Code: 05404 _____ VT Zip Code: 05404 _____
 SSN#: _____
 Employer: _____

PHONE NUMBERS:

Home Phone: 800-722-7708 _____
 Work Phone: _____
 Cell Phone: _____
 Emg Phone: _____

Other parent (if not above)

Name: _____
 DOB: _____
 Phone: _____

PRIMARY INSURANCE INFORMATION:

Subscriber Name: Abby Proctor _____ ID#: 1212121312 _____
 Group#: 121312 _____ Effective Dates: 12/01/09- _____
 DOB of Cardholder: 11/21/09 _____ Employer: _____
 Ins. Co. Name: BCBS Federal \$20 Full WC _____

SECONDARY INSURANCE INFORMATION:

Subscriber Name: _____ ID#: _____
 Group#: _____ Effective Dates: _____
 DOB of Cardholder: _____ Employer: _____
 Ins. Co. Name: _____

(Please add siblings below)

Active Children	DOB	Gender	Primary Ins	ID#	Relation
Abigail Proctor	11/21/09	Female	BCBS Federal		Child
Samuel Proctor	12/18/07	Male			Child

I certify that I, or my dependents above, have insurance coverage as indicated above and assign directly to Pirate 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.

Date Signed _____

Signature _____

Staff Initials _____

Sample Account Demographics Form

- Contact PCC Support if you want this

Time-of-Visit – Checking In

Pat PCC (#3336) Checkin - Additional Demographics Step 2 of 5

First Name:	Bebbles	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
Other Language	

Patient Confidential Communication Preference:

Contact Name	
Method:	<input type="checkbox"/> Mailing Address
	<input checked="" type="checkbox"/> Cell Phone: 802-391-1234
	<input type="checkbox"/> Work Phone
	<input type="checkbox"/> Home Phone
	<input type="checkbox"/> Text
	<input type="checkbox"/> E-mail
	<input type="checkbox"/> No Preference

Meaningful Use anyone?

Next Step Edit Policies Imms Record Patient History Patient Forms

- You'll want to record these for MU and PCMH

Time-of-Visit – Checking In

Pat PCC: 3336 Patient Eligibility

Patient: Pebbles Flintstone (04/24/2003)
PCP: Mark Williams, M.D. Subscriber:
Appointment: 05/17/13 3:15pm Sick Call

PRI: Aetna HDHP \$15 CERT: 34DFJH GRP:

Notes: Status: **Validated** Date Verified: 05/16/13

On-Demand eligibility report available by pressing **F6**

Next Step Scroll Backward Scroll Forward Edit Policies Edit Patient **Request Elig** See Full Report Change Status

Verify eligibility has already been checked

On demand eligibility check

- Look for notes left for you by billing staff
- Also check eligibility for all same-day appointments

Time-of-Visit – Checking In

Checkin - Policies
Pebbles Flintstone Step 4 of 5

Copay Insurance Company	Certificate #	Group #
15.00 Aetna HDHP \$15	34DFJH	
20.00 Cigna PPO \$20	24958JD	
10.00 (Expired) Aetna USHC HMO \$10/Z	BG6571296	
20.00 (Expired) Aetna USHC HMO \$20	BG4582164	
20.00 (Expired) BCBS \$20 Custom Blue	BC45912462	

Press the Right Arrow Key for More Information

Aetna HDHP \$15 / Aetna / Aetna HDHP
 PO Box 981106
 El Paso, TX 79998-1106

Payor ID: 6005
 Phone:

Is policy information accurate and up to date?

SUBSCRIBER

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

Winooski, VT 05404 Emplovr:

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

Next Step	Scroll Backward	Scroll Forward	Edit Policy	Insert Policy	Move Policy	Delete Policy	Expire Policy
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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)

AGING	0-29	30-59	60	90-119	120+	CREDIT	BALANCE
PER:	0.00	0.00			37.00	0.00	37.00
INS:	0.00	0.00			0.00	0.00	128.00
Med:	0.00	0.00			0.00	0.00	0.00

Finish Checkin Show Detail TOS Payments Print

The screenshot displays a 'Checkin - Copay and Balance' screen for a patient named Fred Flintstone. It shows a copay of \$15.00 and a personal balance of \$37.00. A table lists various charges (PER, INS, Med) and their corresponding amounts. The 'CREDIT' column shows 0.00 for all items. The 'BALANCE' column shows 37.00 for PER, 128.00 for INS, and 0.00 for Med. The interface includes buttons for 'Finish Checkin', 'Show Detail', 'TOS Payments', and 'Print'. Three callouts are present: 'Expected Copay' pointing to the \$15.00 copay, 'Copay notes and primary policy' pointing to the note about HDHP, and 'Previous personal balance and credit' pointing to the \$37.00 balance.

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



OUTSTANDING CHARGES:	PRIMARY DIAG	PROV	AMOUNT	PERS DUE	INS DUE
05/01/12 Flintstone, Pebbles Well Child 5-11 yrs	V20.2	Case	95.00	7.00	0.00
12/20/12 Flintstone, Dino OV Expanded Focus	372.30	Davi	79.00	15.00	64.00
12/20/12 Flintstone, Pebbles OV Expanded Focus	372.30	Davi	79.00	15.00	64.00
TOTAL AMOUNT DUE				37.00	128.00

- 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