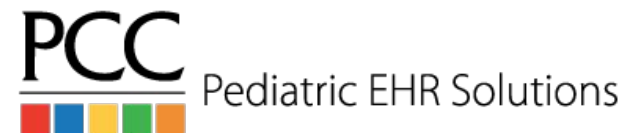


Front Desk Best Practices

Lynne Y Gratton, CPPM, AAPC Fellow
PCC 2017 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.



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 reception areas



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
 - Have them write down why they did not collect a copay when it is expected
- Track collections for past due balances
 - Again, track why they did not collect it
- 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!

Copay & Balance reminder

SAM Search Criteria

Visit Reason: _____ PCP Provider: _____

Time Frame: _____

PATIENT: Pebbles Flintstone PAY STATUS: \$\$ Problem, Adopti LAST PHYS: 01/12
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: _____

Site: Bedrock Central SSN: 828-74-6104
Name: Rubble Chart #: 2755
(12/18/12, Pebbles, Sick Call) CANC: 1 (02/11/07, Pebb)

Inquire Find Next Relation Demo-graphics Clear

Verify insurance!

Update demographics easily with F6



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
 - Anything else?



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, all active plans!
 - 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

- Train the front desk to understand
 - basic information about patient insurance plans
 - when you sign a contract with a new insurance, inform the front desk
 - your financial policy



Front Desk Best Practices

Pre-Visit: Billing Dept Prep

- Create a guide to educate patients about insurance responsibility
 - Make sure the front desk staff knows it front and back so they can answer questions.
- Thursday, 3:45pm
 - Insurance Education 101 for Patients



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?

“Financial problems can be directly related to billing errors that could have been avoided simply by reviewing information. Errors can cause delayed payment, costly fines, and lost revenue if not caught.” (Wilson, Judy A. (2016) [1].



Front Desk Best Practices

Day of Visit: checkin Demographics

Pat PCC (#3336) Checkin - Demographics Step 1 of 5

: Pebbles	Born: Apr 24, 2003
: Flintstone	Age: 10 years
: Williams	Sex: Female
\$\$ Problem, Adoption	
SSN: 828-74-6104	Alt Name: Rubble
Pool: Bedrock Central	Chart #: 2755

Patient Lives with Wilma Flintstone (#1981)

Status: CONFIDENTIAL	Home Phone: 802-555-0194
Addr: 15 Quarry Lane	Work Phone: 802-555-0197
Addr:	Cell Phone: 802-555-0161
City: Winooski	Emg Phone: 802-555-0168
State: VT Zip Code: 05404	
Email: stones@HannaBarbera.com	

Bills Sent to Fred Flintstone (#1980)

Status: Billing Problem	Home Phone: 802-555-0105
Addr: 1400 Rock Road	Work Phone: 802-555-0146
Addr:	Cell Phone: 802-555-0112
City: Winooski	Emg Phone:
State: VT Zip Code: 05404	
Email: stones@HannaBarbera.com	

Next Step Edit Patient Edit Account Reassign Account Make Appt Reprint Enc Form Billing FKey Set

Update demographics



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
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

Next Step Edit Policies Imms Record Patient History Patient Forms

Meaningful Use anyone?



Front Desk Best Practices

Day of Visit: checkin Eligibility

The screenshot shows a patient eligibility check interface. The patient's name is Andrew Rudolph (DOB: 06/21/1998). The appointment is for 06/21/16 at 2:45pm. The insurance company is Aetna PP0 \$10. The certificate number is 83482738472 and the group number is XYZZ. The interface includes a 'Status' field, a 'Date Verified' field, and a 'Request Elig' button. A callout box asks 'Are there notes to review?' pointing to the 'Notes:' field. Another callout asks 'Verify eligibility has already been checked' pointing to the 'Status' field. A third callout asks 'On demand eligibility check' pointing to the 'Request Elig' button. A fourth callout asks 'Check all policies!' pointing to the 'See Full Report' button. The interface also includes a 'Save' button, 'Scroll Backward' and 'Scroll Forward' buttons, 'Edit Policies' and 'Edit Patient' buttons, and a 'Next Policy' button. A red box highlights the 'Request Elig' button and the 'See Full Report' button. A red box also highlights the 'Status' field and the 'Date Verified' field. A red box highlights the 'Request Elig' button and the 'See Full Report' button. A red box highlights the 'Request Elig' button and the 'See Full Report' button.

Are there notes to review?

Verify eligibility has already been checked

On demand eligibility check

Check all policies!

Notes: Status: Date Verified:

On-Demand eligibility report available by pressing F6

Save Scroll Backward Scroll Forward Edit Policies Edit Patient Request Elig See Full Report Next Policy



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.



Front Desk Best Practices

Day of Visit: checkin Policies

Checkin - Policies Step 4 of 5
Pebbles Flintstone

Copay	Insurance Company	Certificate #	Group #
X 15.00	Aetna HDHP \$15	34DFJH	
20.00	Cigna PPO \$20	24958JD	
10.00	(Expired) Aetna USHC HMO \$10/2	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: 60054
Phone:

SUBSCRIBER

First:	Birth:	Start: 05/30/2012
Last:	Sex: Female	End:
Address: 1400 Rock Road	Reln: Child	
Winooski, VT 05404	Employr:	

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

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: checkin Copays

Checkin - Copay and Balance

***** 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	120+	CREDIT	BALANCE
PER:	0.00	0.00	0.00	0.00	37.00
INS:	0.00	0.00	128.00	0.00	128.00
Med:	0.00	0.00	0.00	0.00	0.00

Finish Checkin Show Detail TOS Payments Print

Expected copay

Copay notes and primary policy

Previous personal balance or credit



Front Desk Best Practices

Day of Visit: checkin Copays

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

		Finish Checkin		Show Detail		TOS Payments		Print
OUTSTANDING CHARGES:			PRIMARY					
			DIAG	PROV	AMOUNT	PERS DUE	INS DUE	

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



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



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



Front Desk Best Practices

Day of Visit: Check Out

- Schedule next appointment
- Missed appointments
- Account for all visits
- Proving Out



Front Desk Best Practices

Day of Visit: Check Out

- 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 End of Day

- 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)



Front Desk Best Practices End of Day

- Account for All Visits
 - Make sure at the end of the day you go into checkin and hit the up arrow to make sure there are not any appointments you forgot to mark as missed.



Front Desk Best Practices End of Day

- Proving Out
 - Each person that takes money needs to prove out
 - You can use deposit or srs reports
 - Any payments they have must match what they posted in the computer before they leave.



Front Desk Best Practices Review

- Goals for the front desk
- Customer service
- Telephones
- Keep them busy
- Oversight



Front Desk Best Practices Review

- Pre Visit
 - Scheduling
 - Appointment Verification
 - Eligibility Verification
 - Billing Department Prep



Front Desk Best Practices Review

- Visit Date
 - Patient Check In (checkin)
 - Patient Check Out



Front Desk Best Practices Review

Day of Visit

- Schedule next appointment
- Missed appointments
- Account for all visits
- Proving Out



Front Desk Best Practices

- Questions?



Front Desk Best Practices

Reference List

1. Wilson, Judy A. (2016, April). Conquer common billing errors. *Healthcare Business Monthly*, 26.

