Front Desk Best Practices

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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!**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PATIENT</td>
<td>Pebbles Flintstone</td>
</tr>
<tr>
<td>DOB</td>
<td>04/24/2003</td>
</tr>
<tr>
<td>AGE</td>
<td>10 years</td>
</tr>
<tr>
<td>CUST</td>
<td>Wilma Flintstone</td>
</tr>
<tr>
<td>CUST ADDRESS</td>
<td>15 Quarry Lane</td>
</tr>
<tr>
<td>CUST CITY</td>
<td>Winooski, VT</td>
</tr>
<tr>
<td>CUST ZIP</td>
<td>05404</td>
</tr>
<tr>
<td>GUAR</td>
<td>Fred Flintstone</td>
</tr>
<tr>
<td>GUAR ADDRESS</td>
<td>1400 Rock Road</td>
</tr>
<tr>
<td>GUAR CITY</td>
<td>Winooski, VT</td>
</tr>
<tr>
<td>GUAR ZIP</td>
<td>05404</td>
</tr>
<tr>
<td>H:</td>
<td>802-555-0194</td>
</tr>
<tr>
<td>W:</td>
<td>802-555-0197</td>
</tr>
<tr>
<td>H: PERS BAL</td>
<td>$37.00</td>
</tr>
<tr>
<td>W: PERS BAL</td>
<td>$37.00</td>
</tr>
<tr>
<td>INS BAL</td>
<td>$128.00</td>
</tr>
</tbody>
</table>

**Verify insurance!**

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

**Copay & Balance reminder**

- $37.00

**Update demographics easily with F6**

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*PCC Pediatric EHR Solutions*
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?
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
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

<table>
<thead>
<tr>
<th>Pat PCC (#3336)</th>
<th>Checkin - Demographics</th>
<th>Step 1 of 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pebbles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flintstone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Williams</td>
<td></td>
<td></td>
</tr>
<tr>
<td>§§ Problem, Adoption</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SSN: 828-74-6104</td>
<td>Alt Name: Rubble</td>
<td></td>
</tr>
<tr>
<td>Pool: Bedrock Central</td>
<td>Chart #: 2755</td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

- **Status:** Billing Problem
- **Addr:** 1400 Rock Road
- **Addr:**
- **City:** Winooski
- **State:** VT
- **Zip Code:** 05404
- **Email:** stones@HannaBarbera.com
- **Home Phone:** 802-555-0105
- **Work Phone:** 802-555-0146
- **Cell Phone:** 802-555-0112
- **Emg Phone:**
Front Desk Best Practices
Day of Visit: checkin Demographics

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Pebbles</td>
</tr>
<tr>
<td>Last Name</td>
<td>Flintstone</td>
</tr>
<tr>
<td>Physician</td>
<td>Mark Williams, M.D.</td>
</tr>
<tr>
<td>Status</td>
<td>$$ Problem, Adoption</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>Not Hispanic or Latino</td>
</tr>
<tr>
<td>Race</td>
<td>White</td>
</tr>
<tr>
<td>Preferred Language</td>
<td>English</td>
</tr>
<tr>
<td>Other Language</td>
<td>Spanish</td>
</tr>
<tr>
<td>Contact Name</td>
<td></td>
</tr>
<tr>
<td>Method</td>
<td>Mailing Address</td>
</tr>
<tr>
<td></td>
<td>Cell Phone: 802-391-1234</td>
</tr>
<tr>
<td></td>
<td>Work Phone</td>
</tr>
<tr>
<td></td>
<td>Home Phone</td>
</tr>
<tr>
<td></td>
<td>Text</td>
</tr>
<tr>
<td></td>
<td>E-mail</td>
</tr>
<tr>
<td></td>
<td>No Preference</td>
</tr>
</tbody>
</table>

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

Verify eligibility has already been checked

Are there notes to review?

On demand eligibility check

Check all policies!

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.
### Front Desk Best Practices

**Day of Visit: checkin Policies**

<table>
<thead>
<tr>
<th>Copay</th>
<th>Insurance Company</th>
<th>Certificate #</th>
<th>Group #</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.00</td>
<td>Aetna HDHP $15</td>
<td>34DFJH</td>
<td></td>
</tr>
<tr>
<td>20.00</td>
<td>Cigna PPO $20</td>
<td>24958JD</td>
<td></td>
</tr>
<tr>
<td>10.00</td>
<td>(Expired) Aetna USHC HMO $10/2</td>
<td>BG6571296</td>
<td></td>
</tr>
<tr>
<td>20.00</td>
<td>(Expired) Aetna USHC HMO $20</td>
<td>BG4582164</td>
<td></td>
</tr>
<tr>
<td>20.00</td>
<td>(Expired) BCBS $20 Custom Blue</td>
<td>BC45912462</td>
<td></td>
</tr>
</tbody>
</table>

Is policy information accurate and up to date?

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

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

**Contact Patty Leduc at 1-800-345-1284 ext 111134 for specific patient billing questions.**
Front Desk Best Practices
Day of Visit: check-in Policies

- Always get a copy of their insurance card
- Verify subscriber information
Front Desk Best Practices
Day of Visit: check in Copays

<table>
<thead>
<tr>
<th>Aging</th>
<th>0-29</th>
<th>30-59</th>
<th>120+</th>
<th>Credit</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Per</td>
<td>0.00</td>
<td>0.00</td>
<td>128.00</td>
<td>0.00</td>
<td>128.00</td>
</tr>
<tr>
<td>Ins</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Med</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Account: Fred Flintstone (#1980)

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 *****

Finished Checkin
Show Detail
TOS Payments
Print
Front Desk Best Practices
Day of Visit: checkin Copays

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Patient Name</th>
<th>Diagnosis/Procedure</th>
<th>Provider</th>
<th>Amount</th>
<th>Patient Due</th>
<th>Insurance Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/01/12</td>
<td>Flintstone, Pebbles</td>
<td>V20.2</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</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</td>
<td>Davi</td>
<td>79.00</td>
<td>15.00</td>
<td>64.00</td>
</tr>
</tbody>
</table>

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