# Front Desk Best Practices

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PCC 2019 Users' Conference

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# Front Desk Best Practices

Overview

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

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THRIVING THROUGH CHANGE

# Front Desk Best Practices

- What is the Take Away?
  - Learning the importance of the front desk and best practices.

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THRIVING THROUGH CHANGE

# 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

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THRIVING THROUGH CHANGE

# Front Desk Best Practices
# Customer Service

- First impressions count

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THRIVING THROUGH CHANGE

# Front Desk Best Practices
# Customer Service

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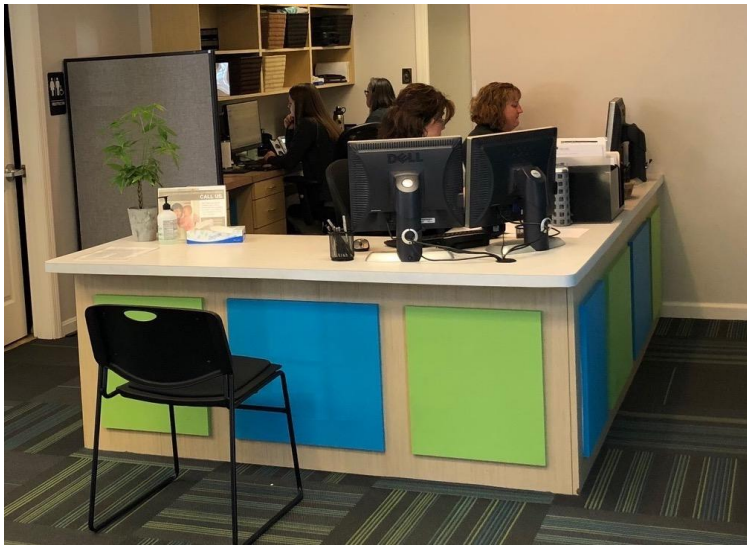
THRIVING THROUGH CHANGE

# Front Desk Best Practices
# Customer Service



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# Front Desk Best Practices
# Customer Service

- Greet patients immediately
- Work as a team, help each other with overflow
- Separate sick and well *reception* areas

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# 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

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# 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 check-ups, ADHD checkups, flu shots, etc.

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# 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.

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# Front Desk Best Practices
# Pre-Visit

- Scheduling
- Appointment Verification
- Eligibility Verification
- Eligibility Using Partner
- Billing Department Prep

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# Front Desk Best Practices
# Pre-Visit: Scheduling

- Verify
  - Demographics
  - Insurance
  - Update instantly
- Review copay and personal balance
  - See CARC codes!

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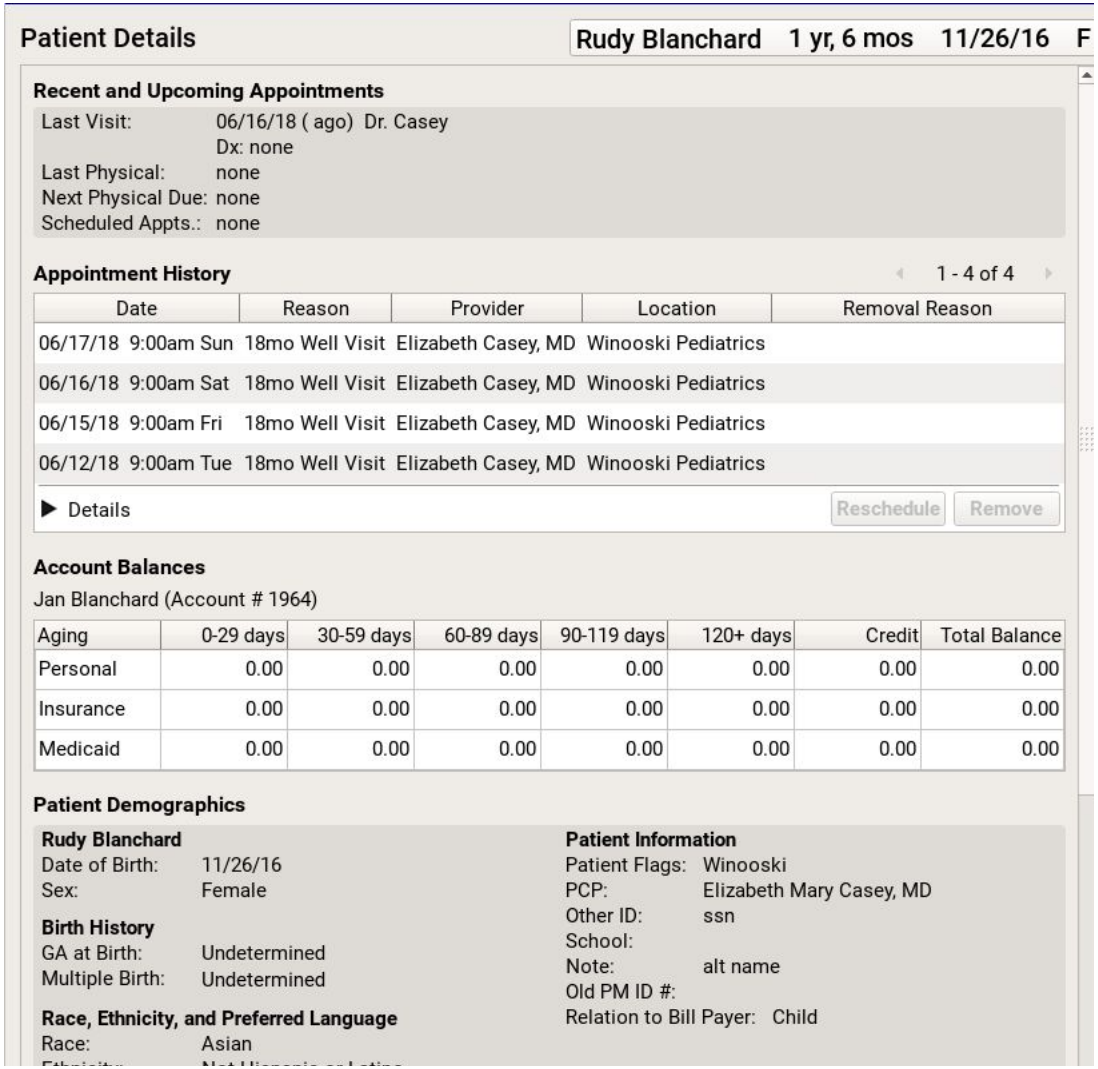
# Front Desk Best Practices
# Pre-Visit: Appt Book



**Patient Details** — Rudy Blanchard 1 yr, 6 mos 11/26/16 F

**Recent and Upcoming Appointments**

Last Visit: 06/16/18 ( ago) Dr. Casey
Dx: none
Last Physical: none
Next Physical Due: none
Scheduled Appts.: none

**Appointment History** — 1 - 4 of 4

| Date | Reason | Provider | Location | Removal Reason |
|---|---|---|---|---|
| 06/17/18 9:00am Sun | 18mo Well Visit | Elizabeth Casey, MD | Winooski Pediatrics | |
| 06/16/18 9:00am Sat | 18mo Well Visit | Elizabeth Casey, MD | Winooski Pediatrics | |
| 06/15/18 9:00am Fri | 18mo Well Visit | Elizabeth Casey, MD | Winooski Pediatrics | |
| 06/12/18 9:00am Tue | 18mo Well Visit | Elizabeth Casey, MD | Winooski Pediatrics | |

▶ Details — Reschedule — Remove

**Account Balances**

Jan Blanchard (Account # 1964)

| Aging | 0-29 days | 30-59 days | 60-89 days | 90-119 days | 120+ days | Credit | Total Balance |
|---|---|---|---|---|---|---|---|
| Personal | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Insurance | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Medicaid | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

**Patient Demographics**

**Rudy Blanchard**
Date of Birth: 11/26/16
Sex: Female

**Birth History**
GA at Birth: Undetermined
Multiple Birth: Undetermined

**Race, Ethnicity, and Preferred Language**
Race: Asian

**Patient Information**
Patient Flags: Winooski
PCP: Elizabeth Mary Casey, MD
Other ID: ssn
School:
Note: alt name
Old PM ID #:
Relation to Bill Payer: Child

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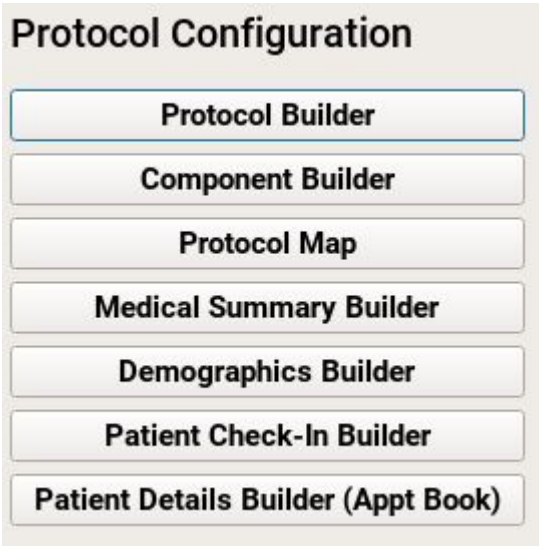
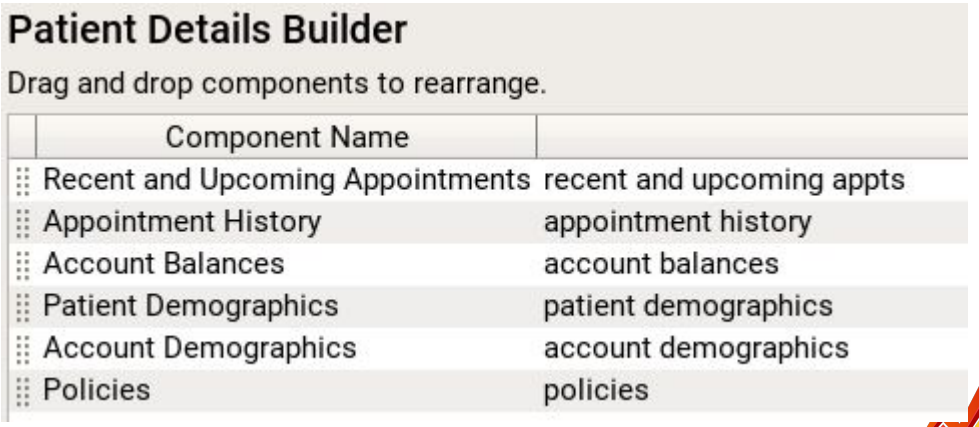
# Front Desk Best Practices
# Pre-Visit: Appt Book

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# Front Desk Best Practices
# Pre-Visit: Scheduling

Now Patient Details in the Appointment Book lets you:

- Review current and past appointments
- Verify / Update
  - Demographics
  - Insurance
- Review copay and personal balance

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# Front Desk Best Practices
# Pre-Visit: Scheduling

- New Patient Process
  - Who collects insurance information over the phone?
  - Use Patient Details in the Appt Book to add/edit policy information or check balances
  - Remind them to bring their insurance card and copay

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# 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?

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# 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 patient check in, these will appear in the EHR check in process.
  - Available in the EHR!

# 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
  - outstanding balances!

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# Front Desk Best Practices
# Pre-Visit: Billing Dept Prep

- Have a **daily huddle** between the front desk and billing staff to discuss appointments that day
  - Explain outstanding balances
  - Insurance issues
  - Anything else?

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# 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.

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# 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

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# 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].

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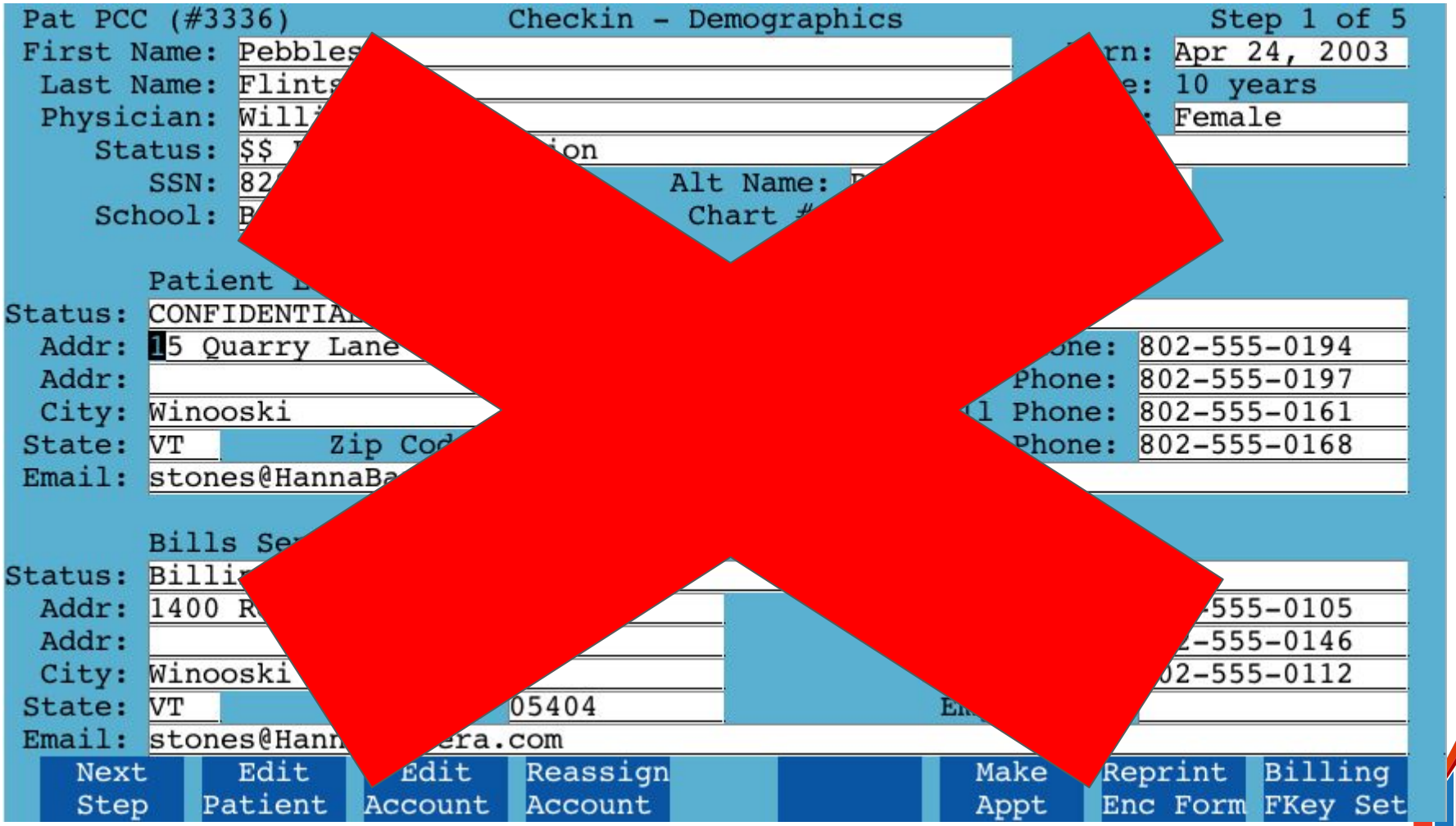
# Front Desk Best Practices
# Day of Visit: checkin Demographics

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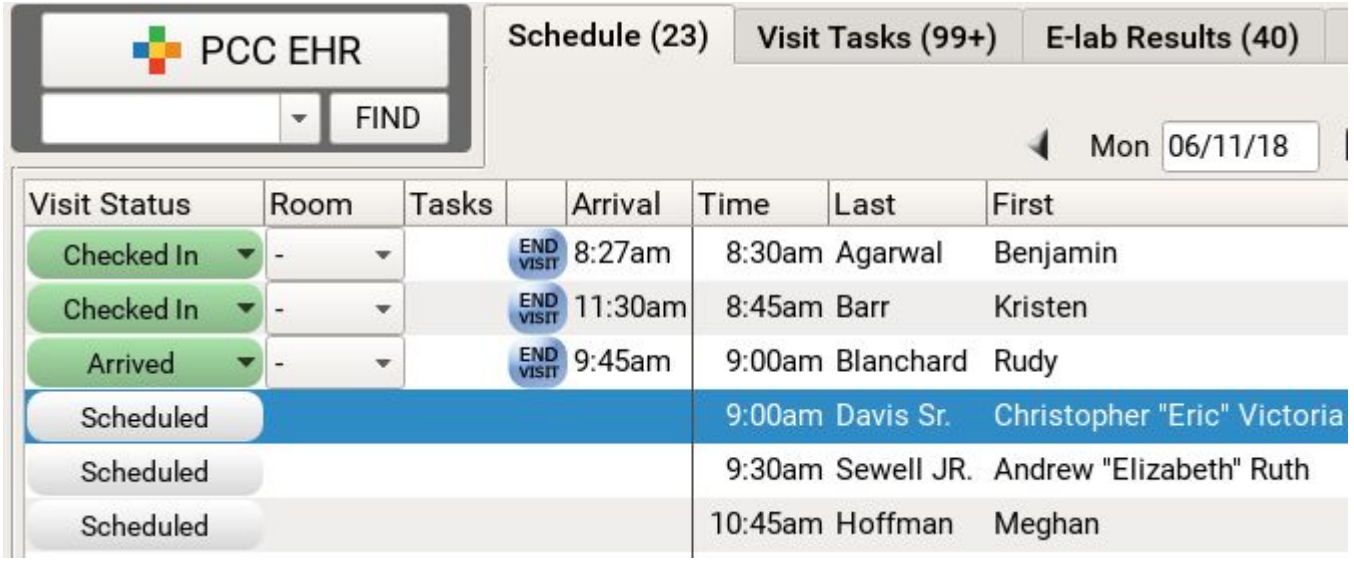
# Front Desk Best Practices
# Day of Visit: checkin EHR Style

A new day has arrived…

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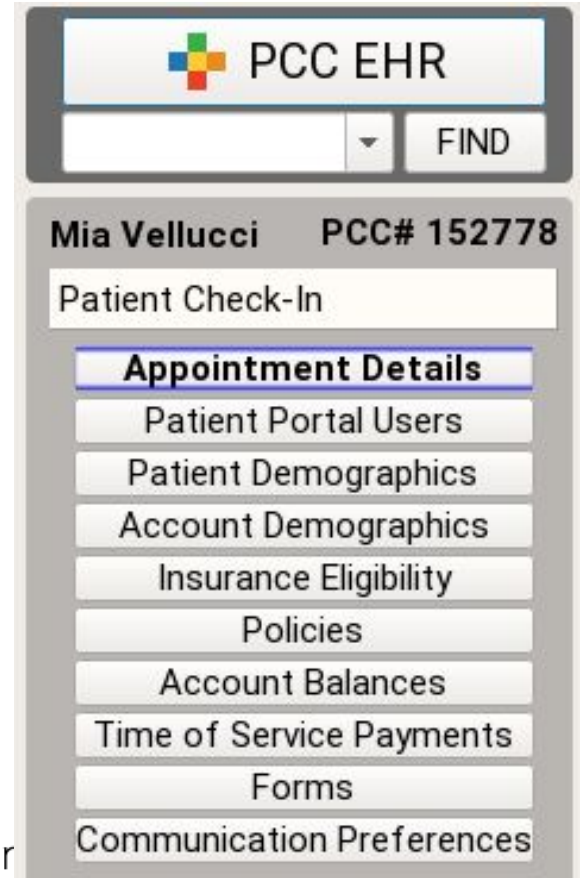
# Front Desk Best Practices
# Day of Visit: checkin EHR Style

It's like the medical summary screen and demographics - add any chart wide components you like!



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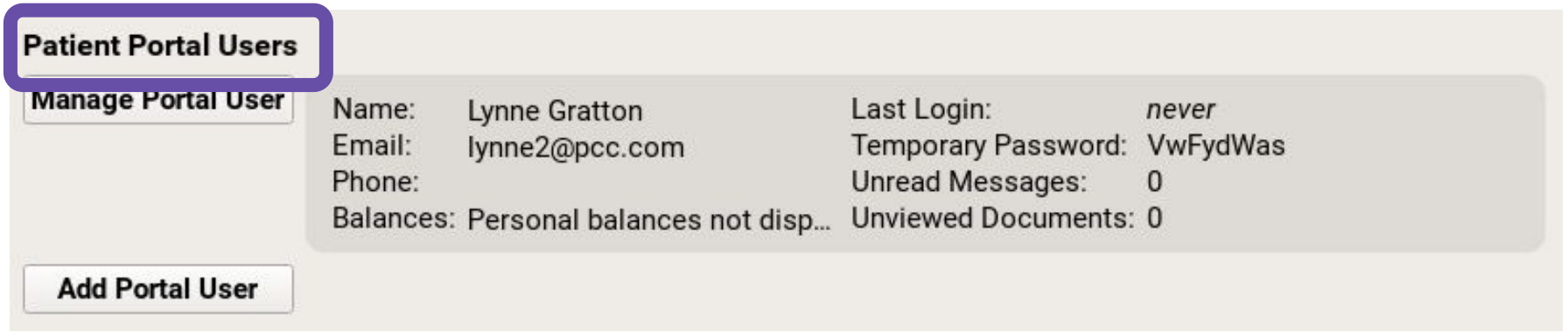
# Front Desk Best Practices
# Day of Visit: checkin EHR Style

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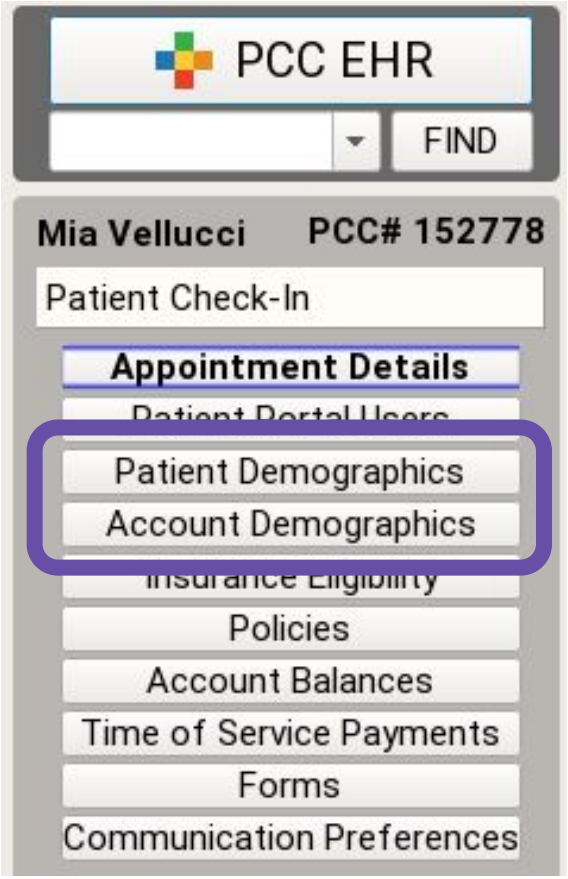
# Front Desk Best Practices
# Day of Visit: checkin EHR Style

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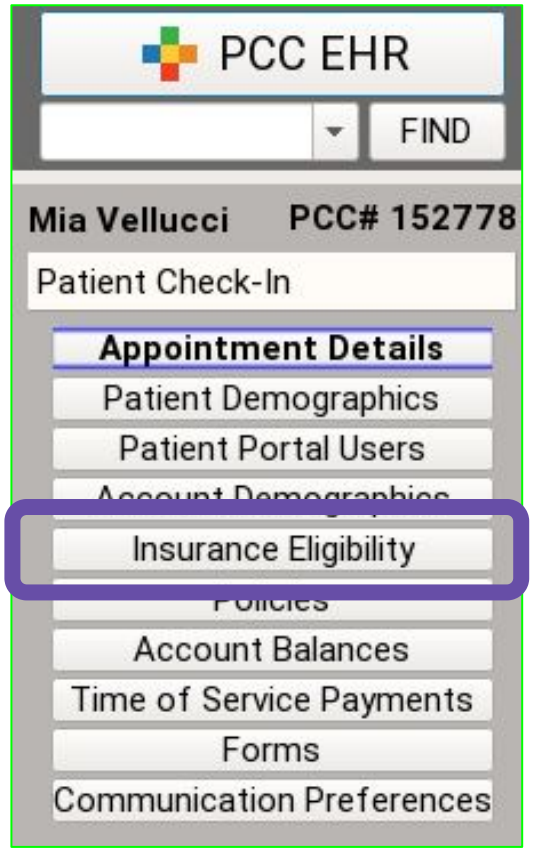
# Front Desk Best Practices
# Day of Visit: checkin EHR Style

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# 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.

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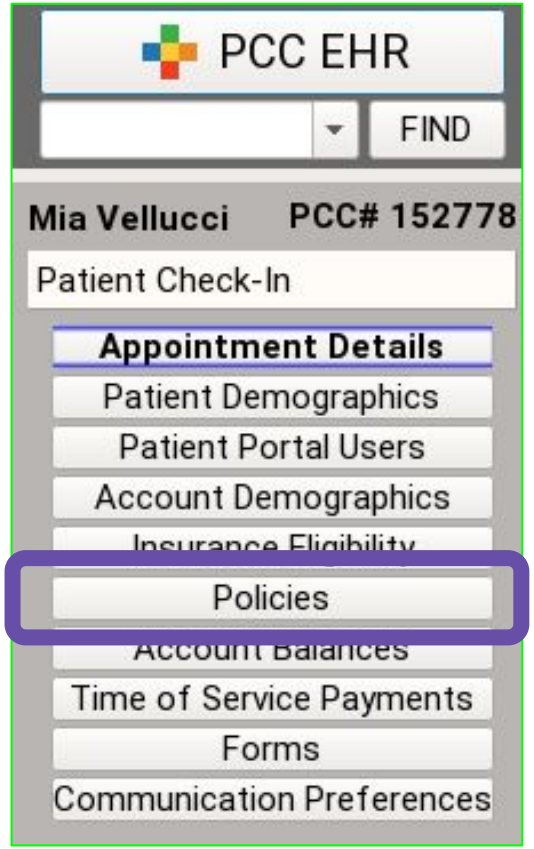
# Front Desk Best Practices
# Day of Visit: checkin Policies

- Always get a copy of their insurance card
- Verify subscriber information

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# Front Desk Best Practices
# Day of Visit: checkin EHR Style

**Account Balances**

[redacted] # 536)

| Aging | 0-29 days | 30-59 days | 60-89 days | 90-119 days | 120+ days | Credit | Total Balance |
|---|---|---|---|---|---|---|---|
| Personal | **41.00** | 0.00 | 0.00 | 0.00 | **250.00** | 0.00 | **291.00** |
| Insurance | 284.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 284.00 |
| Medicaid | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

▶ Encounters with Outstanding Personal Balances

Click on Encounters and get...

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# Front Desk Best Practices
# Day of Visit: checkin EHR Style

▼ Encounters with Outstanding Personal Balances

Mark Williams, M.D. Winooski Pediatrics

| Date | Description | Charge | Payment/Adj | Insurance Due | Medicaid Due | Personal Due |
|---|---|---|---|---|---|---|
| 04/23/18 | OV Expanded Focus | 56.00 | | 0.00 | | **41.00** |
| 04/23/18 | TOS Cash Payment - Personal | | 15.00 | | | |
| 05/19/18 | Ins Pmt - UnitedHealthcare $15 | | 0.00 | | | |
| | | 56.00 | 15.00 | 0.00 | 0.00 | **41.00** |

Christopher Davis (# 184)

Mark Williams, M.D. Winooski Pediatrics

| Date | Description | Charge | Payment/Adj | Insurance Due | Medicaid Due | Personal Due |
|---|---|---|---|---|---|---|
| 10/31/17 | HepB/Hib | 80.00 | | 0.00 | | **80.00** |
| 10/31/17 | 2+ Immuniz Admin W/O MD Counse... | 20.00 | | 0.00 | | **20.00** |
| 10/31/17 | Pneumo-7 | 90.00 | | 0.00 | | **90.00** |
| 10/31/17 | New Pt Well Child Under 1 yr | 65.00 | | 0.00 | | 0.00 |
| 10/31/17 | TOS Check Payment - Personal | | 15.00 | | | |
| 10/31/17 | 1 Immuniz Admin W/O MD Counseli... | 10.00 | | 0.00 | | **10.00** |
| 10/31/17 | IPV | 50.00 | | 0.00 | | **50.00** |
| | | 315.00 | 15.00 | 0.00 | 0.00 | **250.00** |

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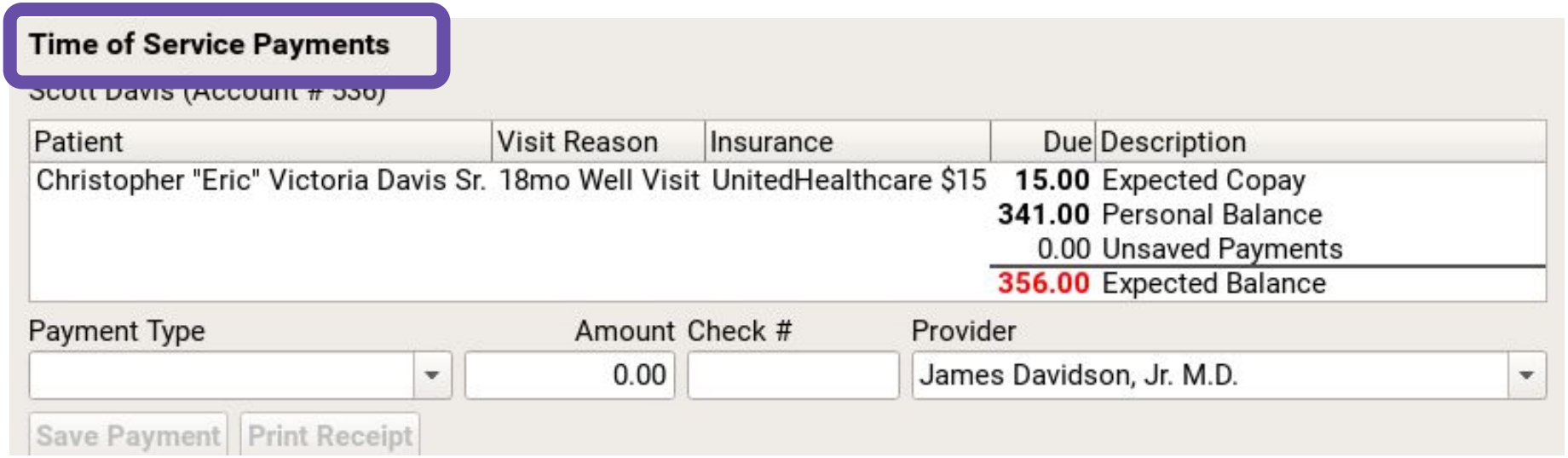
# Front Desk Best Practices
# Day of Visit: checkin EHR Style

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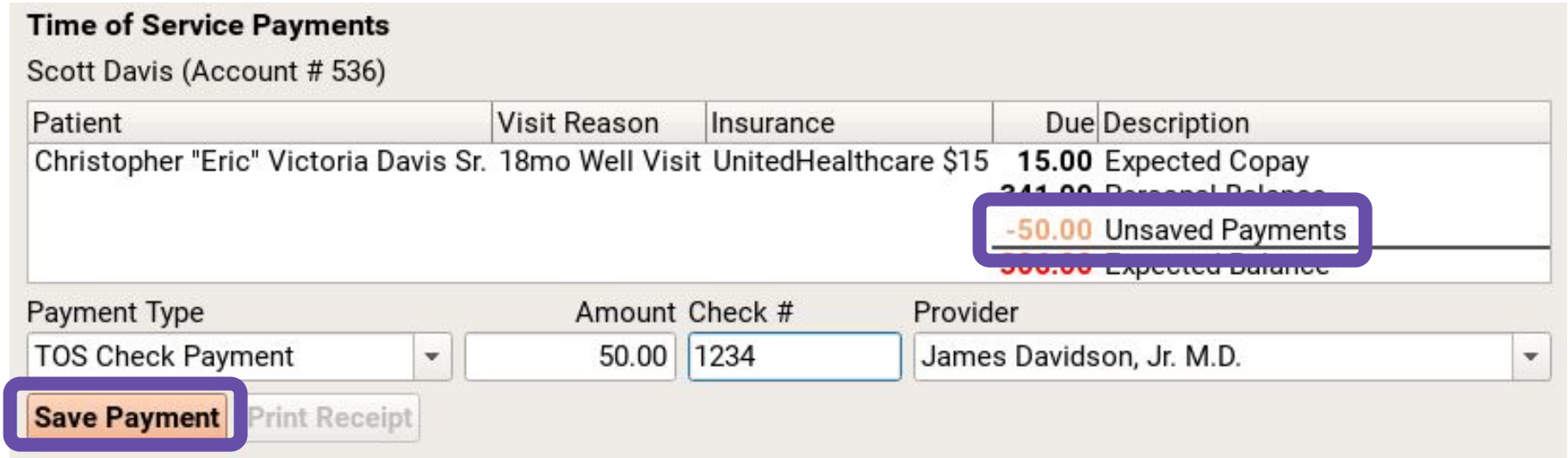
# Front Desk Best Practices
# Day of Visit: checkin EHR Style

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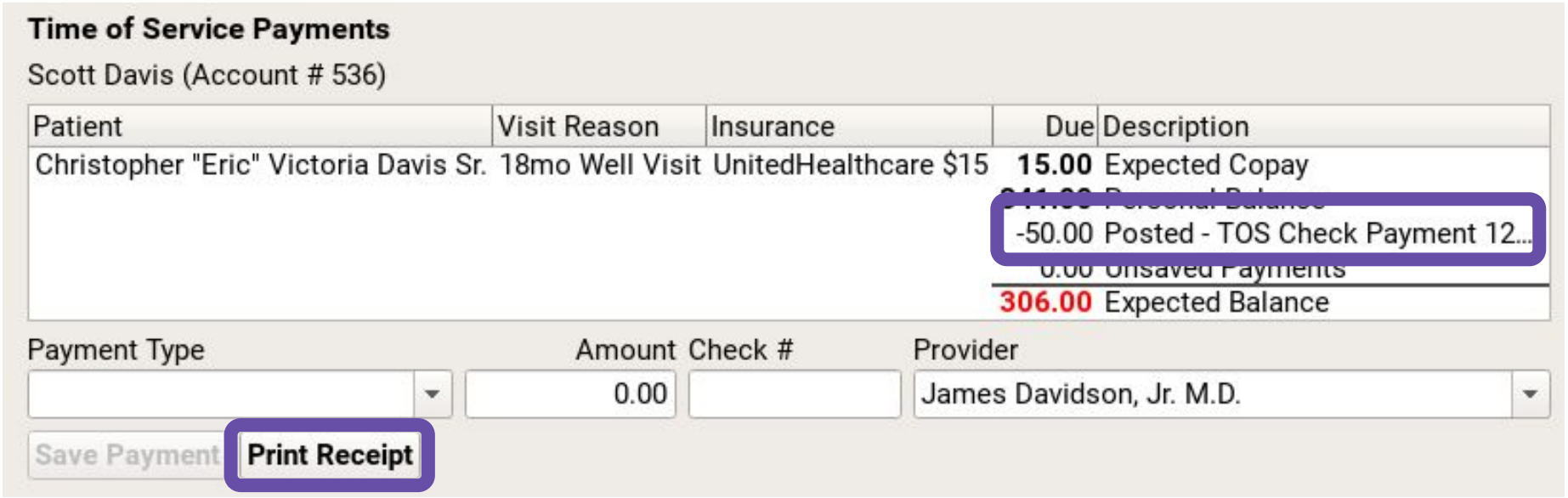
# Front Desk Best Practices
# Day of Visit: checkin EHR Style

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# Front Desk Best Practices
# Day of Visit: checkin Copays

- Make sure to collect the proper copay amount, sick vs. well
- What is your policy regarding HSA Accounts and policies with high deductibles?

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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

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THRIVING THROUGH CHANGE

# Front Desk Best Practices
# Day of Visit: Check Out

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

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THRIVING THROUGH CHANGE

# 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!

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# 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 - this only works with sam!

# Front Desk Best Practices
# End of Day

- Account for All Visits
  - Make sure at the end of the day all of the appointments have been checked in and verify there is nobody left on the Schedule tab

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THRIVING THROUGH CHANGE

# 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.
  - Payment Reconciliation Report in the EHR

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THRIVING THROUGH CHANGE

# Front Desk Best Practices Review

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

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THRIVING THROUGH CHANGE

# Front Desk Best Practices Review

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

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THRIVING THROUGH CHANGE

# 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

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# Front Desk Best Practices

## Reference List

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

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