

Front Desk Best Practices

Lynne Y Gratton, CPPM
PCC 2015 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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Front Desk Best Practices

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



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 stand point
- 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 waiting rooms



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
- 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.

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!

Copay & Balance reminder

Update demographics easily with F6

Verify insurance!

SAM Search Criteria

Visit Reason	PCP	Provider	Mins	L
<input type="text" value="Pebbles Flintstone"/>	W	<input type="text"/>	<input type="text"/>	<input type="text"/>

PATIENT: Pebbles Flintstone PAT STATUS: \$\$ Problem, Adopti LAST PHYS: 05/01/12
DOB: 04/24/2003 SUSP 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: 802-555-0148 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
Last Name: Rubble Chart #: 2755
\$: 1 (12/18/12, Pebbles, Sick Call) CANC: 1 (02/11/07, Pebbles, Sick Call)

Schedule Inquire Find Next Relation Demo-graphics Clear



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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?



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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

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
 - 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

- Develop a financial policy you share with parents.
- Develop guides to educate patients about insurance responsibility.
- Understand basic information about patient insurance plans and share with the front desk.
 - When you sign a contract with a new insurance, inform the front desk.

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?
 - Most Common Clearinghouse Claim Rejection Reasons can be avoided by properly using the checkin program
 - TOS payments

Front Desk Best Practices – Day of Visit checkin Demographics

Update demographics

(#3336) Checkin - Demographics Step 1 of 5

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

Patient Lives with Wilma Flintstone (#1981)

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

Bills Sent to Fred Flintstone (#1980)

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

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



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 Consent

Contact Name	Mailing Address
Method	<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 name is Pebbles Flintstone (04/24/2003) and the provider is Mark Williams, M.D. The appointment is for 05/17/13 at 3:15pm for a Sick Call. The status is 'Validated' and the date verified is 05/16/13. A callout asks 'Are there notes to review?' pointing to the 'Notes:' field. Another callout says 'Verify eligibility has already been checked' pointing to the 'Validated' status. A third callout says 'On demand eligibility check' pointing to the 'Request Elig' button. The interface also includes a 'Notes:' field, a 'Status:' field, a 'Date Verified:' field, and a 'Request Elig' button. A red box highlights the 'Validated' status and the 'Request Elig' button. A red box also highlights the 'Notes:' field. A red box highlights the 'F6' key. A red box highlights the 'Request Elig' button. A red box highlights the 'Request Elig' button. A red box highlights the 'Request Elig' button.

Are there notes to review?

Patient Eligibility

Pebbles Flintstone (04/24/2003)
Mark Williams, M.D. Subscriber:

Appointment: 05/17/13 3:15pm Sick Call

PRI: Alpha 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



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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.

Front Desk Best Practices – Day of Visit checkin Policies

Checkin - Policies Step 4 of 5
Pebbles Flintstone

Copay	Insurance Company	Certificate #	Group #
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 Payor ID: 60054
 El Paso, TX 79998-1106 Phone:

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

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 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		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

Expected copay

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

Copay notes and primary policy

Previous personal balance or credit

CREDIT
0.00



Front Desk Best Practices – Day of Visit checkin Copays

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



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

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 checkout

- Schedule next appointment
- Missed appointments
- Proper insurance configuration
- checkout screens pre-set by visit reason
- SNAP codes
- Clean claims
- Account for all visits

Front Desk Best Practices – Day of Visit checkout

- 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 – Day of Visit checkout

- 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 – Review

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- Oversight

Front Desk Best Practices – Review

- Pre Visit
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Front Desk Best Practices – Review

- Visit Date
 - Patient Check In (checkin)
 - Posting Charges (checkout)
 - Clean claims

Front Desk Best Practices

- Questions?