Front Desk Best Practices

2013 Users Conference
7/17/13
Tim Proctor (tim@pcc.com)

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?

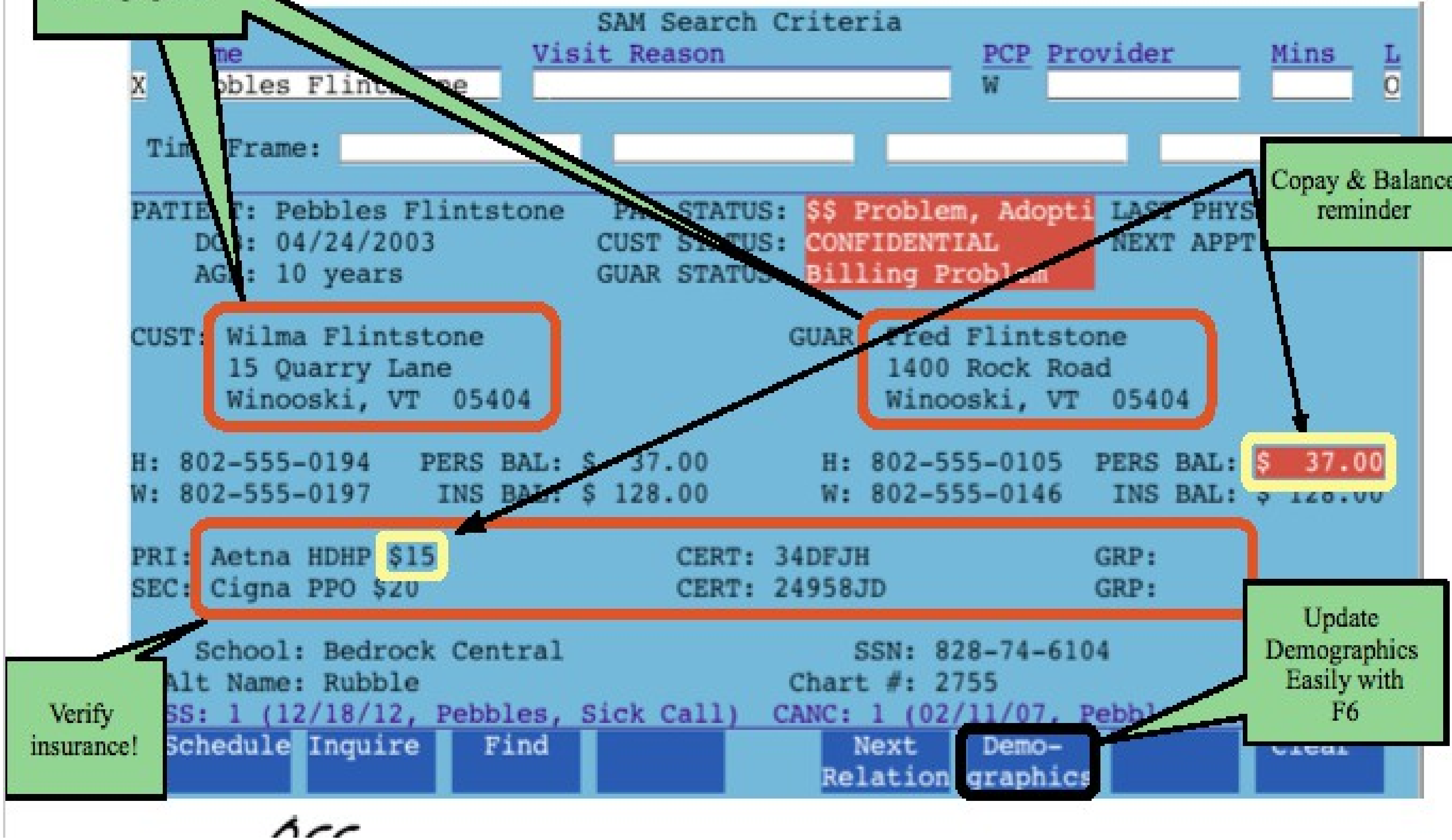
Front Desk And The Revenue Cycle

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



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

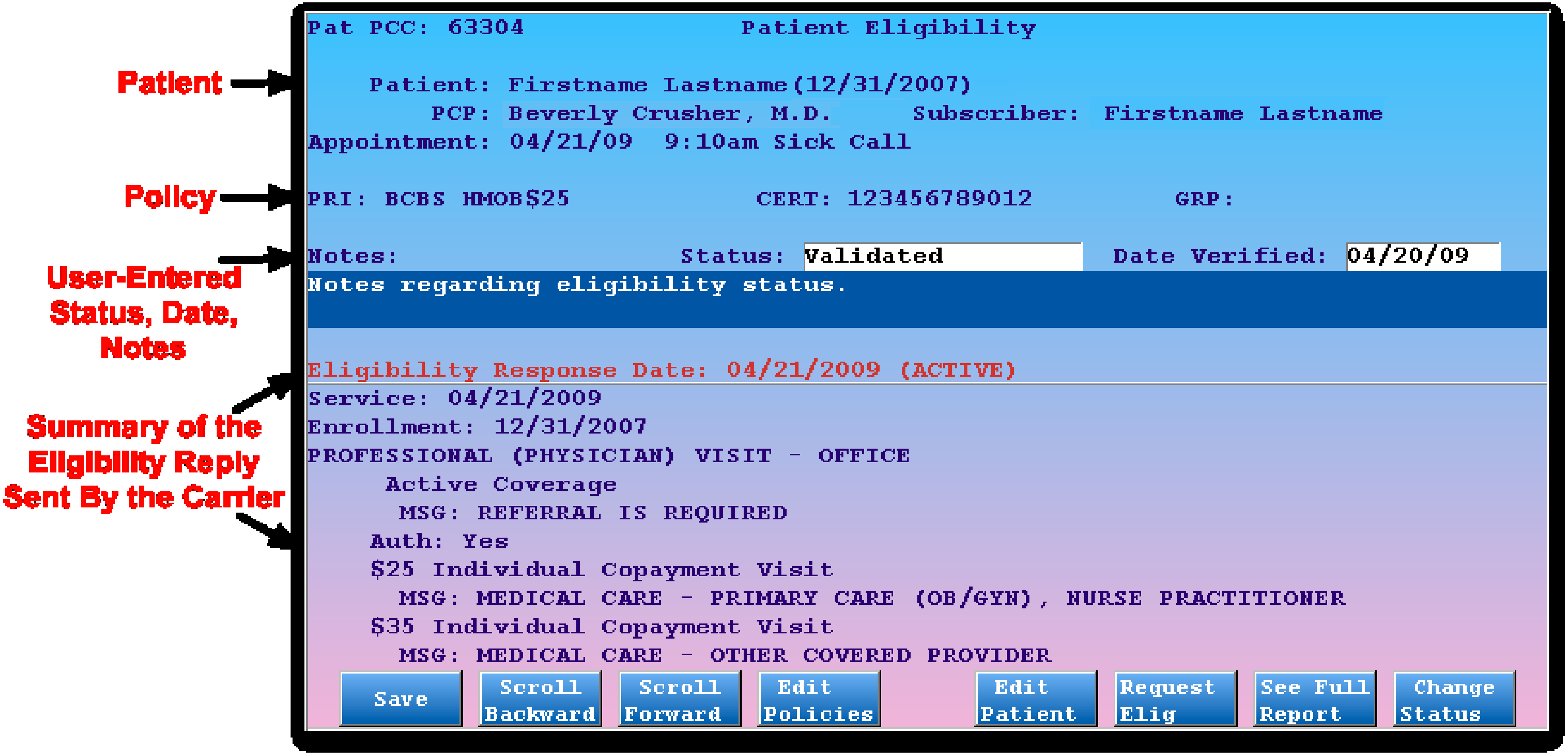
Pre-Visit – Appointment Verification

- 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

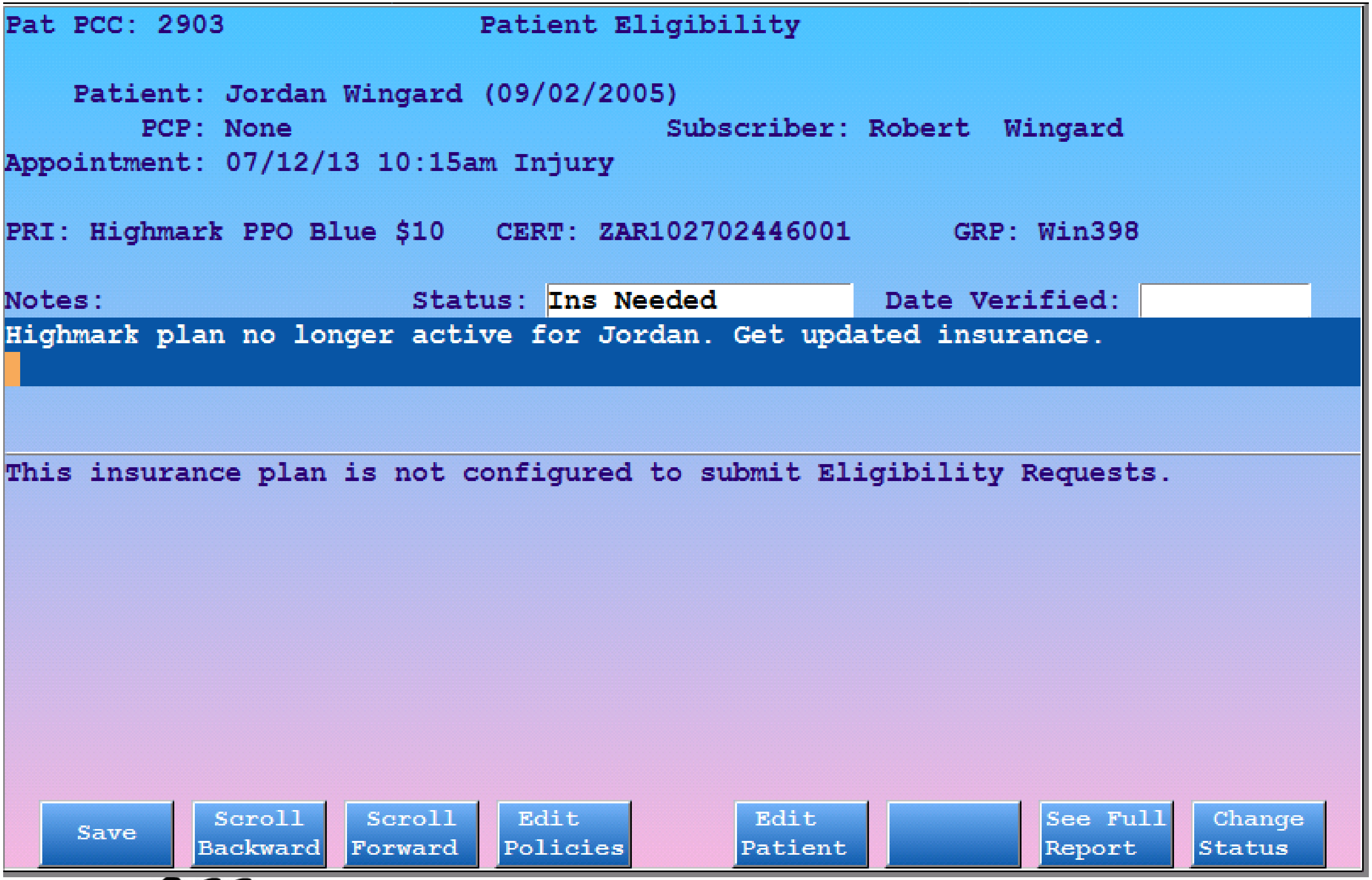
- Why?
  - To avoid claim rejections and costly billing followup
- How?
  - `elig` program
  - Online or by phone
- When?
  - 1-2 days before appointment

Pre-Visit – Eligibility Verification



- 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



ACCT INFO UPDATE FORM FOR: Tim Proctor July 12, 2013

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:
Name: Tim Proctor
Address: 1 Main St
Address:
City: Winooski
State: VT Zip Code: 05404

Send Bill To:
Tim Proctor
1 Main St

Winooski
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
Group#: 121312
DOB of Cardholder: 11/21/09
Ins. Co. Name: BCBS Federal $20 Full WC

ID#: 1212121312
Effective Dates: 12/01/09-
Employer:

SECONDARY INSURANCE INFORMATION:

Subscriber Name:
Group#:
DOB of Cardholder:
Ins. Co. Name:

ID#:
Effective Dates: -
Employer:

(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

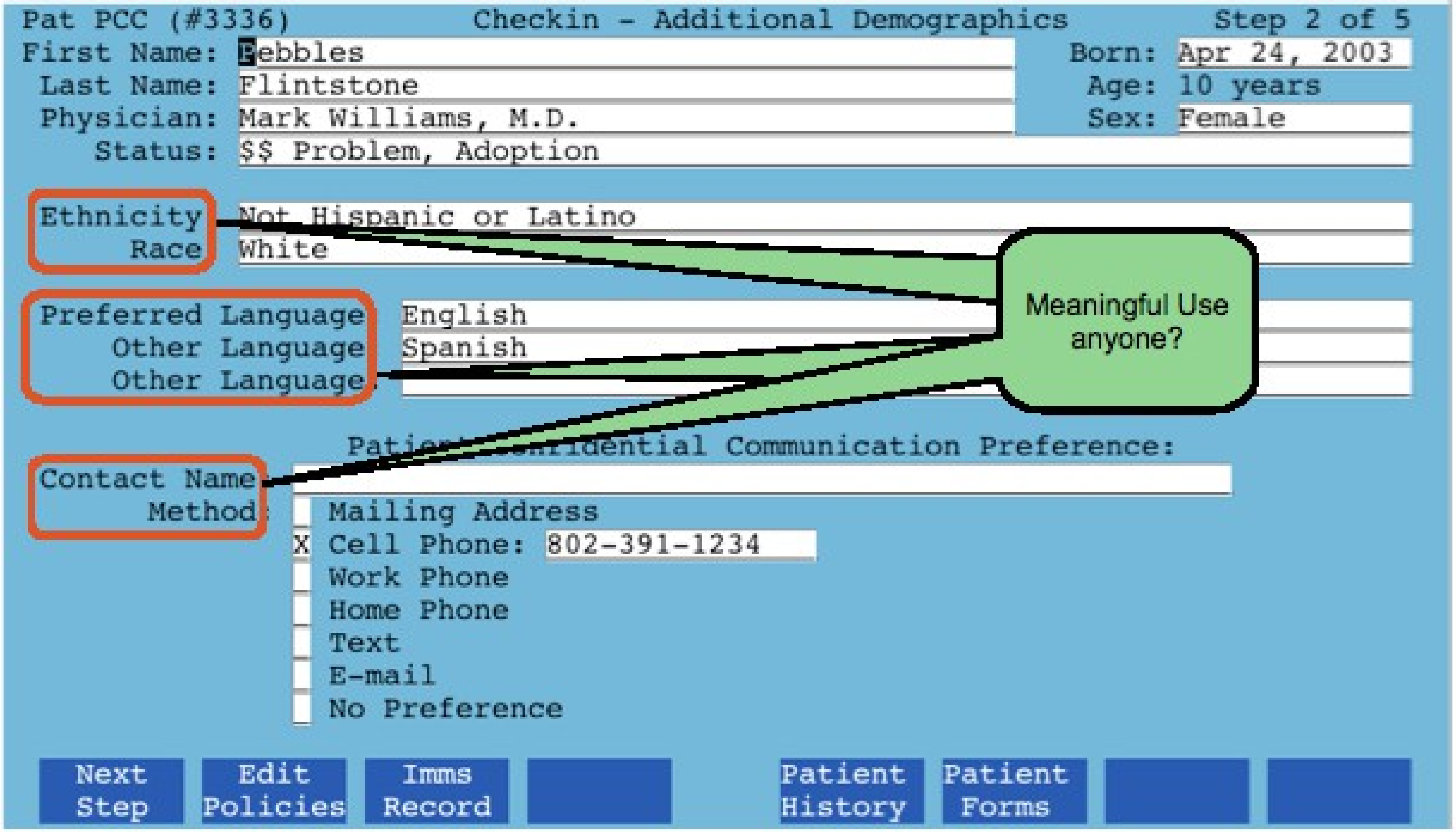
I certify that I, or my dependents above, have insurance coverage as indicated above and assign directly to Pirate Pediatrics, PA all insurance benefits, if any, otherwise payable to me for services rendered. I understand that I am financially responsible for all charges whether or not paid by insurance. 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

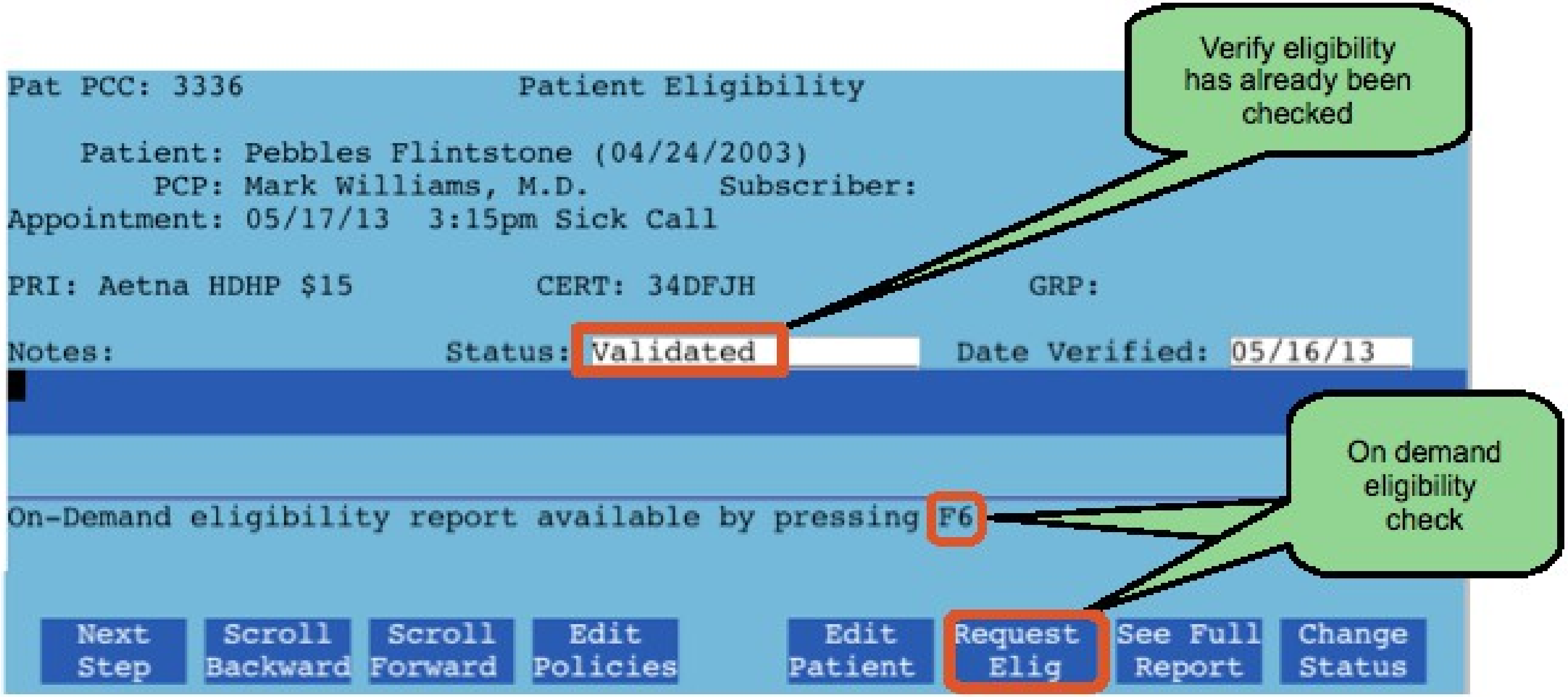
- Contact PCC Support if you want this

Time-of-Visit – Checking In



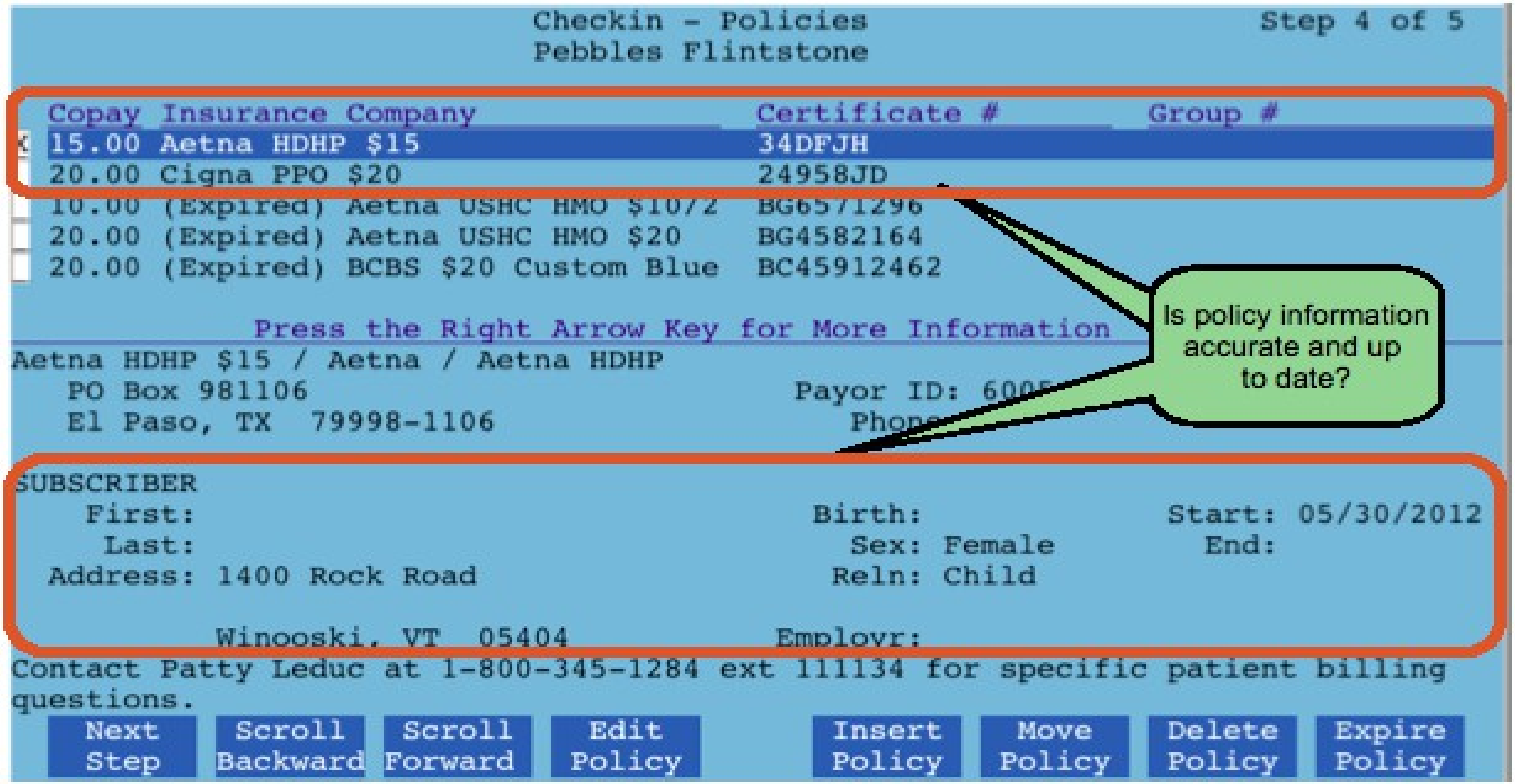
- You'll want to record these for MU and PCMH

Time-of-Visit – Checking In

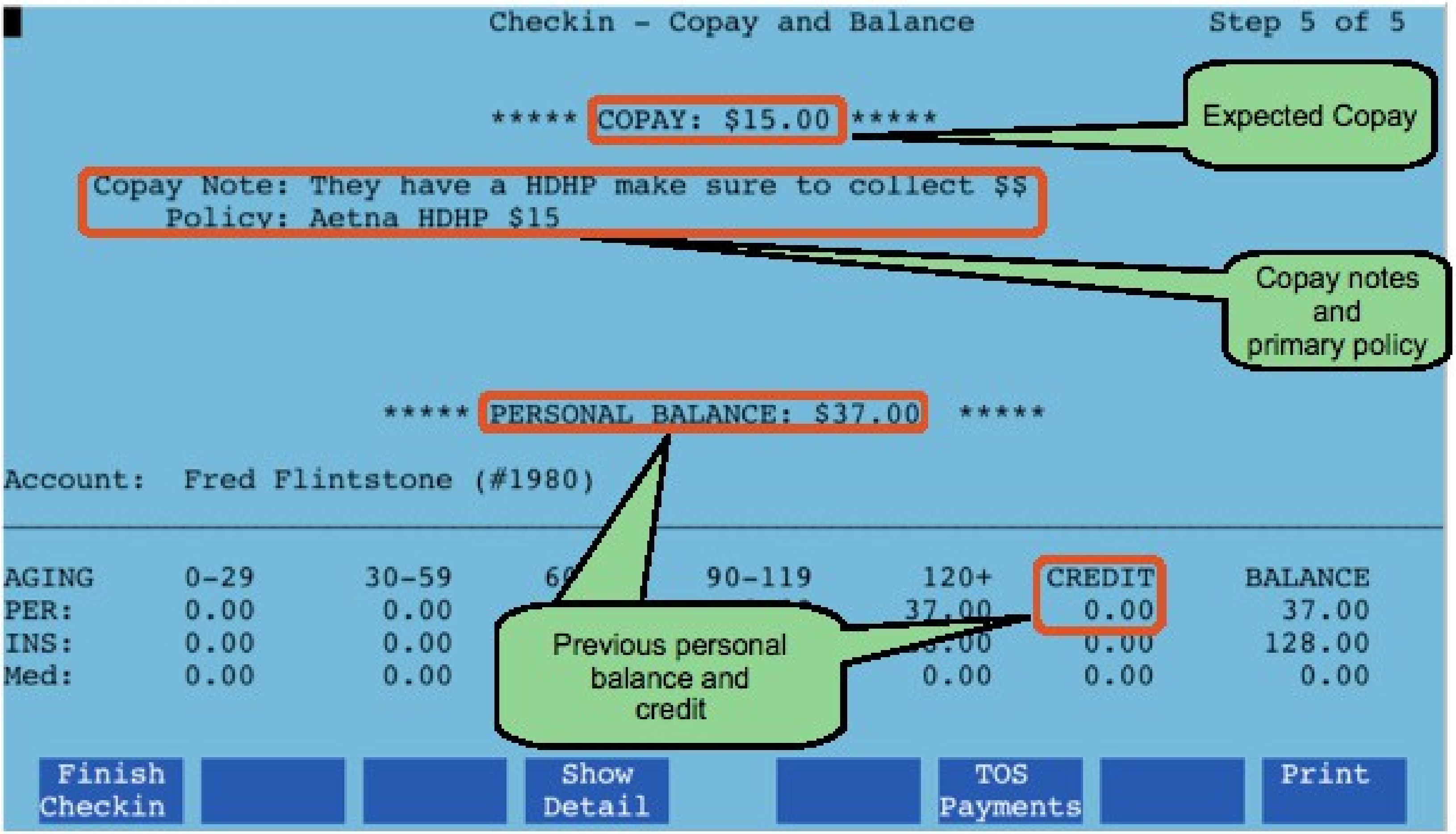


- Look for notes left for you by billing staff
- Also check eligibility for all same-day appointments

Time-of-Visit – Checking In



Time-of-Visit – Checking In



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

Finish Checkin			Show Detail		TOS Payments		Print

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