Front Desk Best Practices

Lynne Y Gratton, CPPM, AAPC Fellow
PCC 2017 Users' Conference

UC2017

PCC Pediatric EHR Solutions

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

Pediatric EHR Solutions

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

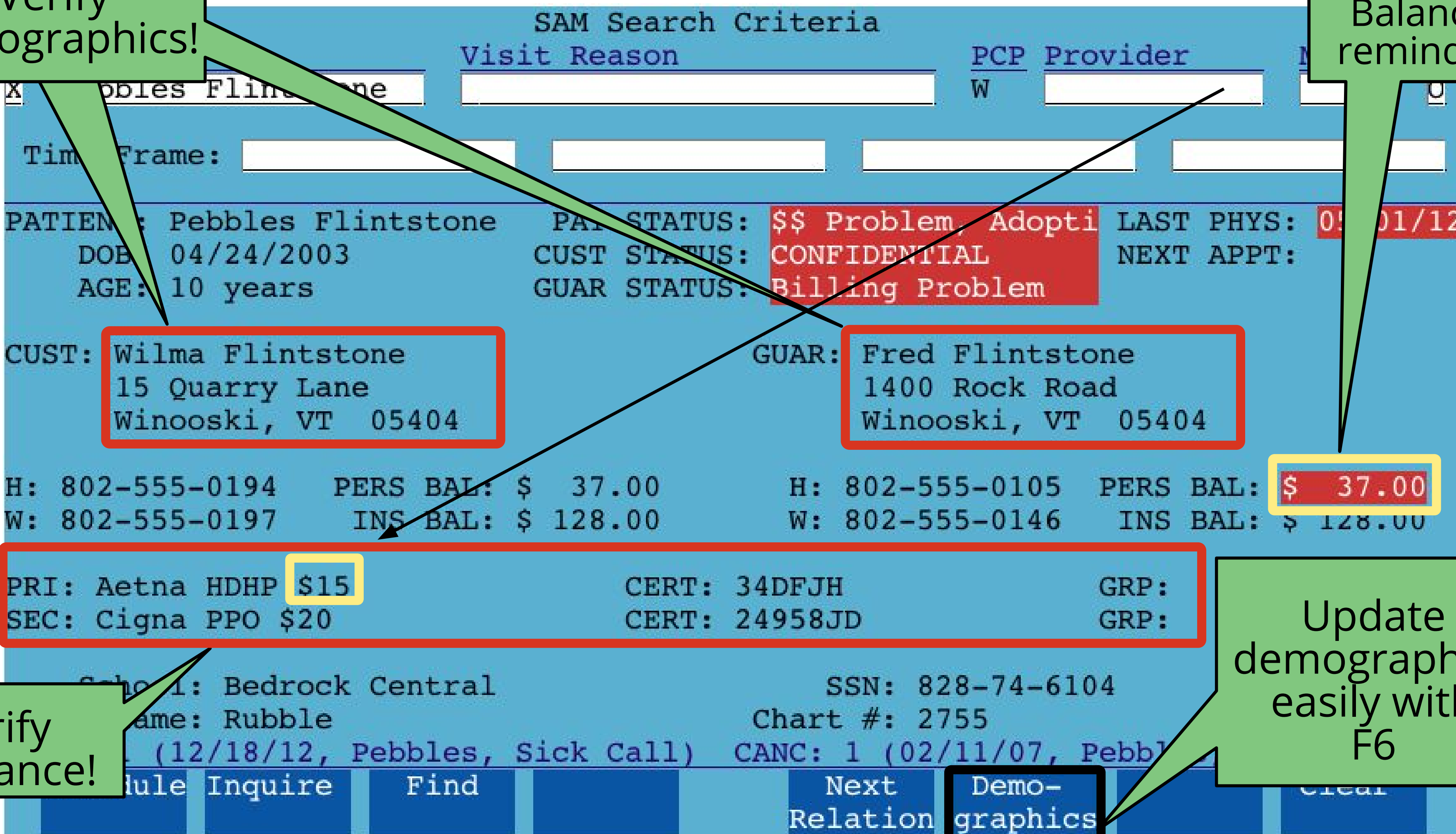
UC2017

PCC Pediatric EHR Solutions

Front Desk Best Practices
Pre-Visit: Scheduling

Verify demographics!

Copay & Balance reminder



Verify insurance!

Update demographics easily with F6

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?

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

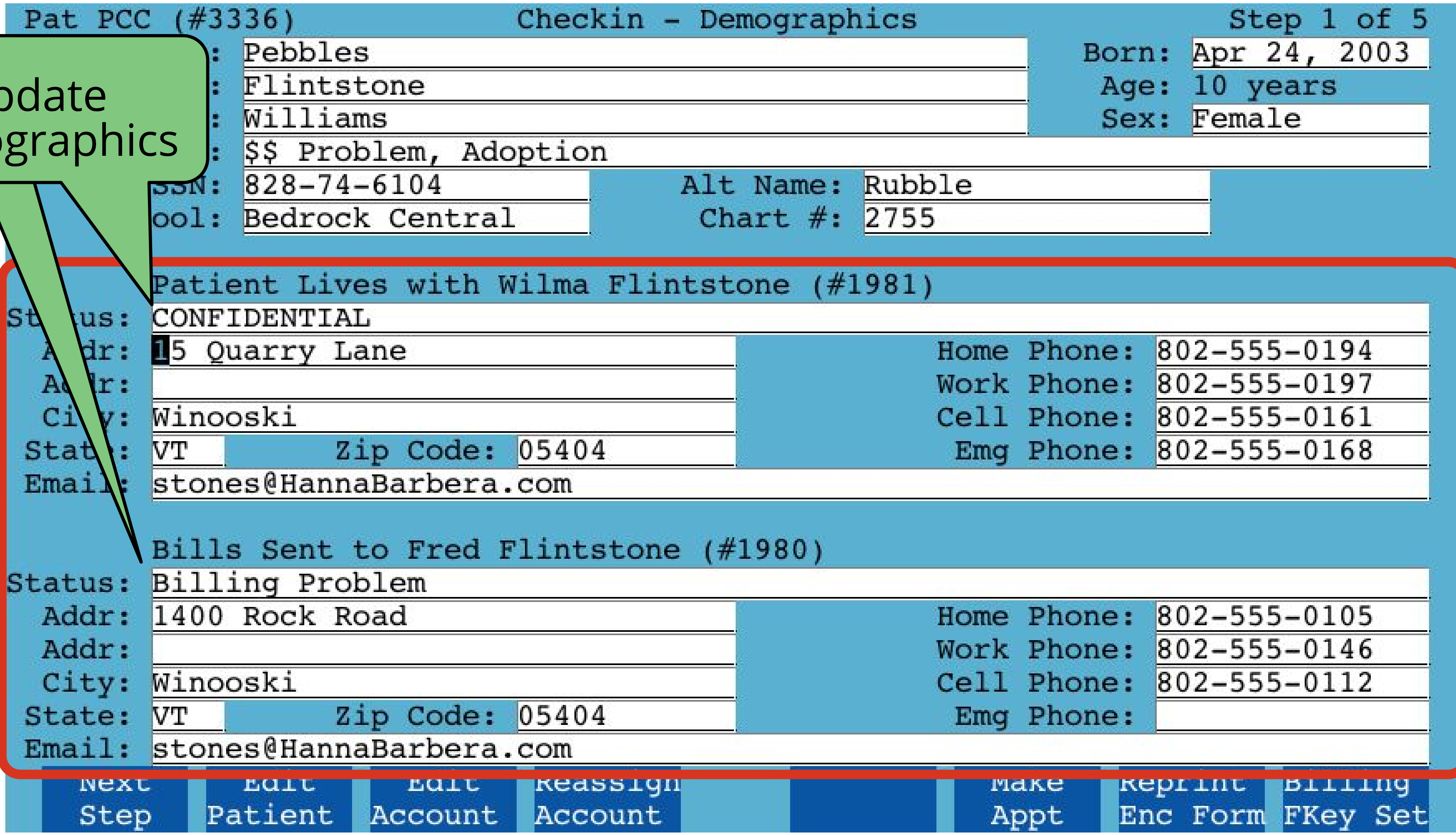
Front Desk Best Practices
Day of Visit: checkin

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

Update demographics

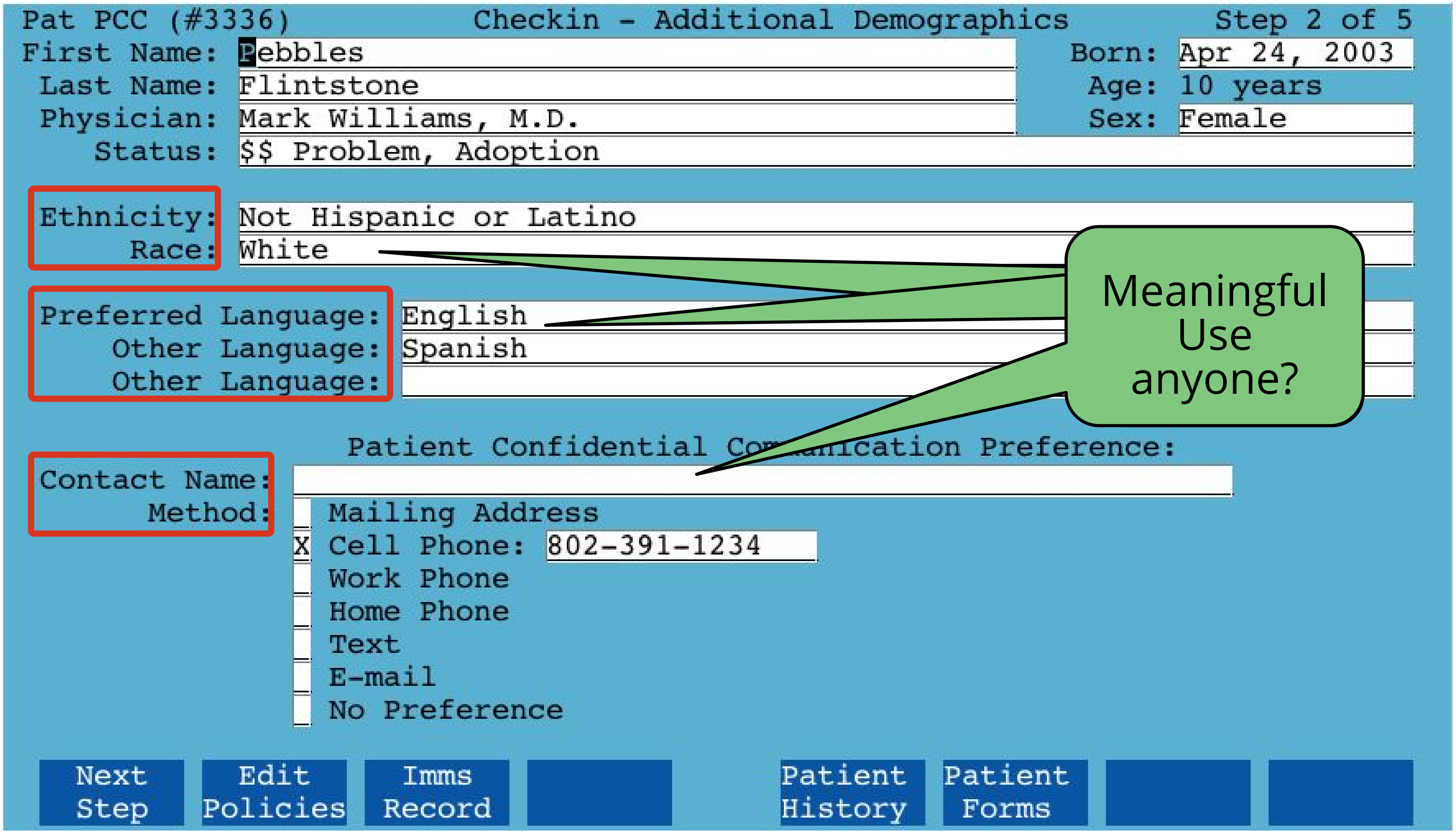

Pat PCC (#3336) Checkin - Demographics Step 1 of 5
: Pebbles Born: Apr 24, 2003
: Flintstone Age: 10 years
: Williams Sex: Female
: $$ Problem, Adoption
SSN: 828-74-6104 Alt Name: Rubble
ool: Bedrock Central Chart #: 2755

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 Communication Preference:

Contact Name:

Method:

_ Mailing Address

X Cell Phone: 802-391-1234

_ Work Phone

_ Home Phone

_ Text

_ E-mail

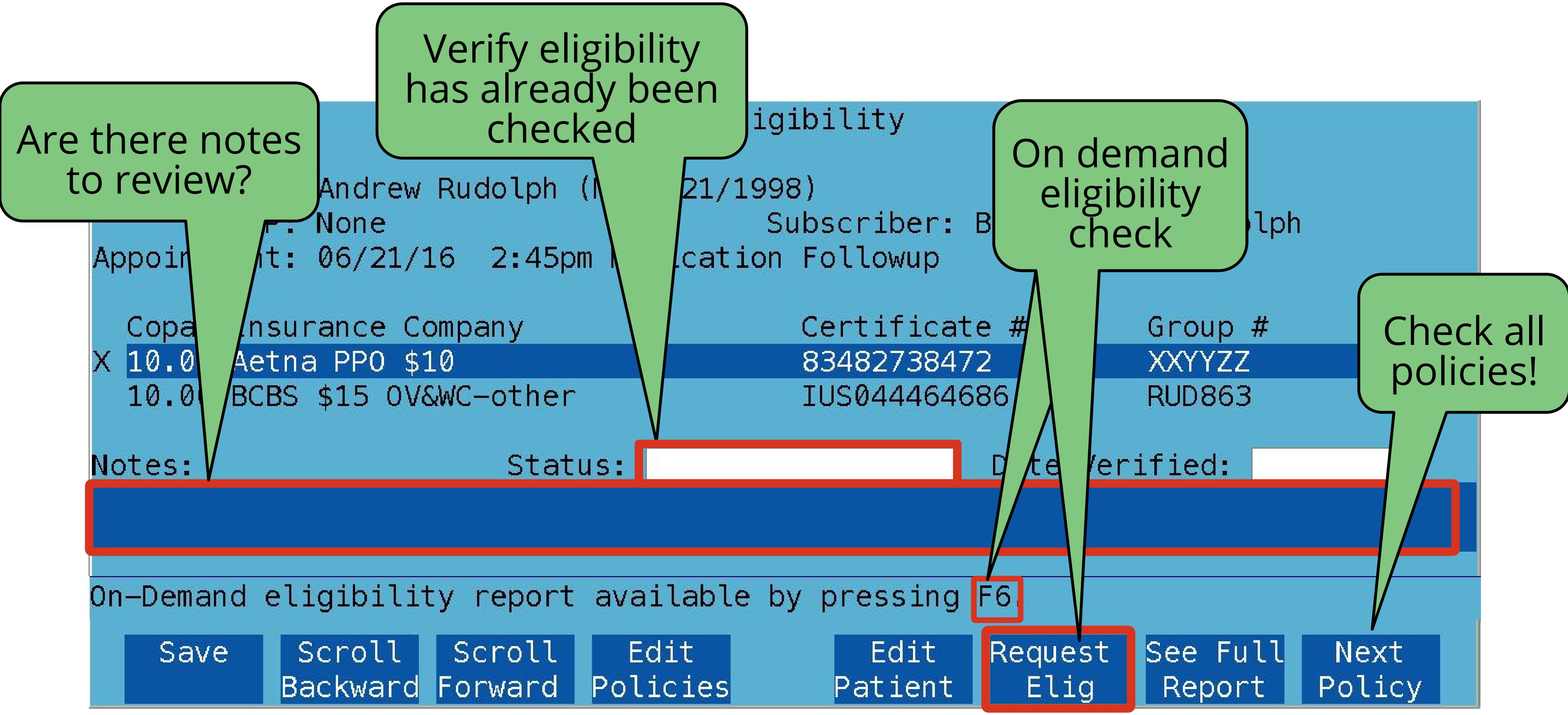
_ No Preference

Next Step | Edit Policies | Imms Record | Patient History | Patient Forms

UC2017

PCC Pediatric EHR Solutions

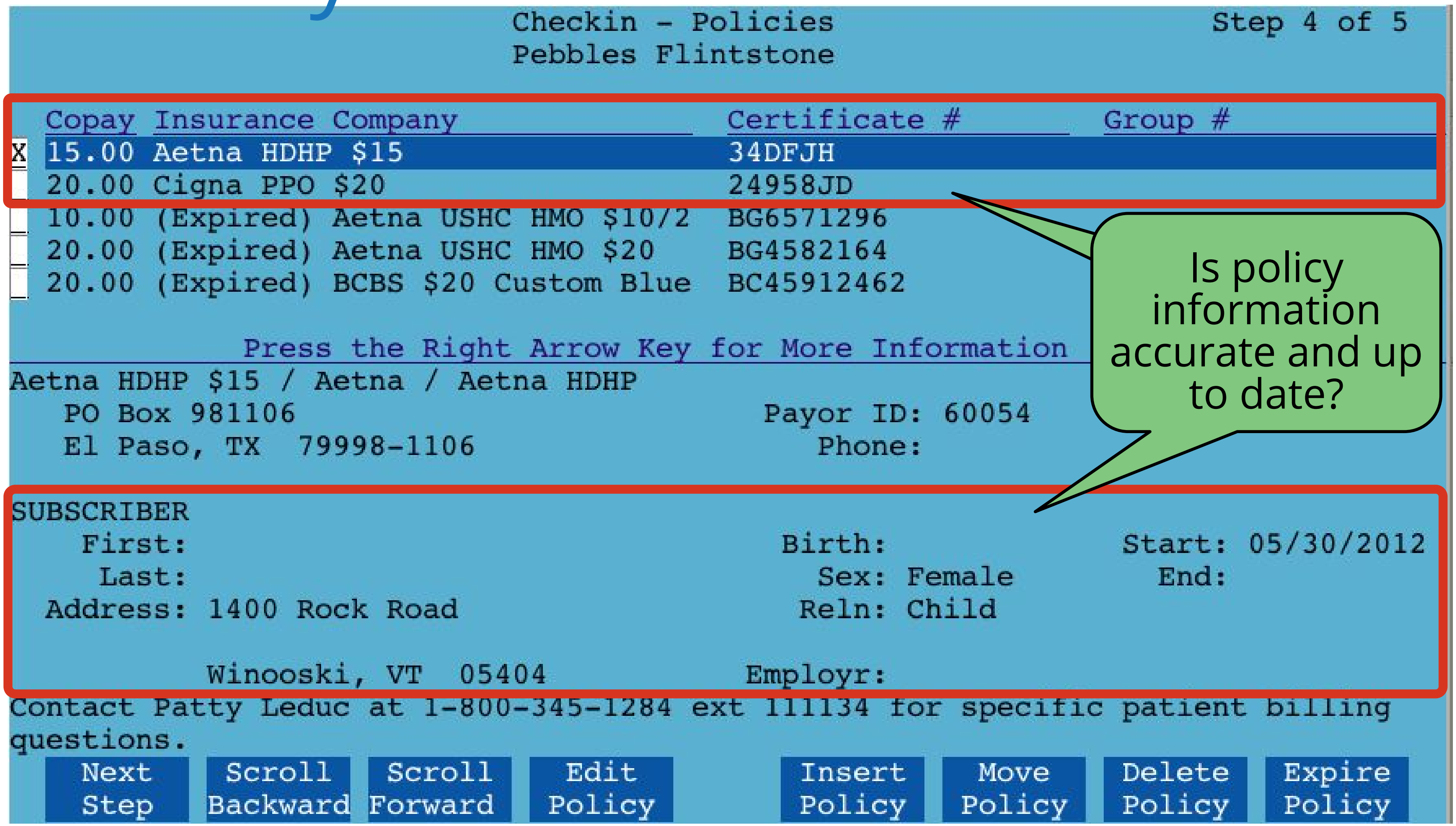
Front Desk Best Practices
Day of Visit: checkin Eligibility



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



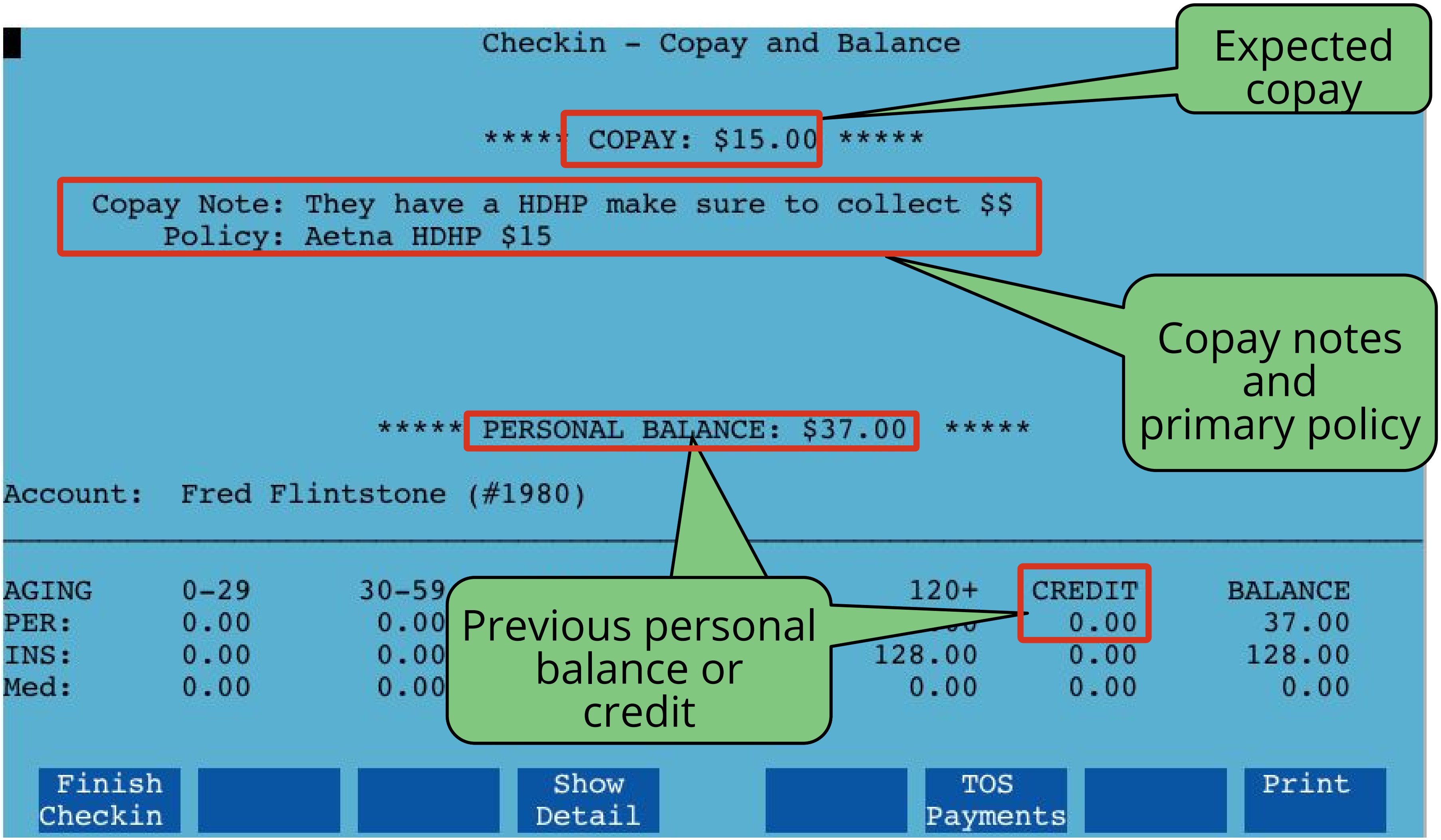
Front Desk Best Practices
Day of Visit: checkin Policies

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

UC2017

PCC Pediatric EHR Solutions

Front Desk Best Practices Day of Visit: checkin Copays



UC2017

PCC Pediatric EHR Solutions

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					
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

UC2017

PCC Pediatric EHR Solutions

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

UC2017

PCC Pediatric EHR Solutions

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.

UC2017

PCC Pediatric EHR Solutions