Front Desk Best Practices

Lynne Y Gratton, CPPM, AAPC Fellow
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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?
  - “Don’t mess with Maui when he’s on the breakaway!”
  - 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 check-ups, 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

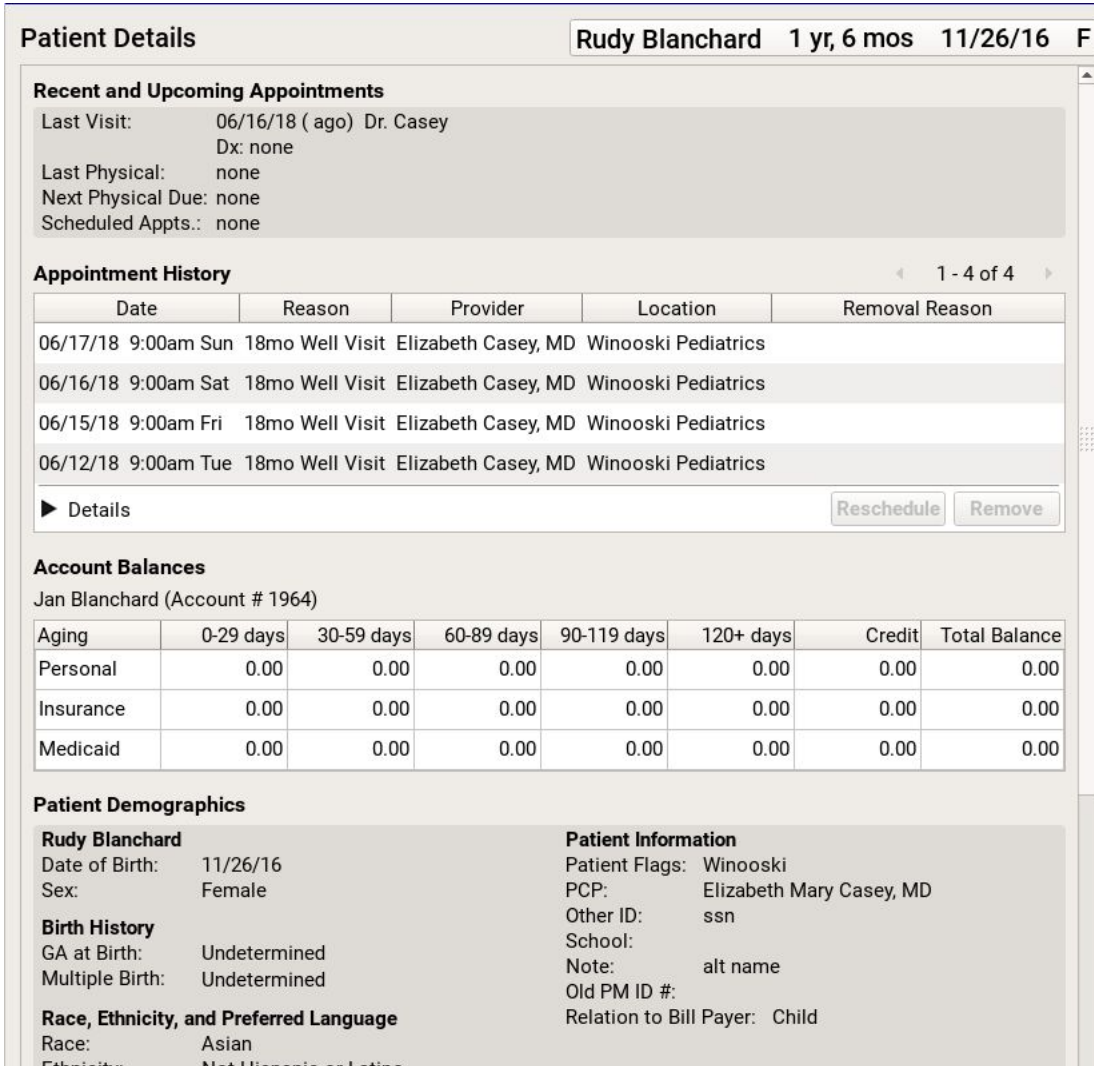
Front Desk Best Practices
Pre-Visit: Scheduling

- Verify
  - Demographics
  - Insurance
  - Update instantly
- Review copay and personal balance
- Only available in sam? Not once you get the 8.5 release!

Front Desk Best Practices
Pre-Visit: Scheduling

In the 8.5 release, after you select a patient in the Appointment Book you will get the screen on the following slide.

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

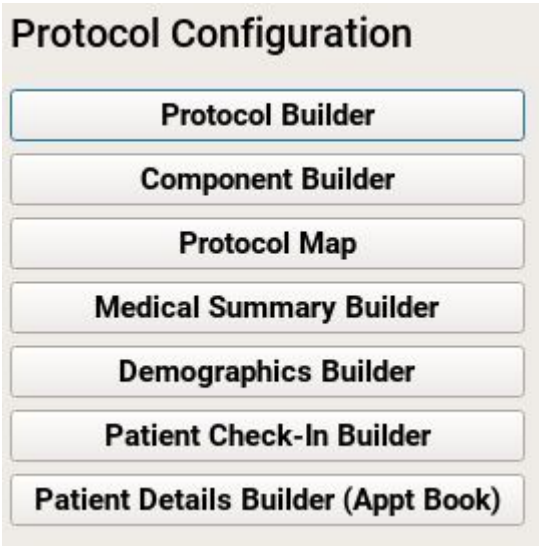
Rudy Blanchard
Date of Birth: 11/26/16
Sex: Female

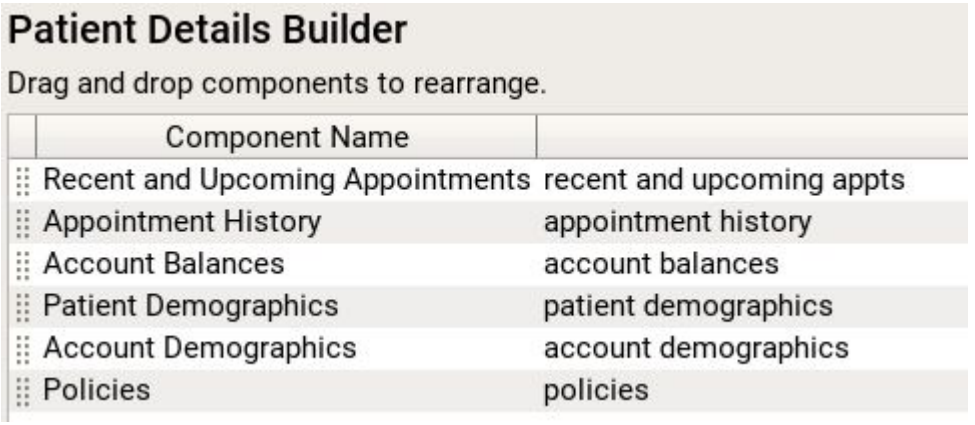
Birth History
GA at Birth: Undetermined
Multiple Birth: Undetermined

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

Front Desk Best Practices
Pre-Visit: Appt Book





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

Front Desk Best Practices
Pre-Visit: Scheduling

Attend the Roadmap session tomorrow at 9:45am for a live demo of the Patient Details in the Appointment Book.

See the Appointment Book in action Thursday at 11:00am.

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

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

- 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.

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!

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?

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.

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

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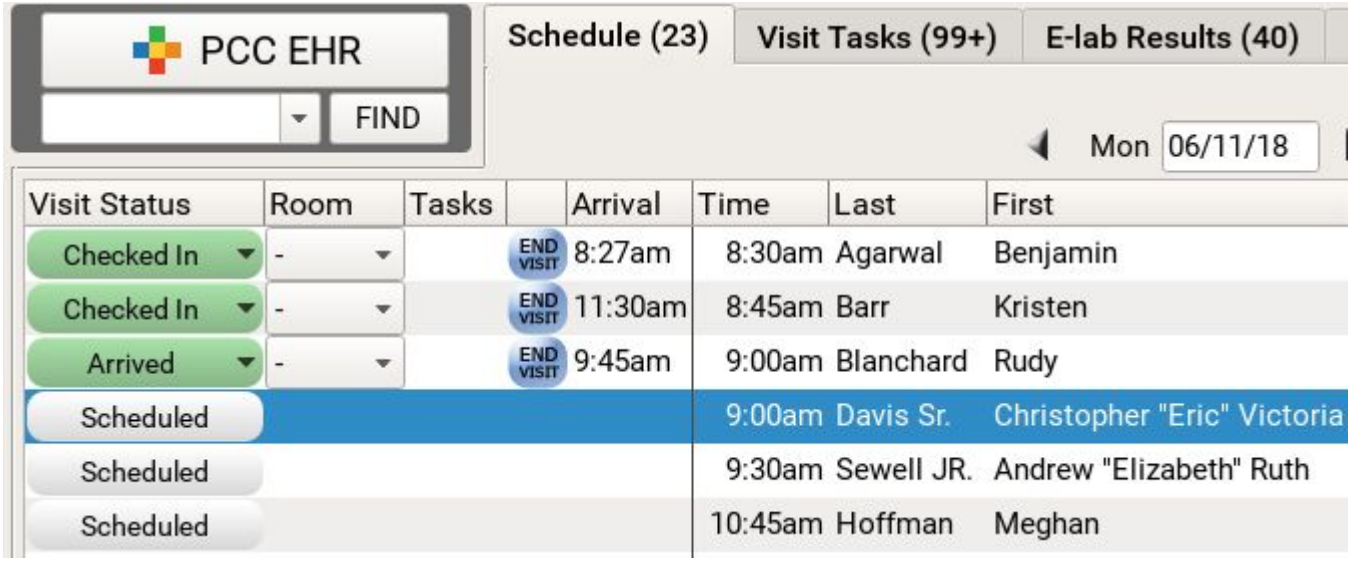
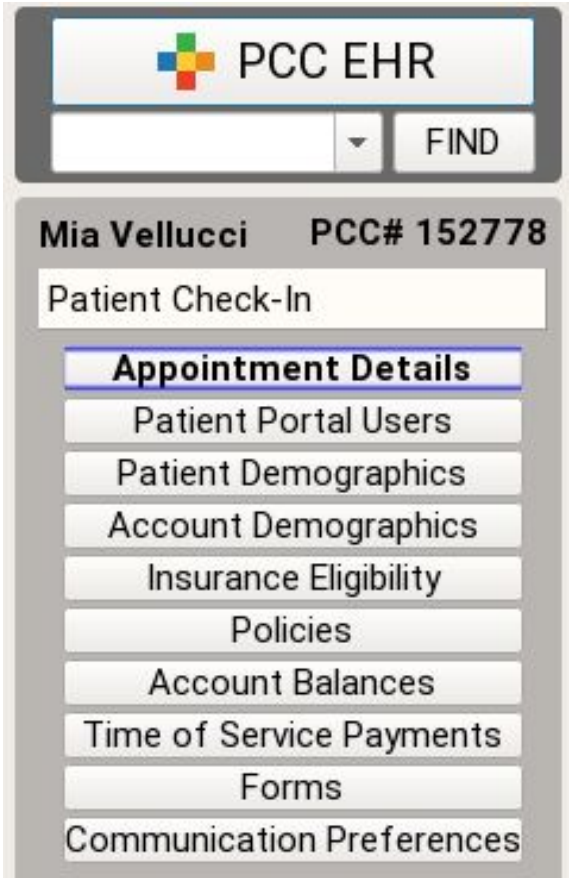
Front Desk Best Practices
Day of Visit: checkin EHR Style

A new day has arrived…

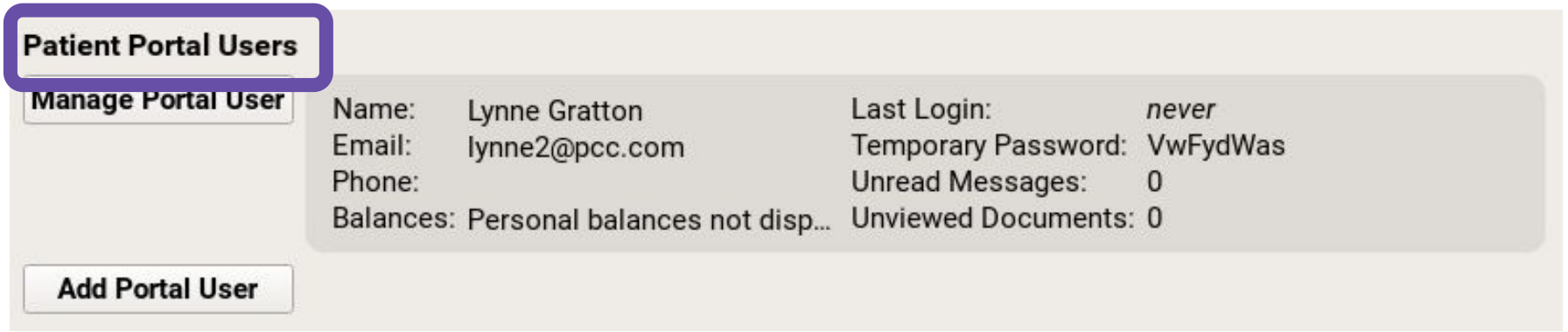


Front Desk Best Practices
Day of Visit: checkin EHR Style

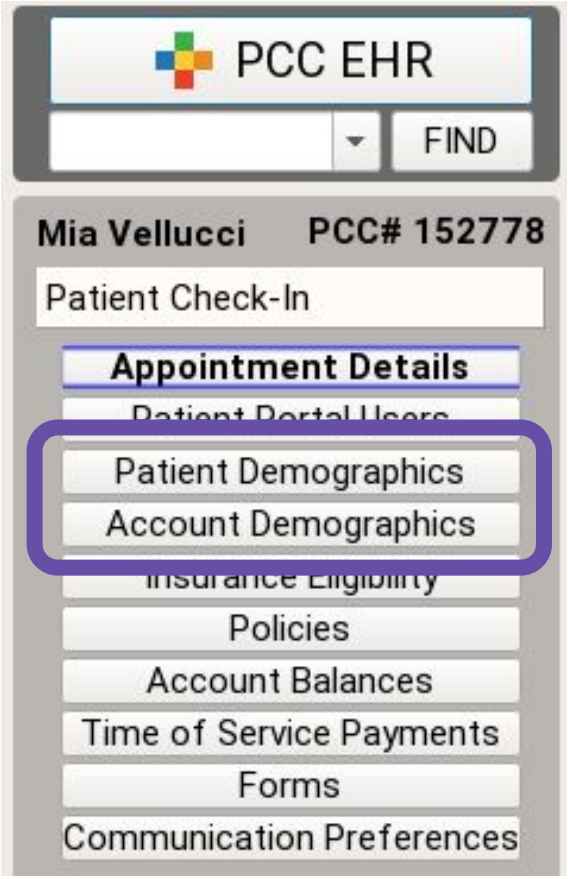
It's like the medical summary screen and demographics - add any chart wide components you like!



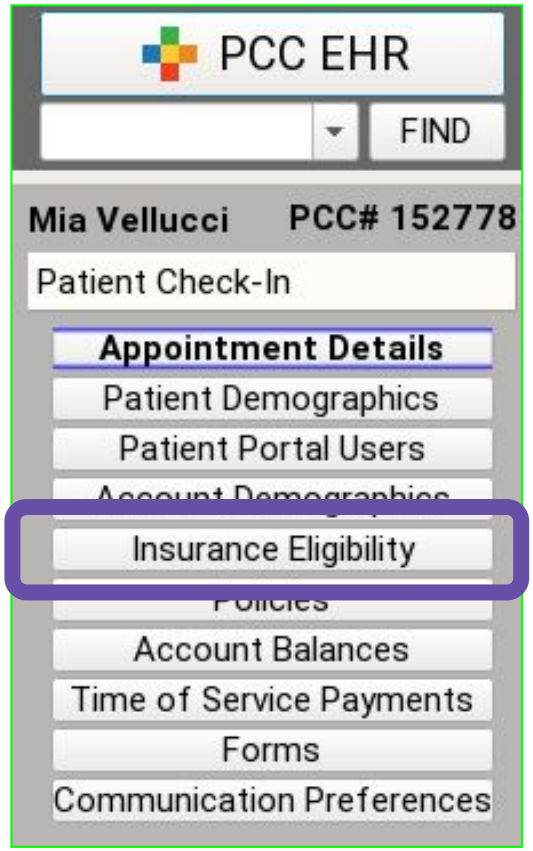
Front Desk Best Practices
Day of Visit: checkin EHR Style



Front Desk Best Practices
Day of Visit: checkin EHR Style



Front Desk Best Practices
Day of Visit: checkin EHR Style

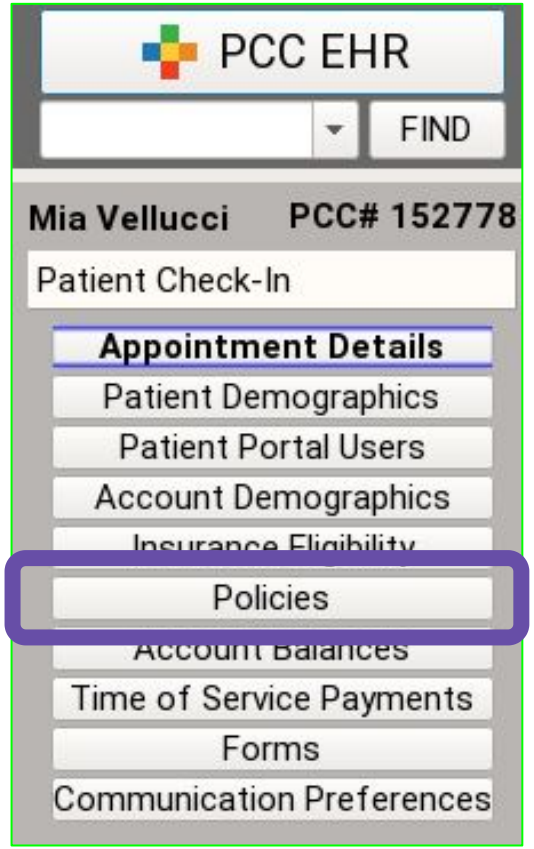


Front Desk Best Practices
Day of Visit: checkin Eligibility

- 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

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



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...

Front Desk Best Practices
Day of Visit: checkin EHR Style

▼ Encounters with Outstanding Personal Balances

[redacted] 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**

Front Desk Best Practices
Day of Visit: checkin EHR Style

Time of Service Payments

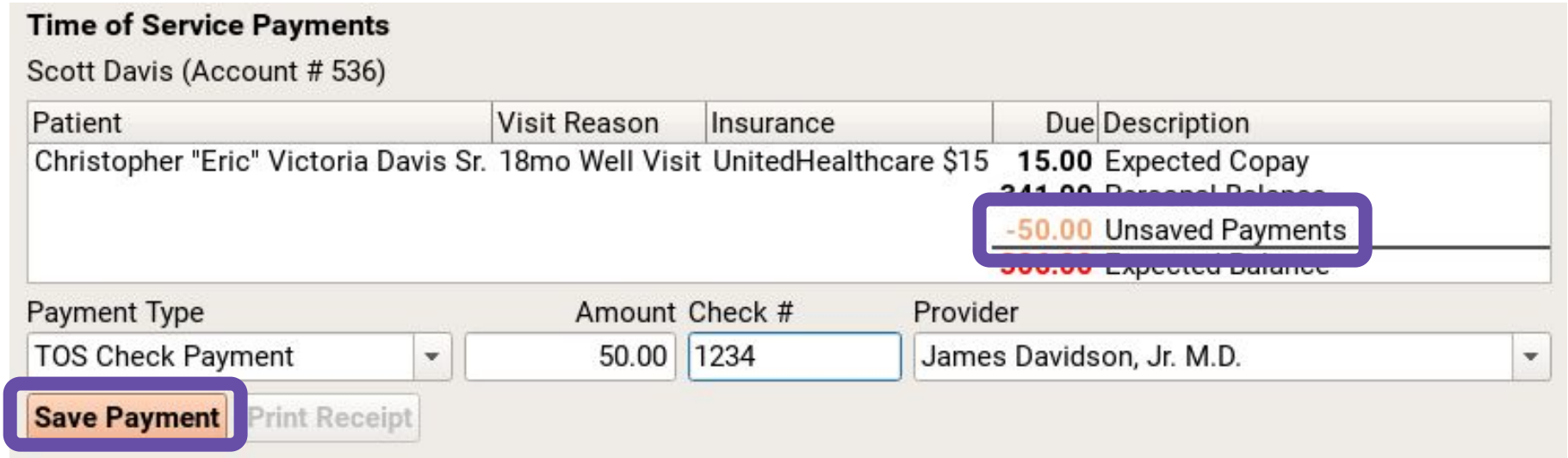
Scott Davis (Account # 336)

Patient	Visit Reason	Insurance	Due	Description
Christopher "Eric" Victoria Davis Sr.	18mo Well Visit	UnitedHealthcare $15	**15.00**	Expected Copay
			341.00	Personal Balance
			0.00	Unsaved Payments
			356.00	Expected Balance

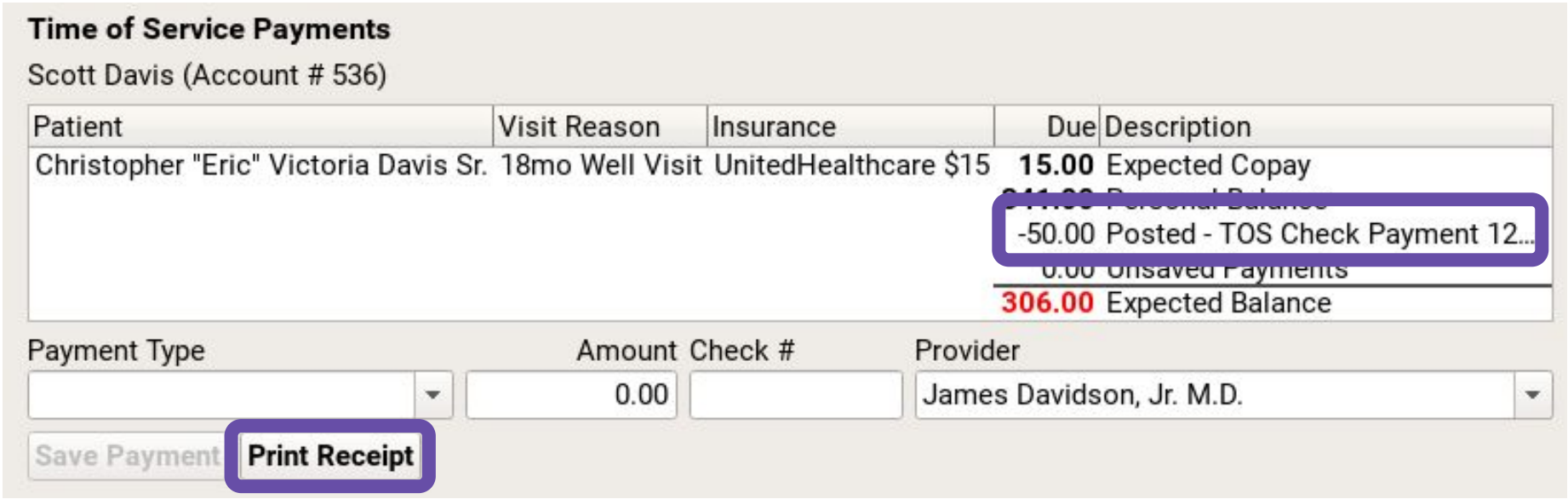
Payment Type	Amount	Check #	Provider
	0.00		James Davidson, Jr. M.D.

Save Payment | Print Receipt

Front Desk Best Practices
Day of Visit: checkin EHR Style



Front Desk Best Practices
Day of Visit: checkin EHR Style



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?

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

Front Desk Best Practices
Day of Visit: checkin Copays

- PCC EHR Check In will be covered in the General Session Thursday at 8:30am.

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 - 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

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

For a more in depth look at the Appointment Patient Details screen and Check In, attend the Roadmap session Thursday at 8:30am!

Check In will be covered in the General Session, the Appointment Book Patient Details will be covered in the 9:45am Roadmap session.

Plus a whole lot more!

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.