Front Desk Best Practices

Lynne Y Gratton, CPPM
PCC 2019 Users' Conference
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
Front Desk Best Practices

Customer Service
Front Desk Best Practices
Customer Service
Front Desk Best Practices  
Customer Service

- 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
  - See CARC codes!
Front Desk Best Practices

Pre-Visit: Appt Book

Patient Details

- **Rudy Blanchard**
- Age: 1 yr, 6 mos
- Date of Birth: 11/26/16
- Gender: Female

Recent and Upcoming Appointments

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

Appointment History

<table>
<thead>
<tr>
<th>Date</th>
<th>Reason</th>
<th>Provider</th>
<th>Location</th>
<th>Removal Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/17/18</td>
<td>9:00am Sun 18mo Well Visit</td>
<td>Elizabeth Casey, MD</td>
<td>Winooski Pediatrics</td>
<td></td>
</tr>
<tr>
<td>06/16/18</td>
<td>9:00am Sat 18mo Well Visit</td>
<td>Elizabeth Casey, MD</td>
<td>Winooski Pediatrics</td>
<td></td>
</tr>
<tr>
<td>06/15/18</td>
<td>9:00am Fri 18mo Well Visit</td>
<td>Elizabeth Casey, MD</td>
<td>Winooski Pediatrics</td>
<td></td>
</tr>
<tr>
<td>06/12/18</td>
<td>9:00am Tue 18mo Well Visit</td>
<td>Elizabeth Casey, MD</td>
<td>Winooski Pediatrics</td>
<td></td>
</tr>
</tbody>
</table>

Account Balances

Jan Blanchard (Account # 1964)

<table>
<thead>
<tr>
<th>Aging</th>
<th>0-29 days</th>
<th>30-59 days</th>
<th>60-89 days</th>
<th>90-119 days</th>
<th>120+ days</th>
<th>Credit</th>
<th>Total Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Insurance</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Medicaid</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

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

Pediatric EHR Solutions

Thriving Change
Front Desk Best Practices
Pre-Visit: Appt Book

Protocol Configuration
- Protocol Builder
- Component Builder
- Protocol Map
- Medical Summary Builder
- Demographics Builder
- Patient Check-In Builder
- Patient Details Builder (Appt Book)

Patient Details Builder
Drag and drop components to rearrange.

<table>
<thead>
<tr>
<th>Component Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recent and Upcoming Appointments</td>
</tr>
<tr>
<td>Appointment History</td>
</tr>
<tr>
<td>Account Balances</td>
</tr>
<tr>
<td>Patient Demographics</td>
</tr>
<tr>
<td>Account Demographics</td>
</tr>
<tr>
<td>Policies</td>
</tr>
</tbody>
</table>
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

- **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.
  - 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!
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

Pat PCC (#3336) Checkin - Demographics

First Name: Pebbles
Last Name: Flintstone
Physician: William Brady
Status: $5
SSN: 821-22-4051
Alt Name: Pebbles
School: P
Chart #: 123

Patient Info

Status: CONFIDENTIAL
Addr: 15 Quarry Lane
City: Winooski
State: VT
Zip Code: 05404
Email: stones@HannaBarbera.com

Billing Info

Addr: 1400 River Road
City: Winooski
State: VT
Email: stones@HannaBarbera.com

Next Step
Make Appt
Edit Patient
Edit Account
Reassign Account
Make Reprint
Billing
Enc Form
FK Key Set
A new day has arrived…

### Schedule (23)

<table>
<thead>
<tr>
<th>Visit Status</th>
<th>Room</th>
<th>Tasks</th>
<th>Arrival</th>
<th>Time</th>
<th>Last</th>
<th>First</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checked In</td>
<td>-</td>
<td>END VISIT</td>
<td>8:27am</td>
<td>8:30am</td>
<td>Agarwal</td>
<td>Benjamin</td>
</tr>
<tr>
<td>Checked In</td>
<td>-</td>
<td>END VISIT</td>
<td>11:30am</td>
<td>8:45am</td>
<td>Barr</td>
<td>Kristen</td>
</tr>
<tr>
<td>Arrived</td>
<td>-</td>
<td>END VISIT</td>
<td>9:45am</td>
<td>9:00am</td>
<td>Blanchard</td>
<td>Rudy</td>
</tr>
<tr>
<td>Scheduled</td>
<td>-</td>
<td>END VISIT</td>
<td></td>
<td>9:00am</td>
<td>Davis Sr.</td>
<td>Christopher &quot;Eric&quot; Victoria</td>
</tr>
<tr>
<td>Scheduled</td>
<td>-</td>
<td></td>
<td></td>
<td>9:30am</td>
<td>Sewell Jr.</td>
<td>Andrew &quot;Elizabeth&quot; Ruth</td>
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<tr>
<td>Scheduled</td>
<td>-</td>
<td></td>
<td></td>
<td>10:45am</td>
<td>Hoffman</td>
<td>Meghan</td>
</tr>
</tbody>
</table>
Front Desk Best Practices
Day of Visit: check in 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

Patient Portal Users
Manage Portal User
Name: Lynne Gratton
Email: lynne2@pcc.com
Phone: 
Balances: Personal balances not disp...

Last Login: never
Temporary Password: VwFydWas
Unread Messages: 0
Unviewed Documents: 0

Add Portal User
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: check in 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: check-in Policies

- Always get a copy of their insurance card
- Verify subscriber information
Front Desk Best Practices
Day of Visit: checkin EHR Style

Account Balances

<table>
<thead>
<tr>
<th>Aging</th>
<th>0-29 days</th>
<th>30-59 days</th>
<th>60-89 days</th>
<th>90-119 days</th>
<th>120+ days</th>
<th>Credit</th>
<th>Total Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal</td>
<td>41.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>250.00</td>
<td>0.00</td>
<td>291.00</td>
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<tr>
<td>Insurance</td>
<td>284.00</td>
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<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>284.00</td>
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<tr>
<td>Medicaid</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

| 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

<table>
<thead>
<tr>
<th>Christopher Davis (# 184)</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Description</td>
<td>Charge</td>
<td>Payment/Adj</td>
<td>Insurance Due</td>
<td>Medicaid Due</td>
</tr>
<tr>
<td>04/23/18</td>
<td>OV Expanded Focus</td>
<td>56.00</td>
<td>0.00</td>
<td>15.00</td>
<td>0.00</td>
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<tr>
<td>04/23/18</td>
<td>TOS Cash Payment - Personal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>05/19/18</td>
<td>Ins Pmt - UnitedHealthcare $15</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>56.00</td>
<td>15.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Christopher Davis (# 184)</th>
<th></th>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Description</td>
<td>Charge</td>
<td>Payment/Adj</td>
<td>Insurance Due</td>
<td>Medicaid Due</td>
</tr>
<tr>
<td>10/31/17</td>
<td>HepB/Hib</td>
<td>80.00</td>
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<td>0.00</td>
<td>80.00</td>
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<tr>
<td>10/31/17</td>
<td>2+ Immuniz Admin W/O MD Counse...</td>
<td>20.00</td>
<td>0.00</td>
<td>0.00</td>
<td>20.00</td>
</tr>
<tr>
<td>10/31/17</td>
<td>Pneumo-7</td>
<td>90.00</td>
<td>0.00</td>
<td>0.00</td>
<td>90.00</td>
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<tr>
<td>10/31/17</td>
<td>New Pt Well Child Under 1 yr</td>
<td>65.00</td>
<td>0.00</td>
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<td>65.00</td>
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<tr>
<td>10/31/17</td>
<td>TOS Check Payment - Personal</td>
<td>15.00</td>
<td>0.00</td>
<td>0.00</td>
<td>15.00</td>
</tr>
<tr>
<td>10/31/17</td>
<td>1 Immuniz Admin W/O MD Counse...</td>
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<td>0.00</td>
<td>0.00</td>
<td>10.00</td>
</tr>
<tr>
<td>10/31/17</td>
<td>IPV</td>
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<td>0.00</td>
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<tr>
<td></td>
<td></td>
<td>315.00</td>
<td>15.00</td>
<td>0.00</td>
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</tbody>
</table>

Mark Williams, M.D.  
Winooski Pediatrics
Front Desk Best Practices
Day of Visit: check in EHR Style

### Time of Service Payments

<table>
<thead>
<tr>
<th>Patient</th>
<th>Visit Reason</th>
<th>Insurance</th>
<th>Due</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scott Davis (Account # 336)</td>
<td>Christopher &quot;Eric&quot; Victoria Davis Sr. 18mo Well Visit</td>
<td>UnitedHealthcare $15</td>
<td>$15.00</td>
<td>Expected Copay</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$341.00</td>
<td>Personal Balance</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>Unsaved Payments</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>356.00</strong></td>
<td>Expected Balance</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payment Type</th>
<th>Amount</th>
<th>Check #</th>
<th>Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.00</td>
<td></td>
<td>James Davidson, Jr. M.D.</td>
</tr>
</tbody>
</table>

Save Payment  | Print Receipt
Front Desk Best Practices
Day of Visit: checkin EHR Style
# Front Desk Best Practices

**Day of Visit: checkin EHR Style**

## Time of Service Payments

**Scott Davis (Account # 536)**

<table>
<thead>
<tr>
<th>Patient</th>
<th>Visit Reason</th>
<th>Insurance</th>
<th>Due</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Christopher &quot;Eric&quot; Victoria Davis Sr. 18mo Well Visit</td>
<td>UnitedHealthcare</td>
<td>$15</td>
<td>15.00</td>
<td>Expected Copay</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>211.00</td>
<td>Personal Balance</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>-50.00</td>
<td>Posted - TOS Check Payment 12...</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>Unsaved Payments</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>306.00</td>
<td>Expected Balance</td>
</tr>
</tbody>
</table>

- **Payment Type**: [Dropdown]
- **Amount**: 0.00
- **Check #**: [Dropdown]
- **Provider**: James Davidson, Jr. M.D.

[Print Receipt]

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**PCC**

Pediatric EHR Solutions
Front Desk Best Practices
Day of Visit: check in 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: 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.
  - Payment Reconciliation Report in the EHR
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

Reference List