Front Desk Best Practices

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Q&A and Networking

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Session Goals

1. Learning the importance of the front desk
2. Best practices

Front Desk Best Practices

Overview
- Take Away
- Front Desk Best Practices
- Pre Visit Tasks
- Visit Day Tasks
- Oversight
Front Desk Best Practices

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

Front Desk Best Practices

- Great customer service
- Generate clean claims from a demographics standpoint
- Increase time of service payments
- Reduce the amount of collections after the visit
- Stay busy
Front Desk Best Practices
Customer Service

- First impressions count
Front Desk Best Practices
Customer Service

Greet patients immediately

○ Work as a team, help each other with overflow
Front Desk Best Practices
Phones

Move phone triage away from the front desk

- Allow the front desk to focus on verifying:
  - Demographics
  - Insurance
  - Collecting copays / past due balances

Great Customer Service

- Use your phone system to appropriately route calls
- For staff on phones, use a cordless headset
Front Desk Best Practices Customer Service

Answering Telephones

- “Pediatric Associates, hold please.”
- Try:
  - “Thank you for calling Pediatric Associates, this is Lynne, how may I help you?”

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 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.

- 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

<table>
<thead>
<tr>
<th>Patient Details</th>
<th>Rudy Blanchard  1 yr, 6 mos  11/26/16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recent and Upcoming Appointments</td>
<td></td>
</tr>
<tr>
<td>Last Visit</td>
<td>06/16/18  (w/o ped)  Dr. Casey</td>
</tr>
<tr>
<td>Last Physical</td>
<td>none</td>
</tr>
<tr>
<td>Next Physical Due</td>
<td>no next Physical</td>
</tr>
<tr>
<td>Scheduled Apple</td>
<td>none</td>
</tr>
<tr>
<td>Appointment History</td>
<td>1 of 4</td>
</tr>
<tr>
<td>Date</td>
<td>Reason</td>
</tr>
<tr>
<td>06/16/18  9:00am Sun</td>
<td>New Well Visit</td>
</tr>
<tr>
<td>06/15/18  9:00am Sat</td>
<td>New Well Visit</td>
</tr>
<tr>
<td>06/15/18  9:00am Fri</td>
<td>New Well Visit</td>
</tr>
<tr>
<td>06/12/18  9:00am Tue</td>
<td>New Well Visit</td>
</tr>
<tr>
<td>Account Balances</td>
<td></td>
</tr>
<tr>
<td>Jan Blanchard (Account # 1964)</td>
<td></td>
</tr>
<tr>
<td>Aging</td>
<td>0-29 days</td>
</tr>
<tr>
<td>Personal</td>
<td>0.00</td>
</tr>
<tr>
<td>Insurance</td>
<td>0.00</td>
</tr>
<tr>
<td>Patient Demographics</td>
<td></td>
</tr>
<tr>
<td>Rudy Blanchard</td>
<td>11/26/15</td>
</tr>
<tr>
<td>Sex</td>
<td>Female</td>
</tr>
<tr>
<td>Birth History</td>
<td></td>
</tr>
<tr>
<td>GA at Birth</td>
<td>Undetermined</td>
</tr>
<tr>
<td>Multiple Birth</td>
<td>Undetermined</td>
</tr>
<tr>
<td>Race, Ethnicity, and Preferred Language</td>
<td></td>
</tr>
<tr>
<td>Language</td>
<td>English</td>
</tr>
</tbody>
</table>
Front Desk Best Practices Pre-Visit: Scheduling

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

Manual reminders vs Automated reminders
  - Be in the same place as your patients
  - Are they Millennials or Baby Boomers?

What to verify during reminder calls
  - Date, time and visit reason
  - Insurance plan, subscriber, start/end dates
Front Desk Best Practices

Pre-Visit: Appointment Verification

Remind them:

- Bring your insurance card(s)
- Expected copay
- Payment for personal balances

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

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

It’s like the medical summary screen and demographics - add any chart wide components you like!
Front Desk Best Practices
Day of Visit: checkin Portal Users

Patient Portal Users

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>Last Login</th>
<th>Temporary Password</th>
<th>Unread Messages</th>
<th>Unviewed Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lynne Gatton</td>
<td><a href="mailto:lynne2@pcc.com">lynne2@pcc.com</a></td>
<td>never</td>
<td>VwFydWas</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Add Portal User

Front Desk Best Practices
Day of Visit: checkin Demographics

PCC EHR

Patient Check-In
Appointment Details
Patient Demographics
Account Demographics
Insurance Eligibility
Policies
Account Balances
Time of Service Payments
Forms
Communication Preferences

PCC
Pediatric EHR Solutions
Front Desk Best Practices

Day of Visit: checkin Demographics

Update demographics
  ○ Has anything changed?
    ■ If your front desk asks this, retrain them.
  ○ Instead:
    ■ Would you please verify your address?
    ■ What’s the best number at which to reach you?
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

Verify insurance information

- Do not just look at the insurance name.
- Has the policy holder or id number changed?
- Has the copay changed?
Front Desk Best Practices

Day of Visit: checkin Balance

<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>
</tr>
<tr>
<td>Insurance</td>
<td>284.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>224.00</td>
<td></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>

Encounters with Outstanding Personal Balances

Click on Encounters and get...

Front Desk Best Practices

Day of Visit: checkin Balance Details

<table>
<thead>
<tr>
<th>Description</th>
<th>Charge</th>
<th>Payment/Adj</th>
<th>Insurance Due</th>
<th>Medicaid Due</th>
<th>Personal Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/23/18 OV Expanded Focus</td>
<td>56.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>41.00</td>
</tr>
<tr>
<td>04/23/18 TG Cash Payment - Personal</td>
<td>15.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>15.00</td>
</tr>
<tr>
<td>05/19/18 Ins Pmt - UnitedHealthcare $15</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>04/23/18 TG Expanded Focus</td>
<td>56.00</td>
<td>15.00</td>
<td>0.00</td>
<td>0.00</td>
<td>41.00</td>
</tr>
</tbody>
</table>

Encounters with Outstanding Personal Balances

Christopher Davis (# 194)

Mark Williams, M.D.
Winookski Pediatrics

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Charge</th>
<th>Payment/Adj</th>
<th>Insurance Due</th>
<th>Medicaid Due</th>
<th>Personal Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/31/17</td>
<td>HepB/Hib</td>
<td>80.00</td>
<td>0.00</td>
<td>0.00</td>
<td>80.00</td>
<td></td>
</tr>
<tr>
<td>10/31/17</td>
<td>2nd Immuniz Admin W/O MD Counselor...</td>
<td>20.00</td>
<td>0.00</td>
<td>0.00</td>
<td>20.00</td>
<td></td>
</tr>
<tr>
<td>10/31/17</td>
<td>Pneum0-1</td>
<td>90.00</td>
<td>0.00</td>
<td>0.00</td>
<td>90.00</td>
<td></td>
</tr>
<tr>
<td>10/31/17</td>
<td>New Pt Well Child Under 2 yr</td>
<td>65.00</td>
<td>0.00</td>
<td>0.00</td>
<td>65.00</td>
<td></td>
</tr>
<tr>
<td>10/31/17</td>
<td>TG Check Payment - Personal</td>
<td>15.00</td>
<td>0.00</td>
<td>0.00</td>
<td>15.00</td>
<td></td>
</tr>
<tr>
<td>10/31/17</td>
<td>1 Immuniz Admin W/O MD Counselor...</td>
<td>10.00</td>
<td>0.00</td>
<td>0.00</td>
<td>10.00</td>
<td></td>
</tr>
<tr>
<td>10/31/17</td>
<td>IPV</td>
<td>50.00</td>
<td>0.00</td>
<td>0.00</td>
<td>50.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>315.00</td>
<td>15.00</td>
<td>0.00</td>
<td>0.00</td>
<td>250.00</td>
</tr>
</tbody>
</table>
Front Desk Best Practices
Day of Visit: checkin TOS payments

Time of Service Payments
Scott Davis (Account # 386)

<table>
<thead>
<tr>
<th>Patient</th>
<th>Visit Reason</th>
<th>Insurance</th>
<th>Due/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Christopher “Eric” Victoria Davis Sr.</td>
<td>18mo Well Visit, UnitedHealthcare</td>
<td>$15.00</td>
<td>-50.00 Expected Copay</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>341.00 Personal Balance</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>356.00 Expected Balance</td>
</tr>
</tbody>
</table>

Payment Type | Amount | Check # | Provider |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>TOS Check Payment</td>
<td>50.00</td>
<td>1234</td>
<td>James Davidson, Jr. M.D.</td>
</tr>
</tbody>
</table>

Save Payment | Print Receipt
Front Desk Best Practices
Day of Visit: check in TOS Payments

Collect the proper copay amount
- Is this a well or sick visit?
Collect any personal balance
- “How will you be paying your copay (and/or balance) today?”
Front Desk Best Practices
Day of Visit: check-in Copays

High deductible plans and HSA accounts
- What should the front desk collect at time of service?
- Make sure this is part of your financial policy

Credit card on file
- Get authorization from the patient to charge their credit card for outstanding balances.
  - This should be part of your financial policy
- Use a secure web service
Front Desk Best Practices
Day of Visit: checkin Copays

Have the front desk staff track payments not made and why it was not collected.

- Use this to train the front desk on how to respond to patients not willing to pay
- Consider a billing fee if a copay is not paid at the time of 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
- Do you charge a missed appointment fee?
  - Is it the same for a sick visit vs a well visit?
- Make sure this is part of your financial policy and the front desk knows it
- Does someone call the patient to reschedule?
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

Proving Out / Payment Reconciliation

- Each person that takes money needs to prove out
  - Payment Reconciliation Report in the EHR
- Any payments they have must match what they posted in the computer before they leave
Front Desk Best Practices
End of Day

Payment reconciliation
● Each front desk staff should have their own money drawer
  ○ How do you know who made a mistake otherwise?
● Do not keep the money where it is easily accessible from the other side of the front desk

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 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

● Visit Date
  - Patient Check In (checkin)
  - Patient Check Out
Front Desk Best Practices

Review

- Visit Date
  - Schedule next appointment
  - Missed appointments
  - Account for all visits
  - Proving Out

Reference List
What Questions Do You Have?

Questions posted in the Live Session channel of UC Chat will be read aloud by moderator for presenter to answer. Please post your questions in Live Session.