Front Desk Best Practices

Lynne Y Gratton, CPPM

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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

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Front Desk Best Practices

Overview

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

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Front Desk Best Practices

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

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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
- Stay busy

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Front Desk Best Practices
Customer Service

- First impressions count

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Front Desk Best Practices
Customer Service

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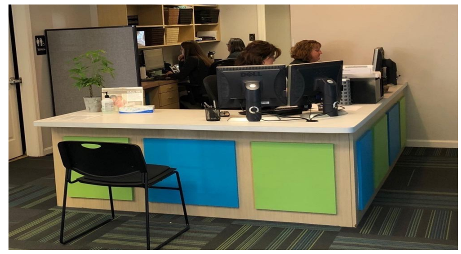
Front Desk Best Practices Customer Service



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Front Desk Best Practices Customer Service

Greet patients immediately

- Work as a team, help each other with overflow

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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

Front Desk Best Practices
Phones

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?"

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Front Desk Best Practices Customer Service

- 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

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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.

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Front Desk Best Practices Pre-Visit

- Scheduling
- Appointment Verification
- Eligibility Verification
- Eligibility Using Partner
- Billing Department Prep

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Front Desk Best Practices Pre-Visit:
Scheduling

- Verify
  - Demographics
  - Insurance
  - Update instantly
- Review copay and personal balance
  - See CARC codes!

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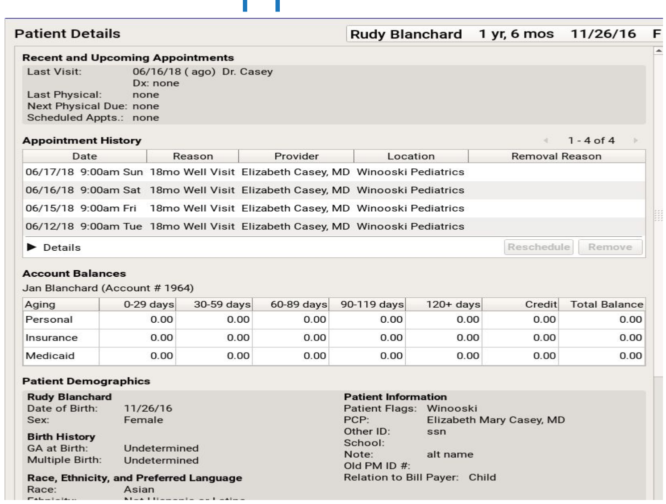
Front Desk Best Practices Pre-Visit:
Appt Book



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

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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?

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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

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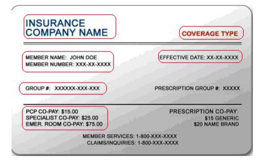
Front Desk Best Practices
Pre-Visit: Appointment Verification

Remind them:

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



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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.

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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!

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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?

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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.

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Front Desk Best Practices
Same Day Visits

- Scheduling
  - Verification
  - Reminders
- Eligibility
  - Real time with elig if possible
  - Check online/via phone as needed

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Front Desk Best Practices
Day of Visit

- Patient Check In (checkin)
- Posting Charges (checkout)
- Clean claims

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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].

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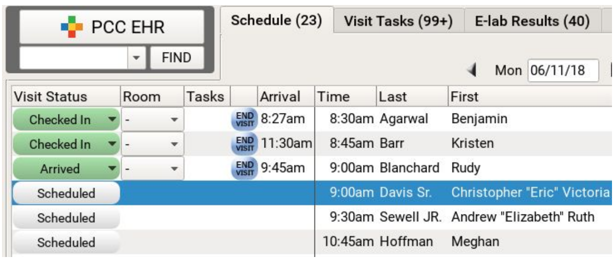
Front Desk Best Practices
Day of Visit: checkin



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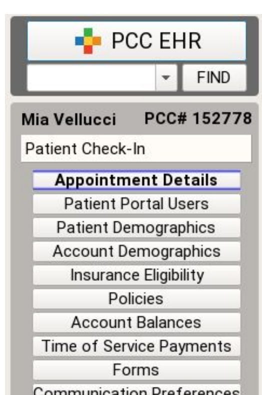
Front Desk Best Practices
Day of Visit: checkin

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



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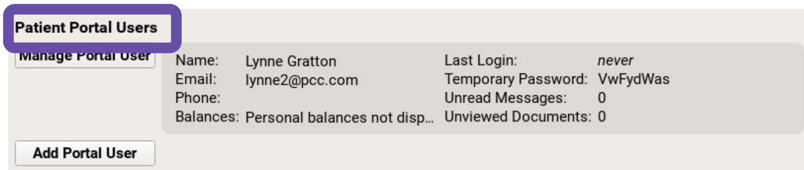
Front Desk Best Practices
Day of Visit: checkin Portal Users



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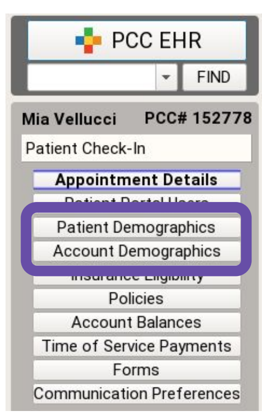
Front Desk Best Practices
Day of Visit: checkin Demographics



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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?

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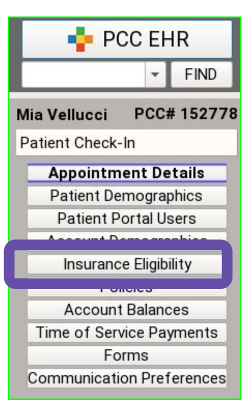
Front Desk Best Practices
Day of Visit: checkin



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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.

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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?

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Front Desk Best Practices
Day of Visit: checkin Balance

Account Balances

(# 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...

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Front Desk Best Practices
Day of Visit: checkin Balance Details

▼ Encounters with Outstanding Personal Balances

Christopher Davis (# 184) 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**

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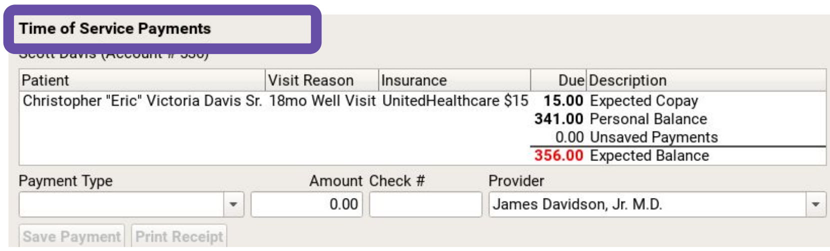
Front Desk Best Practices
Day of Visit: checkin TOS payments



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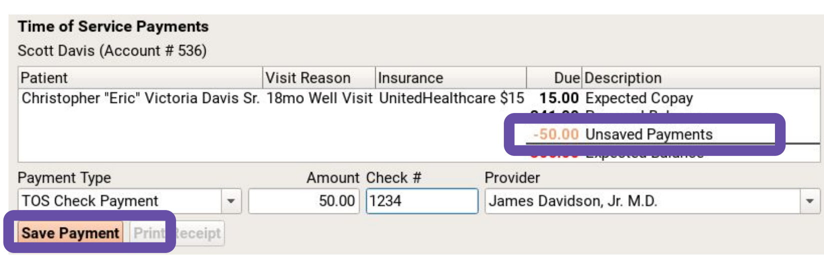
Front Desk Best Practices
Day of Visit: checkin TOS Payments



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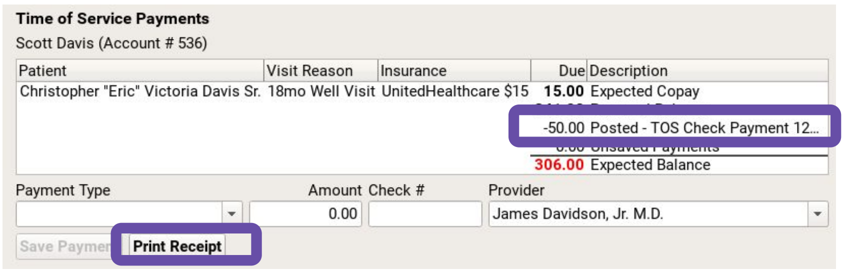
Front Desk Best Practices
Day of Visit: checkin TOS Payments



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Front Desk Best Practices
Day of Visit: checkin Copays

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?”

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Front Desk Best Practices
Day of Visit: checkin 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

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Front Desk Best Practices
Day of Visit: checkin Copays

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

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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

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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!

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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?

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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

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Front Desk Best Practices End of Day

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

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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

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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.

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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

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Front Desk Best Practices Review

- Goals for the front desk
- Customer service
- Telephones
- Keep them busy
- Oversight

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Front Desk Best Practices Review

- Pre Visit
  - Scheduling
  - Appointment Verification
  - Eligibility Verification
  - Billing Department Prep

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Front Desk Best Practices Review

- Visit Date
  - Patient Check In (checkin)
  - Patient Check Out

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Front Desk Best Practices Review

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

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Front Desk Best Practices

Reference List

1. Wilson, Judy A. (2016, April). Conquer common billing errors. *Healthcare Business Monthly,* 26.

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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.

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