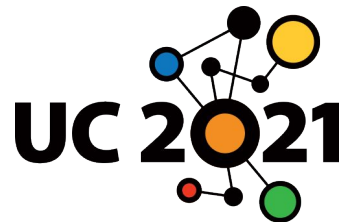


Front Desk Best Practices

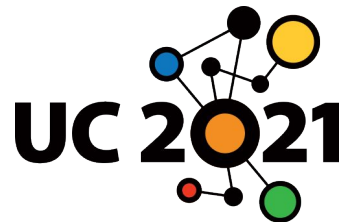
Lynne Gratton, CPPM

Kate Taylor, Account Team Coordinator & Client Advocate



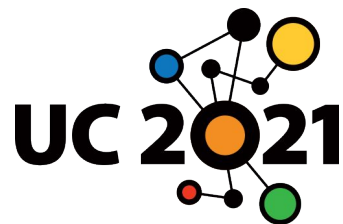
Session Goals

- What is the Take Away?
 - Learning the importance of the front desk and best practices.
 - Reviewing Front Desk Practices in detail.



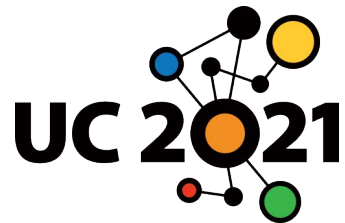
FDBP: Goals

- 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!



FDBP: Customer Service

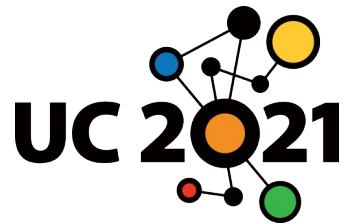
- First impressions count



FDBP: Customer Service



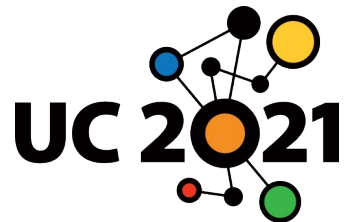
FDBP: Customer Service



FDBP: Customer Service

Greet patients immediately

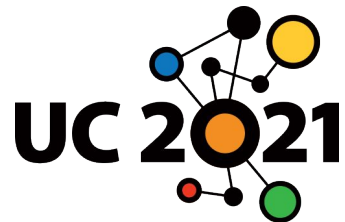
- Work as a team, help each other with overflow for seamless interactions



FDBP: Phones

Move phone triage away from the front desk

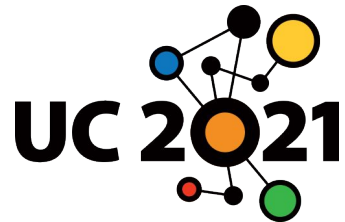
- Allow the front desk to focus on verifying:
 - Demographics
 - Insurance
 - Collecting copays / past due balances



FDBP: Phones

Great Customer Service

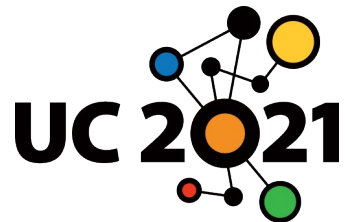
- Use your phone system to appropriately route calls
- For staff on phones, use a cordless headset



FDBP: Customer Service

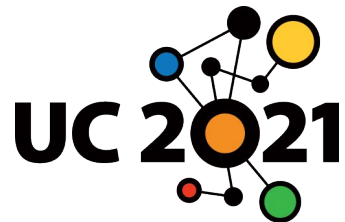
Answering Telephones

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



FDBP: Customer Service

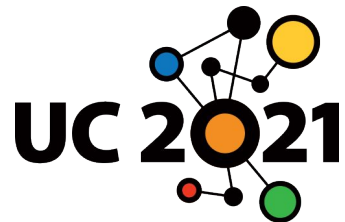
- Discuss significant billing issues in private
 - Have at least one billing staff with an office near the front
- Do not discuss other families (patients, parents, community) at the front desk



FDBP: Pre-Visit

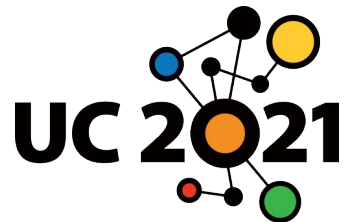
The processes used *prior* to when a patient comes in will impact the quality of your claims, increase TOS payments, and help reduce the amount of collections needed.

In short the Front End functions drive the revenue cycle.



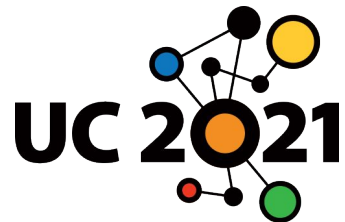
FDBP: Pre-Visit

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



FDBP Pre-Visit: Scheduling

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



FDBP Pre-Visit: Appt Book

Patient Details Dash Parr 9 yrs, 5 mos 12/09/11 M

Recent and Upcoming Appointments

Last Visit: 05/13/21 (5d ago) Pierce
Dx: Streptococcal sore throat
Last Physical: none
Next Physical Due: none
Scheduled Appts.: none

Appointment History 1 - 3 of 3

| Date | Reason | Provider | Location | Removal Reason |
|----------------------|-----------|---------------------|----------------|----------------------|
| 05/13/21 4:45pm Thu | Sick Call | Stephen Strange, MD | PCC Pediatrics | |
| 05/13/21 1:00pm Thu | Sick Call | Benjamin Pierce MD | PCC Pediatrics | Canceled by Practice |
| 05/13/21 11:30am Thu | Sick Call | Benjamin Pierce MD | PCC Pediatrics | |

Remove Reschedule Edit

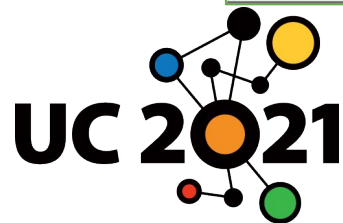
Account Balances
Bob & Helen Parr (Account # 9)

| 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 | 118.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 118.00 |
| Medicaid | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

Patient Portal Users

Name: Lynne Gratton (Other) Last Login: 05/13/21 4:03pm

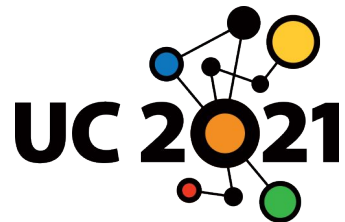
Edit Close



FDBP Pre-Visit: Scheduling

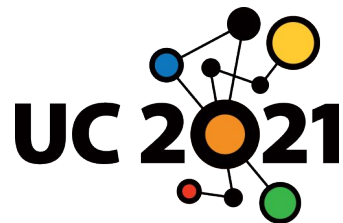
Patient Details in the Appointment Book allows users to:

- Review current and past appointments
 - Verify and/or Update
 - Demographics
 - Insurance
 - Review copay and personal balance



FDBP Pre-Visit: Scheduling

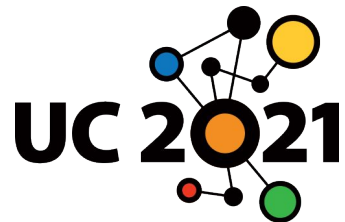
- New Patient Process
 - Who collects insurance information over the phone? Now we all do! Consider adding a portal template for them to upload a photo of their insurance card!
 - Use Patient Details in the Appointment Book to add/edit policy information and check balances
 - Always remind them to bring their insurance card, anticipated copay, and any balance



FDBP Pre-Visit: Appointment Verification

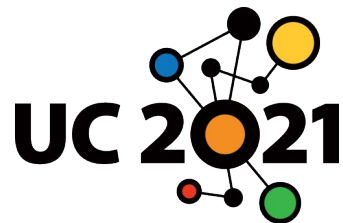
Manual reminders vs Automated reminders

- Are they Millennials or Baby Boomers?
 - Meet your families where they are, not where you or your providers are



FDBP Pre-Visit: Appointment Verification

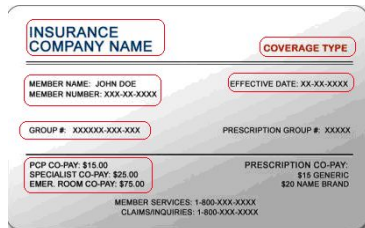
- What to verify during reminder calls
 - Date, time and visit reason (automated or manual calls)
 - Insurance plan, subscriber, start/end dates (manual calls)



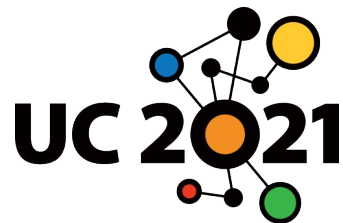
FDBP Pre-Visit: Appointment Verification

Remind them:

- Bring your insurance card(s)
- Expected copay per their insurance coverage
- Payment for personal balances
 - They can pay via the portal - contact-less!

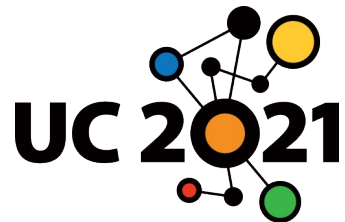


| INSURANCE COMPANY NAME | | COVERAGE TYPE |
|---|--|--|
| MEMBER NAME: JOHN DOE MEMBER NUMBER: XXX-XX-XXXX | | EFFECTIVE DATE: XX-XX-XXXX |
| GROUP #: XXXXXX-XXX-XXX | | PRESCRIPTION GROUP #: XXXXX |
| PCP CO-PAY: \$15.00 SPECIALIST CO-PAY: \$25.00 EMER. ROOM CO-PAY: \$75.00 | | PRESCRIPTION CO-PAY: \$15.00 \$15.00 GENERIC \$20.00 BRAND |
| MEMBER SERVICES: 1-800-XXX-XXXX CLAIMS INQUIRIES: 1-800-XXX-XXXX | | |



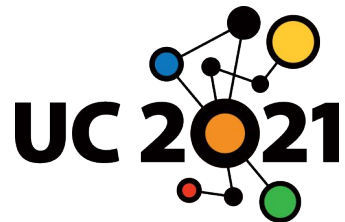
FDBP Pre-Visit: Eligibility Verification

- PCC's elig program
 - Auto eligibility overnight, all active plans!
 - Update policy information as needed, especially **copays!** Don't just accept "Active".
 - Use notes for the front desk to see at patient check in, these will appear in the EHR check in process.



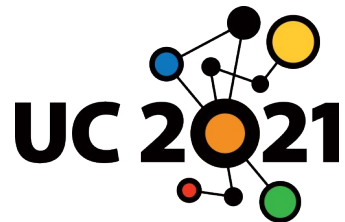
FDBP Pre-Visit: Billing Dept Prep

- Train the front desk to understand
 - Basic information about patient insurance plans
 - Which insurance plans you do NOT accept
 - When you sign a new insurance contract
 - Your financial policy
 - Outstanding balances



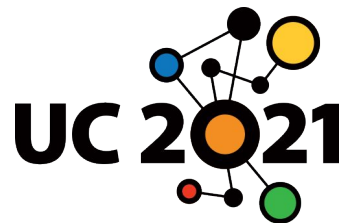
FDBP Pre-Visit: Billing Dept Prep

- Have a **daily huddle** between the front desk and billing staff to discuss appointments that day
 - Explain outstanding balances
 - Insurance issues
 - Anything else?



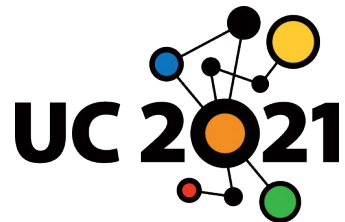
FDBP Pre-Visit: Billing Dept Prep

- 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
 - Publish it on your website
 - Make families sign it annually
 - Ask the PCC Community for guidance



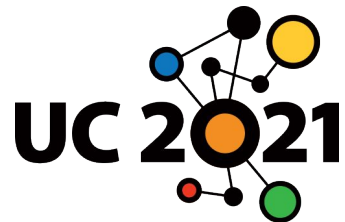
FDBP Same Day Visits

- Scheduling
 - Verification
 - Reminders - especially with any new COVID-19 policies your practice may have implemented (car check-in, copayments paid via the portal)
- Eligibility
 - Real time with eligibility if possible
 - Check online/via phone as needed



FDBP Day of Visit

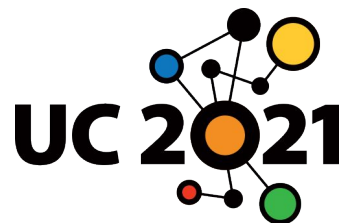
- Patient Check-In
- Posting Charges
- Clean claims




FDBP Day of Visit: Patient Check-In

Why do Patient Check In?

“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].



FDBP Day of Visit: Patient Check-In

 PCC EHR

▼

FIND

Schedule (23)

Visit Tasks (99+)

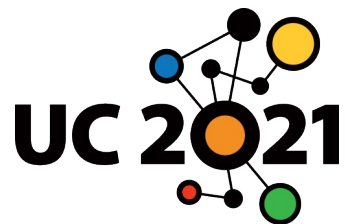
E-lab Results (40)

◀

Mon

06/11/18

| Visit Status | Room | Tasks | | Arrival | Time | Last | First |
|--------------|------|-------|-----------|---------|---------|------------|-----------------------------|
| Checked In ▼ | - ▼ | | END VISIT | 8:27am | 8:30am | Agarwal | Benjamin |
| Checked In ▼ | - ▼ | | END VISIT | 11:30am | 8:45am | Barr | Kristen |
| Arrived ▼ | - ▼ | | END VISIT | 9:45am | 9:00am | Blanchard | Rudy |
| Scheduled | | | | | 9:00am | Davis Sr. | Christopher "Eric" Victoria |
| Scheduled | | | | | 9:30am | Sewell JR. | Andrew "Elizabeth" Ruth |
| Scheduled | | | | | 10:45am | Hoffman | Meghan |



FDBP Day of Visit: Patient Check-In

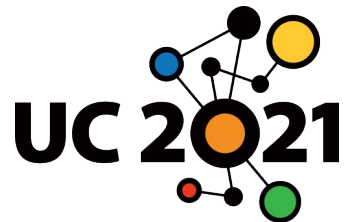
It's like the medical summary screen and demographics - add any chart wide components you like!



The screenshot shows the PCC EHR interface. At the top is the PCC EHR logo and a search bar with a dropdown arrow and a 'FIND' button. Below this, the patient's name 'Mia Vellucci' and PCC# '152778' are displayed. The main section is titled 'Patient Check-In' and contains a list of menu items: Appointment Details (highlighted with a blue border), Patient Portal Users, Patient Demographics, Account Demographics, Insurance Eligibility, Policies, Account Balances, Time of Service Payments, Forms, and Communication Preferences.



Two buttons labeled 'Previous' and 'Next' are shown side-by-side.



FDBP Day of Visit: Portal Users

Manage your portal users during the check in process.

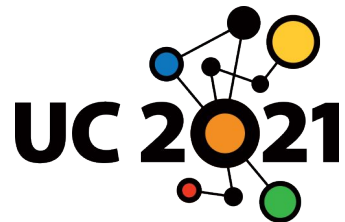
Patient Portal Users

Manage Portal User


Name: Lynne Gratton (Other)
Sign In: lynne@pcc.com
Portal Notifications: 575-640-5900
Balances: Bob & Helen Parr (Account # 9)

Last Login: 05/13/21 4:03pm
Identity Verification: Verified
Unread Messages: 0
Unviewed Documents: 1

Add Portal User



FDBP Day of Visit: Demographics

 PCC EHR

Mia Vellucci PCC# 152778

Patient Check-In

Appointment Details

Patient Portal Users

Patient Demographics

Account Demographics

Insurance Eligibility

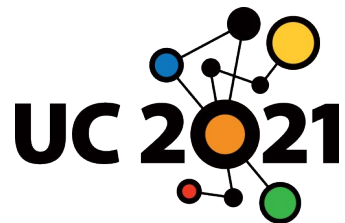
Policies

Account Balances

Time of Service Payments

Forms

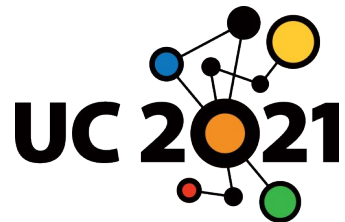
Communication Preferences



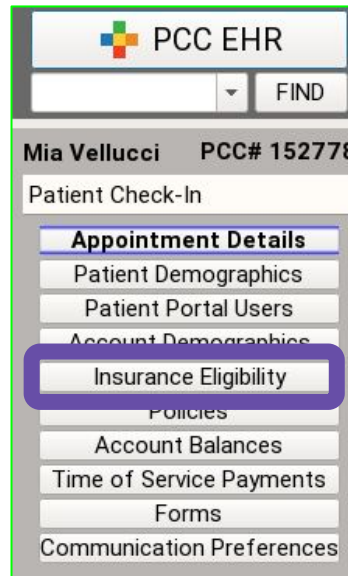
FDBP Day of Visit: Demographics

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?*
 - *Do you prefer emails, texts, or both?*



FDBP Day of Visit: Ins Eligibility



PCC EHR

FIND

Mia Vellucci PCC# 152778

Patient Check-In

Appointment Details

Patient Demographics

Patient Portal Users

Account Demographics

Insurance Eligibility

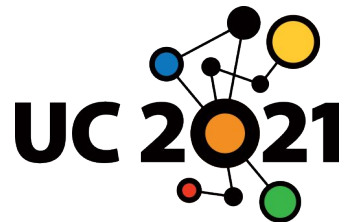
Policies

Account Balances

Time of Service Payments

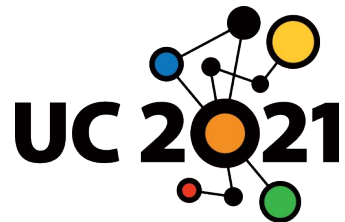
Forms

Communication Preferences



FDBP Day of Visit: Ins 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.



Patient Check-In

Insurance Eligibility
Appt: Sick Call 05/19/21 8:30am Beverly Crusher, MD
PCP: None

Eligibility Notes: Previous balance is from 1/27 DOS, co-insurance

BCBS \$10
Copay: \$10.00 Cert: 23423523523 Group: 43424 Subscriber: Bob & Helen Parr

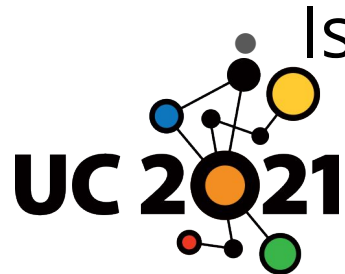
Status: Validated 05/18/21 [Physicians Computer Company]



FDBP Day of Visit: Policies

Verify insurance information

- Do not just look at the insurance name
- Review all details, every single visit
- Has the policy holder, ID number, or copay changed?
- Is the relationship still accurate?

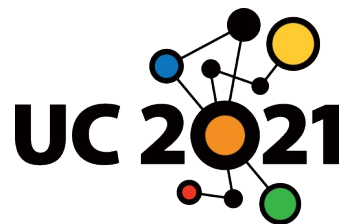


FDBP Day of Visit: Personal Balance

| Account Balances | | | | | | | |
|-----------------------------|-----------|------------|------------|-------------|-----------|--------|---------------|
| Scott Davis (Account # 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...



FDBP Day of Visit: Balance Details

▼ Encounters with Outstanding Personal Balances

Christopher Davis (# 184)

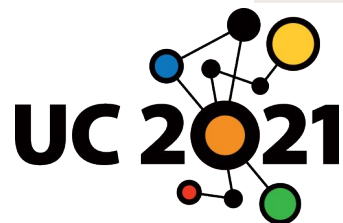
Mark Williams, M.D. Winooski Pediatrics

| 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 |



FDBP Day of Visit: TOS payments

Time of Service Payments

Scott Davis (Account # 536)

| 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 |

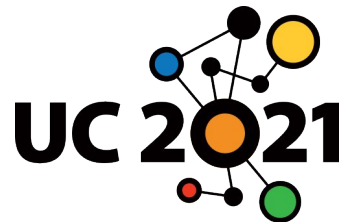
Payment Type

Amount Check #

Provider

Save Payment

Print Receipt



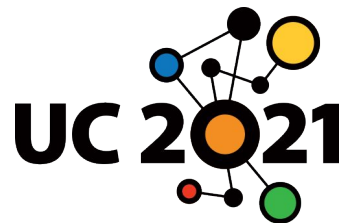
FDBP Day of Visit: TOS Payments

Time of Service Payments
Scott Davis (Account # 536)

| Patient | Visit Reason | Insurance | Due | Description |
|---------------------------------------|-----------------|------------------|------|-------------------------|
| Christopher "Eric" Victoria Davis Sr. | 18mo Well Visit | UnitedHealthcare | \$15 | 15.00 Expected Copay |
| | | | | 341.00 Personal Balance |
| | | | | -50.00 Unsaved Payments |
| | | | | 306.00 Expected Balance |

Payment Type: TOS Check Payment Amount: 50.00 Check #: 1234 Provider: James Davidson, Jr. M.D.

Save Payment Print Receipt

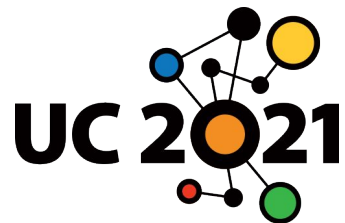


FDBP Day of Visit: TOS Payments

Time of Service Payments
Scott Davis (Account # 536)

| Patient | Visit Reason | Insurance | Due | Description |
|---------------------------------------|-----------------|------------------|------|---|
| Christopher "Eric" Victoria Davis Sr. | 18mo Well Visit | UnitedHealthcare | \$15 | 15.00 Expected Copay |
| | | | | 341.00 Personal Balance |
| | | | | -50.00 Posted - TOS Check Payment 12... |
| | | | | 0.00 Unsaved Payments |
| | | | | 306.00 Expected Balance |

Payment Type Amount Check # Provider



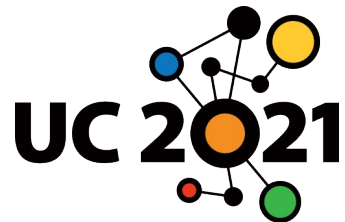
FDBP Day of Visit: Copays

Collect the proper copay amount

- Is this a *well* or *sick* visit?

Collect any personal balance

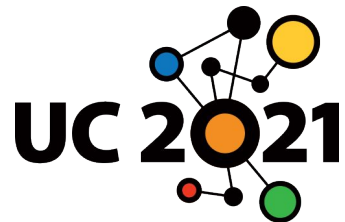
- "How will you be paying your copay (and/or balance) today?"
 - Not "*Do you want to pay...*" or "*Did you know...*"



FDBP Day of Visit: 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 or even better, keep CCOF



Front Desk Best Practices

Day of Visit: checkin Copays

Credit card on file

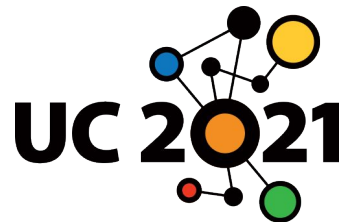
- Get authorization from the patient to charge their credit card for outstanding balances.
 - *This should be part of your financial policy*
- Use a secure web service



FDBP Day of Visit: Copays

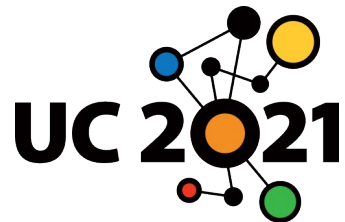
Have the front desk staff track payments not made and *why* it was not collected.

- 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



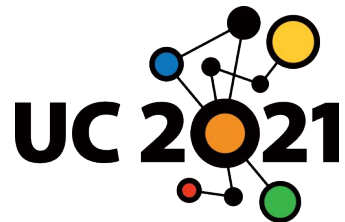
FDBP Day of Visit: Check Out

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



FDBP Day of Visit: Check Out

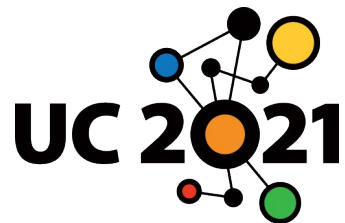
- Schedule next appointment
 - Make sure your schedule is out at least 6 months so you can schedule younger children easily, 1 year is better, 13 months ideal!



FDBP End of Day

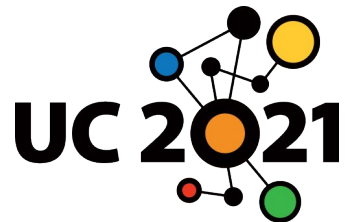
Track missed appointments

- 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?



FDBP End of Day

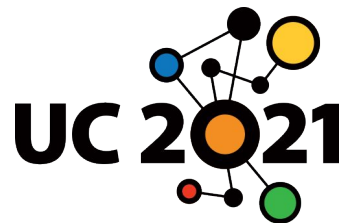
- Account for All Visits
 - Make sure at the end of the day all of the appointments have been checked in and verify there is nobody left on the Schedule tab



FDBP End of Day

Proving Out / Payment Reconciliation

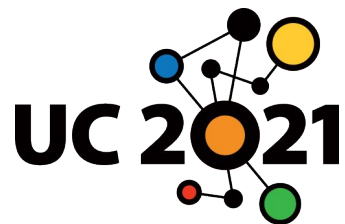
- Each person that takes money needs to prove out
 - The “Payment Reconciliation Report” in the EHR can be run by user and customized and saved, even scheduled.
- Any payments they have must match what they posted in the computer before they leave



FDBP End of Day

Payment reconciliation

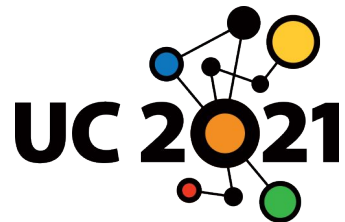
- Each front desk staff should have their own money drawer
 - How do you know who made a mistake otherwise?
- Do not keep the money where it is easily accessible from the other side of the front desk



FDBP Keep Them Busy

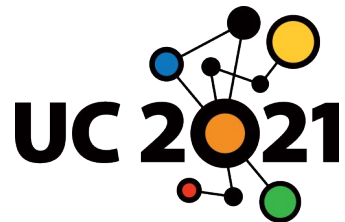
There should be no down time at the front desk

- If things slow down, have them work on recall lists
 - Call patients overdue for well visits, Asthma check-ups, ADHD checkups, flu shots, etc.
 - Incentivize projects/great performance



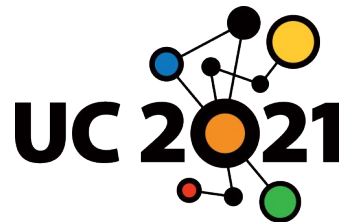
FDBP Oversight

- Track how much recall they are doing
- Track copay collection rates
- Track collections for past due balances
- Track Phone Note KPIs
- Track Patient Portal KPIs
- Set goals and reward staff for achievements



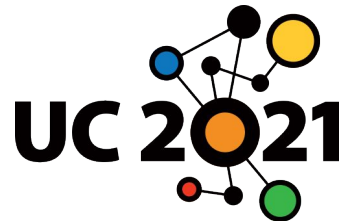
Front Desk Best Practices Review

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



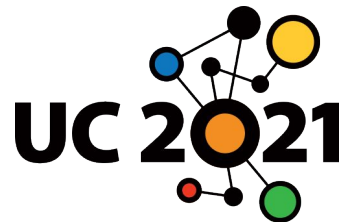
Front Desk Best Practices Review

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



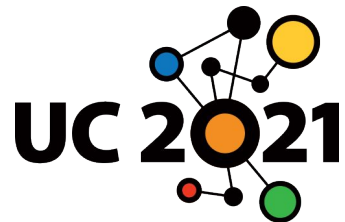
Front Desk Best Practices Review

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



Front Desk Best Practices Review

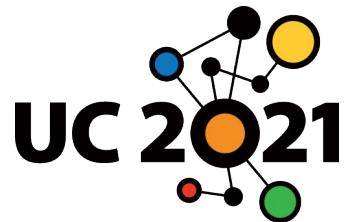
- Visit Date
 - Schedule next appointment
 - Missed appointments
 - Account for all visits
 - Proving Out



Front Desk Best Practices

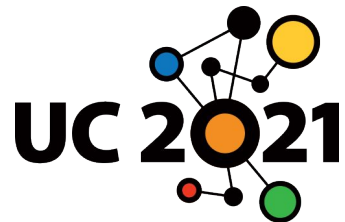
Reference List

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



What Questions Do You Have?

Questions posted in Socio will be read aloud by the moderator for the presenter to answer. Please post your questions in Socio now.



Later Viewing

This and all other UC 2021 course recordings will be available for later viewing via the Socio app for the next year!

