

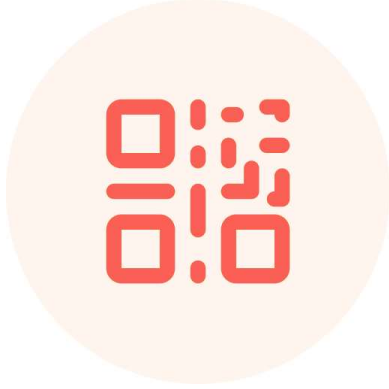
Front Desk Best Practices

(2023 Edition)

Lynne Gratton
CPPM



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#1571010

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Session Goals

What is the Take Away?

- Learning the importance of the front desk and best practices.
- Reviewing Front Desk Practices in detail

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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Are you using your waiting area?

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Customer Service

First impressions count

- Keep the front desk neat and tidy
- If you have a partition, don't cover it all up with announcements and paper

Customer Service

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



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Who answers the phones at your office?

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Phones

Move phone triage away from the front desk which allows the front desk to focus on verifying:

- Demographics
- Insurance
- Collecting copays / past due balances

Phones

Great Customer Service

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



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?”

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

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.

Pre-Visit

What happens before the patient arrives?

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

Pre-Visit: Scheduling

Verify

- Demographics
- Insurance
- Update instantly

Review copay and personal balance

- See CARC codes

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

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	

Account Balances
Bob & Helen Parr (Account # 9)

Aging	0-25 days	30-59 days	60-89 days	90-119 days	120+ days	Credit
Personal	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
Medicaid	0.00	0.00	0.00	0.00	0.00	0.00
Total Balance						0.00

Patient Portal Users
Lynne Gratton (Other) Last Login: 05/13/21 4:03pm

Name:

Pre-Visit: Scheduling

Patient Details allows users to:

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

Pre-Visit: Scheduling

New Patient Process

- Who collects insurance information over the phone? 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

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
 - Are they frequent no shows?
 - Call them!

Pre-Visit: Appointment Verification

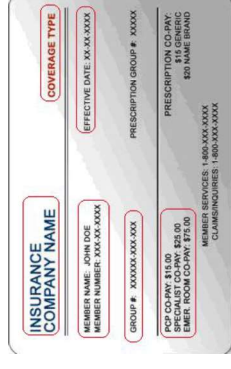
What to verify during reminder calls

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

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!



Pre-Visit: Eligibility Verification

PCC's Insurance Eligibility 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.

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

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Does your practice do a daily huddle?

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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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**For those with a front desk/billing huddle,
when do you have your huddle and what do
you discuss?**

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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

Same Day Visits

Scheduling

- Verification
- Reminders - especially with any new COVID-19 policies your practice may have implemented (car check-in, copay paid via the portal)

Eligibility

- Real time with eligibility if possible
- Check online/via phone as needed

Day of Visit

- Patient Check-In
- Posting Charges
- Clean claims

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].

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How does you practice check in patients?

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Day of Visit: Patient Check-In

PCC EHR		Schedule (23)		Visit Tasks (99+)		E-lab Results (40)	
<input type="text"/> <input type="button" value="FIND"/>						<input type="text" value="Mon 06/11/18"/>	
Visit Status	Room	Tasks	Arrival	Time	Last	First	
Checked In	-		8:27am <small>END VISIT</small>	8:30am	Agarwal	Benjamin	
Checked In	-		11:30am <small>END VISIT</small>	8:45am	Barr	Kristen	
Arrived	-		9:45am <small>END VISIT</small>	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	

Day of Visit: Patient Check-In

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



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When are you adding portal users?

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Day of Visit: Portal Users

Manage your portal users during the check in process.

Patient Portal Users

[Manage Portal User](#)

[Add Portal User](#)

Name:	Lynne Gratton (Other)	Last Login:	05/13/21 4:03pm
Sign In:	lynne@pcc.com	Identity Verification:	Verified
Portal Notifications:	575-640-5900	Unread Messages:	0
Balances:	Bob & Helen Parr (Account # 9)	Unviewed Documents:	1



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?*

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

RCBS \$10
Copay: \$10.00 Cert: 23423523523 Group: 43424 Subscriber: Bob & Helen Parr
Status: Validated 05/18/21 [Physicians Computer Company]

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?

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...

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 Course...	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	

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	Expected Copay
			341.00	Personal Balance
			0.00	Unsaved Payments
			356.00	Expected Balance

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

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	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



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...
			306.00	Expected Balance

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

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...*"

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

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Does your practice have a Credit Card of File (CCOF) policy?

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Day of Visit: checkin Copays

Credit card on file (CCOF)

- 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



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

Day of Visit: Check Out

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

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!

Day of Visit: Check Out

Schedule well visits

- The front desk should **know** your well visit schedule
- They should **focus** on scheduling well visits

Day of Visit: Check Out

Schedule well visits

- They need to know where to find the next physical due date

Recent and Upcoming Appointments	
Last Visit:	02/15/23 (9d ago) Pierce Dx: Well child visit
Last Physical:	12/01/22 (2m 3w ago)
Next Physical Due:	12/08/23
Scheduled Appts.:	none

Day of Visit: Check Out

Find it easily when scheduling!

Appointment Book

Schedule Appointment Add Block

Violet Parr 14y 7m 07/05/08 F

Sick Call PCP: Unassigned

Beverly Crusher, MD

PCC Pediatrics

mm/dd/yy 12:00am

- 12/08/23 - next physical due (15y 5m)
- 03/10/23 - 2 weeks (14y 8m)
- 03/24/23 - 1 month (14y 8m)
- 05/24/23 - 3 months (14y 10m)
- 08/24/23 - 6 months (15y 1m)
- 02/24/24 - 12 months (15y 7m)



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?*
 - *Do you know this does not keep people from missing appointments?*
- Make sure this is part of your financial policy and the front desk knows it
- Does someone call the patient to reschedule?

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

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, customized, saved, even scheduled.
- Any payments they have must match what they posted in the computer before they leave

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

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

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

Review

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

Review

Pre Visit

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

Review

Visit Date

- Patient Check In (checkin)
- Patient Check Out

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

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