Front Desk Best Practices

Nick Meunier
Kate Taylor

UC2025
BUILDING SOMETHING AWESOME!

PCC
Pediatric EHR Solutions

slido

Join at slido.com #PCC2025

ⓘ Click **Present with Slido** or install our Chrome extension to display joining instructions for participants while presenting.

UC2025
BUILDING SOMETHING AWESOME!

Session Takeaways

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

Session 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!

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

slido

Are you using your waiting area?

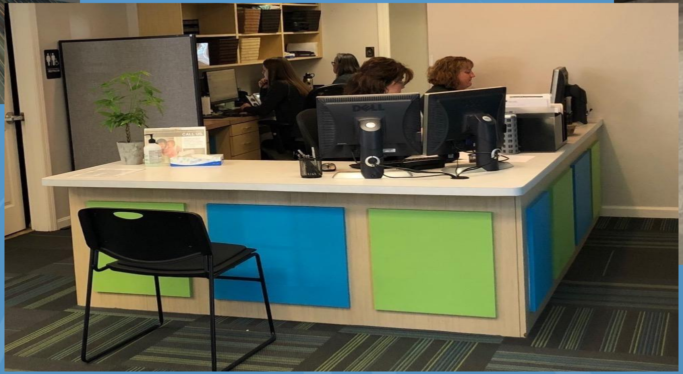
ⓘ Click **Present with Slido** or install our Chrome extension to activate this poll while presenting.

Customer Service

Greet patients immediately

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

Customer Service



slido

Who answers the phones at your office?

Click **Present with Slido** or install our Chrome extension to activate this poll while presenting.

Phones

Move phone triage away from the front desk.

This allows the front desk to focus on verifying:

- Demographics
- Insurance
- Collecting copays / past due balances

Phones

- 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

Patient Details

Pugsley Addams 2 yrs, 10 mos 07/16/21

Insurance Eligibility

Date: 06/07/24
PCP: None

BCBS $25
Copay: $25.00 Cert: 8760786408726 Group: 234556235 Subscriber: Gomez & Morticia Addams

Eligibility Response: This eligibility request cannot be submitted.
Alert: Your practice's connection to PCC cannot be authenticated.
Explanation: PCC's system which handles eligibility requests requires valid credentials to authenticate your server.
Action: Please contact PCC Support to help configure your practice credentials.

Recent and Upcoming Appointments

Last Visit: none
Last Physical: none
Next Physical Due: none
Scheduled Appts.: 08/03/24 10:30am 3yr PE Crusher PCC Pediatrics

Appointment History

1 - 4 of 4

Date	Reason	Provider	Location	Removal Reason
08/03/24 10:30am Sat	3yr PE	Beverly Crusher, MD	PCC Pediatrics	
06/05/24 1:45pm Wed	Sick Call	Benjamin Pierce MD	PCC Pediatrics	
10/31/23 10:15am Tue	Sick Call	Benjamin Pierce MD	PCC Pediatrics	
07/25/23 11:15am Tue	2yr PE	Benjamin Pierce MD	PCC Pediatrics	

▶ Details

Remove Reschedule Edit

Account Balances

Print

Morticia Addams (Account # 2)

Aging	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Personal	**50.00**	0.00	0.00	0.00	0.00	0.00	**50.00**
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

▼ Encounters with Outstanding Personal Balances

Pugsley Addams (PCC# 10) Benjamin Franklin Pierce MD PCC Pediatrics

Date	Description	Charge	Payment/Adj	Insurance Due	Medicaid Due	Personal Due
05/30/24	Forms Fee	50.00		0.00		**50.00**
		50.00	0.00	0.00	0.00	**50.00**

Pre-Visit Scheduling

Patient Details allows users to:

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

Pre-Visit Scheduling

New Patient Process

- Who collects insurance information over the phone?
  - Pre-Check-In allows them to upload their insurance card
- Use Patient Details in the Appointment Book to add/edit policy information and check eligibility!
- Always remind them to bring their insurance card and anticipated copay

Pre-Visit Scheduling

New Patient Process

- Who collects insurance information over the phone?
  - Pre-Check-In allows them to upload their insurance card
- Use Patient Details in the Appointment Book to add/edit policy information and check eligibility!
- Always remind them to bring their insurance card and anticipated copay

Pre-Visit Appt 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
  - Is a family a frequent no show?
    - Call them the day before and the day of to remind them and/or use Send Text in the EHR.

Pre-Visit Appt Verification

What to verify during reminder calls

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

Pre-Visit Appt Verification

Portal Scheduling

- Are you using Portal Scheduling?
  - Run a report in Report Library to see who has scheduled through the portal
  - This can help capture anyone who may not have been on the huddle sheet (depending when it runs)

Pre-Visit Appt Verification

Remind them:

- Bring your insurance card(s)
- Expected copay per their insurance coverage
- Payment for personal balances
    - They can pay via the portal and Patient Pre-Checkin - contactless!

Pre-Visit Eligibility

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.

slido

Are you using Patient Pre-Check-In?

ⓘ Click **Present with Slido** or install our Chrome extension to activate this poll while presenting.

Pre-Visit Patient Pre-Checkin

Get parents/guardians on the portal!

- Currently the portal user linked to the Billing Account is the only one who can access Patient Pre-Checkin
- Make sure they know about Pre-Checkin. How?
  - Flyers in the office, your web page, appointment verification, broadcast messages

Pre-Visit Billing Prep

Train the front desk to understand

- Basic information about patient insurance plans
- Which insurance plans you do NOT accept
- Your financial policy
- Outstanding balances

slido

Does your practice do a daily huddle?

ⓘ Click **Present with Slido** or install our Chrome extension to activate this poll while presenting.

Pre-Visit Billing Prep

Have a **daily huddle** between the front desk and billing staff to discuss appointments that day

- Explain outstanding balances
- Insurance issues
- Anything else?

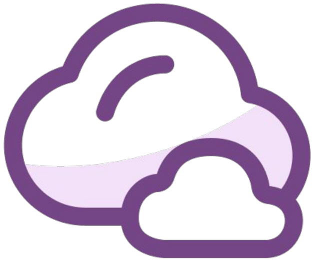
slido

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

Click **Present with Slido** or install our Chrome extension to activate this poll while presenting.

UC2025
BUILDING SOMETHING AWESOME!

slido



For those with a front desk/billing huddle, what do you discuss?

Click **Present with Slido** or install our Chrome extension to activate this poll while presenting.

Pre-Visit Billing Prep

Create a guide to educate patients about insurance responsibility

- Make sure the front desk staff knows so they can answer questions
- Publish it on your website
- Ask the PCC Community for suggestions

Same Day Visit

Scheduling

- Verification: Phone number!
- Reminders: Ins card, copay, personal balance

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].

slido

How does your practice check in patients?

ⓘ Click **Present with Slido** or install our Chrome extension to activate this poll while presenting.

Day of Visit Patient Check-in

Day of Visit Patient Check-in

It's like the medical summary screen and demographics - add any chart wide components you like or change their order.

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?*

slido

When are you adding portal users?

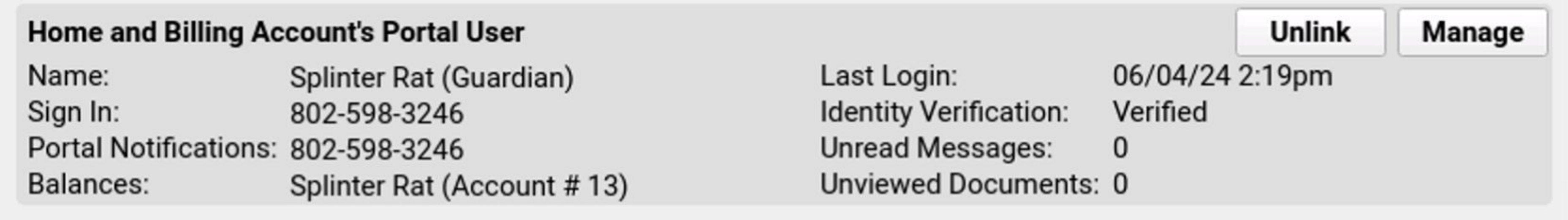
ⓘ Click **Present with Slido** or install our Chrome extension to activate this poll while presenting.

UC2025

BUILDING SOMETHING AWESOME!

Day of Visit Portal Users

Make sure the billing account is linked to the appropriate portal user so Patient Pre-Check-in works.



Day of Visit Portal Users

Manage the rest of your portal users during the check in process.

Patient Portal Users

Name:	Splinter Rat (Guardian)	Last Login:	06/04/24 2:19pm	Manage
Sign In:	802-598-3246	Identity Verification:	Verified	
Portal Notifications:	802-598-3246	Unread Messages:	0	
Balances:	Splinter Rat (Account # 13)	Unviewed Documents:	0	

Add Portal User

Day of Visit Policies

Verify insurance information

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

Day of Visit Personal Balances

Morticia Addams (Account # 2)

Aging	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Personal	**50.00**	0.00	0.00	0.00	0.00	0.00	50.00
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

▶ Encounters with Outstanding Personal Balances

Click on Encounters and get…

Day of Visit Personal Balance

Morticia Addams (Account # 2)

Aging	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Personal	**50.00**	0.00	0.00	0.00	0.00	0.00	**50.00**
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

▼ Encounters with Outstanding Personal Balances

Pugsley Addams (PCC# 10) Benjamin Franklin Pierce MD PCC Pediatrics

Date	Description	Charge	Payment/Adj	Insurance Due	Medicaid Due	Personal Due
05/30/24	Forms Fee	50.00		0.00		**50.00**
		50.00	0.00	0.00	0.00	**50.00**

Day of Visit TOS Payments

Time of Service Payments

Morticia Addams (Account # 2)

Patient	Visit Reason	Insurance	Due	Description
Wednesday Addams	Sick Call	BCBS $25	**25.00**	Expected Copay
			50.00	Personal Balance
			0.00	Unsaved Payments
			75.00	Expected Balance

Payment Type	Amount	Check #	Provider
	0.00		Beverly Crusher, MD

Save Payment   Print Receipt

Day of Visit TOS Payments

Time of Service Payments

Morticia Addams (Account # 2)

Patient	Visit Reason	Insurance	Due	Description
Wednesday Addams	Sick Call	BCBS $25	**25.00**	Expected Copay
			50.00	Personal Balance
			-25.00	Unsaved Payments
			50.00	Expected Balance

Payment Type	Amount	Check #	Provider
TOS Visa Card Payment	25.00		Beverly Crusher, MD

Save Payment Print Receipt

Day of Visit TOS Payments

Time of Service Payments

Morticia Addams (Account # 2)

Patient	Visit Reason	Insurance	Due	Description
Wednesday Addams	Sick Call	BCBS $25	**25.00**	Expected Copay
			50.00	Personal Balance
			-25.00	Posted - TOS Visa Card Payment (06/11/24 Beverly Crusher, MD)
			0.00	Unsaved Payments
			50.00	Expected Balance

Payment Type	Amount	Check #	Provider
	0.00		Beverly Crusher, MD

Save Payment   **Print Receipt**

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

slido

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

ⓘ Click **Present with Slido** or install our Chrome extension to activate this poll while presenting.

Day of Visit 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 Checkout

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

Day of Visit Checkout

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 Checkout

Schedule well visits

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

Day of Visit Checkout

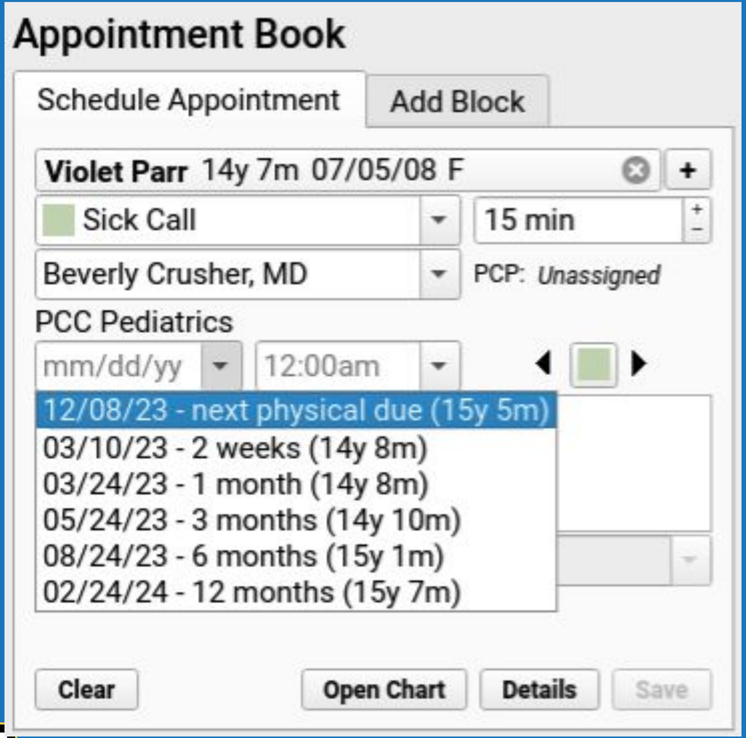
Schedule well visits

- 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 Checkout



Find it easily
when scheduling!

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?*

End of Day

Track missed 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

Reference List

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

What Questions Do You Have?