



Front Desk Excellence: Mastering the Patient Journey from Scheduling to Check-in

Nick Meunier
Jerry Wolfenbarger





Asking Questions:

Virtual attendees: Use the chat if you have a question that you want answered

In-person attendees: Go to the stationary microphone in your room.

CEUs:

You can request CEU codes for qualifying sessions using the form PCC shares out at the conclusion of the conference.



Session Objectives

1. Great customer service
2. Generate clean claims from a demographics standpoint
3. Increase time of service payments
4. Reduce the amount of collections after the visit
5. Stay busy!





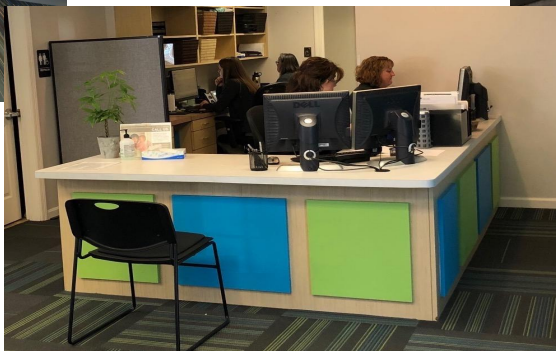
Customer Service



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

Customer Service





Customer Service

Greet patients immediately

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



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 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

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?





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

Scheduling Appointment → Patient Check-In Demonstration



Session Takeaways

1. Takeaway
2. Takeaway
3. Takeaway
4. Etc, etc, etc





**Please complete the course
survey in the UC App.**



Do you have any questions?

