

The logo features three overlapping rectangular boxes. The leftmost box is dark blue with a white letter 'C'. The middle box is light grey with a dark blue letter 'C'. The rightmost box is dark blue with a light grey letter 'I'. The background consists of abstract, flowing blue and purple lines and shapes.

C

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CODING & COMPLIANCE INITIATIVES, INC.

Front Desk – Patient Experience Specialist

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Disclaimer

The information provided within this presentation is for educational purposes only and is not intended to be considered legal advice. Opinions and commentary are solely the opinion of the speaker. Many variables affect coding decisions and any response to the limited information provided in a question is intended to provide general information only. All coding must be considered on a case-by-case basis and must be supported by appropriate documentation, medical necessity, hospital bylaws, state regulations, etc. The CPT codes that are utilized in coding are produced and copyrighted by the American Medical Association (AMA).

Objectives

- We will discuss the importance of the front desk staff:
 - Making a great first impression,
 - Ensuring the patient experience is pleasant and effective
- We will discuss how critical the front desk role is in acquiring sliding fee (income) eligibility information, requesting co-pays, asking for payments, etc.
- We will discuss the importance of determining the purpose of the visit and ensuring the reason documented is clear and that the appropriate amount of time is scheduled.
- We will discuss how important the front desk staff is and discuss the importance of understanding their role on the care team and in the care coordination

Billing starts with Front Desk

- The reimbursement process is a sequence of interdependent steps that start with the first phone call to schedule
 - Collect accurate and complete information (i.e. demographics, current insurance card, SSN, DOB, etc.)
 - The professional services (what did the doctor do)
 - The documentation of the service
 - The coding and all reportable and billable services
 - The charge entry
 - Submission of the claim for reimbursement
 - Claim review or processing of the claim form payment
 - Payment or request for additional information for the carrier to review the claim

Pre-visit Planning

- Reviewing the schedule
 - Which providers have openings in their schedule
 - Which patients have a co-payment or outstanding balance?

First Impression

- Role of a Patient Experience Specialist
 - Professionalism and service oriented
 - Greeting, telephone and scheduling
 - Communication
 - Insurance, billing and collection
 - Regulatory and legal
- Creating a Connection NOT a Transaction

Front Desk

- Patient flow starts at the front desk
- Billing starts at the front desk
- Educating the patient starts at the front desk

Important Front Desk Functions

- Being Efficient
- Greeting patients
- Telephone
- Scheduling
- Registration at check-in
- Communication
- Responsible for the waiting room
- Facilitating patient flow

Being Efficient

- Efficient - performing or functioning in the best possible manner with the least waste of time and effort; having and using requisite knowledge, skill, and industry; competent; capable

Source: dictionary.com

Greeting the Patient

- Patients measure the quality of their medical care through the customer service experience
 - 30 seconds to make a first impression
 - Make eye contact
 - Use the patient's name
 - Lean in and listen
 - Make it a patient-friendly process

Telephone Etiquette

- The telephone greeting is a verbal handshake
 - Friendly introduction
 - Identify the office or department
 - Identify yourself
 - Make an offer of help
 - SMILE!!
 - LISTEN!!

Telephone Etiquette

- Ask permission before placing the caller on hold
- Inform the caller before transferring into voice mail
- Excuse yourself before interrupting a conversation to answer the telephone
- When on the phone, acknowledge the patient in front of you with a smile and nod

Telephone Tips

- Create written procedures/scripts
- Add outgoing, non-rollover lines
- Set expectations and follow through
- Have nursing staff schedule triaged calls
- Have a back-up for periods of heavy volume

Scheduling

- Managing the Schedule
 - Is your area set up to greet patients efficiently and effectively?
 - Do you have the equipment and supplies close by?
 - Are you trained?
- Schedule delays
 - Notify patients immediately
 - Offer the option to reschedule
 - Call patients who have yet to arrive

Scheduling

- Late Arrivals
 - Penalizes patients who arrive on time
 - Not a black & white issue
 - Tell the patient what can be done, not what cannot
- Dealing with “no-shows”
 - Develop a communicate a policy
 - Track “no-shows”

Registration

- Complete and accurate patient demographics
 - Date of birth
 - Telephone numbers (including cell)
 - Verify address
 - Collect email addresses
 - Verify insurance
- Insurance verification
 - Review the card carefully when it is unfamiliar
 - Copy (scan) the card front **and** back
 - Check eligibility pre-visit
 - Internet
 - Phone

Checking in Patients

- Make sure the primary and secondary insurance are correct.
- Pay attention to the information on the card (i.e. name, member ID, etc.)
- Understand the difference between managed care plans and commercial
- Collection of co-pay and/or any outstanding balance

Point of Service Collections

- Eligibility & verification of benefits
- Pre-visit or post visit collections
- Transparent conversation about financial obligation
- Co-pay, co-insurance, deductibles
- Sliding scale
- Have options available
 - Credit/debit card
 - Checks or cash

Point of Service Collection Goals

- 100% of scheduled patients:
 - Checked for insurance eligibility, benefits, etc.
 - Have been informed about the requirements for the sliding scale application before their appointment
 - Are informed about their financial obligation prior to their service
- Ask the patient: “do you know your amount to pay today?”

Point of Service Collection Goals

Patient Objection	Staff Response
“You can bill me after my insurance pays.”	We now have the technology to verify your benefits and closely determine the amount you are responsible for.
“I have never been asked to pay.” “They never have collected money from me here.”	I understand, however, our policy has changed and paying at the time of service helps control our costs.
“The doctor told me not to worry about paying.”	He/she may have said that, however, I am sure that is because he/she is focused on your health. It is our responsibly to work with you to resolve your account balance.

Billing starts at the front desk

- Accurate demographic information
- Verify insurance at every visit
- Collect co-pays
- Review patient balance at every visit
 - Set up payment plans
- Review financial policy at every visit
- Create a billing process that involves front desk as an integral component
- Have regular cross-functional team meetings
 - Front desk
 - Billing department

Every Penny Counts



Communication

- Confident
- Competent
- Compassionate
- Collaborative

Communication

- Face-to-Face communication
 - 7% words
 - 38% tone of voice
 - 55% body language
- Phone Communication
 - 16% words
 - 84% tone of voice
 - 0% body language

Communication

- Effective Communication Skills
 - Active Listening
 - Friendliness
 - Confidence
 - Giving and receiving feedback
 - Empathy
 - Respect
 - Adapting your communication style to your audience

Communication

- Use “I” statements
- “You” can be a trigger word or aggressive

“You owe a \$4.00 co-pay.”

“I see your insurance requires a \$4.00 co-pay.”

“You have a high deductible plan and you haven’t met it yet. You will need to pay a deposit of \$200.00”

“I see with your insurance plan that you still have to meet the deductible. A \$200.00 deposit will be required today.”

“You didn’t bring your application for the sliding scale so you need to pay the prompt pay discount of \$100.00 today.”

“I am not finding your application for the sliding scale. We will need to collect the prompt pay discount of \$100.00 today which will cover the entire visit.

Non-Verbal Communication

Your body is talking
even when your
mouth is shut

Waiting Room

- Own the waiting room

Patient Flow

- Prepares patients for clinical visit
 - Communicating with the patient on what will happen next
- Interfaces with clinical staff on continual basis
 - Informing them who has arrived, who is running late or not there
 - Checking to see how far behind the provider is, so the front desk staff can update patient, etc.

Workflow Development

- Develop a policy to support the procedure
- Determine:
 - When (specific steps)
 - Who (collection advisory)
 - Why (to educate patients the costs of their care and help them navigate these costs)
 - What (how much \$)
 - How (scripts)

Patient Experience Specialist – Summary

- Patient calls for appointment
 - Intake done – Financial expectations discussed – Eligibility & Verification of benefits done real time. New or established patient
- Appointment types standardized making scheduling efficient
- Patient arrives
 - Real time eligibility occurs automatically when patient is marked as arrived. Build rules by insurance type to alert clinical staff what may be needed for this patient.
- Financial discussion and point of service collections occur
- Forms needing updates and signatures are captured electronically
- Consider adding pre-registration for established patients on-line

Patient Experience Specialist – Your Role is IMPORTANT!

- You are the first and lasting impression.
- The way you handle a situation determines a patient's view of the practice.
- You are often the only member of the billing process that comes in contact with the patient.

Sliding Fee

Sliding fee

- Provide verification
 - Proof of income
 - Certification of household size
 - Proof of address
- Self Declaration

Prompt Pay Discount

- If patient does not apply/qualify for the Sliding Fee Discount or any Grant
 - Offer option to pay XX – “same day discount” fee in full
 - If patient opts not to take the same day discount – remind them they will be billed the FULL non-discounted charges.



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