

DEPARTMENTAL UPDATES FROM

PATIENT ACCESS SERVICES, UPSTATE CONNECT, AMBASSADOR SERVICES, AMBULATORY CALL CENTER

June 2021

Investing in You!

Shelley White, MS, CHAM, FACHE

Have you thought about your professional development plans? Upstate offers many options for both personal and professional development. There are also local and national professional organizations in Patient Access. Professional development can help you learn new skills, connect with new people in a similar field, and open up new career opportunities.

[Upstate Professional Development & Learning](#). Click on the link to the left to review services and training offered by this Upstate department. There are numerous training classes available as well. The department of Professional Development and Learning is launching a **[Mentoring Program](#)**. Upstate's Mentoring program is a key component of our employee satisfaction, engagement and overall career development. We provide the opportunity for employees to request a Mentor for a period of 12-18 months that have agreed to meet with mentees on an informal basis and provide support, perspective and learning opportunities to enhance your future goals. Mentors can provide great advice and share much knowledge on career paths, networking, and personal and professional growth. Mentors may open doors where supervisors cannot or don't have the time to devote. Our Mentors have said that it is a mutually rewarding experience as they often learn from their Mentees as well!

[National Association of Healthcare Access Management](#): This organization offers numerous educational events, networking opportunities, publications and certifications. Have you seen the initials CHAM or CHAA after co-workers' names and wondered what it stands for? Those reflect certification in health access management or as a health access associate. All managers in Patient Access have earned their CHAM and some also have their CHAA credential. Additionally, many of our registration staff have earned their CHAA. Congratulations to those that have a CHAA certification. It demonstrates your commitment to your career and your advanced knowledge in patient access. To learn more, go to: <https://www.naham.org/page/CertPatientAccess>. Talk with your manager if you're interested in working towards your certification.

New York & Vermont Association of Health Access Management: This is a small growing local chapter of NAHAM. This is a group of local Patient Access professionals that host webinars and an annual educational conference. It's a great group to share challenges and suggestions with a local flair. A membership form is attached to the email that accompanied this newsletter.

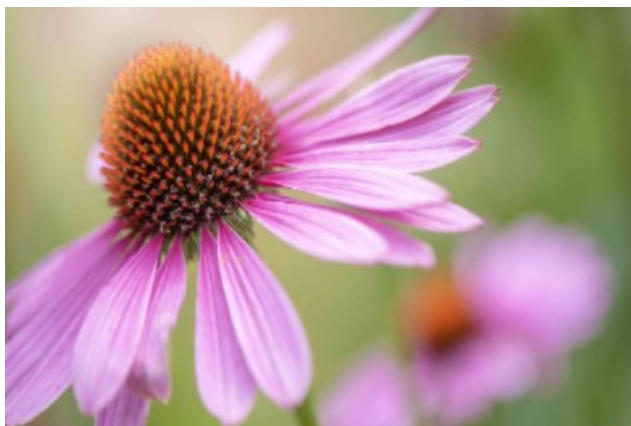
Inside This Issue:

Registration Tips	2
RTE Enhancements	3
Insurance Corner	4
Announcements	4 & 5
Kudos	6
Top Collectors	7
Open Positions	9
Birthdays	10
New Employees	10
Training Resources	11



REGISTRATION TIPS

- Be sure to address the **Research Recruitment** question at the time of registration. If a response of No is not indicated, ask the patient if they are interested. This question needs to be addressed every six months when answered **No**
- Be sure to complete all registrations. Use the **side checklist** to verify. No items should be left unverified
- Under patient contacts, be sure to complete both **Emergency Contact** and **Permission to Discuss Fields**
- Check to see if a **Social Security Number** is listed, if not be sure to ask and complete
- Only enter a name in the **preferred field** if different than the patients legal name. If you notice they are the same, remove from the preferred field
- If loading a **Generic Insurance** always include a billing address
- Never compromise the integrity of a registration. A thorough registration includes updated demographics, guarantor, insurance, and Point of Service Collections



LUNCH AND LEARN SESSIONS

Bring your own Lunch

The June Lunch & Learn (WebEx):

Claim Information Form Overview

Wednesday June 23rd @ 12:00 p.m.

Thursday June 24th @ 12:00 p.m.

Friday June 25th @ 2:00 pm

Sign up is available in **Self-Serve**. **A Webex invite will be sent via email the day of the scheduled session** to those that sign up. If your unable to attend one of the above sessions, please complete the mandatory session on Blackboard.

Quote of the Day

“ When I think about great service, it’s about how you take every interaction you have with the customer and use that as a way to improve their perception of your organization.”

—— Jon Herstein

As you may already know, there have been several recent changes to Real Time Eligibility (RTE) in effort to offer more automation for front desk users. The goal is to have the system query the correct plan and assign appropriate insurance and benefits whenever possible. ***It is imperative that registrars continue to review all responses and follow outlined desk procedures.*** Be on the lookout for new updates coming soon! Review the list of recent changes below:

Auto-Creation

Match/Update/Create

When an RTE query is sent for a new coverage, we'll try and match the response to an existing coverage before creating a new one.

- To match, coverage must have the same payor/plan, and match certain demographic information .
- If more than one coverage could be a match, Epic will ask the user to choose how to proceed rather than guessing
- If the dates returned do not overlap with the effective dates on the coverage we are matching to, date ranges will not be expanded. A new member line will be added so the coverage can be "recycled"

If we can't find a coverage to match, we will create a new one if appropriate. When possible, the coverage will be auto-created, and users notified. If we can't determine the appropriate plan, users will be asked to choose one as they do today.

Query Chaining & Reverse Query Chaining

Medicare and Medicaid will both be set up to "Query Chain" – A query chain is attempting to kick off a new RTE query based on information returned about additional or replacement insurance for that patient.

- If we have the Medicare/Medicaid IDs on file, these queries can be sent out automatically. If not, a Possible Coverage to Create will show on the Interactive Face Sheet (IFS) – choosing Send Query will allow users to input missing IDs, and send the message out manually.
- Medicare and Medicaid are set up to query each other if it is determined that a patient is QMB. If the Medicaid query is sent first, we will kick off a Medicare query automatically, if possible. If the Medicare Query is sent first, we will attempt to kick off a query to Medicaid.
- If Medicare Managed Care coverage is being created off of the query sent to the 'parent' company (UHC, Fidl, Aetna, etc) the MBI will not automatically populate on the coverage info screen. If needed you will need to copy and paste this value from the Additional information section where the MBI is now stored.
- If Medicare Managed Care coverage is created from the query sent to Medicare the MBI number will default for you into the field on the coverage info screen.
- When a patient has a Medicare Managed plan, we will automatically mark the Medicare coverage as not eligible, and query the parent company of their managed plan to get more detailed benefit information.
- Not all payors will allow us to auto-query without a Subscriber ID. If we can't send a query automatically, or the managed plan is not configured for RTE, a Possible Coverage to Create will show on the IFS. Hit Send Query, add missing information, and query the payor suggested.
- When a patient has an Eligible PCP plan through Medicaid, we will now automate the process of querying again when a changed in the managed provider is detected
- Please continue to review all alerts and ensure that the patient has their Medicaid plan loaded, if appropriate.

Copay Table/Benefit Information

New Display of Benefits

- The copay table will be deleted soon and benefit information can now be found on the Interactive Face sheet (IFS) under the Benefit Collection information section
- Information within this section is pulled from the Benefit Collections

RTE Revamp

Updates to Radiology and Pathology benefits for Excellus payors

- New benefit collection for radiology and lab services for Excellus
- Review Benefit Information section and RTE response to discover correct patient responsibility
- Coming soon- UHC & Aetna

New Plans set to go live with RTE

(Coming soon!)- 7 new RTE enabled plans (Champva, GEHA, Globe Life Insurance, Martins Point, UHC Student Resources, Univera)

ANNOUNCEMENTS

Insurance Corner – Monthly Alert

Important information

Issue: Approximately 180 new prefixes have been added to Epic for mapping. There was a report run that showed 400 prefixes used were not on our BCBS spread sheet. About half of them were not actual prefixes and were tagged because incorrect or false prefixes were used. Please run **RTE** using the **complete ID#, including the prefix**. Using the incorrect prefix, will not provide the real ID number. Also with the recent changes to RTE, it's more important than ever that we are using accurate information when running RTE queries.

Several new pieces of functionality have been implemented to introduce more automation for RTE. **Auto-Creation and Query Chaining**

Auto-Creation involves Match/Update/Create

Please refer to the Quick Reference Sheet on Auto Creation for more information

https://epic.upstate.edu/documents/intra/auto_creation_query_chaining_quick_reference_sheet.pdf



Insurance Basic Classes Schedule

Insurance Basic Classes will be held on every 3rd Thursday and Friday every month starting at 8:30 a.m. to 4:30 p.m.

June Class Schedule: 6/17-6/18

FYI

Office Hours with Shelley White will be offered via Conference Call, WebEx and in person. Please call Carol at ext. 4-5035 or email Carol at andrewsc@upstate.edu) Carol to schedule.

ANNOUNCEMENTS



New Functionality has been built for Real Time Eligibility called Auto-Creation and Query Chaining. This went live on May 24, 2021 and there is a SUB available and also Jack Leporte and Jackie Wheeler have created an eLearning video that explains the overview of the new functionality.



Take Note

It is being discovered that patients that once had Lifetime Benefit Solutions no longer have active coverage. If you see that a patient has Lifetime, please make sure that you verify the eligibility. It cannot be verified through RTE....you will need to verify by website or call for eligibility. **Please do not verify by card!**



Advocates for Upstate is now accepting applications for the 2021-22 Nellie Hurley Scholarships. Active employees or volunteers who will have worked for Upstate for at least six months prior to the June 25 application deadline are eligible. Scholarships will be awarded for the fall 2021 semester only and must be for undergraduate study at an accredited institution in any health-related field. Click here for more information on eligibility criteria and for an application form or contact Advocates Administrative Coordinator Jonathan Adler at advocates@upstate.edu.

STAFF KUDOS

Highlighted monthly will be Press Ganey Survey results



Compliments for **all staff in the Emergency Room Department, including registration staff, nurses and physicians.**

I was waiting downstairs for news of my husband's surgery after we were in a car accident the night before. My sister approached Janie Thompson at the front desk as I was having issues with my legs. She dropped everything and took me to be in a wheel chair to the ER, not leaving me until I was with the registrar. From there every person I had contact with gave me excellent attention, and I've never seen a more caring team.

The quality of care for my child was superb. Every staff member from registration to surgery was efficient and understanding. I was really impressed with the team of nurses and physicians in the pre-surgery room. They eased my mind and helped my son prepare for his first surgery with humor and encouragement. Two anesthesiologists came out to the operating room to give me an update on his progress. Hearing from them mid surgery really eased my mind. Dr. Villanueva acted quickly and sent us right to the emergency room to get Tommy emergency surgery. Within 4 hours, Tommy was being operated on. His quick thinking, knowledge and compassion helped us through a very stressful situation. I am forever grateful for him and the whole team that took care of Tommy at Upstate.

The staff made sure to check my bracelet verify my Name/DOB every time. The facility was clean.

To our ED staff, our great Float Team, and our incredible Friends of the ED.....Your work does not go unnoticed. Every interaction we have our patients leaves an impression.....You are all clearly leaving good ones.

Thanks so much

Mark Geremia

Emergency Department Registration Manager

A graphic with the words "Great Job!" written in a large, black, cursive font. The text is surrounded by several small, five-pointed gold stars. Below the text is a thick, gold-colored brushstroke that curves under the words.

TOP COLLECTORS WAY TO GO

Top POS Collectors (listed by number of accounts) for the month of May

Mary Hoare.....Collected on 386 accounts (\$101,024)



April Sadeckas.....Collected on 48 accounts (\$3,197)

Lorelle Ash..... Collected on 43 accounts (\$9,068)

Coleen Schaefer.....Collected on 43 accounts (\$6,635)

Tiffany Jennings.....Collected on 40 accounts (\$25,805)

Reminder to make sure to verify coverages and RTE responses.

Lets all try to make 2021 a ground breaking year with off the chart collections !!!



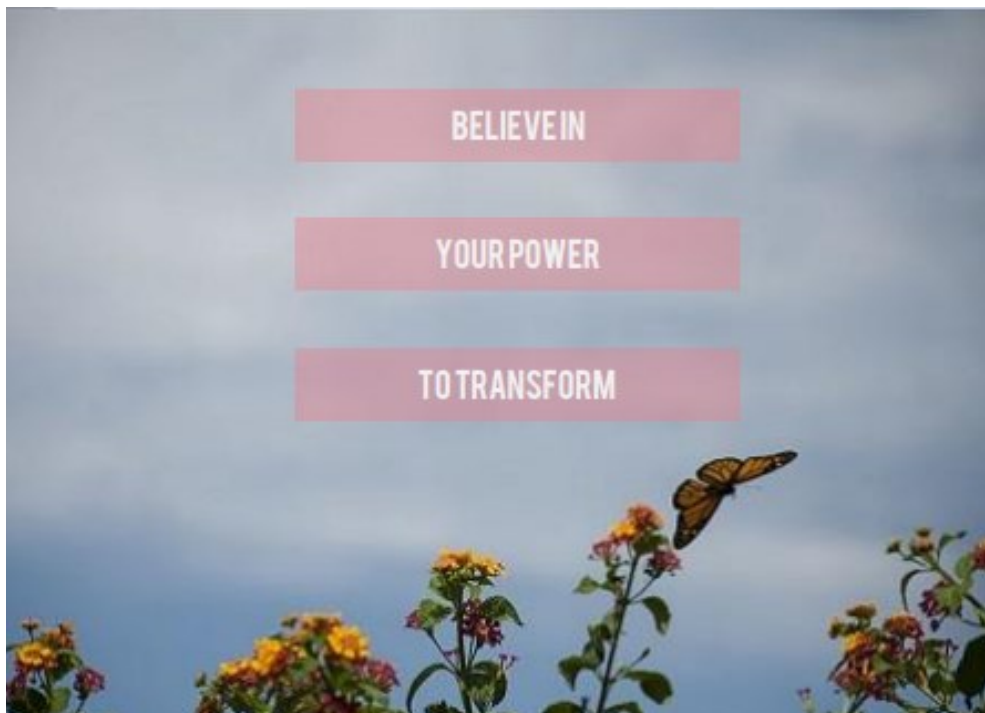


Thanks to the Pathway To Wellness Program and Suzanne Brisk , each month I will include an affirmation card taken from the Positivity Pack. Each card provides an optimistic outlook.

Everyone is individually capable of creating a culture of optimism, simply by refining your day-to-day thoughts, beliefs and actions to celebrate the bright side of your work, your peers, and your life. We find this philosophy to be at the very core of who we are and seek to find the positive in all aspects of our business.

Whenever you need a bit of a boost in your day, Total Wellness' Positivity Pack is there to give you direction, motivation and an extra dose of confidence. These bright, cheery cards offer words of wisdom and affirmation to help get you through a bad minute, day or week.

Every month an affirmation card will be shared.



Ambulatory Call Center—Congratulates...

Shannon Austin, CHAM

It is my pleasure to welcome the four Ambulatory Call Center agents that were promoted to Senior Call Center Agent .

Each one chosen is experienced in taking calls for all 14 Ambulatory departments. Our Senior Call Center Agents have great EPIC quality, meet their outlined metrics and provide consistent, superb customer service.



Mark White- Mark has been with the Ambulatory Call Center since 2018. During his time with the us, he has been tasked with various added responsibilities, such as new staff training & returning voicemails. Mark’s desire to help comes naturally and he is quick to provide any type of assistance to his coworkers, leadership or those outside of our department. He is also an excellent patient advocate.



Cheryl Dixon- Cheryl has been with the Ambulatory Call Center since 2019. Cheryl brings several years of call center experience with her. That experience has provided her the gift of great listening and customer service skills. Cheryl is very consciences about bringing forward process improvements that will have a direct impact on the patient experience.



Jacqueline Barrett- Jackie has been with the Ambulatory Call Center since 2019. She possesses a quiet confidence and feedback received from patients is that Jackie is very warm and kind to speak with. She is comfortable conversing and collaborating with physicians and their office staff as a result of her close working relationship with private physician practice prior to joining Upstate. She is super flexible and has great customer service skills.



Tiera Betsey- Tiera has been with the Ambulatory Call Center since 2019. She is very inquisitive, often asking questions to fully understand the how and why, and then takes the initiative, providing process improvement suggestions to leadership. Tiera is committed to delivering the most valuable service to our patients and clinical areas with a kind and calm demeanor.



OPEN POSITIONS



Ambulatory Call Center:

(1.0) Call Center Team Leader

(1.0) Call Center Rep

Ambassadors:

(4.0) Temps

(2.0) HPSC1

UH Central Registration:

(6.0) HPSC1

ED UH Reg:

(4.0) OAS Administrative Specialist

(1.0) Team Leader

(3.0) Temps

Admitting:

(3.0) OAS Administrative Specialist Admitting

Central Scheduling:

(1.0) HPSC2

Pre Services:

(2.0) HPSC2

UC Call Center:

(1.5) Call Center Rep



HAPPY BIRTHDAY

June Birthdays:

Tiffany Jennings	06/01	Central Reg
Linny Hernandez	06/05	Verification
Loretta Owens	06/06	Pre-Services
Shante Taylor	06/06	CG Switchboard
Annyssa Williams	06/07	UC Call Center
Tiffany Euson	06/08	UH Central Reg
Robin Gilfilian	06/08	PID Team
Cora LoVetere	06/10	CG Central Reg
Brenda Passardi	06/10	PAS
Jamila Abuhamda	06/14	ED Reg
Diane Mills	06/15	Pre-Services
Harmony Mantor	06/19	Admitting
Shawnasia Hoke	06/22	UH Central Reg
Carol Andrews	06/23	All
Whitney Camby	06/24	Pre-Reg
Carmella Carroll	06/30	Amb Call Center
Justin Collyer	06/30	UH Central Reg



Welcome to the following new employees:

Shylah Brown	ED Reg
Laci Harriger	Ambassador
Jacob Leichtling	ED Reg
Alisha McDowell	CG Switchboard



MOVERS & SHAKERS

Ann David-Salati will be retiring at the end of the month. Congratulations Ann !!



TRAINING RESOURCES

Did you know that the following training resources are available to you and can be found on the PAS Website at : <http://www.upstate.edu/ihospital/intra/pas/contact.php>

The screenshot shows the 'Patient Access Services' section of the Upstate Medical University Intranet. The page features a navigation menu on the left with links to various resources such as 'Authorization Grids', 'Insurance Links', 'For Managers', 'Managed Care Notices', 'Newsletters', 'PAS Bulletins', 'PAS Forms', 'PAS Honorable Mentions', 'Policies', 'Point of Service Resources', 'Quality Corner', 'Contact Us', 'Tip Sheets', 'Training Resources', and 'Hospital Intranet Home'. The main content area displays a 'Patient Access Services' header, followed by news items including 'Point of Service Collections - "Races" 2017 WINNERS CIRCLE!' and 'Congratulations to the Top POS collectors for the month of January 2017!'. A large image of a smiling woman on a phone is accompanied by the text 'How can we help?'. On the right side, there is a 'Have a Question? Ask us!' section and a 'QUICK LINKS' section with links to 'Guide to Patients Rights', 'UH Inpatient Handbook', 'CC Inpatient Handbook', 'Insurance Cheat Sheet', 'Upstate Connect', 'Participating Provider List', 'Interpreter Services', 'Secure Payments', and 'Parking Validation'.

- **Tips and Tricks:** Outlining approved workflows
- **PAS Newsletter:** Including updates and Registration Tips
- **PAS Bulletins:** Highlighting specialized desk procedures
- **Policies:** Link to intranet policies
- **Insurance Links:** Insurance Websites with instructions on navigating
- **Insurance Cheat Sheet:** Overview of insurance entry rules
- **Point of Service Resources:** Co-pay collection tools and scripting
- **Have a Question? Ask us!:** Email hyperlink to request information from Performance Improvement Team
- **UH Inpatient Handbook:** Hospital guides with information specific to site
- **CC Inpatient Handbook:** Hospital guides with information specific to site
- **Interpreter Services:** Link to Interpreter and Patient Communication Services
- **Participating Provider List:** includes a list of participating insurances
- **Training Resources:** Sign-up for Lunch and Learn Sessions. (If unable to attend, complete by Blackboard)

TRAINING RESOURCES

Did you know that in addition to the PAS Website, resources can be found on the Patient Access Learning Home Dashboard. The dashboard allows easy access to resources. If something could not be found on the dashboard, the PAS website is easily accessed by scrolling to the bottom of the page.

Nice feature to use is the BCBS pre-fix list. To access just follow the steps listed below:

- 1) Click on Insurance Links found under Quick Links
- 2) Insurance sites will populate
- 3) The BCBS Prefix List is the first one listed

My Dashboards

ADT Patient Access Learning Home Dashboard

What's New

New Status for ADT Patient Handbook

Effective April 28, 2020, the Document List will have a new category selection in the ADT Patient Handbook status category list. End users will now be able to choose **MyChart Access**. MyChart Access is used if the patient states they will access the Patient Handbook, (including a copy of Patient Rights) via their MyChart patient portal.

[Systeme Update Bulletin - ADT Patient Handbook MyChart Status](#)

Fri 5/1 11:20 AM - Jack L. Leporte

New Cross Campus Imaging Work Flow

There are times patients need to be transferred from the Downtown campus to receive Imaging Procedures at the Community Campus and return to the Downtown campus or vice versa. Nursing Supervisors are able to use the Transfer activity in Unit Manager to transfer the patient to another

Resources by Category

eLearnings/Videos/Training

- Accessing Playground and User ID/Passwords
- Accessing the Epic Documents Site
- Name Standardization - One Name Legal Names
- Collecting Outstanding Hospital Balances using POS Payment activity
- Importance of adding PCP, Care Team and Referring Provider
- BCA Web Application
- Encounter Storyboard Overview
- Non-Encounter Storyboard Overview
- Self Pay Query
- Sidebar Checklist Overview

- > General Registration Tip Sheets by Topic
- > ED Reg (Adult/Peds) Tip Sheets by Role and Topic
- > Ambassador Tip Sheets by Topic
- > Bed Board Tip Sheets by Topic
- > Auth/Cert Tip Sheets by topic
- > Call Centers (CRM, MD Direct) Tip Sheets by Topic
- > PMR Tip Sheets by Topic
- > PAS Radiology Tip Sheets by Topic

Quick Links

Insurance Websites

-- If there is an insurance site which is not listed here, open your browser and go to the Insurance Links page on the PAS Webpage --

- BCBS Prefix List
- Cigna
- Excellus
- Fidelis
- GEHA Federal Employees Insurance
- GHI
- Humana
- Medicaid EmedNY (Medicaid) ePACES MVP
- New York State Workers' Compensation
- Tricare
- United Healthcare (can use NaviNet)
- WellCare

- > Insurance Basics Tip Sheets
- > Upstate Links (new window)
- > Epic/PAS Resource Links

PAS Website

INTRANET

Upstate Patient Care Academics Research Library Locations HR Groupwise iPage

UPSTATE MEDICAL UNIVERSITY State University of New York Patient Access Services

Web Pages People

Search Upstate's Intranet

More Search Options