

DEPARTMENTAL UPDATES FROM

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

September 2022

APPOINTMENT REMINDER UPDATE

Ananya Choudhury

It has been a little over one month since we went live with our CipherHealth Appointment Reminder System. This month taught us a valuable lesson – things that don't kill us, make us stronger. That is to say that we came across a lot of unanticipated issues – some with the Epic interface & some with data flow. But thanks to all the departments who reached out to us with their patient feedbacks, we have been able to identify the cause & work on them. This has led to some key changes being made in the CipherHealth system. Some of these changes include:

The number of retries has now been reduced from 3 to 1. This means that now a patient would only get notified once at 10 AM 5 Day & 1 Day before their appointments.

Missing cancellation/reschedule information in CipherHealth interface has now been addressed. We have been able to identify the missing link with Medilinks & other coupled appointments (e.g. infusion + provider visit) & ensure that the correct cancellation/rescheduled data is flowing to CipherHealth & reflecting in the patient reminders.

We have been cautious to not add any new departments to the CipherHealth system while we have been working on improving the quality. & we had also moved some of our departments to our legacy appointment reminder system Pro Show – so that patients were not being misinformed in anyway. We will switch these departments back to CipherHealth next week & also start adding new departments.

This has only been possible due to the ongoing support we have had from the various departments, our IMT specialists - Karen Netti, Grace White, Eugene Moore, & our Operational team. We are grateful for all your hard work & patience to improve this system.

Ananya

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REGISTRATION TIPS

- Be sure to complete all registrations. Use the side bar checklist to verify items that have been reviewed with the patient. No items should be left unverified.
- Always double check the **spelling** of the **first and last name** of every patient when registering. Also, ask for a middle initial if one is not listed. ex : *Katelyn and Caitlin are the same name spelled differently but pronounced the same .*
- When registering a patient and the **DOB** in the system is different than what the patient is providing, do not change the **DOB** on file, instead create a new patient record. The records can be merged later if the two in question are in fact the same patient.
- Under emergency patient contacts, be sure to complete both **Emergency Contact** and **Permission to Discuss Fields**.
- Verify **email addresses** to ensure that the spelling is correct.



LUNCH AND LEARN SESSIONS

Bring your Lunch

The September Lunch & Learn (WebEx):

POS Collections

Tuesday 9/20 @ 9:00 a.m.

Wednesday 9/21 @ 12:00 p.m.

Thursday 9/22 @ 2:00 p.m.

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.



Quote of the Day

“ We see our customers as invited guests to a party, and we are the hosts. It is our job every day to make every important aspect of the customer experience a little better. ”

——Jeff Bezos, CEO Amazon

ANNOUNCEMENTS

Insurance Corner – Monthly Alert

Important information

Issue: Registering a Worker's Compensation Patient

When registering a patient, one crucial question the register should be asking is “how did this injury or illness occur”?

If the patient advises the injury/accident occurred at while at work, a worker's compensation guarantor must be assigned to the visit and additional information is needed. On the IFS, be sure to go to the Encounter Tab in the Navigator and value the **Accident Related** field to a **YES**. This field should only be valued as yes if the visit is related to a car or work related accident.

The screenshot shows the IFS interface for a patient named George Yellow. The 'Encounter Info' tab is selected. The 'Admission Info' section contains the following fields:

Expected date:	8/4/2022	Expected time:	0600
Admission source:	OP Clinic/Physician Office	Referral Institution:	
Admission type:	Routine/Elective	Patient Source:	Urgent
Private Encounter?	No	Accident related?	Yes
Interpreter name:		Transfer Agreement:	

Create the Workers Compensation Guarantor Type and enter the employers insurance (subscriber) information. Select Worker's Comp and the patient is always the Guarantor. Do not fill anything in on the **Date of Injury** field.

The screenshot shows the 'Add Guarantor Account Questionnaire' form. The 'What type of guarantor account would you like to add to this patient?' section has 'Workers' Comp' selected. The 'Who is responsible for this guarantor account?' section has 'Self' selected. The 'Guarantor Information' section contains the following fields:

Name/ID:	YELLOW,GEORGE	SSN:	xxx-xx-2740
Sex:	Male	Birth date:	8/18/1954
Home phone:	315-678-5555	Date of injury:	
Employer:	GREEN HILLS FARM STAN		

Proceed to complete the Claim Info Form –bottom portion for the WC/TPL



Insurance Basic Classes Schedule

Insurance Basic Classes will be held on every 3rd Thursday and Friday every month from 9:30 a.m. to 4:30 p.m.

September Class Schedule: 22nd and 23rd

OFFICE HOURS

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

ANNOUNCEMENTS



Effective August 12, 2022, Patient Station and Today's Patients Report (TPR) will display an [e PreCheck-In Status](#) when a Pre Check-In form has been sent to a patient's MyChart. The status will show as **Sch (Scheduled)** if the patient received the form but did not complete it and **eCheck-In Comp** when the form is completed.

Jack Adt "Jake"
Male, 42 yrs, 09/09/1979
210.777.8888
MRN: 6059625
Photo Effective Date: 8/12/2019
Downloaded PHOTO to show
Active Downloads

Research Participant
Legally Blind
Clinical Student at Upstate

Last refreshed: 8/9/2022 3:27:44 PM

Legend: [Green Circle] [Yellow Circle] [Red Circle] [Blue Circle] [Purple Circle] [Orange Circle] [Pink Circle] [Light Blue Circle] [Light Green Circle] [Light Yellow Circle] [Light Purple Circle] [Light Orange Circle] [Light Pink Circle] [Light Blue Circle] [Light Green Circle] [Light Yellow Circle] [Light Purple Circle] [Light Orange Circle] [Light Pink Circle]

Some encounters may be hidden based on the applied filters.

Encounter	Status	Pl. Cls	Date	Time	Location	Provider	Reason	CDR	Hosp. Acct	A. No.	Cost?	e PreCheck-In S.
Appointment	Scheduled &...		08/09/2022	1230	ORTHOPEDICS PRIVATE PRAC...	John P Cannizzaro, MD	Appointment	1000121158		87		Sch
Appointment	Scheduled &...		08/09/2022	1100	CARDIOLOGY PROVIDER BASE...	Sabirpala Workhorgun, MD	Appointment	1000121155		85		eCheck-In comp
Appointment	No Show Appt		07/18/2022	1400	CARDIOLOGY PROVIDER BASE...	Amant Singh, MD	Appointment	1000120824		83		No Show
Admission	Discharged	Inpatient	07/18/2022	1100	905 GENERAL MEDICINE UN	Timothy A. Demson, MD	Headache	1000119023	1000118164	71		

Patient Station – e PreCheck-in Status Column

Search patients

8/9/2022 Yesterday Today Tomorrow

Name	Preferred Name	MRN	DOB	Gender	SSN4
Adt, Jack "Jake"	Jake	6059625	09/09/79	M	0000
Hah, Ordianast		6051632	01/12/90	F	4444
Nappt, Test "Mike"	Mike	6050785	01/01/83	U	9999
Park, Testing		6051954	05/05/97	F	7839
Testing, Stephanie		6050239	12/17/90	F	6556

Patient is Clinical Student at Upstate

Demographics

Adt, Jack "Jake"
42 yrs (9/9/1979)
Male
MRN: 6059625
PCP: Not on file

Address
64 Oswego Street
Baldwinsville NY 13027

Most Recent Encounter

Appointment at 1230 (Arrive by: 1230)

Visit Type OFFICE VISIT	Status Appt - Scheduled	Department ORTHOPEDICS PRIVATE PRACTICE UPSTATE BONE AND JOINT
Provider John P Cannizzaro, MD	Appt Message None	Appt Dept Upstate Orthopedics, LLP
Appt Prev CANNIZZARO, JOHN P	Pre-Proc Area None	e PreCheck-In Status Sch

Actions

Sign In	Cancel	Check In	Change
	Confirm	Reg	Print Forms
	Open Chart	Send Pt Data	Enc Summary

ANNOUNCEMENTS



Verbal Consents

Written consent should be obtained whenever possible. However, if written consent cannot be obtained, verbal consent may be obtained (i.e. oral) or via telephone consent.

Verbal consents are allowed under certain circumstances. When obtaining verbal consent, follow the workflow listed below and remember to document correctly as consents are legal binding documents.

- Always include a **Date** and **Time**
- A **witness** is needed when taking the verbal. If a representative is signing, always enter their relationship to the patient on the form.
- A **reason** must be included why you are collecting a verbal

Note: For further reference on the above, review **Policy C-07** Titled Informed Consent/Refusal



ANNOUNCEMENTS

Participate in Research



Featured monthly will be the top 5 departments with the highest percentage of patient participation for ***OK to Contact for Research Recruitment.***

Great job to the following departments ! Let the percentage continue to rise.

Reminder to ask the patient at registration if they are willing to be contacted about research opportunities. Our goal is to increase participation.

Top Five Departments Enterprise Wide with the highest percentage for the month of August.

Upstate Connect.....	37%
Psychiatry Private Practice.....	21%
Psych & Behavioral Science Annex Private.....	13%
PM&R Concussion Clinic Hospital.....	12%
Patient Access.....	7%



STAFF KUDOS

I would like to take a moment to thank every member of the Call Center for working diligently the last six months to adapt to the changes required. The Community Switchboard has undergone immense change and adapted quicker than I ever anticipated. The Galleries Call Center agents have learned to cover a new location, including all of its nuisances, to provide much needed coverage for pass days and illness. Change is never easy but two separate areas have come together to work together and make one team! While we still have more obstacles to face, the journey is a little easier with all staff working towards our shared goals. Thank you for all of your hard work, patience, and perseverance.

Jacqueline A Pilon

Upstate Connect Call Center & Switchboard Manager

Compliment for **Shylah Brown** from a patient

Pt named Joanne Hannah said that Shylah Brown was the nicest person she has met here at Upstate. She was kind, very informative and was wonderful at her job. She said that civil service people don't get the credit they deserve and she recommended a raise for Shylah!

Compliment for **Nancy Russo** from a patient

THANK YOU!

*Nancy was wonderful,
to deal w/ today.*

She is a treasure!

July 2022

Great Job!

TOP COLLECTORS WAY TO GO

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

Mary Hoare.....Collected on 315 accounts (\$64,222)

Coleen Schaefer.....Collected on 90 accounts (\$13,180)



Lorelle Ash.....Collected on 76 accounts (\$7,780)

Zainab Dougherty..... Collected on 48 accounts (\$4,026)

Diane Mills.....Collected on 46 accounts (\$11,719)

Reminder to make sure to verify coverages and RTE responses.

Lets all try to make 2022 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.



OPEN POSITIONS

UC Call Center:

Call Center Representatives

Ambassadors:

Team Leader

HPSC1's

Temp Positions

Ambulatory Call Center:

Call Center Representatives

UH Central Registration:

HPSC1's

UH ED Reg :

Manager

Outpatient Administrative Specialists

CG ED Reg:

Outpatient Administrative Specialists

CG Switchboard:

Clerk 1

Temp Position

Verification:

HPSC2

Temp Position

Admitting:

Outpatient Administrative Specialist

Central Scheduling:

HPSC2's

Float Pool:

HPSC2



HAPPY BIRTHDAY

September Birthdays:

Sydney Wiesing	9/02	UH Central Reg
Kimberly Cummings	9/06	CG Switchboard
Joe Trivison	9/06	Ambassadors
Angela Williams	9/06	Amb Call Center
Randi Proctor	9/09	CG Registration
Chris Hotaling	9/11	CG Cen Reg
Lexadel Casanova	9/12	ED Reg
Kathleen L-McNulty	9/13	Central Sch
Shannon Austin	9/16	UC Call Center
Lewis Piraino	9/17	Amb Call Center
Shannon Burley	9/18	UC Call Center
Christina Dee	9/20	Amb Call Center
Megan Webb	9/20	Central Sch
Vanessa Marmolejos	9/26	ED Reg
Michelle Napier	9/26	CG SB
Kala Adams	9/27	Amb Call Center
Kelly Hemingway	9/29	CG ED Reg



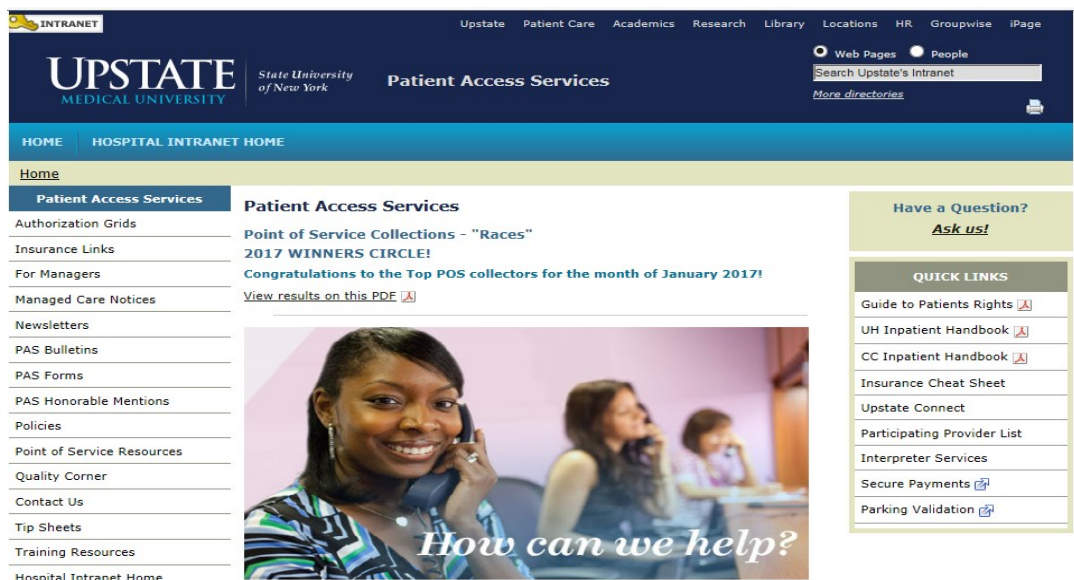
Welcome to the following new employees:

Melissa Berhardt	Amb Call Center
Brittney Florence	ED Reg
Kristen Henry	Nappi Wellness Institute
Carly Perry-Stoddard	UC Call Center
Molly Schaefer	UH Central Reg



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>



- **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

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