

## DEPARTMENTAL UPDATES FROM

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

March 2023

### Registration Navigator, *Kaniesha Mason*

As you are already aware, Epic went live with the Navigator registration workflow on 2/21. This change will help us prepare for future Epic upgrades. Congratulations on a successful transition! Below are a few registration tips that you may find helpful:

- **Research Recruitment question:** There is a known issue that IMT is working on resolving whereas the system is not allowing the same selection. The workaround for this is to select the opposite entry then close out of the screen, re-enter, then select the appropriate response.
- **Claim Form:** There is a known issue presenting when the information is completed within the claim form however, an error displays stating that there is no claim form attached. If the claim form is in fact attached to the record, the workaround is to “*unassociate*” the record, close out, then “*associate*”.
- **Workers Comp & TPL:** The default documents are not currently automatically populating. You should manually add the required documents at the time of registration. This is currently being worked on. The WC/TPL guarantor should be created prior to accessing the documents table.
- **Registration Notes:** This is a new section that should be utilized by registrars to communicate registration related information. Har notes should continue to be used to communicate with finance.
- **Reviewing inactive coverages:** To view inactive coverages for a patient, you will need to access the *PAT Guarantor/Coverages*. This information cannot be accessed from the HAR level. Click the “*show ineffective coverage*” button then the ineffective coverages will show. Also, once you select that button it will continue to stay checked until you deselect the checkbox for all encounters.

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# REGISTRATION TIPS

- When loading a **Generic Insurance** always include a billing address
- Always use the **City/Zip** field to enter the zip code
- Use the **Next button** on the new navigator workflow for each section when completed
- Under Patient Contacts, be sure to complete both **Emergency Contact** and **Permission to Discuss Fields**
- Verify the **email address on file** to ensure that the spelling is correct
- Be sure to use the **Not Collected Button** and select the **appropriate reason**, when no co-pay is being collected
- Collect missing **SSN numbers** whenever you can, as they help with patient identity
- Capitalize the first letter in a person's first and last name along with a street name, as the name will appear on correspondence exactly how you enter it
- Remember to complete the **MSPQ** in its entirety. Please do not fill in information without speaking to the patient

## LUNCH AND LEARN SESSIONS

### Bring your Lunch

The March Lunch & Learn

Jeopardy Registration Game

Prizes to be awarded

Thursday March 23rd @ 10:00 a.m. To be held in person only in Room C1071  
Cancer Center

Friday March 24th @ 2:00 p.m. To be held in person only in,  
Room C1076 A/B/C Cancer Center



### Quote of the Day

“ Successful people are always looking for opportunities to help others. Unsuccessful people are always asking . What’s in it for me? ”

—— Brian Tracy



# ANNOUNCEMENTS

## Insurance Corner – Monthly Alert

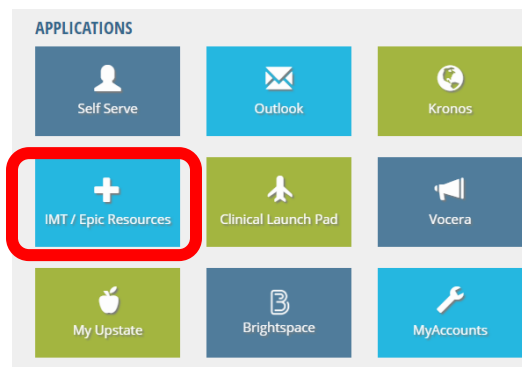
### **Epic Registration Navigator view**

#### **Important information**

The IFS previously known as the interactive face sheet has been replaced with an Epic Navigator. This change was necessary in preparation for future upgrades.

The overall process for registering a patient has not changed. We still need to ask the same questions and document all the information. What has changed is where we have to enter the information.

There are tips sheets available that can walk you through different scenarios . To find this education you can go to your I-Pages> Click on IMT/Epic Resources



In the Search for Documents, enter the keywords: **2023** to access the latest tipsheets and **2023 ADT** to search for inpatient registration workflows . You will see each ADT 2023 Navigators SUB listed for various scenarios.

[Search/Browse Again](#)

Title	Audience	Category	Last Updated
<a href="#">ADT 2023 Navigators SUB - Registration - Entering UB Codes with Access Navigators</a>	Non-Clinical Staff	Tips & Tricks	01/19/2023
<a href="#">ADT 2023 Navigators SUB - Registration - Stork Gets an Upgrade with Newborn Navigator</a>	Non-Clinical Staff	Tips & Tricks	01/25/2023
<a href="#">ADT 2023 Navigators SUB - Transfer Center - Expected Admissions and ED Arrivals Have a New Look</a>	Non-Clinical Staff	Tips & Tricks	01/31/2023
<a href="#">ADT 2023 Navigators Scheduling a Lactation Follow Up Appointment</a>		Tips & Tricks	01/31/2023
<a href="#">ADT CPW 2023 Navigators - Adding and Managing Coverages with Navigators</a>	Non-Clinical Staff	Tips & Tricks	01/19/2023
<a href="#">ADT CPW 2023 Navigators - Create Hospital Accounts &amp; Manage Guarantors with Navigators</a>	Non-Clinical Staff	Tips & Tricks	01/25/2023

# ANNOUNCEMENTS

Participate in Research



Going forward, results will be featured quarterly showing the top 5 departments with the highest percentage of patient participation for ***OK to Contact for Research Recruitment.***

***Results will be featured quarterly in the newsletter.***



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](mailto:andrewsc@upstate.edu)) Carol to schedule.



## 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.

**March Class Schedule: the 16th and 17th**

# ANNOUNCEMENTS



## February Is Black History Month

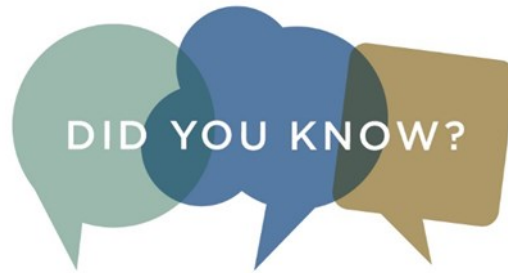
Here are a few pictures from the Renaissance Gala Celebrating Black Excellence that Upstate hosted.



From left to right is Patient Access Members, Ummay Nahian, Kaniesha Mason, Doris Price-Webb, Katrina Jones and Vanessa Marmolejos



# ANNOUNCEMENTS



## TUG Robots

TUGs are autonomous mobile robots made especially for hospitals. While TUGs won't enter patient rooms, they do travel the halls and elevators, so there's a good chance you'll see one while in the hospital.

TUGs deliver supplies, lab specimens, medications, and meals while reducing our staffs' physical workloads and their risk of injury. Each TUG has identifying features such as their name and a colorful label noting the job they perform.

TUGs have sensors that guide them through hospital spaces while steering clear of patients, visitors, and caregivers. Keep in mind that TUGs are helpful, but shy. If you see one coming down the hall, simply step out of its way so it can continue to its destination. TUGs also prefer to ride the elevator alone (they use the space to turn around during the journey). Please do not attempt to enter an elevator with a TUG.



# ANNOUNCEMENTS



Sadly, another important member of our Pre Registration team, April Fairbrother, passed away at the end of February while at home surrounded by family.

April was a knowledgeable, helpful and consistent member of Patient Access since 2002. Recent health issues contributed to her long term medical leave. Thankfully, during that time, she was able to spend quality moments with her most favorite people, her beloved family.

April had a contagious giggle and the most strikingly beautiful red hair. In her typical selfless fashion, she loved to grow her hair super long and then donate it to Locks of Love to help children who suffer from hair loss. She was a true rocker, frequently attending live music events with her husband and always had Classic Rock playing softly while in the office.

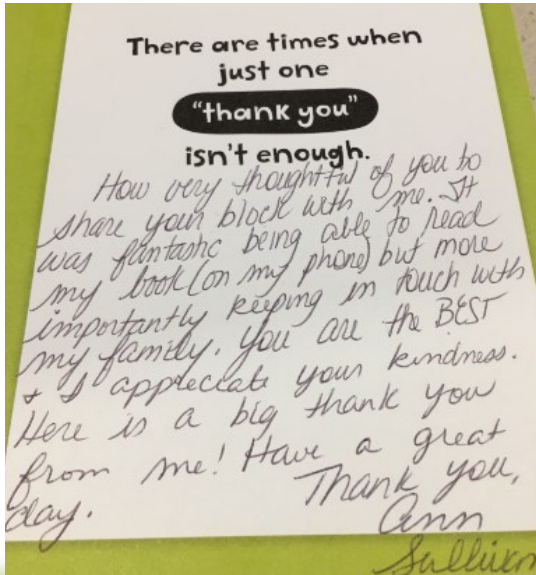
She was an expert registrar and a constant resource for her coworkers. April always providing top notch customer service and quality registrations. She also had many passions outside of work. April was very tech savvy. She created and managed content for her family weight loss journey through a Keto website as well as a T-shirt sales website. She loved reading, sharing recipes, knitting, baking and the autumn season, especially Halloween. It wasn't easy to see that she was dedicated to her husband of 30 years, Michael and 2 sons Trent and Devon. Team members will always remember how she shined when she would chat and laugh about the goings on with her boys.

We will miss this kind soul but will cherish the many reminders in which we will remember her fondly. This is another immeasurable loss. Please keep our team and April's husband and sons in your thoughts and prayers.

Shannon 🙏❤️

# STAFF KUDOS

Kudos for **Doris Price-Webb** from a patient. Reprint from last month's newsletter error, as this compliment was meant for Doris.



## Compliment for **Victoria Watts**

I work at PNC and my patient wanted to give Victoria Watts a kudos. The patient ended up in the East Garage somehow and was extremely upset that she couldn't find UHCC for her appointment. Victoria not only got them here, but she calmed the patient down enough to still pre-register her. The patient and her spouse wanted to give Victoria a shout out for helping them. They are so appreciative that they still made their appointment because of her.





# STAFF KUDOS

Compliment for **Roberta Martinez** from Shelley White:

Roberta, THANK YOU! You made husband's arrival so easy and thanked him for using pre-checkin. This allowed him to see the provider within minutes! Kudos!



Compliment from Tina Evans for **Katelynn Jaeger**:

Katelynn is wonderful to all of our patients. She does a great job interacting with them all and she is very kind.

Compliment from visitor Tessa Fields:

The **front desk staff** is top-notch, your service was fantastic!



thank you!

**Thank You!** From visitor Shafica Bailey for **Sabrina Kane**:

I want to thank Sabrina for all the help she provided to me when I needed a notary for my son. I won't forget you!

**Thank You!** From visitor Dominique Agnes for **Brandon, Damien & Gary**:

I want to thank Sabrina for all the help she provided to me when I needed a notary for my son. I won't forget you!

# STAFF KUDOS

Thank you note from Theresa Hankin, Respiratory Care Services, for assisting all the new residents with sign-ins for their interviews.



You have all be very helpful during this month of our pharmacy residency interviews. Thank you for checking in our candidates and calling me to let me know they are here. You have helped to make this process run smoothly.

Enjoy your day!  
Theresa

To Lisa and Bridget – You have a great staff!!

10E Case Manager Michelle Weston:

**Tricia Eldred** & her team of **Verification staff** are great to work with. She and her staff call the Verification department constantly, the Verification staff is always pleasant and willing to help. Enjoy the snacks!

# STAFF KUDOS

Kudos for **Deborah Maddox**

Writing to you because I had the recent unfortunate circumstance of visiting the Community ED for some personal issues.

Upon Check-in- Deborah Maddox checked me in- to which I was a little anxious to be at the ED but Deborah made check in so extremely easy and she was so sweet. We chatted about a few personal things and both agreed we would rather be on the beach! Just going the extra mile to make me feel better when I was feeling terrible was fantastic and I truly appreciate her and her kindness!

Just wanted to let you know that you have some awesome staff up there at the Community Campus ☐

Shannon Marcotte, OAS Surg Spec

NICE WORK

Compliment for **Melissa Bernhardt** from a geriatric patient's spouse

Melissa Bernhardt just got glowing compliments from a Pt wife

She took time with me.

She listened to me.

She gave me hope.

She apologized for the wait.

Thank you,

Melissa

**Melissa Yarbrough, BSHA**

**Team Lead, SUNY Upstate Medical University**



I wanted to send a quick shout out to the registration staff in the **Neurology Clinic** for recognizing I completed my precheck-in in MyChart! Trusting the information and not making me answer questions I already did truly made the arrival process swift and easy.

To those experts- fantastic work embracing our technology. Thanks!!

*Shannon Austin, CHAM*

PAS, MD Direct & Ambulatory Call Center Manager

# TOP COLLECTORS WAY TO GO

*Top POS Collectors (listed by number of accounts) for the month of February.*

*Mary Hoare.....Collected on 366 accounts (\$57,597)*

*Lorrelle Ash.....Collected on 65 accounts (\$10,801)*



*Philip Carpenter.....Collected on 58 accounts (\$13,877)*

*Deanna D'Arrigo.....Collected on 46 accounts (\$6,720)*

*Zaniab Dougherty ..... Collected on 44 accounts (\$6,332)*

**Lets all try to make 2023 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.***



**Pre-Services:**

HPSC2 Verifiers (partially remote)

**Ambassadors:**

HPSC1's

Temps

**Ambulatory Call Center:**

Call Center Representative

**UH Central Registration:**

HPSC1's

**UH ED Reg :**

OAS's

RF- Registrars

**CG ED Reg :**

OAS's

**Verification:**

Temps

HPSC2's

**Central Scheduling:**

HPSC2's

**Pre-Reg:**

HPSC1's

**Nappi:**

PAS Associates

Senior PAS Associates

Clerical Specialist 2

HPSC1

**Community General Switchboard:**

Clerk 1

**PID/Float:**

HPSC2

**MD Direct:**



# HAPPY BIRTHDAY

## March Birthdays:

Patty DuBrule	03/02	Verification
Mary Wagner	03/06	Amb Call Center
Nancy Russo	03/09	Switchboard
Tigist Getahun	03/13	CC Switchboard
Joshua Hughes	03/19	Verification
Curtis Scrivens	03/19	Float Pool
Erica Ward	03/21	Ambassadors
Vlora Hoxha	03/27	Central Scheduling



## Welcome to the following new employees:

Marc Behringer	Ambassadors
Connor Ransier	Verification
Crystal Marinelli	UH ED

On behalf of Nappi Patient Access, we'd like to welcome the following employees to our new department:

### Team Leader – Shannon Marcotte

Shannon is currently an OAS in Surgical Subspecialties and is bringing with her almost 20 years' experience at Upstate!

### Senior Patient Access Associate – Mark White

Mark is currently an OAS with University Cardiology. He's bringing with him 18 years' experience in insurance, Ambulatory, and Patient Access.

### Senior Patient Access Associate – Kachelah Flournory

Kachelah has worked in Patient Access with Helio Health for the last 3 years and most recently as a level 2 Patient Access Representative. Welcome to Upstate Kachelah!



## MOVERS & SHAKERS

Shylah Brown is transferring to Surgical Specialties  
Bill Burke is transferring to Finance  
Dawn Johnson has been promoted to a Sr. Registrar  
April Sadeckas has been promoted to a Sr. Registrar  
Angela Williams to be retiring

# 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 Upstate Medical University Patient Access Services Intranet Home page. The header includes the Upstate Medical University logo, the text 'State University of New York', and 'Patient Access Services'. A search bar is located in the top right corner. The main content area features a 'Patient Access Services' sidebar with a list of links: 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 news item titled 'Point of Service Collections - "Races" 2017 WINNERS CIRCLE!' with a sub-headline 'Congratulations to the Top POS collectors for the month of January 2017!' and a link to 'View results on this PDF'. Below the news item is a photograph of three women talking on mobile phones, with the text 'How can we help?' overlaid. To the right of the main content is a 'Have a Question? Ask us!' section with an email icon, and a 'QUICK LINKS' section with a list of links: 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](#)