

## DEPARTMENTAL UPDATES FROM

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

July 2023

### CURIOSITY KILLED THE CAT & GETS EMPLOYEES INTO TROUBLE

*Protecting Our Patient's Privacy...Kaniesha Mason*

As you may already know, patient confidentiality is a huge issue in healthcare. The Health Insurance Portability and Accountability Act (HIPAA) of 1996 was established to provide data privacy and security provisions for safeguarding medical information. As employees in a hospital setting, we must be diligent and consistent in our approach to protect our patient's privacy. Everyone in this organization has an obligation to respect the privacy integrity of a medical record, regardless of title or position. Snooping in a patient's record is a privacy violation. University Hospital has a zero tolerance for breeches of confidentiality and combats snooping by:

- Adding "Break the Glass" functionality in Epic on confidential encounters
- Educating employees of the risks and consequences from the beginning of hire
- Having employees sign a confidentiality statement
- Informing employees of the strict policies in place outlining consequences of snooping
- Conducting routine audits to identify inappropriate access to a patient's medical record

As a team, we can protect our patient's privacy and build trust by following the tips below.

1. Understand that just because you are an authorized Epic user ***DOES NOT*** justify you looking at all records in EPIC.
2. Before accessing a record ask yourself "Am I accessing this record for treatment, payment, or operations"? If the answer is no, simply don't do it!
3. Remember to lock your workstations prior to leaving unattended.
4. Shred paperwork containing patient information immediately after use.
5. Request for another employee to work with a patient that you may know personally (i.e. a neighbor or relative).
6. Don't discuss patient information in public areas or with others who are not directly involved in the patient's care.



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 "It's our new security software. That's what happens if the system detects unauthorized access to patient records."

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# REGISTRATION TIPS

- Gender ***X or I type*** maps to unknown
- Enter the exact **9 Digit SSN** number. Do not enter leading **zeros** with the last 4 digits.
- Be sure to review the patient and guarantor address during the registration process.
- Copy both **front and back** of all insurance cards and label with the **payor name**.
- Check to see if the **Driver's License Photo ID** has **expired**. If so, ask for the **updated copy**.
- Under emergency patient contacts, be sure to complete both **Emergency Contact** and **Permission to Discuss Fields**.
- Ask the patient for the **correct spelling** of their **name, address, employer**, etc.
- Be sure to use the **Not Collecting Button** and select the **appropriate reason**, when no co-pay is being collected.
- **Employment information** needs to be asked at every registration and completed accordingly.



## LUNCH AND LEARN SESSIONS

**Bring your Lunch & Learn**

Topic: [Summer Upgrade](#)

Hosted by Emily Greenwood on Monday  
July 24th at Noon.

Sign up is available in Self-Seve. Click the  
Summer Upgrade link above and follow the  
prompts to enter the meeting .



### Quote of the Day

**“ Treat The Customer As If You Are That Customer. ”**

——- Laurie McIntosh

# ANNOUNCEMENTS

## Monthly Alert

### Important information

### MSPQ Retirement Dates Kaniesha Mason

The Medicare Secondary Payor Questionnaire (MSPQ) is a statutory requirement designed to assist hospitals in determining who should be the primary payer on the patient's encounter. It also aids us in insuring that the bill is sent to the correct insurance payer to avoid billing delays.

#### ***As a registrar you must know the following:***

- It is essential that patients are asked this questionnaire whenever Medicare is assigned to an encounter for every inpatient and Emergency Department visit. Recurring encounters require completion of the MSPQ every 30 days or new HAR.
- Never assume the answers or complete the fields in this questionnaire without speaking to the patient or patient representative.
- Understand that the answers to the questions may change based on the reason for the patient's current visit.
- The answers to the questions in this questionnaire help determine the coordination of benefits (insurance priority).

Now that you understand why proper completion of the MSPQ is necessary, I'd like to bring your attention to a common error that is made on the front end. Registrars are often confused by what should be entered as the retirement date within the MSPQ whenever the retirement date is unavailable, therefore often leave the field blank or populate with erroneous information. Per CMS's guidelines, we are required to collect and report this information as it populates important codes needed for billing behind the scene. Refer to the approved desk procedure below that is documented in Admissions Policy ADM-M-01.

#### **Recording Retirement Dates**

- When a beneficiary cannot recall his/her retirement date but knows it occurred prior to his/her Medicare entitlement dates, as shown on his/her Medicare card, report his/her Medicare A entitlement date as the date of retirement.
- If the beneficiary is a dependent under his/her spouse's group health insurance and the spouse retired prior to the beneficiary's Medicare Part A entitlement date, report the beneficiary's Medicare entitlement date as his/her retirement date.
- If the beneficiary worked beyond his/her Medicare A entitlement date, had coverage under a group health plan during that time, and cannot recall his/her precise date of retirement but you determine it has been at least 5 years since the beneficiary retired, enter the retirement date as 5 years retrospective to the date of admission (if the date of admission is January 4, 2002, report the retirement date as January 4, 1997).
- As applicable, the same procedure holds for a spouse who had retired at least 5 years prior to the date of the beneficiary's hospital admission.
- If a beneficiary's (or spouse's, as applicable) retirement date occurred less than 5 years ago, you must obtain the retirement date from appropriate informational sources; e.g., former employer or supplemental insurer."

Feel free to reach out to your training team with questions!

# 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

**Note: The Insurance Basics Class will be offered from 8:30 to 4:30 on the 4th Thursday of every month.**

**Sign up will be available in Self-Serve.**

# ANNOUNCEMENTS

## Take Note



Listed below is the test window and dates for anyone interested in taking an upcoming exam.

### Test Windows and Application Deadlines

<u>Testing Window**</u>	<u>Application Timeline</u>
January	apply between September 1 and November 30
April	apply between December 1 and the last day of February
July	apply between March 1 and May 31
October	apply between June 1 and August 31

\*\*Exam windows are open all month for testing.

# STAFF KUDOS

Compliment for **Edward Napper**

I don't have you on the mailing list for our Ambulatory Surgery comments since we don't get a lot of registration ones on there, but this week we had a wonderful compliment for Eddie on our IR report:

"A gentleman in Registration with the last name, 'Nappa'...above & beyond the normal customer service! He needs to be recognized!!!"

I saw him in the hall and let him know he got a wonderful compliment, but wanted to share with you as well.

Thanks!

Cassandra



Compliment for **Lorraine Montreal** from a patient.



**RECOGNIZING AN UPSTATE STAR:**

Staff Name(s) Lorraine

Department/Unit Connect Care

Reason for Recognition So personable & helpful!  
The best medical office experience we've  
ever had.

Your Name (Optional) Jennifer Perna

Patient /Family     Faculty     Staff     Volunteer     Other

# STAFF KUDOS

The following compliments are for **Alex Hike**, **Deborah Maddox** and **Doris Price-Webb** from **Andrea Luce**

- **Alex Hike**

It is getting so that when a N/F account hits my WQ and I see that you registered the patient, I know I am going to have a good HAR note to refer to. It is very much appreciated!

- **Deborah Maddox:**

Great Job on all these registrations. And Deborah, you do an excellent job on documents as far as obtaining new documents when needed (such as patient turned 18 and needs new RHIO, etc.), and obtaining the most current insurance cards, photo ID, etc. when there are outdated ones in Epic. Keep that up! It is much appreciated.

- **Doris Price-Webb:**

Good job on verifying the Patient, PCP, and Guarantor sections of the Checklist!

- **Bernard Smith from Katrina Jones**

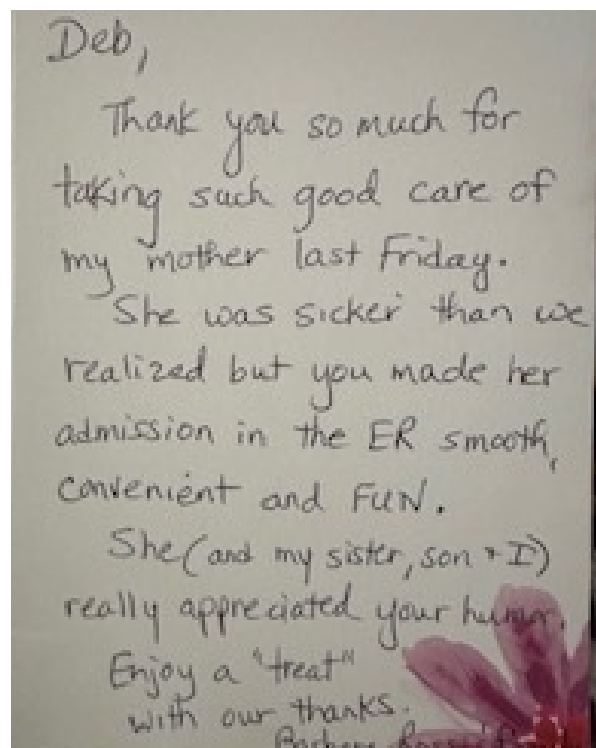
Great Job, Bernard ! Your accuracy rate continues to increase every month!



Nice Compliment for **Deborah Maddox** from a patient's daughter.

Thank you for shining your light on the patients. You are truly a gem!

Kaniesha



# STAFF KUDOS



PRESS GANEY®

- **Shawnee Stith:** The front Desk receptionist was very polite and kind. She carried message from my family and to me.
- **Dicy Robinson:** The person who completed our registration was professional and exceedingly kind. At 3:30am, I was delirious while answering the questions, she had a good sense of humor to get me through it and was patient.
- **Lorraine Banda:** The staff including the receptionist were wonderful and doing the best they could.





# STAFF KUDOS



I would like to congratulate **Heather Fehrman** as she begins a new career as a registered nurse at Upstate.

Heather has been working in Patient Access Services for 13 years. Heather started working as a HPSC 1 in the Ambassador Program, in Central Registration and the Emergency Department

Heather became a HPSC 2 supervisor over the Ambassadors in 2018

Heather joined the Float Pool in the Spring of 2019

Heather became a Team Leader of the Ambassador Program in the Fall of 2019 and this is the role she currently occupies.

We would like to thank Heather for her dedication, her years of service and for the contribution she has made in helping our patients and our visitors.

Heather is kind and empathetic and she always goes above and beyond to help our patients, no matter what the need is.

Heather, we know you'll be a good, caring nurse and 5B is lucky to have you.

We wish you luck as you continue to grow in your new role here at Upstate!



## Nappi Staff Kudos

Congratulations to **Cody Ryder** for making the Dean's List submitted by Kristen Henry

Dear Cody:

On behalf of Bryant & Stratton College Online and the Online Team of Advisors & Coaches, Congratulations are in order. You have been named to our *Dean's List for 2nd Winter 2023*. Being a recipient of this honor indicates that you have attained a *3.75 GPA*.



# TOP COLLECTORS WAY TO GO

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

*Mary Hoare.....Collected on 321 accounts (\$50,974)*

*Molly Schaefer.....Collected on 86 accounts (\$16,552)*

*Lorrelle Ash.....Collected on 70 accounts (\$10,327)*

*Zainab Dougherty.....Collected on 67 accounts (\$22,308)*

*Denneya Edwards ..... Collected on 45 accounts (\$4,193)*

**Lets all try to make 2023 a ground breaking year with off the chart collections !!!**



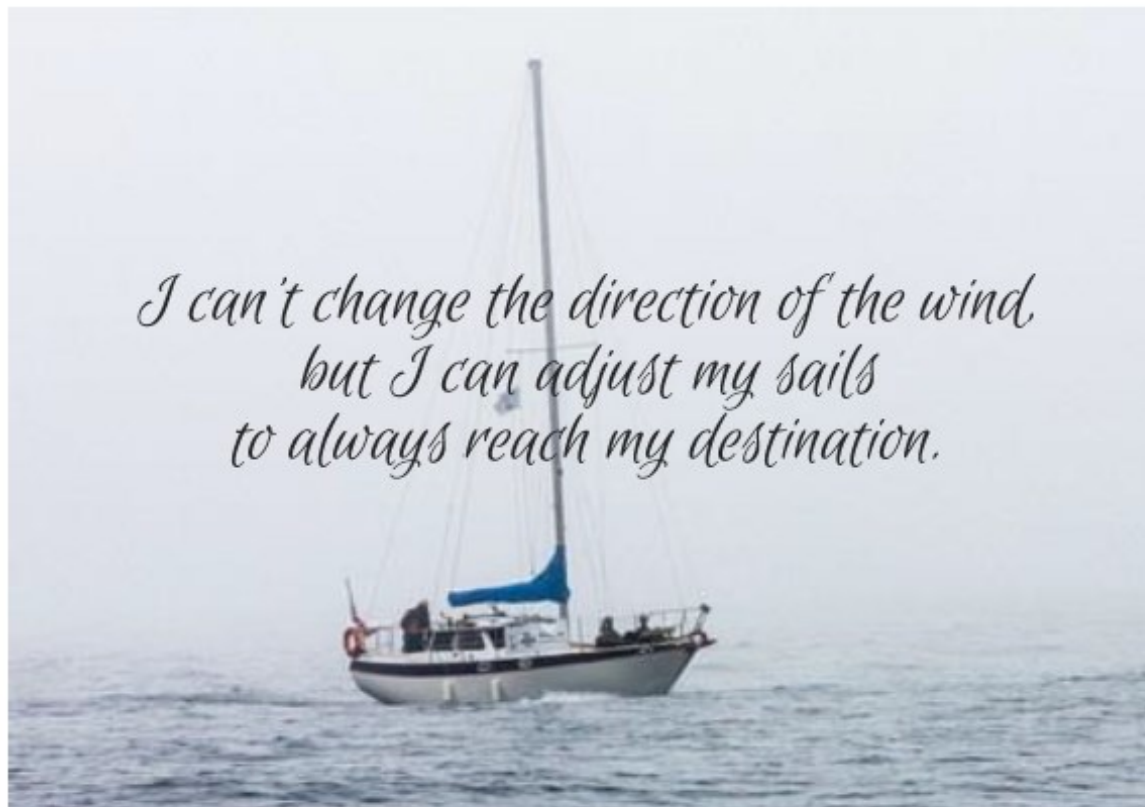


Thanks to the Pathway To Wellness Program and Suzanne Brisk , each month I will include an affirmation card taken from the Positivity Pack. Each card provides an optimistic outlook.

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.***



**Ambassadors:**

HPSC1

Ambassador Team Leader

**UH Central Registration:**

HPSC1

**UH ED Reg :**

OAS

**CG ED Reg :**

OAS

**Verification:**

HPSC2

**Central Scheduling:**

HPSC2

**Pre-Reg:**

HPSC1

**Nappi:**

PAS Associates

Clerical Specialist 2

HPSC1

**Admitting:**

HPSC2

**CG Switchboard :**

Clerk 1

**Float :**

HPSC2



Make that job yours



# HAPPY BIRTHDAY

## July Birthdays:

Cathy Smith	07/02	Central Sch
Ahaquana Woodley	07/03	UC Call Center
Ananya Choudhury	07/04	Data Services
Deanna D'Arrigo	07/04	ED Reg
Steven Johnson	07/07	Verification
Melanie Carbone	07/09	Amb Call Center
Jacqueline Hardy	07/09	Pre-Reg
Denneya Edwards	07/10	UC Central Reg
Terry Engelbrecht	07/11	Central Sched
Pamela Dineen	07/12	Amb Call Center
Brett Parsons	07/12	Nappi
Tabitha White	07/18	MDD
Debbie Nelson	07/19	Amb Call Center
Amber Gray	07/20	Pre- Reg
Melissa Yarbrough	07/20	Amb Call Center
Shermell Sherman	07/21	Central Sched
Jessica Newson	07/29	Verification



### Welcome to the following new employees:

Tammy Hughes UH Central Reg

Fredreca Johnson ED

Shayne Mitchell UH Central Reg



## MOVERS & SHAKERS

Shanna-Kay Brown Samuels transferred to the ED

William Burke returns from Finance



# 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 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 in a call center setting, 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 listing various resources like '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](#)