

DEPARTMENTAL UPDATES FROM

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

December 2023

Understanding MyChart Proxy

MyChart is an Epic application that allows patients to view their medical records and interact with their physicians over the internet.

PAS would like to encourage patients to sign up and utilize MyChart. Some of the benefits of MyChart are accessing results, immunizations and other health records; ease of scheduling appointments; contacting providers with questions/concerns via messaging and updating demographics, guarantor and coverage information. MyChart also offers proxy access to allow someone other than the patient to view the patients information.

There are 4 Relation Types:

- 1) **Adult accessing Adult** (usually used for any patient that would like their spouse, friends or other family members to have access to their chart)
- 2) **Diminished Capacity** (usually used if a power of attorney or if elderly family member may not be able to access their chart on their own)
- 3) **MyChart Bedside Proxy Only** (usually used for minors 12 and older who have to give parents proxy access or for patient who don't have rights so that they can give proxy to another individual)
- 4) **Parent accessing Child** (usually used for parents of minors under the age of 12 to have access to their child's MyChart account)

Parent accessing Child follows below :

For a **child ages 0 to 11**-an email for a parent can be entered and the parent has full access to the information up to age 11

From **age 12 to age 17**-access to the minor's chart is restricted

Age 18 and onward- the previously listed proxy is terminated. The patient now has to set up their proxy's for adult to adult to take place and that proxy will have full access.

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REGISTRATION TIPS

- When scanning **insurance cards** be sure to scan both **front and back** and then enter the name of the insurance in the description field.
- Never enter **spaces** or special characters in the auth and address fields. Claims will not make it out the door if such symbols are left on the account.
- Always read **RTE** to confirm eligibility and subscriber information. **RTE** will provide this information.
- Always validate the patient's **e-mail address**
- Be sure to use the **Not Collecting Button** and select the **appropriate reason**, when no co-pay is being collected.
- Always use the **City/Zip field** to enter the zip code.
- If loading a **Generic Insurance**, always include a billing address.
- When **RTE** shows **additional coverage** be sure to assign that additional coverage.
- The (FE) facilitated enroller form should only be signed if the patient does not have any insurance. Not when they forgot their insurance card at home.



LUNCH AND LEARN SESSIONS

Bring your Lunch & Learn

Topic: MyChart Documents

Hosted by Jack LePorte

Tuesday December 12th at 2pm

UH C1076 A/B/C Cancer Center

[Click here to join the meeting](#)

Sign up is available in Self-Seve. Please click on the link above to access the lunch & learn you prefer to attend. Please follow the prompts for access.

If you have trouble with the links use the Meeting ID and Pass codes below.

Tuesday: Meeting ID: 279 777 882 046

Pass Code: xFz6Ho



“Quality in a service or product is not what you put into it. It is what the customer gets out of it ”

— Peter Drucker

ANNOUNCEMENTS

Monthly Alert

Important information

Navigating RTE Coverage Mismatches for Medicaid / Medicaid Managed Care

An increase in the misassignment of Medicaid Managed Care plans has been noticed. Many coverage mismatches are not being addressed and the result is incorrect coverages are being billed, resulting in denials.

Examples of coverage mismatches:

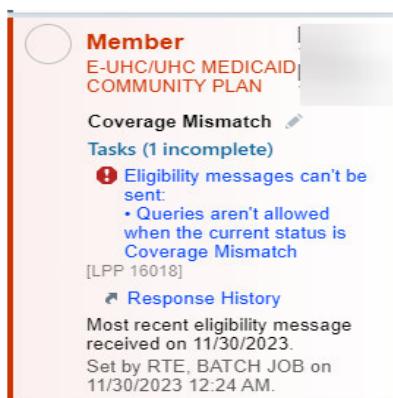
--Epic shows Traditional Medicaid and RTE brings back a response showing the patient now has a Medicaid Managed Care plan.

--Epic shows a Medicaid Managed Care plan and RTE brings back a response showing a different Managed Care plan.

--Epic shows a Medicaid Managed Care plan and RTE brings back a response showing the patient now has traditional Medicaid.

Note: RTE queries can be initiated at the Patient Level or at the Encounter/HAR Level. A way to distinguish the levels is you might think of "Patient Level" as covering the patient's entire chart, all visits and info, where the Encounter/HAR level is one page in the chart, one encounter/visit.

An RTE query initiated on an existing Medicaid / Medicaid Managed Care coverage in Epic is an Encounter/HAR level query. This means that you are verifying existing coverage from the checklist or encounter section. If a coverage mismatch is identified, the warning below will show in the Checklist. The registrar must act by reviewing the response to determine what the mismatch is, terminating coverage when needed, and creating the correct coverage, as necessary.



In recent years, many enhancements have been made to insurance Real Time Eligibility (RTE) to assist registrars in proper insurance creation. Auto-creation is one of those enhancements, however, Auto creation will only occur when an RTE query is initiated at the Patient Level.

Plans that have EPIC mapping built will Auto-create coverage when certain parameters and data elements in the response are met. When selecting the "Add Coverage" button, an RTE query takes place at the Patient Level and EPIC will create the correct coverage if the plan is mapped. The act of "adding coverage," not just "verifying coverage" is what triggers auto-creation when possible. These are the RTE queries that cause the Notifications alarm bell on the Checklist and requires the registrar to complete an action (acknowledge/create/ignore).

Please, remember to run RTE, read RTE, carefully and completely. RTE responses are full of information needed to properly assign coverages. Always verify that the correct coverage is assigned at the encounter level.

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 or Kaniesha Mason 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.



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.

NAHAM Contact Hour Guide

The CHAA and CHAM certifications require achievers to earn contact hours towards maintaining their certification. Contact hours are separate from the ongoing work experience required for recertification and are specific to education, training, and other activities related to patient access or healthcare. NAHAM offers year-round opportunities to earn contact hours, including the Annual Conference, webinars, volunteer opportunities, and more.

ANNOUNCEMENTS

Telephone Doctor Service Skills Highlights

5 Forbidden Phrases of Customer Service:

“I don’t know”

“We can’t do that”

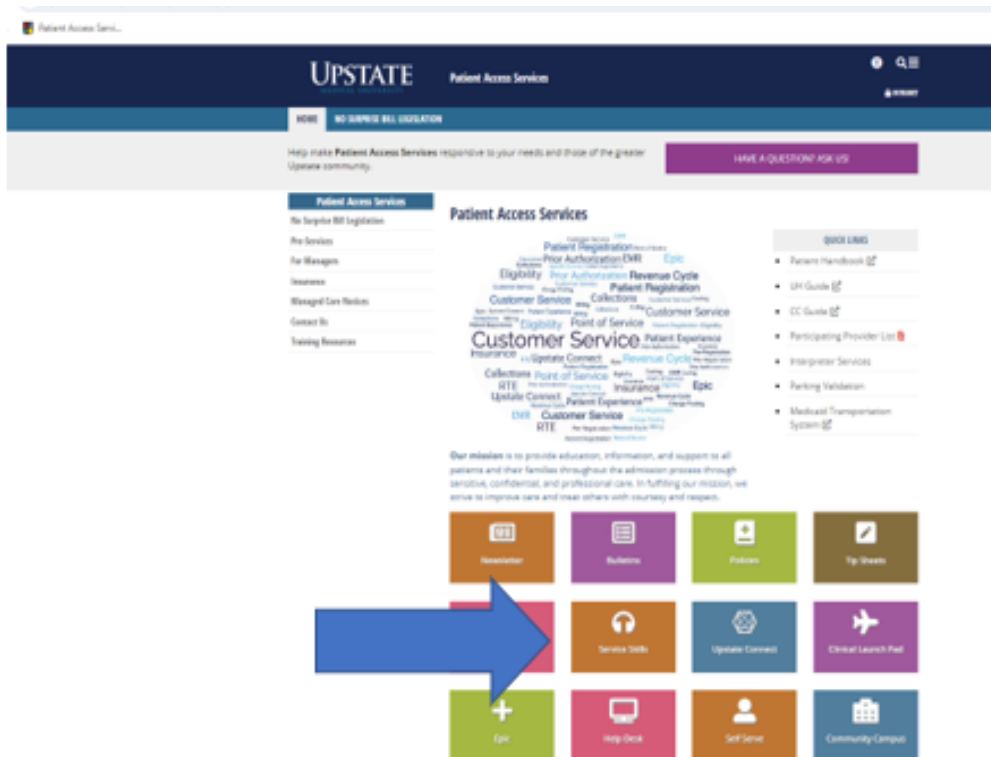
“You’ll have to...”

“Just a second”

“No” at the start of a sentence

How often do you catch yourself saying these phrases? Watch Five Forbidden Phrases on the Service Skills site to learn easy techniques to offer better customer service by not falling into these customer service traps.

Access Service Skills from the Patient Access Services website.



Be one of the first five people to send Shelley alternate responses to the 5 forbidden phrases to receive some fun Upstate gifts. 😊

ANNOUNCEMENTS



Submitted by Lisa Gaspe

In an effort to improve patient & visitor satisfaction in the main lobby at the Downtown campus, Ambassador Team Leader Connor Ransier suggested a television for our patients and visitors. We have many people who wait in the lobby for their loved ones, wait for their appointment time or wait for a ride. This new television is mounted in the lounge area of the lobby where there are comfy couches and chairs. I've seen many people sitting there being entertained, helping to pass their time.

We wanted to send a huge shout out to Brian Hofer, Service Technician, from Avidex (our patient television and phone provider). Brian, THANK YOU for **donating** this television to our patients and visitors. Your generosity creates a more welcoming atmosphere in our lobby, while serving a great purpose. We greatly appreciate your assistance!

The Ambassador Staff

Compliment for **Dustin Adams**

Submitted by Kaniesha Mason

Dustin Adams is always a pleasure to work with. He is very responsive and always helpful. I'm happy to work with someone with his talent and professionalism.



Nappi

UPSTATE
NAPPI WELLNESS INSTITUTE

Nappi Wellness Institute



11/8/23
Kin + All
Cindy + all the girls,
I love coming to your office,
now who can say thanks for sticking
me, it's your friendliness all your
smiling faces you all make my
day. Have a wonderful Day,
Love
Rae Anne

Welcome to the following new employees:

Jaheel Rowe (Student Assistant)

Welcome back, Marla Hill



Congratulations to Shante Taylor on her baby girl!



STAFF KUDOS

Compliment for **Tammy Hughes** and **Allana Albanese**

Information Desk staff survey

1. Was the Ambassador helpful & professional? YES NO
2. How has your overall experience been with the Information Desk staff?

Excellent Good Fair Poor

3. Is there any way we can be of more help to you & your family?

Your staff is excellent Tammy Allana

4. Are there any services you would like us to offer?

None

5. Ambassador name (optional) *Tammy, Allana*

Nice Work!

Compliment for **Tammy Hughes**

Information Desk staff survey

1. Was the Ambassador helpful & professional? YES NO
2. How has your overall experience been with the Information Desk staff?

Excellent Good Fair Poor

3. Is there any way we can be of more help to you & your family?

4. Are there any services you would like us to offer?

5. Ambassador name (optional) *Tammy Hughes*



STAFF KUDOS

Compliment for **Sydney Wiesing**

I'd like to bring some excellent work to your attention, I'm not sure who her direct supervisor is, but I have been very impressed with Sydney Wiesing and want to share that I think she does a fantastic job. I've witnessed her doing some training with a new employee and she's thorough and pleasant, and explains what she's doing and why. Additionally, I've been waited on her as a patient myself and she did everything correctly AND made sure to ask me for my copay. She also isn't afraid to reach out to me or Bill if she's identified an issue that she thinks we can help with, or needs to direct a patient with billing questions to us. She is knowledgeable, professional, and enthusiastic and I appreciate her positive attitude.

In my opinion, and from what I have seen, she is a real asset to her team.

Thank you,

Matthew J. McDougall, CAC

Financial Resource Specialist

Patient Financial Services



Information Desk staff survey

1. Was the Ambassador helpful & professional? YES NO
2. How has your overall experience been with the Information Desk staff?
 Excellent Good Fair Poor
3. Is there any way we can be of more help to you & your family?
NO
4. Are there any services you would like us to offer?

5. Ambassador name (optional) Damian

Compliments for **Angela Galutz** and **Damian Irvine**.

Information Desk staff survey

1. Was the Ambassador helpful & professional? YES NO
2. How has your overall experience been with the Information Desk staff?
 Excellent Good Fair Poor
3. Is there any way we can be of more help to you & your family?
None
4. Are there any services you would like us to offer?

5. Ambassador name (optional) Angela, She is Always Pleasant & Professional,



STAFF KUDOS

Compliment for **Jodeann Harris**

Employee Recognition

We have many different ways to help you say thank you to a special caregiver. We honor the doctors, nurses and staff who provide you with extraordinary care. For more information or if you would like to nominate a caregiver fill out and mail in the form below or go to www.upstate.edu/stars. There is no cost involved. It is just a simple way you may express your gratitude for a special caregiver.



JODEANN (REGISTRATION)

Staff Name

EMERGENCY DEPARTMENT

Department/unit

How was your care extraordinary?

JODEANN WAS OUR
EXTRAORDINARY 'WELCOME'
LAST NIGHT WHEN WE
CAME TO THE ED WITH AN
ELDERLY FAMILY MEMBER.
HER DEMEANOR WAS
SO COMPASSIONATE,
CARING AND CALM
DURING THE STRETCHER-
SIDE ADMISSION.
JODEANN'S CONCERN
AND KINDNESS SET THE
STAGE FOR OUR

UPSTATE EXPERIENCE
AND COMMUNICATED VERY
CLEARLY THAT WE'D COME
TO THE RIGHT HOSPITAL
AND WE WERE IN GOOD
HANDS.

JODEANN EXEMPLIFIES
THE BEST OF THOSE IN
HEALTHCARE - HOW SMALL
GESTURES ARE PROFOUNDLY
MEANINGFUL TO PATIENTS AND
THEIR FAMILIES.

 SARAH STUART,
MO

Your name (optional)
Please return Completed form to:
Megan Chase, Human Resources
Upstate Medical University
750 East Adams Street, Syracuse, NY 13210
315-464-4970




Thank You
FOR MAKING
A DIFFERENCE

STAFF KUDOS

Compliments for the **Information Desk staff/Ambassadors** : **Norris Gary, LaShawn Robinson, Damian Irvine, Erica Ward, Esther Owusu, Brandon Caporin, Kelly Oram** and **Doug Dever**.

Information Desk staff survey

1. Was the Ambassador helpful & professional? YES NO
2. How has your overall experience been with the Information Desk staff?
 Excellent Good Fair Poor
3. Is there any way we can be of more help to you & your family?
You guys have gone above and beyond...treating me like family, waiting me to crock!
4. Are there any services you would like us to offer?
NOPE
5. Ambassador name (optional) LaShawn, Esther, Gary
Have been more than exceptional and have truly made this process easier and makes me smile

1. Was the Ambassador helpful & professional? YES NO
2. How has your overall experience been with the Information Desk staff?
 Excellent Good Fair Poor
3. Is there any way we can be of more help to you & your family?
Not at this time
4. Are there any services you would like us to offer?

5. Ambassador name (optional) Doug

Information Desk staff survey

1. Was the Ambassador helpful & professional? YES NO
2. How has your overall experience been with the Information Desk staff?
 Excellent Good Fair Poor
3. Is there any way we can be of more help to you & your family?
4. Are there any services you would like us to offer?
5. Ambassador name (optional) Alaina

Information Desk staff survey

1. Was the Ambassador helpful & professional? YES NO
2. How has your overall experience been with the Information Desk staff?
 Excellent Good Fair Poor
3. Is there any way we can be of more help to you & your family?
4. Are there any services you would like us to offer?
5. Ambassador name (optional) DOUG

Information Desk staff survey

1. Was the Ambassador helpful & professional? YES NO
2. How has your overall experience been with the Information Desk staff?
 Excellent Good Fair Poor
3. Is there any way we can be of more help to you & your family?
4. Are there any services you would like us to offer?
5. Ambassador name (optional) Erica

Information Desk staff survey

1. Was the Ambassador helpful & professional? YES NO
2. How has your overall experience been with the Information Desk staff?
 Excellent Good Fair Poor
3. Is there any way we can be of more help to you & your family?
N/A
4. Are there any services you would like us to offer?
N/A
5. Ambassador name (optional) GARY NORRIS

Information Desk staff survey

1. Was the Ambassador helpful & professional? YES NO
2. How has your overall experience been with the Information Desk staff?
 Excellent Good Fair Poor
3. Is there any way we can be of more help to you & your family?
no
4. Are there any services you would like us to offer?
no
5. Ambassador name (optional) Norris Gary

Information Desk staff survey

1. Was the Ambassador helpful & professional? YES NO
2. How has your overall experience been with the Information Desk staff?
 Excellent Good Fair Poor
3. Is there any way we can be of more help to you & your family?
No, you all are great
4. Are there any services you would like us to offer?
No
5. Ambassador name (optional) All That I Spoke too Since their 19th though - 17th

TOP COLLECTORS WAY TO GO

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

Sydney WiesingCollected on 196 accounts (\$30,988)

Katelynn Jaeger....Collected on 93 accounts (\$11,974)



Lorrelle Ash.....Collected on 76 accounts (\$14,203)

Shawnasia Hoke.....Collected on 56 accounts (\$4,433)

Denneya Edwards..... Collected on 51 accounts (\$5,529)

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

UH Central Registration:

HPSC1

UH ED Reg :

Outpatient Admin. Spec

Central Scheduling:

HPSC2

Pre-Reg:

HPSC1

Nappi:

HPSC1

Patient Access Assoc.

Upstate Connect :

Associate Director

Call Center Representative

Float :

HPSC2

ACC :

Call Center Representative



Make that job yours



HAPPY BIRTHDAY

December Birthdays:

Cheryl Dixon	12/01	ACC
Molly Schaefer	12/03	Verification
Dominic Mosley	12/04	CG Central Reg
Shannon Marcotte	12/09	Nappi
Kristen Songer	12/10	UC Call Center
Jeanette Temple	12/12	UC Call Center
Ester Owusu	12/14	Ambassadors
Shaquan Richardson	12/14	ACC
Marc Behringer	12/15	Ambassadors
Kristen Henry	12/18	Nappi
Dorey Youngblood	12/18	UC Call Center
Tammy Hughes	12/21	UH Central Reg
Brenda Shea	12/26	Central Scheduling
Jamie Ortiz	12/28	ACC
Lisa Gaspe	12/31	Admitting
Kelly O'Hara	12/31	Central Scheduling
Bernard Smith	12/31	ED Reg
Jody Williams	12/31	Data Services



Welcome to the following new employees:

Taylor Bartle	Ambassadors
Cory Bivens	Verification
Michaela Brooks	UC CC
Tracy Goodman	ACC
Marcia Knobel	Ambassadors
Heather Wilhelm	Verification



MOVERS & SHAKERS

Monica Rhyne took state position in ACC
 Molly Schaefer transferred to verification
 Peggy Steeprock returned to PAS



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>

HOME NO SURPRISE BILL LEGISLATION

Help make **Patient Access Services** responsive to your needs and those of the greater Upstate community.

HAVE A QUESTION? ASK US!

Patient Access Services

No Surprise Bill Legislation

Pre-Services

For Managers

Insurance

Managed Care Notices

Contact Us

Training Resources

Patient Access Services



QUICK LINKS

- Patient Handbook [↗](#)
- UH Guide [↗](#)
- CC Guide [↗](#)
- Participating Provider List [↗](#)
- Interpreter Services
- 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](#)