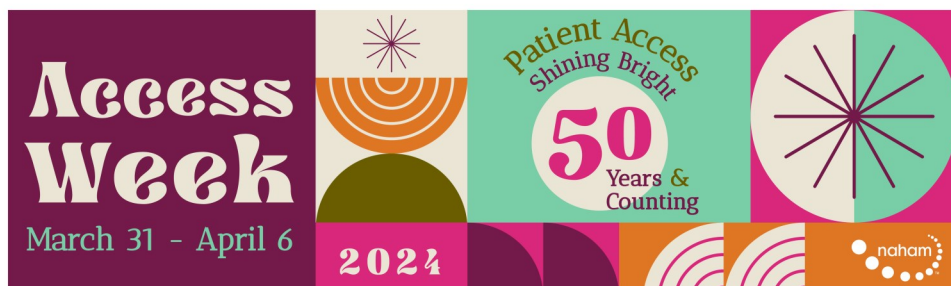


DEPARTMENTAL UPDATES FROM

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

April 2024



Together with NAHAM, National Association of Health Access Management association, we are celebrating National Access Week! Each area has some fun activities planned to celebrate the work our teams do every day to support our Upstate mission.

We are so proud of the difference our staff make in the lives of patients, callers, referring physicians, families and each other.

Patient Access Services @ Upstate Includes:

- ◇ Ambassadors at UH, Community and Nappi Wellness Inst.
- ◇ Admitting & Central Registration at UH and Community
- ◇ Emergency Registration
- ◇ Pre-admission Services
- ◇ Pre-registration & Scheduling
- ◇ PAS Performance Improvement, Quality & Training Teams
- ◇ Ambulatory Call Center
- ◇ Upstate Connect:
- ◇ Upstate Connect Call Center
- ◇ MD Direct (learn more about MD Direct on page 4)
- ◇ Upstate Connect Systems Support (aka Data Services)

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REGISTRATION TIPS

- Be sure to use the **Not Collecting 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 and insurance look up.
- Be sure to complete all registrations and use the **side bar checklist** to verify. The checklist should only be validated with a green check, after interviewing the patient and verifying the information entered.
- Always ask the patient if they have a **middle name/initial** if one is not listed.
- Do not forget to **term out** all **old insurances** that are no longer being used.
- Be sure to review the **HCP information** that is on file with the patient at each visit.
- Ask the patient for the correct spelling of their name, address, employer etc.,

LUNCH AND LEARN SESSIONS

Bring your Lunch & Learn

Topic: Part II RTE & Insurance Errors

Hosted by Tricia Eldred

Thursday April 18th 2pm

UH Cancer Center, Room C1071

[Click here to join the meeting](#)

- Please click on the link above to access the lunch & learn. Please follow the prompts for access.

Join the Teams Meeting by clicking on the link above or typing the address listed below in a web browser window.

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

- <https://www.microsoft.com/microsoft-teams/join-a-meeting>

Meeting ID: 221 188 308 363

Pass code : iNDn5C



Happy Spring

Quote of the Day

“ In a world where things increasingly become commodities (especially services) the real differentiator becomes the personal experience you are able to create in the lives of your customers.”

—John Bessant

ANNOUNCEMENTS



Congratulations ... **Kristen Henry** has been promoted to the Associate Director position in Upstate Connect! Kristen has done an exemplary job bringing up the PAS services at the Nappi Wellness Institute and is ready to hand the reins over to someone else. The transition to back to Upstate Connect will be a gradual transition while we work on hiring her successor.



TakeNote

Enhanced Call Center Technology, by Jody Williams

Upstate Connect is excited to announce we have begun offering callers the option to request a call back instead of waiting in a call queue. This is the first of several enhanced call center features we hope to offer the option to place a callback request, essentially allowing technology to hold their place in line. When the caller opts in for a callback and enters their phone number, the software holding their place in the queue. Once a call center agent is available, they will receive a call advising them that a callback request is pending. The agent then accepts the callback request, and the software dials the patient's phone number. This allows our patients to avoid waiting on the line and go about their other tasks (work, driving, tending to their families, etc.).

Our first line went live on March 13th. Feedback from the call center agents is that this feature is very easy to use, and the callers seem happy with it as well. Since going live, we have processed 224 call backs and have saved our callers over 2,000 minutes of hold time.

ANNOUNCEMENTS

Get to know MD Direct:

Below is a highlight of the many services offered by the professionals in MD Direct:

Janice, Tracey, Taressa, Marty, & Tabatha

MD Direct Physician Referral Services

- Assists callers (or by email/chat) with referrals to Upstate providers, nearly 3,000 calls per month
- Arranges PCP referrals/appointments for inpatients before discharge and ED patients without PCP
- Answers/schedules for Connect Care
- Send notification letter to PCP's when their patients expire while a patient @ Upstate
- Answers emails for Info@Upstate.edu (400-900/month)
- Answers Cancer Center 464-HOPE (500-600 calls/month)
- Answers emails received from Find a Doc referral requests
- Assists post discharge patients with follow up appointments or MyChart assistance via Cipher Health phone survey

Upstate Wellness Resources

UPSTATE MEDICAL UNIVERSITY Wellness

HOME RESOURCES PATHWAY TO WELLNESS WELLBEING INDEX WELLBEING COUNCIL 4-KARE WELLNESS

Confidential. Available 24/7. Make the most of our new **Upstate Employee, Staff, and Student Wellness Resources:**

UPSTATE WELLNESS RESOURCES

Wellbeing & Mental Health Resources

- Mental Health
- Spiritual
- Medical & Physical
- Safety
- Professional
- All Resources

DONATION TO THE UPSTATE WELLNESS FUND.
THIS FUND HELPS MAINTAIN MOST UPSTATE WELLNESS INITIATIVES.

Welcome to the Upstate Medical University Well-being Resource Center! We are here to provide tools to our entire Upstate community to help with overall health and wellness in your everyday lives. Health and wellness are two important and complementary parts of well-being.

ANNOUNCEMENTS

Monthly Alert



The importance of selecting the correct patient to register and treat.

When searching for a patient in EPIC, follow the **Name Search Guideline**. It is the policy of Patient Access Services to avoid the duplication of patient records by completing a thorough name search in the hospital information system prior to registering a patient for services. This practice which ensures past medical records are linked with the current encounter assists with maintaining the integrity of the patient medical record and facilitates patient care.

Procedure: When searching for a patient name in the hospital information system, an exhaustive search must be performed to determine if the patient has an existing medical record number. The patient name search will be performed in the following format:

Step 1

Electronic Medical Record: Enter the first three letters of the last name and first name separated by a comma. If a match is found, after verifying with the patient additional demographic information that appear on the verification screen, (such as: social security number and date of birth) proceed with the registration.

If a match is not found, return to the “Patient Look up” screen and proceed with Step 2.

Step 2

Electronic Medical Record: Delete the first three letters of the last name and first name (separated by a comma). Value the patient’s DOB

Always have the patient **spell their full name and provide their DOB** before placing a bracelet on their wrist.

Step 3

Electronic Medical Record: Delete the DOB. Perform the name search by entering only the social security number of the patient. NOTE: Children or Immigrants may not have a social security number making this step obsolete for this group. Review the list of names returned for a match to the patient.

If a match is found, after verifying with the patient additional demographic information that appear on the verification screen, (such as: social security number and name) proceed with registration/pre-registration.

Always ask the patient if they have ever received care at our facility (this include inpatient and outpatient). If the answer is yes, we need to ask additional questions.

We find that the wrong patient has been easily selected as a result of searching by date of birth only. The registrars role in patient safety is properly identifying the patient. Documenting in the patient correct chart is essential for patient care. Be sure to always follow the steps above! Whenever in doubt, create a new record, as it is easier to later merge records if needed.

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



Congratulations to Derek and family on the birth of their baby boy. He was born on Tuesday 3/12/24, weighed 7 lbs 2 oz and his name is Hunter Thomas Markle.



HR just launched a great new service called “AskHR” (see the link below). This is a good place to get answers to questions or submit a request for service.

<https://solutions.upstate.edu/TDClient/650/HRPortal/Home/>

This site contains HR related information, such as employment verification, training and development, retirement information, leave of absences, etc. Employees can look for information on any HR topic, or if they cannot find what they are looking for or they don't know who to contact, they can submit a request for service ticket and the system will forward it to the appropriate party.

STAFF KUDOS

Compliment for **Freedom Torrence**

I'm Sue Berry, we don't know each other – I work in the Quality Services Department.

Yesterday, I was working in Triage when an older couple came in to be evaluated. One of them was quite sick.

The first thing they said to us was how “lovely the gentleman at the registration desk” was checking them in.

And they said more. They talked about how Freedom was kind, patient and efficient with them.

Also, “We always get the best care when we come here.”

I spoke to Freedom to let him know how appreciative they were.

I also wanted to let you know that I believe that he made a huge difference to that couple.

Freedom, thank you for making their admission a valuable experience and for easing their anxiety.

Sue

All the best,

Susan

Susan Berry, BScN, RN, PMP, CSSGB

Clinical Abstractor/Analyst

Sepsis Program



STAFF KUDOS

Kudos for Ambassadors for April

- God Bless you, **Damian Irvine**. Stay as helpful as you have been to our patients.
- Great customer service **Tammy Hughes**
- Helpful & great for **Connor Ransier**
- Excellent service by **Marcia Knobel**
- Continue to do what you do and remove mask so we can see your smile
Corey Bivens
- Excellent for **Esther Owusu**
- Excellent for **LaShawn Robinson**
- Great job & thank you for **LaShawn Robinson** and **Dennyeya Edwards**
- Very nice and helpful for **Taylor Bartle**
- Thank you, **Marc Behringer**. You're a great hospitality ambassador! You are the front line for most coming into this hospital. You have been VERY helpful, kind and caring! Fondly, Mike B & Family



WELL DONE!

STAFF KUDOS

Compliment for **Kim Cummings**

I received a voicemail from a Cindy Davis letting me know how wonderful Kim Cummings was and how helpful she was a year ago and again today. She remembered her from the last call and how polite she was ,and was able to assist her in what she needed.

Michelle Stine

P: 315-464-3679

F: 315-464-5541

Upstate Connect Team Leader

Upstate Connect



NICE WORK

Compliment for **Tracy Goodman**

Congratulations with completing your training in the Ambulatory Call Center!

Great job with your accurate message routing!

Thanks,

Melissa Yarbrough, BSHA

Team Lead

SUNY Upstate Medical University

Ambulatory Call Center



GREAT JOB!

STAFF KUDOS

Compliment for **Joe Duffus**

Hi Melissa & Cheryl,

I am always grateful to have the partnership of the call center. Your team is such a great help to our ability to serve patients. I wanted to highlight and share my gratitude for Joseph D.

Every time I get a call, and Joe's on the other line I instantly feel-good energy. You can tell with his thorough handoff that he is an advocate for patients and is authentic in his care for the patients needs. He has a such positive tone in his voice, that no matter what kind of call he's transferring you are insistently filled with positive energy.

We all know the call center role is not for the faint of heart, and Joe really makes a difference, and you can tell he has a great heart for his job.

Thank you, Nicole

Nurse Manager, Medicine Specialties



Compliment for **Elizabeth Solazzo** in the call center.

I would like to thank Elizabeth for taking the extra step to assist a patient that has repeatedly tried to reach the Audiology department. The patient stated she called many times and never received a call back. Elizabeth attempted to reach the department herself and then assured the patient that she would send a high priority message requesting a call back. The patient was so happy to have someone take some time to try to assist her. Thank you for taking care of this patient and being so dedicated to our patients needs Elizabeth!

Cheryl

Cheryl Dixon

SUNY Upstate Medical University

Ambulatory Call Center



Nappi



Nappi Wellness Institute

Upstate Stars:

RECOGNIZING AN UPSTATE STAR:

Staff Name(s) Kim, Rasheedah
 Department/Unit Connect Care
 Reason for Recognition They both gave us wonderful service, very helpful and extremely nice!
 Your Name (Optional) Daquan & Chelsea

RECOGNIZING AN UPSTATE STAR:

Staff Name(s) Olivia Cheung
 Department/Unit Nappi Ambassador
 Reason for Recognition Olivia is one of the sweetest and most helpful person to join our team. She is a huge asset for upstate. Great job olivia!
 Your Name (Optional) Kimmy
 Patient/Family Faculty Staff Volunteer Other



RECOGNIZING AN UPSTATE STAR:

Staff Name(s) Deidre Graves
 Department/Unit Nappi Ambassador
 Reason for Recognition Dede has given me alot of support and is the kindest person I've ever met. She is genuin. She goes above and beyond everyday
 Your Name (Optional) Kimmy
 Patient/Family Faculty Staff Volunteer Other

Welcome to the following new employees:

Bette Baum starting April 1



MOVERS & SHAKERS

Curtis Jones left Upstate

Cody Ryder promoted to Senior Patient Access Associate

TOP COLLECTORS WAY TO GO

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

Molly SchaeferCollected on 219 accounts (\$35,445)

Lorrelle Ash....Collected on 88 accounts (\$9,349)

Anthony Mioni.....Collected on 70 accounts (\$7,476)

Shawnasia Hoke.....Collected on 51 accounts (\$6,179)

Deanna D'Arrigo..... Collected on 44 accounts (\$6,260)

Lets all try to make 2024 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

CC Central Registration:

HSPC1 Clerk for Pediatric After Hours

UH ED Reg :

OAS

Central Scheduling:

HPSC2

Pre-Reg:

HPSC1

Nappi:

Clerical Specialist II

OAS

UC Call Center :

Call Center Operator

Float :

HPSC2

ACC :

Call Center Representative

Secretary II



HAPPY BIRTHDAY

April Birthdays:

Jacqueline Barrett	4/2	ACC
Philip Carpenter	4/7	CG CR
Nicole Cilani	4/9	ACC
Melissa Bernhardt	4/10	ACC
Marybeth Colon	4/11	UC CC
Rusanne Billings	4/13	Nappi
Tammy Gallivan	4/13	ACC
Arthur Walsh	4/13	CG Switchbd
Ciera Brooks	4/14	ED Reg
Donna DeStefano	4/16	DT CR
Terryonna Steward	4/16	ACC
Audra Pelsue	4/17	Float Pool
April Sadeckas	4/17	DT CR
Marcia Knobel	4/19	Ambassadors
Connor Ransier	4/19	Ambassadors
Kimberly Durand	4/20	Nappi
Lorrelle Ash	4/25	CG CR
Lois Moore	4/25	ACC
Tracey Chesbro	4/27	MD Direct
Sharonda Jackson-Richardson	4/29	PID



Welcome to the following new employees:

Adrienne Brown	Upstate Connect Call Cen
Marybeth Colon	Upstate Connect Call Cen
Victoria Harriger	Ambassadors

T OGETHER
E VERYONE
A CHIEVES
M ORE

MOVERS & SHAKERS

Nothing to Report



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