

## DEPARTMENTAL UPDATES FROM

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

August 2024

### [DNV Preparation](#) Kaniesha Mason

We are officially in DNV survey season. For those of you that are unfamiliar with the process, DNV healthcare is a quality management accreditation company that does an annual unannounced survey on our entire health system. They perform tracers that often involve interviews with the front desk staff. *Are you prepared for their visit?*

***Below are a few things to do and/or familiarize yourself with:***

- Be up to date on your mandatory trainings
- Know your role in patient safety
- Know how to access the language line
- Be ready to speak to quality initiatives within your department
- Know how to access policies and forms on the intranet
- Be able to speak to how we collect + document Epic consents
- Familiarize yourself with what's included in the Patient Rights Handbook. Be sure to have the most current version dated 5/24
- Understand how to document Health Care Proxy info in Epic
- Have a basic understanding of EMTALA laws
- Know your departments downtime procedures
- Know how to document workplace violence and/or safety (SI) events
- Know the process for managing patient valuables

For a complete training and tips for Employees and Managers, please refer to the DNV Healthcare Survey Guide at: [Policy Manager - MCN Healthcare \(ellucid.com\)](#)

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# REGISTRATION TIPS

- If loading a **Generic Insurance**, always include the billing address
- When registering an **anonymous minor** in the ED, if the date of birth is unknown, always enter **01/01/+ (current year)** as the date of birth
- Be sure to use the **Not Collecting Button** and select the **appropriate reason**, when no co-pay is being collected
- Capture all **phone numbers** for the patient including the **area code**
- Copy both **front and back** of all **insurance cards** and make sure they are **legible**
- Always **validate** the patient's **e-mail address**
- Be sure to complete all registrations thoroughly. The **sidebar checklist** should be verified after reviewing the information with the patient or relative
- Utilize the insurance websites to confirm missing information. Never add erroneous policy numbers to coverage records
- Be sure to review the **HCP information** that is on file with the patient at each visit

## LUNCH AND LEARN SESSIONS

### Bring your Lunch & Learn

Topic: PAS Scorecard

**“Take the lead on improving your quality by learning how to review/analyze your individual metrics”**

Hosted by Heather Wuilliez

Tuesday August 20th 2 pm

UH Cancer Center, Room C1076 A/B

### [Join the meeting now](#)

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: 294 773 622 901

Pass code : p5E7LU



### Quote of the Day

**“ 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-Insurance Corner



Issue: Missing or Incomplete Health Care Proxy

### Important information

*It is highly recommended that patients have a completed Health Care Proxy (HCP) for their best interest.*



What is a Health Care Proxy?

A health care proxy gives a person (such as a relative, friend or lawyer) the authority to make healthcare decisions for another person. It becomes active when that person loses the ability to make decisions for him/herself. By appointing a health care agent, you can make sure that healthcare providers follow the patients wishes. Anyone 18 years of age or older can be a health care agent.

With every registration, it is required that we ask the patient if an HCP was previously completed. If an HCP was previously completed and scanned in, review the HCP with the patient verifying that all the information is still accurate.

If the patient has not previously completed a **HCP**, offer one at the time of registration. The ADT Patient Handbook contains instructions on how to complete the HCP, and includes a blank HCP that can be completed at registration time if the patient wishes. Other written forms of instruction from the patient ( such as a wallet size HCP card and even instruction written on a piece of paper) are acceptable.

We will continue to ask if the patient wishes to complete the HCP with each registration. When answered No by the patient, always **update the date** in the document section so it matches the encounter date. If there is a HCP listed, registrars should always verify that the information listed is valid.

The screenshot displays a software interface with a document list on the left and a detailed view on the right. The list includes:

ID	Type	Status	Group
51594	Advance Directive - Health Care Proxy	Not R...	-
70230	ADT IMM (MyChart)	Not R...	-
70231	ADT LTR (MyChart)	Not R...	-
51589	UH Consent to Use & Disclose Prot...	Signed	-
51590	Photo ID	Recei...	-
<i>NYS DL</i>			
51591	Insurance Card	Recei...	-
<i>Medicare</i>			
51593	Health e Connections Consent (RHI...	I Give ...	-
51592	Auth for Release of Health Info purs...	Signed	-

The detailed view on the right is titled "Edit Document" and shows "Advance Directive - Health Care Proxy". It indicates there are 0 other documents on this patient. A red box highlights the "Status" dropdown menu, which is currently set to "No". Below it, the "Received On" field shows "7/10/2024 3:00 PM".

**Note:** If a patient has a completed **DNR**, **Living Will** or **MOLST**, these all are accepted and scanned under the title of **Advanced Directives**.

# 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](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



National Association  
of Healthcare Access  
Management



**Congratulations** to the following for passing the CHAA Exam!

**Lisa Taylor**

**Tina Dollinger**

**Stacy Wieczorek**

**Bette Baum**

**Marie Martinez**

**Congratulations** to **Bridget Dooher** for passing the CHAM Exam!

*Please see your supervisor if you are interested in taking the CHAA during the next testing period in October.*

Note: The application timeline for the October testing window is applying between June 1 and Aug 31.



# ANNOUNCEMENTS



## Important information



Per Elaine Doughty, Billing Manager, she has verified in writing from the VA CCN Optum provider rep clarification on the appropriate IDs.

Use the **veterans SSN (9-digit)** or the **ICN number**, i.e., 1234567890V123456 (17-digits).

On the Veterans card there is a **10 digit number that is identified as the ID number**. This number is not a valid number to use as the ID. That number is the VA EDIPI number. The ICN number can be found on the VA authorization. We should only use the patient SSN or the VA ICN number as the ID. The claim will error if one of those numbers are not used.

Thank you

Upstate University Hospital

Elaine Doughty

Billing Manager



*Just a quick reminder!*

Just a reminder to not fill in the alternate fields unless directed by the RTE response. Accounts are dropping into the claim/edit report due to incorrect information being entered into the alternate fields. Also do not enter in the gender fields unless the RTE is saying there is a discrepancy.

If a name is being entered, it should always follow this format:

**Last name, First name** and **middle initial** if one is given.

Example, Jones, Donna A.

Kachelah Flournory, CHAA will be starting in a new role as Team Leader for Central Registration in early September. In this role she will be leading the registrars assigned to 550 Harrison and UHCC, as well as starting Ambassador services in those locations. Kachelah currently works as a Senior OAS at the Nappi Wellness Center and has great customer service, organizational skills, and ideas for process improvements that she brings to the table. We look forward to her development as a Team Leader and are excited to see her thrive!

Thanks,

Megan

# 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



## EMPLOYEE SPOTLIGHT



SCAN TO SUBMIT  
YOUR Q & A!



### LORETTA OWENS

EMERGENCY DEPARTMENT

- Q. How long have you worked in the Emergency Department?  
A. 1 Year
- Q. What is the first job you ever had?  
A. "Picking Tomatoes."
- Q. Do you have any hidden talents?  
A. "I can speed read".
- Q. If you could be any animal, what would it be? Why?  
A. "A bear, so I can sleep all winter".
- Q. If you could have any superpower, what would it be? Why?  
A. "Psychic, so I know everyone's business!"



### DEBORAH MADDOX

Emergency Department

- Q. How long have you worked in Patient Access?  
A. "1 Year 8 months."
- Q. What was the first job you ever had?  
A. "Cashier"
- Q. If you could be any animal, what would it be? Why?  
A. "An Eagle: because they don't come down until they have to."
- Q. What is one thing you can't live without?  
A. "Not being able to encourage people."
- Q. What is your favorite hobby, activity or creative outlet?  
A. "Photography and Bowling."

### MEGAN CAREY

Admitting

- Q. How long have you worked in Patient Access?  
A. "Almost 20 years"
- Q. What was the first job you ever had?  
A. "Cashier at Peter's Grocery Store."
- Q. What is one thing you can't live without?  
A. "Music! Nothing makes me happier than moving and grooving with my favorite tunes :)"
- Q. What is your favorite place to vacation?  
A. "Italy."
- Q. What is your favorite hobby, activity or creative outlet?  
A. "Reading, hiking, swimming."



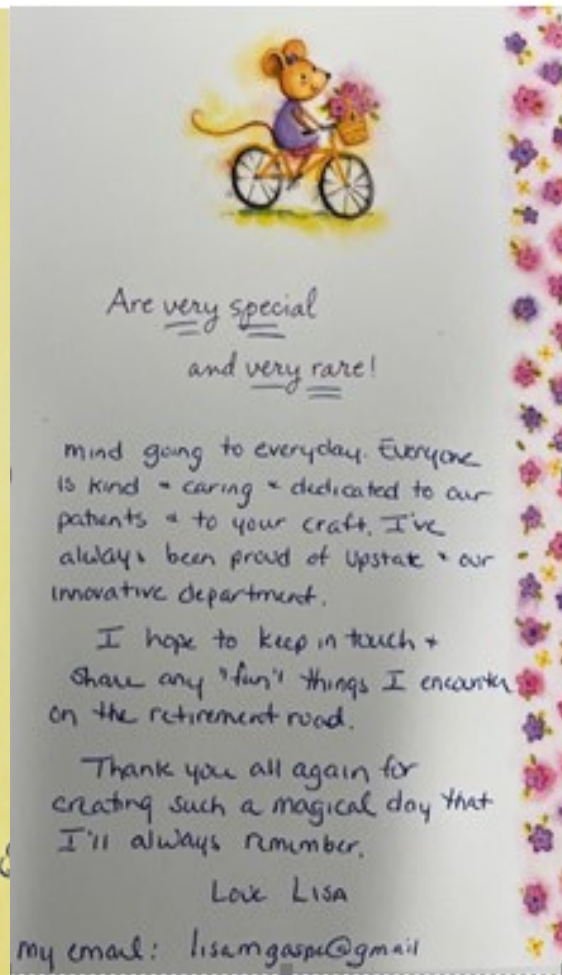


# ANNOUNCEMENTS

Thank You note from Lisa Gaspe



I want to Thank everyone who made my last day at Upstate so very special. I was definitely overwhelmed by the 'special visitors', the kind words and everyone's generosity. I LOVE my IPAD! It's very easy to use and its so quick. I still can't believe it. I have been so very fortunate to have worked with so many great people over the years. It was a great family atmosphere in Pt Access, I only wish I had written down some of the wild stories. It's rare to find a job that you don't



# ANNOUNCEMENTS

## Sharing A Thank You from Lisa

Some of Lisa's oldest and dearest friends gathered with the PAS gang at the downtown campus to share some food, some memories and to wish her the happiest of retirements on July 10<sup>th</sup>. Here is what she had to say in a thank you card to Everyone ...

**To All:**

I have been so fortunate to work with so many great people over the years. It was a great family atmosphere. It's rare to find a job you don't mind going to every day. Everyone is kind and caring and dedicated to their craft. I have always been proud of Upstate and our innovative department. Thank you to everyone who made my last day at Upstate so very special.

Love, Lisa



# STAFF KUDOS

Compliment for **Connect Care**

**THANK YOU!**

*Thank you so much / You all  
gave us the answers we  
needed, and also provided  
kindness and compassion  
& clarity in a hard  
situation. Thank you to giving  
us some peace. Chris Surprenant & Sacco*



*Thank You*  
FOR MAKING  
A DIFFERENCE

# STAFF KUDOS

Compliment for **Cheryl Dixon** and **Melissa Yarbrough**

Hi Shannon,

I'm writing to express my sincere appreciation for the outstanding leadership and coaching provided by Melissa and Cheryl. Their experience and unique coaching methods have significantly contributed to our team's success and my personal growth.

They both have the ability to break down complex tasks into manageable steps, making it easier for the team to understand and execute our daily work effectively. Their hands-on approach and patience in explaining concepts have been invaluable.

They also foster a positive and collaborative environment, which has greatly enhanced our team's morale and productivity. Their commitment to our development and success is truly commendable.

I am grateful to have such dedicated and skilled leaders to guide us, and I wanted to ensure their efforts are recognized.

Best regards,

Marc Buselli

*Senior Agent*

Ambulatory Call Center



Compliment for **Becky Erwin**

My compliments to Becky who was so calm, knowledgeable, and helpful during the downtime on Monday. I really appreciated her help! When I called in she shared with me the information she had and also printed bracelets for my OR patients.

Thanks Becky for always being there when I need your help.

Bridget Dooher

Senior Team Leader

Admitting/Outpatient Registration DT



# Nappi



Nappi Wellness Institute

Shannon Marcotte left patient access

Brett Parsons left (today is his last day) transferred to admitting.

Tina Dollinger leaving department on 8/7

Alisha McDowell left patient access

Kristin Hall was promoted to Sr. PAA

Terea Killings-Primes collected the most in copays for July \$2,560!



I'd like to give a shoutout to the Nappi Wellness Institute Patient Access team for a job well done during the outage on 7/19/24.

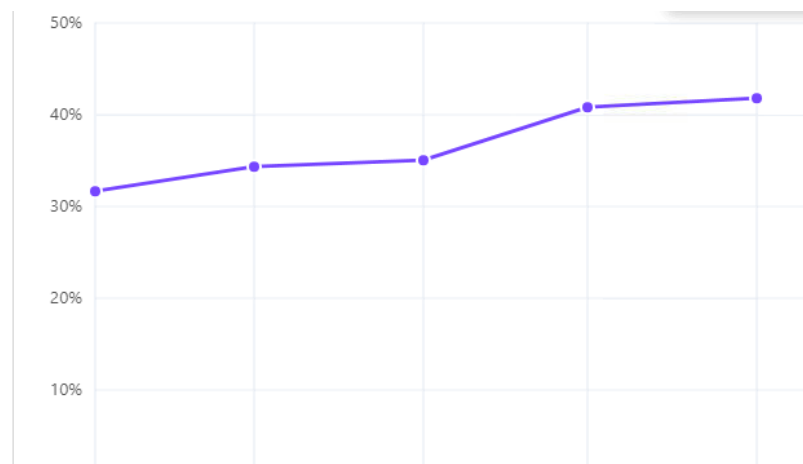
I am grateful to be involved with such an incredible group of people and want to take time to thank them for their hard work and dedication during the outage. Each of you collaborated with one another to ease tensions during a very stressful time. Thank you, PAS Nappi, for always going above and beyond to ensure success!

-Kristen

Shoutout to IHS on 41% Kiosk usage.

Thanks!

Kristen



# TOP COLLECTORS WAY TO GO

*POS Collectors (listed by number of accounts) for the month of July*

*Molly Schaefer .....Collected on 346 accounts (\$53,064)*

*Shayne Mitchell....Collected on 85 accounts (\$7,224)*



*Randi Proctor...Collected on 73 accounts (\$8,168)*

*Katelynn Jaeger.....Collected on 60 accounts (\$8,847)*

*Kazi Hossain..... Collected on 56 accounts (\$5,901)*

**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:

Team Leader

HPSC1

## UH Central Registration:

HPSC1

## CC Central Registration:

HPSC1

## UH ED Reg :

OAS

## Nappi:

Team Leader

Clerical Specialist 2

HPSC1

## Switchboard :

Clerk 1

## Float :

HPSC2

## ACC :

Call Center Representative

## Pre-Services :

HPSC1– Pre-registration

HPSC2—Scheduling





# HAPPY BIRTHDAY

## August Birthdays

Shaquella Newby	8/1	ACC
James Ratchford	8/3	ED Reg
Maria Phillips	8/4	UC CC
Tammy Pais	8/5	Pre Reg
Sabrina Kane	8/7	DT CR
Deidra Graves	8/10	Nappi
Sue Kehrer	8/15	Pre Reg
Laura Hand	8/17	CC CR
Timothy Lounsbery	8/18	UC CC
Heather Wilhelm	8/18	Verification
Lisa Green	8/19	ACC
Kaniesha Mason	8/19	PAS All
Freedom Torrence	8/23	ED Reg
Doug Dever	8/26	Ambassador
Etrenidall Bey	8/29	Nappi



### Welcome to the following new employees:

Kristin Gordon	ACC
Isobel Pymm	ED Reg
Karan Ramos	ACC
Laura Rockwell	Nappi
Sherone Smith	UC CC



**T** OGETHER  
**E** VERYONE  
**A** CHIEVES  
**M** ORE

**MOVERS & SHAKERS**

Marc Behringer moving to Ambulatory Call Center  
 Kachelah Flournoy moving to UH Central Registration

# 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](#)