

## DEPARTMENTAL UPDATES FROM

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

March 2025

### Marching into March Kaniesha Mason

People are much happier when they have something to look forward to. The month of March presents several themes worth celebrating. As we march into March, I'd like to share a few themes to raise awareness.

**Women's History Month** recognizes the contributions women have made throughout history, promotes gender equality, raises awareness of women's challenges worldwide, and includes International Women's Day on March 8th.

**National Developmental Disabilities Awareness** raises awareness and understanding of issues affecting people with intellectual and developmental disabilities.

**National Nutrition Month** encourages people to learn about nutrition and make healthy food choices.

**National Irish American Heritage** also known as **St. Patrick's Day**. St. Patrick's Day is a holiday that celebrates the life of St. Patrick, Ireland's patron saint, and Irish culture. Saint Patrick died on March 17th which later became the day we celebrate him and the Irish culture through parades, music dancing, and food.

**National Deaf History Month** is celebrated 3/13-4/15. It honors the contributions of people who are deaf or hard of hearing.

**National Ethics Awareness** is also observed in March. March is dedicated to raising awareness about ethical practices and decision-making in various professional and personal spheres. Its goal is to encourage individuals and organizations to prioritize integrity and accountability while focusing on the importance of ethical behavior in the workplace.

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## REGISTRATION TIPS

- Important reminder that **CFG Health Systems** is the current insurance carrier for **Onondaga Correctional Facilities** and do not forget to value the **Admission Source** and **Referral institution** correctly.
- There is a new document called “**Transfer UH to CC Questionnaire**” that must be addressed for all UH ED patients to help with bed placement.
- Always check to see if the patient has an active **MyChart**. If not, inquire if they would like to sign up.
- Always validate patient’s **email address**.
- Collect missing **SSN numbers** whenever you can, as they help with patient identity.
- Always ask the patient if they have a **middle initial** if one is not listed.
- Capture all **phone numbers** for the patient including the **area code**.
- Complete a thorough **Name Search** to properly identify patients.

## LUNCH AND LEARN SESSIONS

### Bring your Lunch & Learn

Topic: Medicaid

Thursday March 20th, at 2pm

UH Cancer Center

Room C1076 A/B/C

[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: 212 924 797 681

Pass code: VF6X4Ja7



### Quote of the Day

“ Knowing is not enough; we must apply.  
Wishing is not enough; we must do. “

—— Johann Wolfgang

# ANNOUNCEMENTS

## Monthly Alert-Insurance Corner

### Important information

#### Changing the Guarantor Type

It is Important to review the guarantors that have been previously created prior to creating a new one. Every patient should have a personal family guarantor created. Additional guarantor types may be added as deemed necessary.

When registering a **Worker's Compensation** or **No-Fault**, the guarantor information will pre-fill with the patient's name if the patient is 18 years old or older. Complete the fields as outlined on the Epic Tips & Tricks.

If you do not have all the necessary insurance information such as **subscriber name, address, dob**, and the **insurance carrier and policy number**, create the guarantor type without coverage information. Once the encounter closes, the bill will be forwarded to the guarantor on file. **Never mark these encounters as self-pay**. Adding the guarantor without coverage will force the encounters into various Missing Registration Item work queues for follow up.

Always add a HAR note explaining the situation and be sure to add any known coverage clues. In the Emergency Department, a card is given to the patient with instructions on how to contact us with the missing information.

**Side note:** The finance department has 45 days to submit these claims due to timely filing guidelines, therefore it is important that registration staff follow up on encounters with missing WC/TPL insurance.

Keep in mind that additional documents are needed for each specific scenario. For a Worker's Compensation, in addition to our standard consents, we should have the **A-9 consent** completed. For No-Fault the **NF-3 and NF-4** consents are required for all in patient encounters.

Lastly, a claim form must be completed for Worker's Compensation and No-Fault encounters following the outlined desk procedure. Feel free to reach out to the training team with questions related to this work flow.

# 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 MS Teams. Please call Carol at 315 464-5035 or email Carol at [andrewsc@upstate.edu](mailto:andrewsc@upstate.edu)) 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.**

**IMPORTANT  
REMINDER**

When registering always remember to get the full addresses such as Apartment numbers or lot #, etc. and (any other pertinent identifying information on that street.

The billing department advised , they are finding they are getting a lot of return mail due to this.



# ANNOUNCEMENTS

## TakeNote



National Association  
of Healthcare Access  
Management



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.

# STAFF KUDOS

Compliment for the **Jackie Barrett**

Compliment for Jackie Barrett with Ambulatory Call Center from a patient “ Jackie, you always get done what you say you are going to do, and I know I am always in good shape when you answer. Thank you for all you do!”

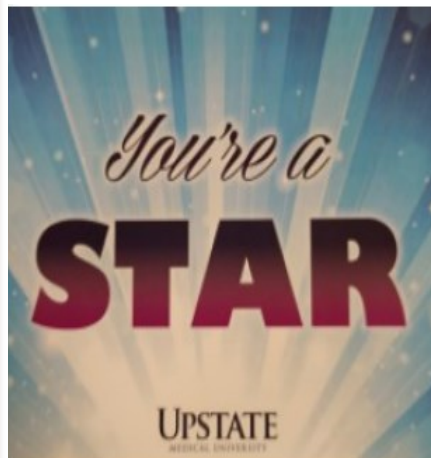


Compliment for **Marisol McCollin**

From the mother of a patient – “Thank you Marisol for providing good information. She was extremely kind and very helpful. She wanted to make a point of sharing when someone does good, as most people will only call when things don’t go right. She sends her sincere thanks and says Marisol is a real asset to Upstate!”



# STAFF KUDOS



## RECOGNIZING AN UPSTATE STAR:

Staff Name(s) Deidre Graves 

Department/Unit Patient Access Graves

Reason for Recognition Your positivity is infectious, Thank you for brightening everyones day ☺

Your Name (Optional) Tiara J. & Kelley M. 3B

☐ Patient/Family ☐ Faculty ☒ Staff ☐ Volunteer ☐ Other



Shared by Tricia Eldred

Sharing a thank you from a very satisfied patient.

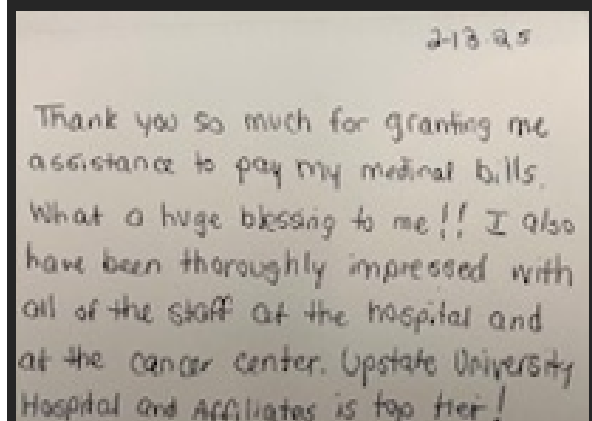
Letters like this one prove that talking about what a person's financial obligation will be for their visit to Upstate and explaining how we may be able to help is appreciated.

Some of the Patient Access Team were lucky enough to interact with her along with the financial resource office and the clinical staff.

It looks like everyone did a fabulous job.

High Five!

~ Trish



# STAFF KUDOS

Shared by Hayam Khalil

On 2/19 Pas ED and PAS NAPPI teams and Family members had a wonderful time serving Breakfast at the Samaritan Center.





# TOP COLLECTORS WAY TO GO

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

*Brett Parsons .....Collected on 232 accounts (\$45,191)*

*Lorelle Ash .....Collected on 68 accounts (\$16,541)*

*Edgardo Rios.....Collected on 62 accounts (\$24,721)*

*Kazi Hossain .....Collected on 39 accounts (\$4,776)*

*Zainab Dougherty..... Collected on 36 accounts (\$8,899)*

**Lets all try to make 2025 a ground breaking year with off the chart collections !!!**



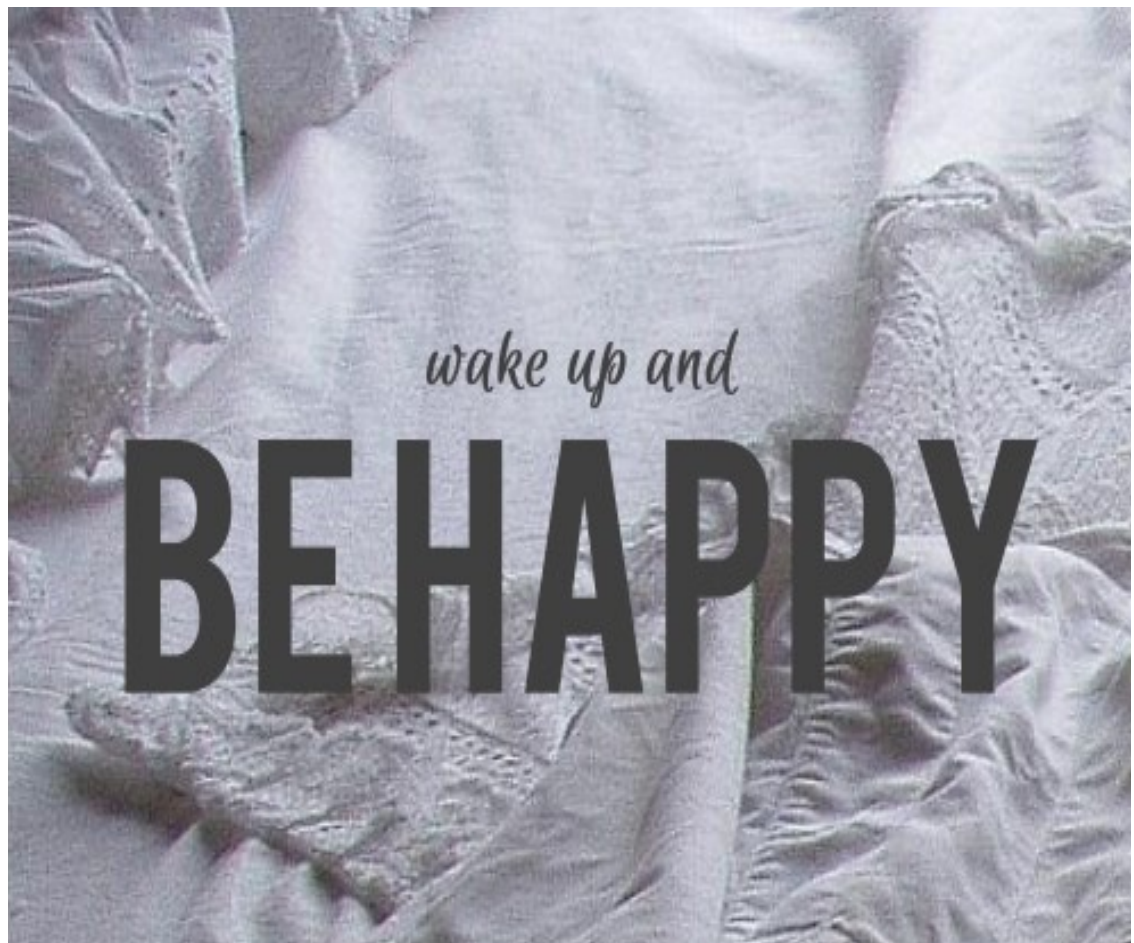


Thanks to the Pathway To Wellness Program and Suzanne Brisk , each month I will include an affirmation card taken from the Positivity Pack. Each card provides an optimistic outlook.

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.***





## **Admitting:**

Admission Coordinator  
Outpatient Administrative Specialist

## **Ambulatory Call Center:**

Call Center Representative  
Secretary 2

## **CC Switchboard:**

Switchboard Operator

## **Nappi:**

Ambassador  
Patient Access Associate

## **Ambassadors:**

Ambassador

## **CC Central Reg:**

Ambassador  
Registrar

## **Downtown Central Reg:**

Registrar

## **ED Registration:**

Team Leader  
Outpatient Administrative Specialist

## **PID/Float:**

Senior Registrar

## **Pre-Services:**

Registrar  
Central Scheduling Coordinator



# HAPPY BIRTHDAY

## March Birthdays

Mackenzie Young	03/06	ED Reg
Amona McDowell	03/13	Nappi
Janetta Williams	03/18	UC Call Cen
Joshua Hughes	03/19	Admitting
Tracy Goodman	03/24	Am Call Cen
Vlora Hoxha	03/27	Central Sched
Bette Baum	03/29	Nappi



## Welcome to the following new employees:

Terria Britt	Ambassadors
Teresa Campbell	Amb Call Center
Erica Green	ED Reg
Greg Schuyler	Amb Call Center
Septime Stobart	UH Central Reg
Tramcar Wallace	Admitting



## MOVERS & SHAKERS

Shantel Knight took a state position in the UC Call Center.

LaShawn Robinson has accepted a state position as a secretary in OR Scheduling.



# 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](#)