

## DEPARTMENTAL UPDATES FROM

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

July 2025

### Middle Initial & Social Security Number Campaign

As part of our ongoing efforts to positively identify patients, maintain accurate records, and comply with regulatory requirements, we are asking all front desk staff to collect a middle initial and social security number for every patient that you register. Doing so will help us positively identify patients with similar names.

#### What's needed?

- **Middle Initial**
- **Social Security Number (SSN)**

#### Why This Is Important:

1. **Patient Identification:** *Proper patient identification is a registrar's role in patient safety.*
2. **Record Accuracy:** Including middle initials helps distinguish individuals with similar names and ensures our records are consistent and complete.
3. **Regulatory Compliance:** Collecting SSNs is necessary for identity verification and reporting purposes as required by certain federal and state agencies.

#### What You Need to Do:

- When registering a new or established patient, please **request/confirm their middle initial and SSN** along with the standard information.
- **Reassure them** that their information will be stored securely and used only for official purposes in accordance with our privacy policy.
- **If a patient is hesitant**, kindly explain that this information is essential for accurate identification.

#### Privacy and Security Reminder:

Please remember that Social Security numbers are extremely sensitive. Be sure to:

- Never write SSNs on sticky notes or in unsecured areas.
- Enter the information directly into the system as soon as it is provided.
- Securely store or dispose of any paperwork containing SSNs in compliance with our data protection policies.

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## REGISTRATION TIPS

- Check to see if the ***Driver's License Photo ID*** has **expired**. If so ask for the updated copy.
- Under ***patient contacts***, be sure to complete both ***Emergency Contact*** and ***Permission to Discuss***
- Verify ***MyChart*** enrollment for each patient
- Always ask the patient if they have any ***other insurance***.
- Be sure to review the ***HCP information*** that is on file with the patient at ***each visit***.
- We can accept an image of a ***Photo ID*** if it is from the ***DMV website*** only.
- If a ***complete registration*** is performed from ***demographics*** to ***documents***, the checklist will have minimal items to address.
- ***MSPQ***-please do not leave the ***retirement date blank***. This should be filled out and if the patient truly can't recall, please refer to the ***Medicare retirement date policy***.



## LUNCH AND LEARN SESSIONS

### Bring your Lunch & Learn

Topic: Customer Service Skills

Hosted by Bethany A. Sciotti

Tuesday July 29th, 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: 264 215 868 682 7

Pass code: j3tM349U

### Quote of the Day

***“ To give real service you must add something which cannot be bought or measured with money, and that is sincerity and integrity. “***

—— Don Alden Adams

# ANNOUNCEMENTS

## Monthly Alert



### **Why Proper Patient Identification Matters**

Accurate patient identification is a registrar's primary role in ensuring patient safety. As the first point of contact in many urgent and life-threatening situations, the ED plays a critical role in ensuring that every patient is correctly identified upon arrival. Failure to do so can lead to serious medical errors, compromised patient safety, and significant legal and ethical consequences.

### ***Importance of Proper Patient Identification***

1. **Ensures Patient Safety** Accurate identification prevents medical errors such as administering the wrong medication, performing incorrect procedures, or confusing patient records. In the chaos of the ED, where patients may be unconscious, disoriented, or unable to communicate, the risk of misidentification is significantly higher.
2. **Facilitates Timely and Appropriate Care** Emergency care is time sensitive. Proper identification allows for the rapid retrieval of medical records, including history, allergies, and prior diagnoses, enabling clinicians to make informed decisions quickly. Delays or errors in identification can postpone critical interventions.
3. **Prevents Duplicate Records** Creating a duplicate medical records due to misidentification can lead to fragmented or inconsistent patient information. This not only affects care continuity but also contributes to billing issues, insurance claim complications, and unnecessary testing.
4. **Reduces Risk of Legal and Ethical Issues** Misidentification may result in serious harm or even death, leading to legal liabilities and reputational damage for healthcare institutions. It also undermines the ethical obligation of clinicians to "do no harm" and respect patient autonomy and dignity.
5. **Supports Effective Communication** Accurate patient identification improves communication between departments, clinicians, and ancillary services such as laboratories and radiology. It ensures that the right information follows the right patient throughout their care journey.

### **Best Practices for Accurate Identification in the ED**

- **Use Patient Identifiers:** Always use at least two patient identifiers (full name and date of birth) during intake. Surprisingly, some patients have the same name and dob. This is where the middle initial and/or social security numbers are helpful in determining their identity.
- **Wristbands:** Review the information on the wristband with the patient prior to placing the wristband on their wrist. This is a crucial step should never be skipped. Doing so would significantly reduce identity errors. The wristband should be reviewed at each point of contact during the patient's visit.
- **Staff Training:** Regularly train staff on patient identification protocols and the consequences of misidentification. Include review of policy and procedures for trauma arrivals.

# 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.**



**Patient Identity:** Be sure to review the Name and DOB of **EVERY PATIENT** prior to putting the bracelet on their wrist. If there is any doubt, feel free to ask for photo identification for verification purposes. Also review patient photos previously taken at the time of registration to prevent identity theft.

# 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

## Employee Recognition Luncheon 2025



**Congratulations!**



# STAFF KUDOS

Compliment for **Marie Martinez** Sharing Kudos that Marie received while being over at Transplant. As always Marie went above and beyond to make sure patients were taken care of.

Lisa M Donovan

Good morning! Kudos to Marie! She identified a patient yesterday who's insurance was not active! This is crucial in transplant, as we can't proceed with transplantation if the insurance is not active. I appreciate her prompt attention, calling the patient to confirm if he may have had other coverage. Great job, Marie and thank you so much!

Kachelah Flournory, CHAA

Central Registration Team Lead

550 Harrison & UHCC Ambassador Team Lead



Compliment for **Dawn Johnson**

I wanted to share a verbal patient compliment that I received today. The patient and her husband were both very impressed with our clinic. They noted how organized we were and how friendly everyone was. They said it started with Dawn at registration, and they really appreciated that Dawn walked them to PAT. They said once they arrived to our clinic, Shannon was very friendly and welcoming. They said that Asia was incredibly sweet. They appreciated the care and attention to detail that I provided. They also wanted to provide a shout out to Dr. Miller who thoroughly explained the patient's situation and what her options were in a calm and non-rushed manner. They have been very happy with their pre-op care so far.

Way to go!!

Jacqueline Kelly, MSN, FNP-C, AGACNP-BC

Perioperative Team Lead Advanced Practice Provider



# STAFF KUDOS

Compliment for **Shaleyia Peterson**

Hi Bridget,

I just wanted to take a moment to recognize one of your team members. I had the pleasure of interacting with her recently, and I was so impressed by how kind, patient, and professional she was. My mom had to register for an US and I took her to registration.

She went out of her way to make the process smooth and welcoming, and her warm demeanor truly stood out – the bling she added to my mom's ID bracelet was so cute! It's clear she cares about the people she's helping, and it made a big difference in my mom's experience.

You're lucky to have someone like her on your team—I hope she knows what a great job she's doing.

Shari

**Shari Sterle-Grant**

Assistant to:

Arabinda Choudhary, MD, MRCP, FRCR, MBA, FACHE, ABPM (Clinical Informatics), FACR

Professor and Chair, Department of Radiology

Professor of Pediatrics

SUNY Upstate Medical University



Compliments to **Leanne**, **Deanna**, **Demetria** and **Styles** in the ED.

Hello, we had 13 pediatric patients arrived at the ED following a motor vehicle collision today. A heartfelt thank you to Lori, Leanne, Deanna, Demetria and Styles for their exceptional work ethics in ensuring a smooth and well-coordinated arrival and registration process.

**Their dedication made a difference during this critical situation.** 🙌

Kaniesha M Mason

Director of Registration

University Hospital RM 1321D



# TOP COLLECTORS WAY TO GO

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

*Lorrelle Ash .....Collected on 107accounts (\$17,660)*

*Brett Parsons .....Collected on 247 accounts (\$46,624)*

*Janella Charles.....Collected on 65 accounts (\$7,213)*

*Spencer Bradshaw .....Collected on 51 accounts (\$5,405)*

*Septima Stobart..... Collected on 50 accounts (\$3,673)*

**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.***

THIS BANANA WANTS YOU TO BE HAPPY.

*look, it is even smiling at you!*



## **Admitting:**

Admission Liaison

Outpatient Administrative Assistant

## **Ambulatory Call Center:**

Call Center Representative

## **UC Call Center:**

Switchboard Operator

## **Nappi:**

Ambassador

Patient Access Associate

## **Ambassadors:**

Ambassador

## **Downtown Central Reg:**

Registrar

## **PID/Float:**

Senior Registrar

## **Pre-Services:**

Central Scheduling Coordinator



# HAPPY BIRTHDAY

## July Birthdays

Cathy Smith	07/02	Central Scheduling
Shaquana Woodley	07/03	UC CC
Fabian Campbell	07/04	Nappi
Ananya Choudhury	07/04	Data
Deanna D'Arrigo	07/04	Ambassadors
Steven Johnson	07/07	Verification
Melanie Carbone	07/09	ACC
Jacqueline Hardy	07/09	Pre Registration
Theresa Engelbrecht	07/11	Central Scheduling
Pamela Dinneen	07/12	ACC
Brett Parsons	07/12	Admitting
Corey Bivens	07/14	Ambassadors
Marie Martinez	07/18	Admitting
Debbie Nelson	07/19	ACC
Theresa Taylor	07/20	Nappi
Melissa Yarbrough	07/20	ACC
Mackenzie Petrocci	07/24	Ambassadors
Denise Williams	07/27	Nappi
Jessica Newson	07/29	Verification
Christopher Indeck	07/30	Nappi



### Welcome to the following new employees:

Quinn Mannion      Ambassadors



## MOVERS & SHAKERS

Brandon Caporin left to work in the HVAC field.

Jonathan Maynard Nappi 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

A word cloud featuring terms related to Patient Access Services. The most prominent words are 'Customer Service', 'Revenue Cycle', 'Patient Registration', 'Eligibility', 'Point of Service', 'Insurance', 'Billing', 'Collections', 'Prior Authorization', 'EMR', 'RTE', 'Update Connect', 'Patient Experience', 'Charge Posting', 'Pre-Registration', and 'Patient Service'. The words are arranged in a circular pattern, with 'Customer Service' and 'Revenue Cycle' being the largest.

### 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](#)