

DEPARTMENTAL UPDATES FROM

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

September 2025

Innovation in the ED

By Hayam Khalil, CHAM

As technology continues to evolve, our Emergency Department remains committed to embracing solutions that enhance patient care and operational efficiency. In **January 2025**, we successfully launched **Self-arrival** across all three ED locations. Patients now use the **Welcome Mobile application on iPads** for a fast, seamless check-in experience. Since launch, we've seen consistent growth in adoption month over month—clear evidence that our patients appreciate the convenience and speed of digital tools.

Next week, we're excited to introduce the next phase: **Self-registration**. This enhancement will further streamline the arrival process, reduce wait times, and empower patients to take greater control of their care journey. Patients will receive a **tickler email** prompting them to complete registration. Registrars will then review any missing items—such as **guarantor & coverage details, claim forms**, and other required documentation—to finalize the registration.

Together, **Self-arrival and Self-registration** will:

- Minimize patient identification errors.
- Reduce bottlenecks during peak volume.
- Support increased patient throughput despite limited staffing.
- Protect the patients privacy

We're proud of the progress we've made and remain focused on building a more **connected, efficient, and patient-centered Emergency Department**. Thank you to our teams for driving this transformation forward.

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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.
- ***Never sign*** a consent on a patient's behalf. This is considered ***falsifying records*** and could result in a fine being issued or termination.
- When a ***System Generated Guarantor*** is ***created for a minor***, change the guarantor to update information. Never overwrite!
- Always ask the patient if they have a ***middle name*** or ***initial*** if one is not listed.
- 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.
- Be sure to follow the ***Name Search Policy*** when searching for patients in the system to avoid duplicate record creation.

LUNCH AND LEARN SESSIONS

Bring your Lunch & Learn

Topic: Fall Upgrade

Hosted by Myranda D'Elia ,
Epic ADT Principal Trainer,

Tuesday September 23rd at 2pm

UH Cancer Center

Room C1071 (Smaller Room)

[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: 215 393 642 663

Pass code: Lw69ta7R



Quote of the Day

“ To truly improve the patient experience, we must understand the patient journey from the patient's perspective. ”

— Jason A. Wolf

ANNOUNCEMENTS

Monthly Alert

Important information

Benefits of using MyChart

With each registration, staff should be reviewing the patient's MyChart status. If the patient does not have an active account, offer to enroll them.

We can use the patient's email on file or add a new one. For minors, a proxy MyChart account can be created using their parent or legal guardians email address. Once the email is added to the patients record, a link to the MyChart portal site will be generated. A code and instructions on how to sign into the portal for the first time will be provided.

MyChart gives our patients access to their health information and a direct connection to their care team. providing tools to help them actively participate in their care.

MyChart is a secure means for patients to access parts of their health records through a web browser and cell-phone apps.

What is the function of MyChart?

- ◆ MyChart allows our patients to view test results and doctor's comments within days
- ◆ Schedule appointments, attend video visits with your provider, create shortcuts for appointments you schedule often
- ◆ Pre-Check in for appointments
- ◆ Get Medical Advice. Send a message to ask your doctor for medical advice and get recommendations for care
- ◆ Medication Refills
- ◆ Request a Referral
- ◆ Make payments on outstanding balances

A warning displays in the Sidebar Checklist when a patient has either never been sent a MyChart activation code or an activation code was sent more than 30 days ago and the patient's MyChart status is listed as pending when completing an **Admission or Emergency Department registration**. The warning states, "Patient does not have an active MyChart Account or has been pending for over 30 days . Please ask the patient if they would like to activate MyChart." To satisfy the warning, a new code must be generated and then either emailed to the patient or printed. To Generate a new code, click the MyChart icon in the Storyboard, and click Generate New Code. If the patient does not want to sign up for MyChart, click **Declined** or **Ask Later**.

Only use Declined if the patient is absolutely sure they will never want to sign up and use the My-³ Chart function. If unsure, the ask later option should be selected.

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) 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.

Reminder: A registrar's role in patient safety is properly identifying a patient

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 **Na Na Robinson** from Kristen Henry

I wanted to share with you my experiences with Na Na Roberson:

Na Na Roberson joined Upstate in December 2024, and from day one, she has been a radiant presence in our workplace. Her infectious personality and warm smile brighten every room she enters. Na Na brings genuine kindness and compassion to every interaction—whether with coworkers, supervisors, or callers. Her positivity is not only uplifting but also deeply inspiring, making her an invaluable part of our team.

KEEP UP THE GREAT WORK NA NA!

Thank you,

Kristen Henry, BSHA CHAM

Associate Director

Upstate Connect Systems



✿ Team Spotlight: Upstate Connect Call Center ✿

Celebrating Two Years of Zero Turnover!

We're proud to recognize the incredible team at the **Upstate Connect Call Center** for reaching a major milestone—**two consecutive years with zero turnover!**

This achievement is a reflection of the team's exceptional culture, strong leadership, and unwavering commitment to excellence. Under the guidance of **Jacqueline Pilon**, Call Center & Switchboard Manager, the team has built an environment where collaboration, compassion, and professionalism thrive.

Every day, this team serves as a vital link between our patients and providers, handling calls with empathy, efficiency, and care. Their dedication not only enhances the patient experience but also strengthens the foundation of our healthcare system.

👏 **Congratulations to the entire Upstate Connect team!** Your hard work and unity are truly



STAFF KUDOS

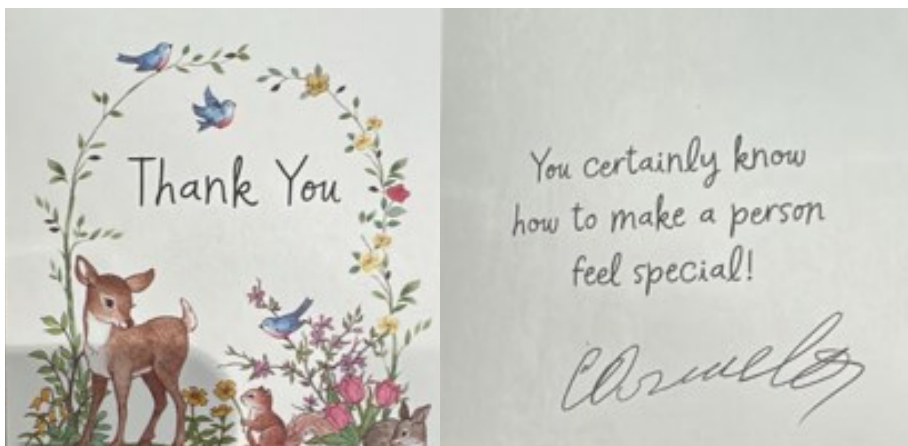
Compliment for **Shaleya Peterson** from a patient

Breast Center
I've been coming here nearly
10 years. Everyone is
always so very nice.
Today special orthotomists to
Kim Radtch &
Shaleya - up front
both made special
efforts to make a super
stressful day better.
Thanks!

8/6/2025 Carolyn F. Dune

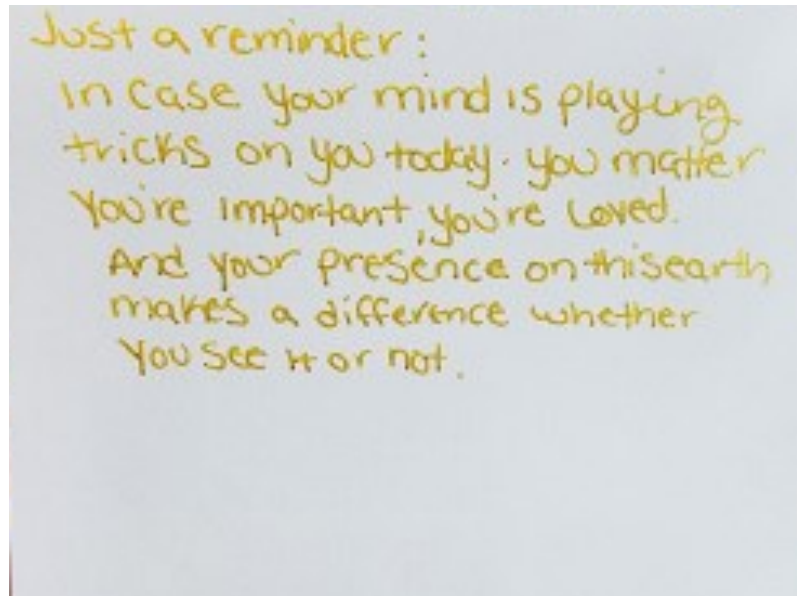
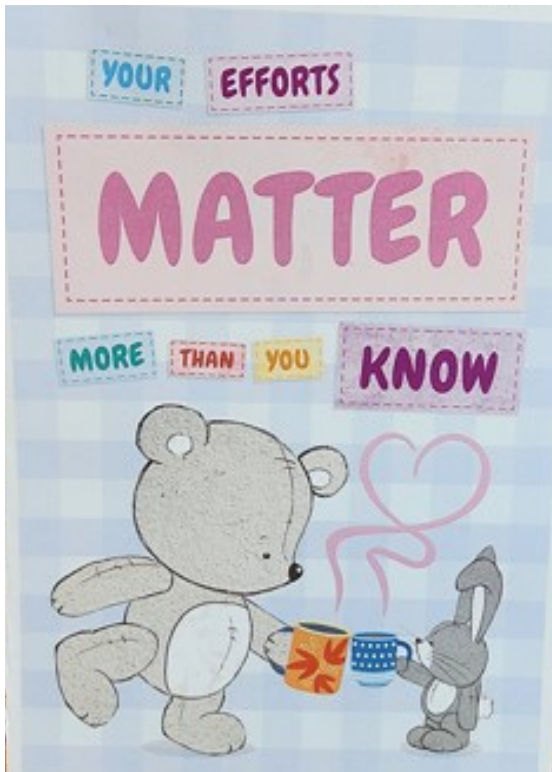


Compliment for **Toby Bryant** from a patient



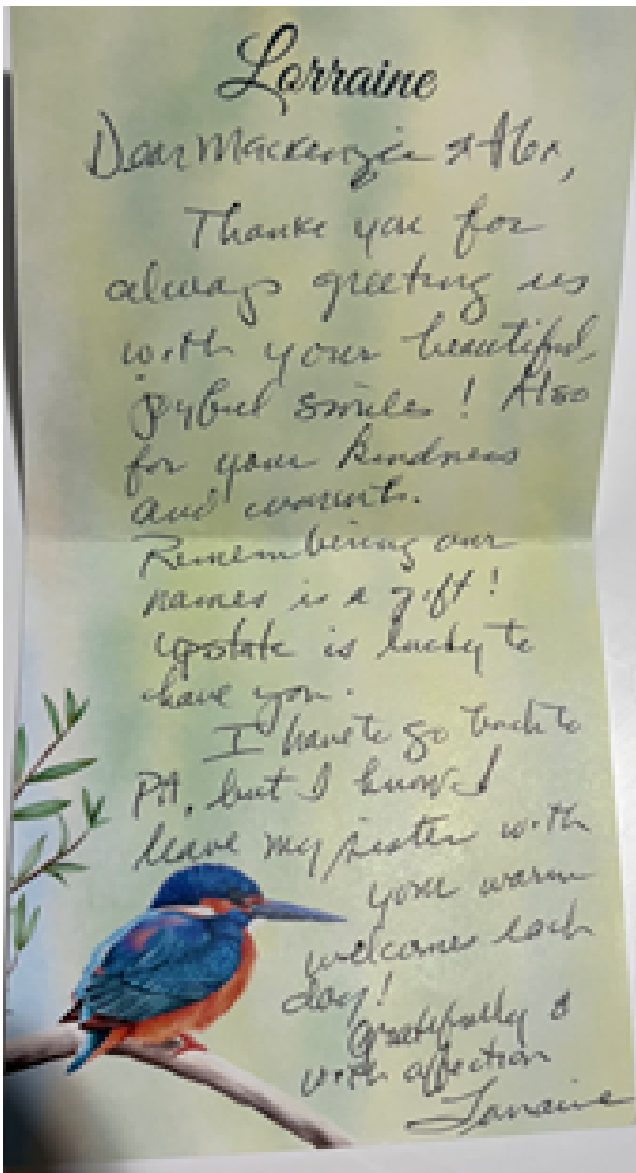
STAFF KUDOS

Compliment for **Shakira Telpha**. A patient gave Shakira a granny stitch blanket as well as a personalized note.



STAFF KUDOS

Compliment for **Mackenzie Petrocci (Kenzie)** and **Alexandra Campbell (Alex)** from a patient's family member.



Thank You
FOR MAKING
A DIFFERENCE



Compliment for **Shakira Telpha**, Central Reg at Community from a patient.

My appointment was rescheduled unbeknownst to me which left me stranded as my ride wasn't available. Shakira called MAS for me after I had asked others to help, which couldn't. She helped me get a cab. She was personable, professional and went above and beyond.

NICE WORK

STAFF KUDOS



Compliment for **Lorrelle Ash** from a patient.

Dear Friend,

At Upstate University Hospital and Community Hospital, our goal in healthcare is to exceed your expectations and to deliver excellent service.

We appreciate your help in recognizing direct care providers and staff members who make the best patient experience happen.

Please drop this comment card in any U.S. mailbox or in the Upstate Stars box in the hospital lobby.

You may also e-mail me at stars@upstate.edu or use the below QR code to send a thank you.

Your remarks will be shared among our staff as we recognize those who go above and beyond.

Sincerely yours,
Megan Chase, Human Resources
stars@upstate.edu



Please use this card or visit our website (upstate.edu/stars) by scanning the QR code.

RECOGNIZING AN UPSTATE STAR:

Staff Name(s) _____

Department/Unit _____

Reason for Recognition _____

Your Name (Optional) _____

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

Lorrelle
Registration Thank-
Her Kindness + you!
empathy. Took her time to
calm me down + walk me to
Radiology. Deserves praise + recognition!
Amy Washington - Gold A
necklace-like
your daughters
so



TOP COLLECTORS WAY TO GO

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

Brett ParsonsCollected on 219 accounts (\$36,703)

Shakira TelphaCollected on 55 accounts (\$5,638)

Marie Martinez.....Collected on 52 accounts (\$7,891)

Janella CharlesCollected on 51 accounts (\$7,940)

Laura Hand..... Collected on 50 accounts (\$1,942)

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



OPEN POSITIONS

Admitting:

OAS

Ambulatory Call Center:

Call Center Representative

Secretary 2

Nappi:

Ambassador

Patient Access Associate

Ambassadors:

Ambassador

Downtown Central Reg:

Registrar

ED Registration:

Outpatient Administrative Specialist

PID/Float:

Senior Registrar

Pre-Services:

Registrar

Central Scheduling Coordinator

UH CC:

Switchboard Operator



HAPPY BIRTHDAY

September Birthdays

Demetria Daniels	09/01	ED Reg
Sydney Wiesing	09/02	DT CR
Kimberly Cummings	09/06	UC CC
Randi Proctor	09/09	CG CR
Leanne Torres	09/10	ED Reg
Kathy Libby-McAnulty	09/13	Cent Sch
Janice Gualtieri	09/14	MDD
Logan McAnulty	09/15	Cent Sch
Christine Weaver	09/15	ACC
Shannon Austin	09/16	Pre-Serv
Eliza Bartle	09/17	CG CR
Shannon Burley	09/18	UC CC
Taylor Bartle	09/19	Amb
Christina Nelson-Dee	09/20	ACC
Megan Webb	09/20	Cent Sch
Mark White	09/24	Nappi
Vanessa Marmolejos	09/26	DT CR
Michelle Napier	09/26	UC CC
Kala Adams	09/27	ACC
Janella Charles	09/30	DT CR



Welcome to the following new employees:

Danielle Carrier	ACC
Emma Demane	CG CR
Sophia Derrick	CG CR
Denise Freeman	ED Reg
Elexus King	Nappi
Marissa Lefever	ACC



MOVERS & SHAKERS

Alex Hike-Patient Access Associate PID
Sharonda Jackson Richardson- Patient Access Associate PID



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](#)