

## DEPARTMENTAL UPDATES FROM

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

October 2025

### Patient Identification

Correct patient identification is THE most important role of Patient Access employees when it comes to ensuring safe patient care. This includes proper name search (do NOT rely on only searching by date of birth). Complete the steps necessary for a proper name search before starting a new record. [Review Name Search Guidelines](#) here.

The last important check-and-balance is confirming spelling patient name, including middle initial, and date of birth when applying a patient ID band to the patient. Skipping this step is a violation of Upstate's [Patient Identification policy I-02](#) and can result in harm to the patient.

We've been experiencing an increasing number of concerning errors. Getting it wrong can result in patient receiving care based on the wrong patient history, administration of the wrong blood products, providers not having patient's current diagnoses, medications and allergies. It also erodes the patient and family's trust in Upstate.

Take your time to develop good habits and slow down to ensure you have the right patient identification.



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## REGISTRATION TIPS

- For **unidentified pediatric trauma patients**, enter the date of birth as **01/01/ (current year)**, unless the correct DOB is known.
- Be sure to review the **patient** and **guarantor address** during the registration process.
- Collect missing **SSN numbers** whenever you can, as they help with patient identify and insurance look up.
- When reviewing **RTE**, always document any discrepancies in **Payer Filed Name/ Payer filed Sex** for the **covered member**. Document discrepancies for the **subscriber** in the **Payer Returned Name/ Sex /DOB**.
- Note use of the **W/C Generic** and **N/F Generic** plans should only occur after a thorough search of **Epic plans** results in no plan found under the carrier.
- Verify **MyChart enrollment** for each patient.



## LUNCH AND LEARN SESSIONS

### PAS Power Hour

Topic: Safety

Hosted by Nicholas Newcomb

Assistant Chief of Upstate Police

Friday October 17th, 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: 246 043 151 168 2

Pass code: aB9oa3bz

### Quote of the Day

“ When you help others feel important, you help yourself feel important too. ”

— David J. Schwartz

# ANNOUNCEMENTS

## Monthly Alert-Insurance Corner

### Patient Photo ID

#### **Important information**

A photo ID is crucial for patient identification, ensuring the correct person receives the right treatment and medication, which prevents medical errors and enhances patient safety.

Also ensuring we have the correct patient prevents the creation of duplicate patient records and then having to merge the record if discovered.

#### **Policy:**

It is the policy of Patient Access Services to request a form of photo identification from any patient 18 years of age or older at each visit (inpatient, outpatient or emergency room) at any University Hospital site. This process will ensure that the patient presenting is not misrepresenting another person and that care is being delivered to the correct patient.

#### **Procedure:**

Each time a patient 18 years or older presents for service, registration staff or other designated personnel must ask the patient for photo identification.

#### **Acceptable forms of ID include:**

**Driver's license**

**Sheriff's ID**

**Passport**

**Military ID**

**Non-driver's license**

At registration, always check to see if the driver's license, passport, and/or military ID is valid. If expired, simply advise the patient they will need to bring in a valid form of photo ID to their next visit.

**Document in the description field within the documents table** that the ID was expired and the patient was advised to bring in an acceptable valid form of ID.

# 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.

***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.

# ANNOUNCEMENTS

## Giving Campaign 2025

Welcome to the 2025 Community Giving Campaign Pledge!

We all know times are tough with grocery prices rising and National Grid increasing their rates. And with the government cutting or canceling some services all together we need to come together and help out those less fortunate than us.

Please consider donating to one of many worthy causes we have locally or globally. A one-time donation of \$26.00 would be less than \$1.00 a day for the month. A \$52.00 donation for the year would cost \$0.15 a day.

Alone we can do a little but if we all put forth a little effort to helping our neighbors and maybe one day ourselves, isn't \$0.15, \$0.30 or \$0.60 a day worth it?

Please consider donating. You can donate through payroll deduction, or you can make a one-time donation.

Thank you,  
Carol



# STAFF KUDOS

## Compliment for **Karicia Axson**

"Karicia is always willing to learn new things, she takes the initiative to learn and help other staff and especially patients. She will walk or wheel patients to where they need to go with a smile."



## You're a Star – **Kim Durand**

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.

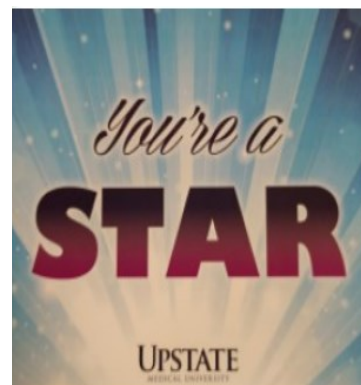
You may also e-mail me at [stars@upstate.edu](mailto:stars@upstate.edu) or use the below QR code to send a thank you.

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](mailto:stars@upstate.edu)



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



PLEASE DETACH

### RECOGNIZING AN UPSTATE STAR:

Staff Name(s) Kim

Department/Unit Nappi Patient access

Reason for Recognition Shes the best!! Helpful

Pleasant Shes the reason I want to come back here!!

Your Name (Optional) Jaylen

☒ (Patient) Family ☐ Faculty ☐ Staff ☐ Volunteer ☐ Other



# STAFF KUDOS

I just wanted to extend a heartfelt thank you for your amazing support and guidance on the Passage Point project for the PAS ED team. I have to admit—it's the fastest project I've ever worked on, and that's entirely thanks to:

- Kerry Wallace & Kevin Bigelow - IMT Team
- Kellie Hemry & Connor Ransier - Ambassador Team Leaders
- Brenda Passardi QIM, & Dustin Adams- Data Support specialist.

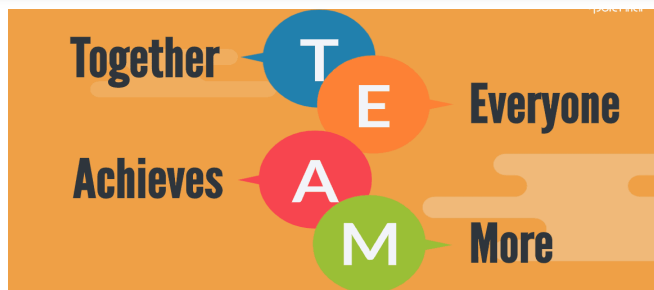
Your responsiveness, collaboration, and expertise made everything run so smoothly. Truly impressive work!

Best Regards,

**Hayam Khalil, CHAM**

PAS ED Manager

UH&CC ED



Kudos from the Family Medicine Nurses at Nappi to **Debbia Nelson** from the ACC-

Debbie, thank you so much for sharing with one of our patients that we were working on obtaining her required results. That saves us precious time to address other priorities and we see and appreciate your going that extra mile to support patient care !!

# STAFF KUDOS

Good afternoon,

I am writing to share a note of appreciation for the [staff at Upstate](#).

Today, while on my lunch break with my colleague, Hayam K., we encountered a visitor sitting on the curb in front of the hospital, sobbing hysterically while holding a small dog. As we approached to see if we could help, we realized the dog had passed away. The visitor shared that she had just been visiting her very ill brother on 9E, only to return outside and discover that her dog, who had been waiting in the car with a family member and appeared to have breathing trouble, had sadly died.

Her relative asked if we could stay with her while they searched for a way to care for the dog. We offered water and tissues but quickly recognized that what she truly needed was comfort, privacy, and support. Hayam and I reached out to Patient Relations and Spiritual Care, both of whom responded without hesitation.

Jean from Spiritual Care went above and beyond, compassionately holding the dog so that the owner could gently wrap him in her jacket, while offering calm presence and comfort. Bethany S. from Patient Relations arranged to provide the visitor with a private space where she could process the situation. Ultimately, the visitor went to Spiritual Care, where she was met with warmth, prayer, and genuine compassion.

In the midst of what had been a chaotic day, witnessing this kindness was a much-needed reminder of why I am proud to be part of this organization. The visitor was not a patient, but in her moment of distress, she needed us—and our team showed up with humanity and care.

Thank you for taking the time to read this, and for recognizing the incredible staff who make Upstate such a special place.

Sincerely,  
Kaniesha Mason

Kaniesha M Mason

Director of Registration

University Hospital RM 1321D

The fundamental  
human experience is  
that of compassion.

JOSEPH CAMPBELL

# TOP COLLECTORS WAY TO GO

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

*Brett Parsons .....Collected on 215 accounts (\$35,340)*

*Shakira Telpha .....Collected on 59 accounts (\$3,132)*

*Katelyn Jaeger.....Collected on 52 accounts (\$8,139)*

*Zainab Dougherty .....Collected on 52 accounts (\$5,231)*

*Lorrelle Ash..... Collected on 51 accounts (\$12, 720)*

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



# OPEN POSITIONS

## **Admitting:**

Outpatient Administrative Specialist

## **Ambulatory Call Center:**

Sr. Call Center Representative

## **CC Switchboard:**

Clerk 1 Operator

## **Nappi:**

Ambassador

Patient Access Associate

## **Ambassadors:**

Ambassador

## **Downtown Central Reg:**

Registrar

## **ED Registration:**

Outpatient Administrative Specialist

## **PID/Float:**

Senior Registrar

Performance Improvement Specialist

## **Pre-Services:**

Central Scheduling Coordinator



# HAPPY BIRTHDAY

## October Birthdays

|                    |       |                    |
|--------------------|-------|--------------------|
| Tricia Eldred      | 10/01 | Pre Admissions     |
| Hannah Stilwell    | 10/01 | Central Scheduling |
| Katelynn Jaeger    | 10/02 | DT CR              |
| Greg Schuyler      | 10/02 | Amb Call Center    |
| Alexander Colella  | 10/06 | Amb Call Center    |
| Lori Covington     | 10/07 | ED Reg             |
| Coleen Schaefer    | 10/09 | Verification       |
| Maggie Durham      | 10/10 | Pre Reg            |
| Shelley White      | 10/10 | All                |
| Shaunvay Lampkin   | 10/11 | DT CR              |
| Anne Otterness     | 10/12 | Pre Admissions     |
| Ruth Hooker        | 10/14 | ED Reg             |
| Mariya Yakuta      | 10/14 | Amb Call Center    |
| Hayam Khalil       | 10/15 | ED Reg             |
| Marisol McCullin   | 10/15 | Amb Call Center    |
| Adrianne Brown     | 10/16 | UC Call Center     |
| Marty Prater       | 10/16 | MDD                |
| Robin Thomas       | 10/17 | Data               |
| Megan Carey        | 10/19 | Admitting          |
| Stacy Wiczorek     | 10/22 | Nappi              |
| Jessica Bowles     | 10/23 | ED Reg             |
| Zainab Dougherty   | 10/24 | CC CR              |
| Kachelah Flournory | 10/25 | DT CR              |
| Amanda Parsons     | 10/28 | DT CR              |
| Colby Walker       | 10/30 | Nappi              |



### Welcome to the following new employees:

|                         |                 |
|-------------------------|-----------------|
| Danielle Carrera        | Amb Call Center |
| Shaunvay Lampkin        | DT CR           |
| Melodi McIntyre         | Nappi           |
| Abdias Nguemadi         | DT CR           |
| Loraine Serrano-Geraldo | CC CR           |



**Anne Otterness** accepted Pre Admission/ Verification position

**Alex Hike** accepted Patient Access Associate position on PID Team

**Sharonda Richardson** accepted Patient Access Associate position on PID Team



# 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](#)