

DEPARTMENTAL UPDATES FROM

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

November 2025



Could You Be Guilty of Snooping?

It starts out innocently enough. A co-worker asks you to look up their next appointment date with their specialist. You break the glass and tell them what they want to know. They gave you permission so it's no big deal, right?

...Wrong!

What you may not know is that all activity in Upstate Medical University's clinical system is monitored and that activity of helping your co-worker may be flagged for further review. This starts an investigation that will question your integrity and worthiness as an Upstate Employee. Snooping is a serious offense that can result in severe consequences, including internal disciplinary action, civil penalties, criminal charges, and the loss of your job.

Improper access to a patient's medical record or chart violates several campus wide policies, including the following policies below:

UW A-04 Access to Family Member and Other Patient Records

This policy explains that access to any medical record is restricted to situations directly related to clinical care, payment for care, or hospital operations, and provides options for individuals to access patient information.

C-28 Clinical Information System Security Access and Use

This policy explains that information systems are only to be accessed to perform essential job functions that support treatment, payment and/or healthcare operations.

UW C-01 Confidentiality

This policy also states employees may only access records if they are involved, in some way, with treatment, payment or operations.

These policies were introduced to us as part of the onboarding process when we began our careers in Patient Access. They can easily be found by clicking on Policies and Forms on your One-up page.



Entering anyone's medical record is not permissible unless it is to perform the functions directly related to your job. Scheduling, Registration, Pre-Registration, Insurance and Authorization Updates are all permissible actions.

Things such as looking up a friend/co-worker appointment, retrieving their insurance information, reviewing emergency contacts to get someone's phone number, retrieving an After Visit Summary and even viewing the ED Track board if you are working in a location other than the ED, whether for your own curiosity or because someone asked you to do them a favor, are not allowed.

Inside This Issue:

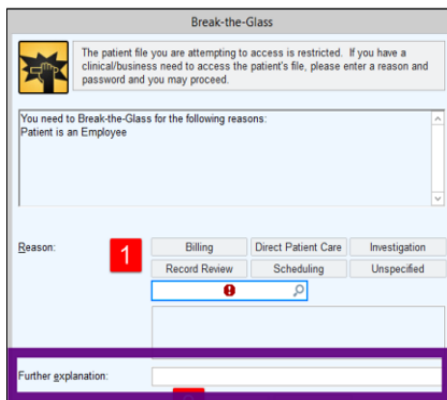
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An easy way to determine if what you are about to do is okay is to ask yourself, will I be making a legitimate workflow related update or change to this medical record? If your answer is yes, you are in the clear. If you are not sure, find your supervisor and ask.

Another way to protect yourself is to add a comment in the further explanation field. Simply clicking on a reason may not tell the whole story. If your name ends up flagged for investigation, having a note attached will help prove you entered the medical record for a permissible reason related to your job.



One question you may have after reading all of this is “what about the patient first philosophy or good customer service”?

Saying no doesn’t mean you are providing poor service.

You can still provide patient friendly service by referring the patient back to their provider’s office for appointment questions. Offer to give them the phone number or better yet, connect them with someone in the office, if the person has time to wait while you call.

Refer the patient to MyChart and offer the instructions for creating an account.

Refer the patient or family member to Health Information Management (HIM) for questions about medical records, again providing a contact phone number or if the patient is already at the downtown campus, walk them to the HIM customer service window.

As a Patient Access Representative, you’re an acrobat; walking a tightrope. You balance on that fine line between making patients, friends and family happy and comfortable while ensuring what you do and say does not violate HIPAA and/or University Hospital Policy. Every access, every click, and every search you make is documented. To uphold the responsibility of safeguarding patient information, our Offices of Institutional Compliance, Privacy and Ethics, and Information Security regularly conduct audits. These efforts are part of our ongoing dedication to fostering a culture of accountability and trust across the organization.

We all know not to look up to celebrities or victims of accidents and crimes and that looking into your own record, the record of a family member, or one of your neighbors, is a big no-no. Looking into co-worker’s records, just for informational purposes, even with permission, falls into that same category. Respecting privacy is a shared responsibility. If you’re ever asked to do something that feels like snooping or could compromise patient confidentiality, it’s important to acknowledge the request respectfully, be honest about your concerns, and explain why you must decline. Offering alternative solutions not only helps avoid uncomfortable situations—including potential HR involvement—but also demonstrates your commitment to Upstate’s policies. By handling such moments with integrity and professionalism, you help strengthen our culture of excellence and trust.

- Note the insurance verification status of “**Workers Compensation**” should only be used for WC coverages and the status of “**No Fault**” should only be used for NF coverages. These two statuses should not be used on health insurance.
- Verify **MyChart enrollment** for each patient at each registration.
- Always validate the patient’s **e-mail address** to ensure the spelling is correct.
- Always read **RTE** to see who the **subscriber** is. The spouse, parent, or patient could be the subscriber. **RTE** will provide this information.
- Check to see if the **Driver’s License Photo ID** has expired. If so, ask for the updated copy.
- Always follow the **Name Search Guidelines** when searching for patients. **Note:** Searching by **date of birth only** limits the results returned and **increases the risk** of patient identification.
- Always ask the patient if they have a **middle name** or **initial** if one is not listed.



LUNCH AND LEARN SESSIONS

PAS Power Hour

Topic: Finance/Follow- up

Hosted by

Sheri Edwards

Financial Services

Friday November 21st, 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: : 280 432 542 438 9

Pass code: ov2UV7Si

Quote of the Day

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

— David J. Schwartz

ANNOUNCEMENTS

Monthly Alert-Insurance Corner Registering VA Patient

Important information

For a scheduled Inpatient Admission or Ambulatory Procedure follow these steps:

- Schedule from the referral, verify if VA Auth is in place, scan Auth paperwork into **Media Tab** with '**VA Auth and Auth #**' in the description field.
- If the encounter has been scheduled prior to the referral being created, assign the referral to the correct encounter.
- For Emergent, Urgent and Direct Admits: We need to call the **VA Reporting Line** or use the **online Reporting System**.
- If patient does not have an auth, use P/F guarantor and attach VA CCN Optum Coverage. **Note the account** as to why no auth is attached. **DO NOT** attach VA Hospital No Auth coverage. This will route to Missing Reg Items WQ. PAS will check for auth. If none is found, they will either attach the Medical Coverage, or bill the patient. **ONLY** if the VA states it will be covered under Mil-Bill should the VA Hospital No Auth coverage be attached.

For ED follow these steps:

- If the patient states VA sent them, ask for the auth paperwork
- If the patient has an auth assign the VA CCN Optum Coverage and load the authorization number in the auth cert field
- If the patient states they have VA benefits but no auth, assign the VA CCN Optum Coverage and the auth number will be obtained by ED Leadership
- If the patient states they do not have VA Benefits, then assign the PF Guarantor and either make self-pay or assign their personal coverage. Note the account by adding a HAR note as to why no auth is attached. **DO NOT ATTACH** VA Hospital NO AUTH Coverage.

Effective October 18th, 2025: A new icon displays in the Storyboard when a patient is marked as a veteran. The icon can be clicked to update the patient's military history or used as a reminder to check and secure the correct coverage and authorization.



Take A ways:

- Always ask – are you a veteran when registering the patient (many times we find out days after an admission occurs from case management that VA benefits may apply and by then it is too late – our 72 hour notification window has expired – the VA automatically denies).
- Know the difference between VA Hospital and VA CCN Optum so plans are assigned appropriately.
- All care in our hospital needs a referral # or auth #.
- VA ID is always the patient's SS number
- All VA visits require an authorization number
- New Authorization numbers should be obtained from VA CCN Optum. All VA Authorization paperwork should be scanned to the Media Tab in the patient's chart with "VA Auth and the Auth # in the Description field.
- Look at the Payer Status on the VA Authorization paperwork to determine who to bill. VA Primary Payer means VA Coverage used only.

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



National Association
of Healthcare Access
Management



Congratulations to the following for passing the CHAA

Jessica Bowles



Word of the Month

Difference Maker

noun

A committed individual who is capable of having a significant effect with just a few words or a small act. A person who improves the lives of others. Someone who inspires and motivates others to progress and bring about change.

STAFF KUDOS

You're a Star – **Olivia Cheung**

The recognition is for Olivia Cheung, one of our ambassadors. She was complimented for the compassion she showed to a patient who needed help checking in. She is a great employee and always goes above and beyond to help out team out in need and is great with the patients. The compliment came from a patient . Submitted by Mark White



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.

PLEASE DETACH

RECOGNIZING AN UPSTATE STAR:

Staff Name(s) Olivia Cheung

Department/Unit Patient Access

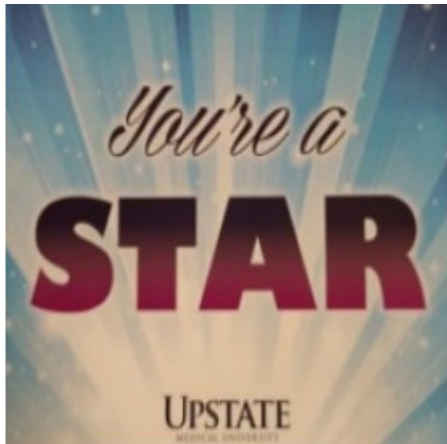
Reason for Recognition Compassion

Your Name (Optional) Joseph Wiatall

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



STAFF KUDOS



Compliment for **Sydney Wiesing**

RECOGNIZING AN UPSTATE STAR:

Staff Name(s) Sydney Wiesing

Department/Unit Blood / Registration

Reason for Recognition Effective, friendly

Your Name (Optional) Jane Zell

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



Submitted by Kaniesha

Sending a huge shout out to the **CC ED campus** for their POS Collection efforts. With one full day to go, this team has managed to collect nearly \$18K independently. Keep up the good work! UH downtown is on track to exceed \$8k. Collectively you guys have collected \$26K. This is a strong collections month. Keep up the good work!



TOP COLLECTORS WAY TO GO

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

Randi ProctorCollected on 65 accounts (\$10,355)

Katelynn JaegerCollected on 90 accounts (\$10, 877)

Lorrelle Ash.....Collected on 62 accounts (\$12,187)

Shaunvay LampkinCollected on 62 accounts (\$6,807)

Zainab Dougherty..... Collected on 50 accounts (\$4,462)



OPEN POSITIONS

Admitting:

Outpatient Administrative Specialist

Ambulatory Call Center:

Call Center Representative

Nappi:

Ambassador

Clerical Specialist 2

Patient Access Associate

Ambassadors:

Ambassador

Downtown Central Reg:

Registrar

ED Registration:

Outpatient Administrative Specialist

PID/Float:

Performance Improvement Specialist

Senior Registrar

Team Leader

Pre-Services:

Central Scheduling Coordinator



HAPPY BIRTHDAY

November Birthdays

Shakira Telpha	11/01	CG CR
Mark Carino	11/05	UC CC
Robert Mastrodicasa	11/07	ACC
Rmani Parnell	11/09	PID/Float
Tom Sekovski	11/16	UC CC
Derek Markle	11/19	ID/Float
Janie Thompson	11/19	ACC
Marc Buselli	11/21	ACC
Genevieve O'Leary	11/22	Verification
Dawn Johnson	11/24	DT CR
Haley McGuigan	11/29	Ambassador



Welcome to the following new employees:

Kerianne Grover	ED Reg
John Patch	DT CR
Julie Snay	ACC



MOVERS & SHAKERS

Nothing to Report this Month



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](#)