PATIENT ACCESS NEWS

UPSTATE
UNIVERSITY HOSPITAL

DEPARTMENTAL UPDATES FROM
PATIENT ACCESS SERVICES, UPSTATE CONNECT, AMBASSADOR SERVICES, AMBULATORY CALL CENTER

February 2026

From Check-In to Checkout: Why Patient Access Matters More Than Ever

In today's fast-paced healthcare environment, Patient Access plays a more critical role than ever before. From the moment a patient checks in to the time they leave our care, Patient Access teams help shape the entire experience. We are often the first point of contact, and that first interaction sets the tone for everything that follows.

Accurate registration, insurance verification, and clear communication are not just administrative steps; they are essential to patient confidence, safety, and financial transparency. When information is collected correctly at the front end, it helps prevent delays, reduces denials, and ensures patients understand what to expect regarding their care and costs. That clarity builds trust during what can be a stressful or uncertain time for patients and families.

As healthcare continues to evolve—with new technologies, policies, and patient expectations, Patient Access remains the steady foundation that keeps operations moving smoothly. Our work supports clinical teams, protects revenue, and most importantly, centers the patient experience.

Every question answered, every detail verified, and every patient greeted with professionalism and compassion makes a difference. From check-in to checkout, Patient Access isn't just part of the process, we are essential to delivering quality, efficient, and patient-centered care.

The role of a registrar goes far beyond data entry. Our patients rely on us to be knowledgeable, helpful, and accurate at every point of contact. By continuing to uphold these standards, we help make Upstate a trusted and valuable resource for the community and the patients we proudly serve.

Continue your professional growth by setting a goal to achieve your Certified Health Access Associate (CHAA) certification this year. See page 5 for information.

CELEBRATE
BLACK HISTORY MONTH
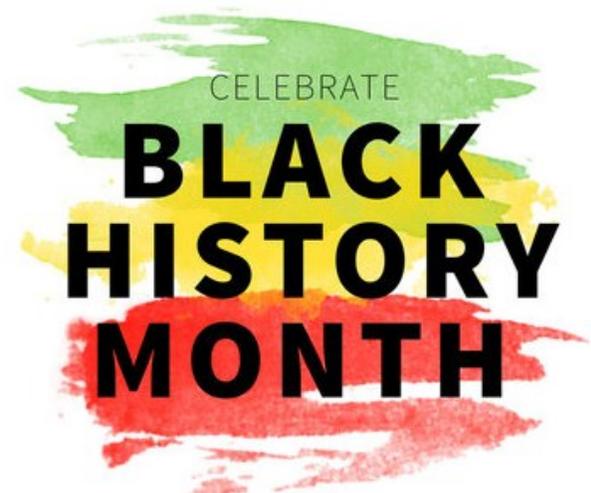
REGISTRATION TIPS

- Check to see if the *Driver's License Photo ID* has expired. If so, ask for the updated copy. If unable to obtain, enter a *HAR* note .

- When registering a *worker's compensation*, if the coverage is *State Insurance Fund.* you must enter the patients *social security number* also.

- Verify *MyChart enrollment* for each patient at each registration.

- 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.

- Be sure to review the *HCP information* that is on file with the patient at *each visit.*

- If a complete registration is performed from *demographics to documents*, the *checklist* will have minimal items to address.

- Capture all phone numbers for the patient including the area code.

LUNCH AND LEARN SESSIONS

PAS Power Hour

Topic: Insurance Jeopardy Game

Hosted by the PID Team

Friday February 2th, at 2pm

UH Cancer Center

Room C1076A

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: 258 573 617 827 22

Pass code: Xz62St97

Quote of the Day

"Good customer service is about understanding your client's needs and then exceeding them."

ANNOUNCEMENTS

Monthly Alert-Insurance Corner

Proper Patient Search

Many patients in our electronic medical record have the same or similar names. The registrar's role in patient safety is properly identifying the patient therefore it is imperative that they follow the Name Search Guideline when completing a patient search. The guideline walks you through an exhaustive search in effort to identify an existing medical record and helps to prevent duplicate record creation.

It is the policy of Patient Access Services to avoid the duplication of patient records by completing a thorough name search in the hospital information system prior to registering a patient for services. This practice which ensures past medical records are linked with the current encounter assists with maintaining the integrity of the patient medical record and facilitates patient care.

Completing a proper patient search:

Step 1 : Electronic Medical Record: Enter the **first three letters** of the **last name** and **first name** separated by a comma. If a match is found, after verifying with the patient additional demographic information that appear on the verification screen, (such as: social security number and date of birth) proceed with the registration. If a match is not found, return to the "Patient Look up" screen and proceed with Step 2.

Step 2 : Electronic Medical Record: Delete the first three letters of the last name and first name (separated by a comma). Value the **patient's DOB**. If a match is found, after verifying with the patient additional demographic information that appear on the verification screen, (such as: social security number and name) proceed with registration/pre-registration. If a match is not found, return to the 'Patient Look up' screen and proceed with Step 3. We find that the wrong patient is been easily selected because of searching by date of birth only.

Step 3: Electronic Medical Record: Delete the DOB. Perform the name search by entering only the **social security number** of the patient. NOTE: Children or Immigrants may not have a social security number making this step obsolete for this group. Review the list of names returned for a match to the patient. If a match is found, after verifying with the patient additional demographic information that appear on the verification screen, (such as: social security number and name) proceed with registration/pre-registration.

Always ask the patient if they have ever received care at our facility. Remember that Upstate is a large facility and patients may not remember if they've received care here. If they answer yes, we need to ask additional questions. It is important to ask if the patient could be in the system under any other name. This is a step that is often missed. ***Prior to placing a bracelet on a patients wrist, be sure to ask them to spell their full name and provide their dob.***

Documenting in the correct patient chart is essential for patient care. Be sure to always follow the steps above! Whenever in doubt, create a new record, as it is easier to later merge records if needed.

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 12:30 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

Listed below is the test window and dates for anyone interested in taking an upcoming exam.

Test Windows and Application Deadlines

Testing Window**	Application Timeline
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.

We are pleased to announce the promotion of Kellie Hemry to the position of Patient Access Services (PAS) Manager-Community Campus, effective February 12th.

Kellie brings a strong background in patient access operations, customer service excellence, and staff leadership. In her most recent role as Ambassador Team Lead, she has been responsible for the daily operations of Ambassador Services, including staff supervision, visitor clearance and sign-in processes, wayfinding, patient escorting, complaint resolution, payroll, evaluations, and training. Her ability to lead teams, manage competing priorities, and contribute to process improvement initiatives has had a positive impact on both patient experience and departmental efficiency.

Kellie has demonstrated adaptability, strong written and verbal communication skills, and a collaborative leadership style throughout her tenure within Patient Access Services and previous healthcare roles. Her experience spans across Central Registration, Bed Board operations, emergency department registration, patient advocacy, and community relations, providing a well-rounded perspective that will be invaluable in this leadership role.

Please join us in congratulating Kellie on this well-deserved promotion. We look forward to her continued contributions and leadership within Patient Access Services.

Sincerely,
Kaniesha Mason

Kaniesha M Mason

Director of Registration

University Hospital RM 1321D

naham National Association of Healthcare Access Management

CERTIFIED CHAM | CERTIFIED HEALTHCARE ACCESS MANAGER

Congratulations to the following for passing the CHAM Exam!

Kellie Hemry

naham National Association of Healthcare Access Management

CERTIFIED CHAA | CERTIFIED HEALTHCARE ACCESS ASSOCIATE

Congratulations to the following for passing the CHAA Exam!

Heather Fenton

Shymere Gandy

Congratulations

STAFF KUDOS

Congratulations to **Julie Snay** for completing her training with the Ambulatory Call Center.

From Melissa and Cheryl

Thanks,

Cheryl

Cheryl Dixon

Quality & Training Team Lead

SUNY Upstate Medical University

Compliment for **Shaunvay Lampkin**

A patient left a note saying "Honestly Shaunvay went above and beyond! Not only was she incredibly helpful and thorough, but she also put me at ease. I was so nervous before my appt and Shaunvay put me at ease completely and make me smile and laugh. She was so kind, helpful and went above and beyond. She made a crappy morning 100x better! Thank you Shaunvay!"

This is just one example of how our teams make a difference every day to our patients!

Just wanted to share this.

Thank you Shaunvay!

Bridget

Compliment for **Janella Charles** and **Amanda Parsons** from a patient.

With many thanks to you for your kindness.
The past 70 Hyperbarics you have greeted me with keindness and a Smile. Thank you for that calm before something that made me anxious
Cheers,
Danielle Thousand

Enclosed are lavender Sachets that are from my very own Summer harvest. Arbor of love, grown, picked, dried, and prepared by me :)

Thank You
FOR MAKING
A DIFFERENCE

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

Brett Parsons ………….……...Collected on 175 accounts ($36,273)

Kimberly Durand……...Collected on 64 accounts ($22,555)

Lorrelle Ash……...Collected on 63 accounts ($13,518)

Randi Proctor………..……....Collected on 44 accounts ($6,682)

Katelynn Jaeger……..... Collected on 41 accounts ($11,311)

Lets all try to make 2026 a ground breaking year with off the chart collections !!!

TAKE A LOOK
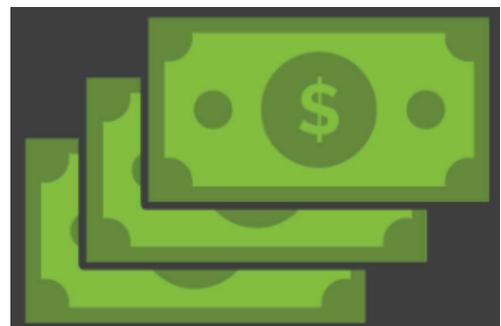
Admitting:

Outpatient Administrative Specialist

Ambulatory Call Center:

Call Center Representatives

UC Call Center:

Call Center Representative

Nappi:

Ambassador

Clerical Specialist 2

Patient Access Associate

Senior PAS Associate

Ambassadors:

Ambassador

Team Leader

Downtown Central Reg:

Registrar

Senior Registrar

ED Registration:

Outpatient Administrative Specialist

PID/Float:

Performance Improvement Specialist

Senior Registrar

Team Leader

Pre-Services:

Central Scheduling Coordinator

Make that job yours

February Birthdays

Bridget Dooher	02/12	DT CR
Savon Baldwin	02/16	Nappi
Tammy Hanscom	02/17	DT CR
Damian Irvine	02/18	BB
Jackie Pilon	02/18	UC CC
Jamauni Adams	02/23	UH CC
Taressa Smith	02/23	ACC
Michelle Stine	02/26	UC CC
Jonathan Maynard	02/27	Nappi
John Patch	02/27	DT CR
Heavyn Speights	02/28	Nappi

A BIG WARM WELCOME

Welcome to the following new employees:

Nothing to report this month

MOVERS & SHAKERS

Andrea Luce will be retiring at the end of February after over 36 years of dedicated service in Patient Access Services.

HAPPY Valentine's day

PATIENT ACCESS NEWS
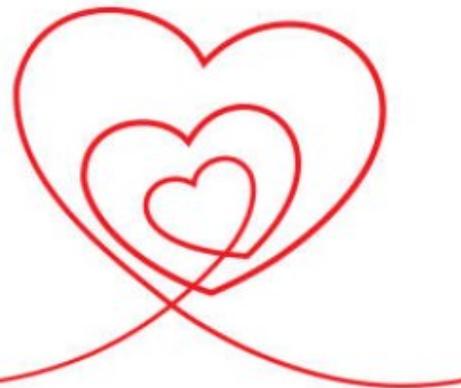
TRAINING RESOURCES

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

- **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