

## DEPARTMENTAL UPDATES FROM

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

April 2026

## Celebrating National Patient Access Week

Next week, we're proud to recognize **National Patient Access Week**, a time dedicated to celebrating the essential role our Patient Access teams play in caring for our patients and supporting our community.

Patient Access professionals are often the first point of contact for patients and families. Every day, you help set the tone for the patient experience—by answering questions, coordinating care, navigating insurance, and ensuring patients feel informed, supported, and welcomed. Your work is critical to removing barriers to care and helping patients focus on what matters most: their health.

National Patient Access Week is an opportunity to pause and say **thank you**. Thank you for your expertise, professionalism, compassion, and dedication. The impact you make is felt not only by our patients, but across our entire organization and community.

We encourage everyone to take a moment next week to recognize and appreciate the vital contributions of our Patient Access teams. Your commitment truly makes a difference—today and every day.

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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.
- An **expiration date** can be added in the document table, when a driver's license is expired.
- Always read RTE to verify the subscriber. A spouse, parent, patient or sibling could be the subscriber. RTE will provide this information.
- When a patient turns age 18, be sure to ask the patient under the permission to discuss if the patient contact information remains the same now that the patient is no longer a minor. The option to select is **Yes-verified when patient is over 18**.
- Do not forget to **term out** all **old insurances** that are no longer being used.
- Be sure to capture any missing SSN's as they help with patient identification.
- Be sure to review the patient and guarantor address during the registration process.

## LUNCH AND LEARN SESSIONS

### PAS Power Hour

**Topic: 2026 Epic Upgrade**

**Hosted by Myranda D'Elia**

**Friday April 10th, at 2 pm**

**Room C1071 (Smaller Room)**

<https://teams.microsoft.com/join/29105683658856?pwd=HuZoXdLbfZys2JXWPq>

**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.***

**Meeting ID: 291 056 836 588 56**

**Pass code: E3JF6XC2**



Happy Spring

### Quote of the Day

“Healthcare is not just about health. It's about dignity, empathy, and connection.”

— Unknown

# ANNOUNCEMENTS

## Monthly Alert-Insurance Corner



**In case you missed this, here's some important payor information...**

**Important information** **New Referral requirements for UHC Medicare Advantage HMO/HMO-POS plans eff. 1/1/2026**

**Starting Jan. 1, 2026**, most members enrolled in UnitedHealthcare Medicare Advantage HMO and HMO-POS plans will be required to obtain a referral from their primary care provider (PCP) before accessing certain specialist services in outpatient, office or home settings. Referrals must be submitted by the PCP to UnitedHealthcare prior to the specialist visit.

The new referral requirements will NOT apply to services provided by a:

- Primary care provider
- Mental health provider
- Obstetrician/gynecologist
- Chiropractor
- Audiologist
- Oncologist
- Hematologist
- Nuclear medicine
- Neonatology
- Emergency medicine
- Nutritionist
- Podiatrist
- Optometrist
- Ophthalmologist
- Optician
- Radiologist
- Therapeutic radiologist
- Infectious disease specialist

Urgent care

In addition, PCP referral is NOT required for these services:

- PT/OT/ST
- Cardiac rehabilitation services or pulmonary rehabilitation services
- Provision of anesthesiology (pain management services rendered by an anesthesiologist do require a referral)
- Home health agency services
- Services performed in an observation setting
- Any services from a pathologist or inpatient consulting physician, including hospitalists
- Emergency room, ambulance or urgent care services
- Same-day or walk-in visits for evaluation and treatment for orthopedic urgent care with a diagnosis of acute fracture, sprain, strain, dislocation or other acute injury
- Telehealth services
- Medicare-covered preventive services, kidney disease education or diabetes self-management training
- Routine annual physical exams, routine vision exams or hearing exams
- Dialysis services
- Any lab services or radiological or non-radiological testing services, including preventive and diagnostic mammograms and colonoscopies
- Durable medical equipment, home health, prosthetic/orthotic devices, medical supplies, diabetic testing supplies, Medicare Part B drugs or allergens

Additional coverage that may be included by some Medicare Advantage plans but are not covered by Medicare, such as hearing aids, routine eyewear, dental care, fitness memberships or outpatient prescription drugs

# ANNOUNCEMENTS

## Monthly Alert-Insurance Corner Page 2

### Key dates

UnitedHealthcare has allowed a grace period through **April 30, 2026**. However, providers are encouraged to begin submitting referrals for services scheduled on or after **Jan. 1, 2026**. Claims for specialist services without a referral will be denied beginning May 1, 2026.

### What does this mean for us?

If the patient arrives for a specialty office visit it is important to ensure the referral is in place. Specialty Offices include (but are not limited to) Cardiology, ENT, Endocrinology (Joslin), GI, General Surgery, Nephrology, Orthopedics, Pulmonary and Urology.

A referral should also be on file for the physician and the Upstate facility for elective hospital admissions and procedures.

Referrals can be located on the UHC web portal <https://www.uhcprovider.com/>.

IMT has already created an RTE alert for us.

The screenshot shows a sidebar menu on the left with categories like 'Table of Contents', 'Query Status', 'Alerts', 'Subscriber Info', etc. The main content area is divided into sections: 'Query Status' showing 'E-Verified' for Patient: Mary E Miller, Eligibility Start Date: 1/1/2026, and Payer: UHC UNITED MEDICARE DUAL. Below that is an 'Alerts' section with a yellow warning icon and the text: 'Referral Req'd UHC MCR ADV HMO/HMO-POS PCP TO SUBMIT A SPECIALIST REFERRAL.' The alert text is highlighted with a green border. At the bottom, there is a 'Subscriber Info' section.

### Resources:

Get answers to your questions about referral requirements: [2026 UnitedHealthcare Medicare Advantage Referral Requirements Guide](#)

Get updated plan information: [2026 Medicare Advantage, CSNP & DSNP Plan Overview Course](#)

- Verify eligibility and request referrals digitally: UHC offers several digital tools to help you manage eligibility and referral activity. The [Digital Solutions Comparison Guide](#) can help you choose which tools are right for your practice.

Learn how to verify referral requirements, submit requests and see the status of referrals in the Provider Portal: [Referrals Interactive User Guide](#)

If you have questions about the referral process, please speak with your department leadership. <sup>te</sup>  
3/26



# 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 12:30 on the 4th Thursday of every month.**

**Sign up will be available in Self-Serve.**

**IMPORTANT REMINDER**

**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

## Take Note



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

THANKS  
for your

DONATIONS



## REMINDER

### Giving Back Gives Back!

Great news! Shannon Austin was notified last week that, thanks to her donation to the United Way of CNY through Upstate's annual Community Giving Campaign and her participation in the Step-Up Challenge, her name was drawn as one of the weekly winners- wahoo!

Congratulations to **Shannon** for winning a **\$50 Wegmans gift card!** What a great reminder that supporting our community truly shows how giving back can come full circle. 🐝

## UPD Theft Prevention Awareness

Important  
Information



### Tips For Keeping Your Belongings Safe



- 1 Minimize Valuables:**
  - Leave valuables, unnecessary to work, at home.
  - Store bags/purses out of sight. Out of sight, out of mind!
  - Secure personal items when leaving your desk, office, or building.
- 2 Physical Storage:**
  - Use lockers that are properly secured with a lock.
  - Lock desk drawers and cabinets.
  - Use cable locks to secure oversized items.
- 3 Workplace Awareness:**
  - Do not leave doors unlocked or propped open.
  - Stay alert and if you see something, say something.
  - Don't leave items unattended in shared common areas.
- 4 Identification:**
  - Clearly label/mark high-value items.
  - Keep record of serial numbers.
  - Consider registering expensive items with a tracking service.
- 5 See Something, Say Something!**
  - Report suspicious activity to **UPD at 315-464-4000**

# STAFF KUDOS

Congratulations to **Taressa Smith** for completing her training with the Ambulatory Call Center!!

Submitted by Cheryl Dixon

Congratulations to **Na Na Roberson** for completing her training with the Ambulatory Call Center!!

Submitted by Cheryl Dixon



Note from Dettrick P, Cardiac Rehabilitation:

Just wanted to extend our appreciation for **Shannon Austin**, **Victoria Watts** and **Kelly O'Hara** (Central Scheduling) with their support in transitioning the "front end" work away from our Cardiac Rehab clinical team.

They are doing an amazing job, way faster than expected.

Thank you!





## Congratulations to the UC Call Center Team Recognized for Team Culture

Upstate Connect has been awarded the **Healthcare Contact Center Team Culture Award (under 50 agents)** by Healthcare Contact Center Times, recognizing the strength of its work-place culture and the people who sustain it every day.

This award belongs to the **team**. It reflects a culture built through collaboration, mutual support, shared responsibility, and a commitment to showing up for one another as humans — not just coworkers. The recognition highlights the everyday behaviors that define the team: stepping in when help is needed, sharing knowledge freely, maintaining professionalism with compassion, and supporting one another through the demands of a 24/7 operation.

The culture at Upstate Connect is not driven by any one individual, but by the collective actions and values of the team as a whole. This award acknowledges that culture is lived daily — in how people treat one another, work together, and serve the Upstate community.

*Jacqueline A Pilon*

She/Her

Upstate Connect Call Center  
& Switchboard Manager



Way  
to go!

# STAFF KUDOS



Compliment for **Jack Patch** from a patient.

**RECOGNIZING AN UPSTATE STAR:**

Staff Name(s) Jack Patch

Department/Unit 550 Harrison Ste J.

Reason for Recognition Excellent Customer Service. Very polite AND patient.

Your Name (Optional) Schelly

Patient /Family    Faculty    Staff    Volunteer    Other

Compliment for **Kathy Libby McAnulty** from a patient.



Staff Name(s) Kathy

Department/Unit Scheduling

Reason for Recognition Pleasant on phone (you have a gem) Very helpful with scheduling

My dexa scan + mammogram

Went above + beyond calling my Dr. to get script. Very professional

Your Name (Optional) Debbie Morrell. Very helpful.

Kelly O'Hara  
Team Leader  
Central Scheduling  
[oharak@upstate.edu](mailto:oharak@upstate.edu)  
Office phone 315-464-3753



# STAFF KUDOS



Compliment for **Savon Baldwin**

Dear Savon,

Please see the forwarded Thank an Upstate Star submission from Kelley.

This message recognizes you for your *dedication to your colleagues and willingness to help*. It's great to know your colleagues think so highly of you.

**Thank you for your continued support of Upstate's mission.**

#### **Description**

I wanted to take a moment and recognize SAVON for the truly outstanding work he is doing.

His dedication, professionalism, and consistent effort have not gone unnoticed.

SAVON brings a positive attitude to the workplace each day and goes above and beyond expectations.

Its clear SAVON takes pride in his work, and it reflects everyday., he is very respectful and speaks to everyone with a Good Morning. :)

Thank You Savon for making Adult Medicine run efficiently.

Your truly an UPSTATE STAR!!





# STAFF KUDOS

Congratulations **Deb Maddox** you are officially a Patient Experience Champion!

Thank you,

Hayam Khalil, CHAM

PAS ED Manager

UH&CC ED





# TOP COLLECTORS WAY TO GO

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

*Brett Parsons .....Collected on 174 accounts (\$32,077)*

*Randi Proctor.....Collected on 74 accounts (\$7,535)*

*Kimberly Durand.....Collected on 64 accounts (\$2,700)*

*Lorrelle Ash.....Collected on 59 accounts (\$7,179)*

*Laura Hand..... Collected on 55 accounts (\$2,107)*

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



# OPEN POSITIONS

## Admitting:

OAS

## Ambulatory Call Center:

Call Center Representative

## Nappi:

Ambassador

Senior PAS Associate

## Ambassadors:

Ambassador

Team Leader

## Downtown Central Reg:

Registrar

Senior Registrar

## ED Registration:

OAS

## PID/Float:

Team Leader

Senior Registrar

## Pre-Services:

Sched Registrar

## UC Call Center:

Call Center Agent

## CG CR:

Registrar



# HAPPY BIRTHDAY

## April Birthdays

Jacqueline Barrett	04/02	ACC
Kellie Hemry	04/07	CG CR
Teresa Campbell	04/08	ACC
Christine Slicker	04/08	H CR
Nicole Cilani	04/09	ACC
Melissa Bernhardt	04/10	ACC
Rusanne Billings	04/10	Nappi
Tammy Gallivan	04/13	MDD
Elexus King	04/18	Nappi
NaNa Robertson	04/18	ACC
Marcia Knobel	04/19	Ambass
Connor Ransier	04/19	Ambass
Julie Snay	04/19	ACC
Kimberly Durand	04/20	Nappi
Deborah Johnson	04/22	ED Reg
Elizabeth Schiller	04/22	Admitting
Shymere Gandy	04/23	ED Reg
Lorrelle Ash	04/25	CG CR
Tracey Chesbro	04/27	MDD
Sharonda Jackson-Richardson	04/29	PID



### Welcome to the following new employees:

Angel Burroughs	UC CC
Cullen Castrello	UH CR
Mailyynn Matos-Diaz	ACC
Christine Slicker	UH CR
Tia Smith	Ambassadors
Shania Houston	UH CR

## MOVERS & SHAKERS

Mark Carino took state position in UC CC







# 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