

## DEPARTMENTAL UPDATES FROM

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

July 2026

Culture Community

## Upstate Connect Wins Inaugural National Culture Award

Upstate Culture  
Jun 25 · 1m read · 108 views

English Listen



The Upstate Connect Call Center has earned national recognition as the recipient of the 2026 Healthcare Contact Center Times (HCCT) Contact Center Culture Award (Less Than 50 Agents). **This prestigious honor celebrates organizations that foster a positive, empowering workplace culture while delivering exceptional service and enhancing the patient experience.**

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Selected from organizations across the country, Upstate Connect was recognized for its people-first philosophy, and for creating a workplace culture built on trust, collaboration, and continuous improvement.

The team has achieved an extraordinary milestone of zero agent turnover for two consecutive years while expanding its client base, taking on larger accounts, and maintaining an average patient wait time of less than one minute.

Adding to this achievement, **Jacqueline Pilon**, Manager of Upstate Connect, has been named **HCCT Contributor of the Year** in recognition of her outstanding leadership and contributions to advancing excellence in healthcare contact centers.



Together, these awards reflect the dedication, professionalism, and collaborative spirit of the entire Upstate Connect team. Every day, they play a vital role in supporting patients and strengthening Upstate Medical University's mission through compassionate, high-quality service.

Please join us in congratulating Jackie and the entire Upstate Connect Call Center team on these well-deserved honors and this outstanding achievement.



## REGISTRATION TIPS

- When taking a **verbal consent** be sure to include the **name of the person** giving the verbal, their **phone number** and the **reason for the verbal**.
- Scan both **front and back** of all **insurance cards** and label the payor name in the document table.
- Be sure to verify the SSN with the patient at each visit. If patient refuses to provide their SSN, enter a note .
- Open and use the **sidebar Checklist** only when you are finished with the registration.
- 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.
- Before placing a bracelet on a patient be sure to have them **spell their first and last name** back to you. Also use the 2 other patient identifiers , **DOB** and **SSN** to make sure you have the correct patient.
- Verify **MyChart enrollment** for each patient registration.



## LUNCH AND LEARN SESSIONS

### PAS Power Hour

**Topic: Active Shooter**

**Hosted by Lauren Bordonaro**

**Tuesday July 21 at 2pm**

**Room C1071 Cancer Center**

**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://teams.microsoft.com/join/25500180375206?p=fUH2LywqJQSfIV4Wdk>

**Meeting ID: 255 001 803 752 06**

**Pass code: 4Tb6zH9k**

### Quote of the Day

“Nothing is impossible, the word itself says I’m possible.”

—— Audrey Hepburn

# ANNOUNCEMENTS

## Monthly Alert-Insurance Corner

### Important information

### BCA Web Downtime Workflow

BCA Web is used during Epic downtimes when the Upstate network is functioning.

- ◆ Information can be uploaded to **Epic Hyperspace** once the system is back online.
- ◆ BCA Web is available only if the Upstate network is functioning.
- ◆ **Registration Staff** should use BCA Web whenever it is available
- ◆ BCA Web can be accessed from any Upstate computer, but during a power outage, use the designated BCA Web computers. These have battery operated red keyboards.
- ◆ Test these backup computers and printers **weekly** to ensure they are charged and functioning properly.

### Downtime Procedures

- ◆ During a full downtime, we cannot access BCA Web or Downtime Read Only. A **Master Patient Index (MPI)** is emailed weekly to supervisors. This should be saved on the **downtime computer** for patient lookups during downtime events. This document takes a long time to upload, open the document as soon as a downtime occurs. CTRL F can be used to search for patient names.
- ◆ All registration must take place on a paper registration from which can be found in the Downtime binder.
- ◆ All encounters must have a CSN. Assign a CSN from the Downtime binder. This number follows the patient throughout the encounter and allows us to link test results and labs to the patient.
- ◆ If a patient record cannot be located in Epic Downtime, **DO NOT** assign an MRN. A new MRN will be assigned when the patient is later entered in Epic.
- ◆ Once Registration is completed, create a bracelet. Best practice is to use word. Follow the tipsheet in your binder to create label using Word. The label should be applied to the wristband. Use a two-person verification to ensure the information is correct.

### Keep in mind the following bullets:

- ◆ **Granting access to records.** To have access to the existing patient data in Epic, you must grant yourself access when logging in. Missing this step will result in being unable to access patients that already exist in Epic. This could lead to duplicate records if missed.
- ◆ **Creating a Patient :** Once an exhaustive search has been done, create a new patient if they cannot be found.
- ◆ **Creating an Encounter:** You can admit a patient and arrive a patient to the ED .
- ◆ **Admission Screen:** If this is a new patient, a MRN will be assigned during the admission.
- ◆ **ED Arrival Screen:** If this is a new patient, a MRN will be assigned during the arrival process.
- ◆ **Printing Labels and wristbands :** Go to the patient's chart to access their labels and wristbands. Labels from the Chart-Select the Downtime Label Template and Print.
- ◆ **Print Settings:** Go to More Settings and change scale to Actual Size.

# 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.**



**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

## IMPORTANT REMINDER

Reminder to always look at back of ID cards

We have an Allied benefit insurance in EPIC- but back of ID card says to send to Cigna which is how it should have been entered.

Always copy both the front and back of every insurance card and label the payor name in the document table.



Please remember when running RTE to verify insurances, do not use the update coverage button but **create a new coverage**. When the update option is used it causes the original ID number to be overwritten for the patient and results in a new plan has to be created for the patient . The update button should never be used.

# STAFF KUDOS

Compliment for **Angela Galutz** shared by the Leadership Team

We recently received a note recognizing you as a Patient Experience Champion. It was shared that you resolved the customer's concerns promptly while demonstrating kindness, compassion, and a genuine willingness to help.

On behalf of the leadership team, thank you for your outstanding commitment to providing an exceptional patient experience. Your kindness, generosity, and dedication to those we serve are exactly what our patients and organization need. We sincerely appreciate the positive impact you make every day. Keep up the excellent work!

Kaniesha

Kaniesha M Mason

Director of Registration



*Thank You*

FOR MAKING  
A DIFFERENCE

Congratulations to **Tahlia Brice** and **Mailyynn Matos-Diaz** for completing their training with the Ambulatory Call Center!! Your customer service and attention to detail have been AMAZING!! Great job to both of you! From Melissa and Cheryl



# TOP COLLECTORS WAY TO GO

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

*Brett Parsons.....Collected on 219 accounts (\$26,886)*

*Laura Hand.....Collected on 56 accounts (\$2,190)*

*Randi Proctor.....Collected on 49 accounts (\$8,060)*

*Cullen Castrello.....Collected on 47 accounts (\$4,053)*

*Zainab Dougherty..... Collected on 43 accounts (\$2,217)*

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



# OPEN POSITIONS

## Admitting:

OAS

## Ambulatory Call Center:

Call Center Agent

## Nappi:

Ambassador

Manager

PAS Associate

## Ambassadors:

Ambassador

Team Leader

## Downtown Central Reg:

Senior Registrar

Team Leader

## CG CR:

Ambassador

## ED Registration:

OAS

## PID/Float:

PAS Associate



# HAPPY BIRTHDAY

## July Birthdays

Catherine Smith	07/02	Central Sched
Shaquana Woodley	07/03	UC CC
Ananya Choudhury	07/04	Data
Deanna D'Arrigo	07/04	ED Reg
Steven Johnson	07/07	Verification
Melanie Carbone	07/09	ACC
Jacqueline Hardy	07/09	Pre Reg
Teresa Engelbrecht	07/11	Central Sched
Pamela Dineen	07/12	ACC
Brett Parsons	07/12	Verification
Corey Bivens	07/14	Ambassadors
Denise Freeman	07/15	ED Reg
Marie Martinez	07/18	DT Central Reg
Debbia Nelson	07/19	ACC
Tharesa Taylor	07/20	Nappi
Melissa Yarbrough	07/20	ACC
Kenzi Petrocci	07/24	Ambassadors
Denise Williams	07/27	Nappi
Jessica Newson	07/29	Verification
Christopher Indeck	07/31	Nappi



### Welcome to the following new employees:

Taj Collins	ED Reg
Jasmine Ho	Nappi
Ja'nae Howington	Admitting
Vincent Livingston	DT Central Reg
Glorivette Martinez	DT Central Reg
Brittney Schlie	Registrar
Warsan Ahmed	Ambassador



## MOVERS & SHAKERS

Alexander Hike was promoted to Nappi Team Leader

Connor Ransier has accepted a new job with the Lewis County Health Department and will be leaving Upstate mid-July.



# 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](#)