

DEPARTMENTAL UPDATES FROM

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

July 2026

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REGISTRATION **TIPS**

- Always **check** and **verify the SSN#** with every registration
- **Medicare** coverage tip: if the **ID#** starts with a **1** it is **UHC Medicare Dual**. If the **ID# starts** with an **8 or 9** it is **UHC Medicare completed**.
- Always ask the patient if they have any **other insurance** and **document** accordingly
- Be sure to view the **HCP information** that is on file with the patient at each visit
- Scan both **front** and **back** of every insurance card and label the **payer name**
- Be sure to check if the patient has an active **MyChart**. If not, offer to send the **activation code** and **email** and offer to assist he/she in setting up their account.
- Do not forget to **term out** all **old insurances** that are no longer being used.
- Be sure to review the **patient** and the **guarantor address** during the registration process.
- Check with every registration if there is proper **Photo ID** on file and not expired.

LUNCH AND LEARN SESSIONS

PAS Power Hour

Topic: New Anonymous Workflow

Hosted by Kaniesha and Brenda

Monday August 24th at 2pm

Room C1076A 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/256009462567395?p=ZdotJrpHyjbFSle6hn>

Meeting ID: 256 009 462 567 395

Pass code: fX2PE6E9



Quote of the Day

“Kindness and courtesy are at the root of a positive customer service experience”

_____ Shep Hyken

ANNOUNCEMENTS

Monthly Alert-Insurance Corner

Important information

Medicare Alert

The Centers for Medicare & Medicaid Services (CMS) recently notified Medicare plans that they processed 1.3 million Medicare Beneficiary Identifier (MBI) reassignments with an effective date of April 14, 2026

Why Is CMS Reissuing MBIs in March/April 2026?

Medicare takes steps to protect beneficiary's identity and prevent fraud. New Medicare cards mailed to Beneficiaries Due to Fraud.

New Medicare Beneficiary Identifier (**MBI**) numbers due to fraud. Medicare is sending these new cards with a letter explaining why new numbers were issued. Beneficiaries who receive a new card and are unsure of its legitimacy can call 800-Medicare or OSHIP at 800-686-1578 for assistance. These new cards are NOT plastic. They are the standard paper red/white/blue card

Note: this update does not mean your Medicare coverage is changing.

What Is an **MBI**? Your Medicare Beneficiary Identifier (MBI) is the number printed on your red, white, and blue Medicare card. Doctors, hospitals, pharmacies, and insurance companies use this number to process your claims

How Do MBI Changes Impact Medicare Beneficiaries?

It's important for your clients to be aware of their new MBI when applying for different health coverage and seeking care from their providers. Receiving a new MBI can lead to:

- Client confusion Insurance applications and claims being denied or placed on hold due to an outdated MBI number
- Claim processing and eligibility reverification taking longer, possibly resulting in delays
- Added strain on everyone, including providers' staff, due to inconsistencies

Next Steps for Agents

What can you do for your clients now? Ask your clients if they've received a letter from CMS regarding receiving a new MBI or Medicare card in the mail. Let them know, if so, it's imperative that they take the necessary next steps outlined by CMS.

Once beneficiaries receive their new card, CMS typically instructs them to :

- Follow the instructions in the letter that comes with the new card
- Destroy their old Medicare card
- Inform their providers of their new Medicare number

New MBIs need to be used on enrollment applications to minimize processing delays. Encourage your clients to proactively manage their coverage to ensure a smooth transition to their new MBI.

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.

**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

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.

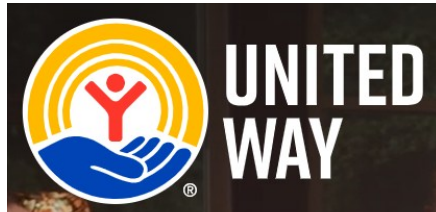
ANNOUNCEMENTS

REMINDER



Donations sought for Mary Nelson's backpack and school supplies drive now through Aug. 5

Donate new or unused backpacks and school supplies to help local children prepare for the school year. Items will be distributed at the 25th annual Mary Nelson's Youth Day Celebration Saturday, Aug. 15. Donations will be accepted now through Aug. 5 at various locations throughout campus. For drop box locations, visit www.upstate.edu/backpack. Questions? Email Becca at pescir@upstate.edu.



Volunteers sought for United Way's Day of Caring Aug. 6

Volunteers are sought for the United Way's Day of Caring, to be held Thursday, Aug. 6. The event is the largest annual community-wide day of volunteering in CNY. A supervisor's approval is required, and volunteers must document the following in Self-Serve: approval from a supervisor, the total time volunteered, where the volunteering took place, and for what organization. For opportunities and to sign up, visit: https://www.volunteercny.org/need/index?s=1&need_init_id=15563. Upstate staff who volunteer are asked to wear an Upstate shirt. Registered volunteers who don't have a shirt may email Rebecca Pesci at PesciR@Upstate.edu.

ANNOUNCEMENTS

WHATS NEW?

NEW: Metabolic Weight Loss Clinic at the Community Campus

MD Direct is partnering with Dr. Sloan to introduce this exciting new service and assist with the initial referral and scheduling process.

The clinic is currently accepting **Upstate employees only** who are interested in weight management services and support. If you are interested in participating in this program, or know an employee who may be interested, please feel free to share this information.

Employees who would like to learn more or schedule an appointment are encouraged to contact the **MD Direct team** at **315-464-4842**. Our team will create the referral, which will be sent to the Metabolic Weight Loss Clinic for review. Once the referral has been reviewed, they will contact you directly to discuss the program and schedule an appointment.

Current eligibility criteria include:

- BMI ≥ 30 kg/m² documented within the past 180 days.
- BMI ≥ 27 kg/m² documented within the past 180 days **and** a history of one or more of the following:
 - Fatty liver disease
 - Metabolic dysfunction-associated steatohepatitis (MASH)
 - Polycystic ovary syndrome (PCOS)
 - Hypertension (HTN)
 - A1c greater than 5.7%
 - History of gestational diabetes
 - Obstructive sleep apnea (OSA)
 - Hyperlipidemia (HLD)
 - Coronary artery disease (CAD)

Thank you for helping us spread the word about this new service and support this exciting pilot program!

Shannon Austin
PAS, MD Direct & Ambulatory Call Center Senior Manager



STAFF KUDOS

Congratulations **Samantha Davis** on becoming our new Senior Agent with the Ambulatory Call Center! Your outstanding work and wonderful customer service will be invaluable in your new role.



Compliment for **Greg Schuyler**

Submitted by Cheryl Dixon

Recognition from Family Med Nappi: "I wanted to share that last night we received a message from Greg Schuyler regarding a potentially patient safety issue. In reviewing the notes, it was clear that this could have been a near miss if assumed to be related to an ongoing issue that was addressed earlier in the day. Greg demonstrated excellent judgment reaching out to the triage nurses for immediate live transfer. I truly believe that Greg played an integral role in helping the patient access the supports she needed to ensure timely assessment and care planning.

Sincere thanks from this team and on behalf of the patient"

Great job, **Greg!**

Thank you for your proactive involvement in supporting this patient. Your dedication and commitment played an integral role in ensuring they received the assistance and resources they needed.

We truly appreciate your efforts and the positive impact you make every day. Thank you for being a valued and essential member of the ACC team.

Thank you,
Melissa

Melissa Yarbrough, BSHA
Senior Team Lead
SUNY Upstate Medical University
Ambulatory Call Center



STAFF KUDOS

Kudos to the **Call Center Representatives**

Compliment from patient with Family Med CC- “I want to thank all the Call Center reps I’ve spoken to recently. They have been kind, patient and very helpful when I need to communicate with my doctor’s office. I appreciate all of their help!”

Submitted by Melissa Yarbrough

Ambulatory Call Center Team Leader

Ambulatory Call Center



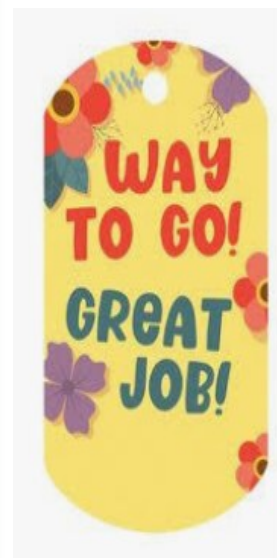
“TEAMWORK” **KUDOS TO PAS ED STAFF** **&** **FRIENDS OF THE ED!!!**



This summer, while many were away enjoying time with family and friends, The Upstate *PAS ED TEAM* and the *Friends of the ED*, met every challenge to cover the ED with a smile and an open heart. ***“It turns out the secret ingredient was each other all along — proving that teamwork and compassion make every season brighter”.***

GREAT JOB TEAM

Thank you from
PAS ED Leadership Team



STAFF KUDOS

Compliment for **Kim Durand**



RECOGNIZING AN UPSTATE STAR:

Staff Name(s) Kim Durand
 Department/Unit Patient Access Nappi
 Reason for Recognition She went out of her way to get in touch with the surgeon for me and we left the office the surgeon's office called me that was such a great help to me
 Your Name (Optional) Joanne Wallis Texas
☒ Patient /Family ☐ Faculty ☐ Staff ☐ Volunteer ☐ Other



Compliment for **Jonathan Maynard-UPSTATE STAR**

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

RECOGNIZING AN UPSTATE STAR:

Staff Name(s) Jonathan Maynard
 Department/Unit Connect Care
 Reason for Recognition Helped me immediately was kind. Answered all questions/concerns.
 Your Name (Optional) _____
☒ Patient /Family ☐ Faculty ☐ Staff ☐ Volunteer ☐ Other



STAFF KUDOS



National Association
of Healthcare Access
Management



Congratulations to the following for passing the CHAA

Cora Lovetere

Joshua Hughes



**Note the next testing window for the CHAM and CHAA is October.
The application timeline to apply is between June 1 and August 31st.**

TOP COLLECTORS WAY TO GO

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

Brett Parsons.....Collected on 144 accounts (\$15,637)

Marie Martinez.....Collected on 55 accounts (\$5,967)

Shakira Telpha.....Collected on 43 accounts (\$4,396)

Zainab Dougherty.....Collected on 42 accounts (\$7,213)

Laura Hand..... Collected on 42 accounts (\$1,683)

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

PAS Associate

Ambassadors:

Ambassador

Team Leader

Downtown Central Reg:

Senior Registrar

Team Leader

ED Registration:

OAS

PID/Float:

PAS Associate

Pre Services:

Central Scheduling Coordinator

Scheduler/Registrar



HAPPY BIRTHDAY

August Birthdays

Shaquella Newby	08/01	ACC
Taj Collins	08/02	ED Reg
Tammy Pais	08/05	Pre Reg
Tahlia Brice	08/16	ACC
John Liberati	08/16	Ambass
Laura Hand	08/17	CG CR
Nastaran Quraishi	08/17	Nappi
Timothy Lounsbery	08/18	UC CC
Heather Wilhelm	08/18	Verification
Lisa Green	08/19	ACC
Kaniesha Mason	08/19	PAS
Freedom Torrence	08/23	ED Reg
Stephanie Bufford	08/25	ACC
Doug Dever	08/26	Ambass



Welcome to the following new employees:

Tomeka Blair	DT CR
Christopher Fong-Duarte	ACC
Jennifer Miller	ACC
Brenda Pendergast	ACC



MOVERS & SHAKERS

Nothing to report

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](#)