

DEPARTMENTAL UPDATES FROM

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

September 2026

UPDATED UNIDENTIFIED PATIENT PROCESS

Hot off the press! Beginning **September 1, 2026**, University Hospital will implement a standardized Epic process for arriving **Level 1 unidentified patients in the Emergency Department**, including both adults and minors.

Previously, the system automatically assigned unidentified patients a generic name, social security number, and **date of birth of 1/1/1900**. While this process provided a temporary record for patients who could not be identified, the generic date of birth made it difficult to quickly distinguish **adults from minors**, potentially creating challenges for timely and appropriate patient care.

What' New?

University Hospital recognizes age 12 as the threshold at which a minor may be granted decision-making authority. As a result, patients may begin to self-identify at age 12 when appropriate.

1. A DOB entry is now required for every unidentified patient.

The previous default date of **1/1/1900 will be removed**. When the exact date of birth is unknown, staff will enter an estimated DOB using the appropriate Epic shortcut.

2. Standardized DOB shortcuts will be used to estimate age:

YB — Years: Used for **adults and pediatric patients** when the estimated age is known in years.

MB — Months: Used **only for pediatric patients 1–11 months old**.

WB — Weeks: Used **only for pediatric patients 1–3 weeks old**.

Pediatric Trauma: *The RN must confirm the estimated age prior to care.*

These standardized shortcuts will help ensure that the patient's estimated age is accurately represented in Epic and that the appropriate care considerations can be made.

3. Chart advisories must be reviewed.

Registration staff should pay close attention to the following advisories:

Unidentified Patient: Indicates that the patient's **age and date of birth have not been verified**.

Unidentified Patient with Pending Order: Indicates that the patient has pending laboratory and/or radiology orders. **Do not update demographics until results are finalized.**

This updated process reinforces the critical role Registration plays in supporting safe, timely, and accurate patient care. **Following the refined desk procedure is essential to prevent registration errors and delays in care.**

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REGISTRATION TIPS

- Be sure to review the **RTE response** associated with each encounter. RTE helps determine if the correct plan and/or coverage information.
- Always ask if today's visit is related to an **accident and/or injury**. If yes, complete the claim form accordingly.
- Enter the zip code in the **city/zip field** to auto-populate the county, city, and state.
- Use the **Pull Info** button to update the guarantors address whenever appropriate.
- Be sure to deselect the **address linked** box in the subscriber section.
- Offer **MyChart** to patients who do not have an account setup. MyChart is a great tool that helps clinicians communicate with patients and gives patients access to our health system.
- Verify that the **PCP** on file is correct. Follow the outlined desk procedure for updating PCP records.

Skills Assessment

Registration and Insurance Skills Assessments will be conducted throughout September to ensure that all Patient Access staff have the knowledge and skills necessary to accurately and consistently perform registration and insurance-related functions.

The assessments will focus on key areas of the registration process, including:

- *Patient identification and demographic verification*
- *Insurance identification and verification*
- *Eligibility and coverage validation*
- *Coordination of benefits and payer information*
- *Required consents and registration documentation*
- *Accurate data entry and registration quality*
- *Understanding of applicable registration workflows and procedures*

The purpose of these assessments is not to create anxiety or serve as a punitive exercise. They are intended to identify strengths, opportunities for additional training, and areas where we can improve consistency and accuracy across Patient Access Services.

Additional information regarding the assessment schedule, format, and expectations will be provided by leadership.



Quote of the Day

"Every interaction is an opportunity to make someone's day a little brighter. Lead with kindness, serve with compassion, and remember that what you do matters."

ANNOUNCEMENTS

Monthly Alert-Insurance Corner

 Important
information 

RTE Importance Kachelah Flourmory

RTE (Real-Time Eligibility) is an important tool that helps aid registrars in proper insurance assignment. RTE should be run for every patient, and reviewed at every visit to determine eligibility and benefits.

Insurance coverage can change at any time. A patient may have had active insurance during their last visit, but their coverage could have since been terminated or changed.

It is our responsibility to catch these changes.

What If RTE Is Down?

RTE being down at the time of registration does not mean the eligibility check should be skipped. Be sure to return to the encounter to complete the verification. Visit the insurance company's website to validate coverage. If you do not have access to the insurance website, reach out to your supervisor to obtain access or assistance with verification.

Why Is This Important?

Running RTE helps us:

- Confirm the patient's insurance is active
- Identify terminated or changed coverage
- Prevent claim issues and denials
- Give patients a chance to provide updated insurance information
- Help prevent patients from receiving an unexpected bill

Protecting Our Patients

Patients often assume their insurance is active because it covered a previous visit. If their insurance coverage has ended and we do not catch it, they could receive a bill they were not expecting. No patient should be caught off guard by an unknown bill when we have an opportunity to identify the insurance issue beforehand. Insurance companies can terminate coverage at any point. We cannot control when coverage changes occur, but we can control whether we verify the information provided to us. Review the RTE response at every visit. If RTE is down, circle back and run it once it is available and/or check the websites.

This simple step helps protect both the patient and the organization. Be diligent and help reduce insurance related denials by verifying the proper coverage is assigned to the encounter.

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.



When registering always remember to get the full addresses such as Apartment numbers or lot #, etc. and (any other pertinent identifying information on that street.

The billing department advised , they are finding they are getting a lot of return mail due to this.

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

Welcome Our New Team Leaders! Megan Carey

I'm excited to announce two new team leaders for the Downtown Central Registration department!

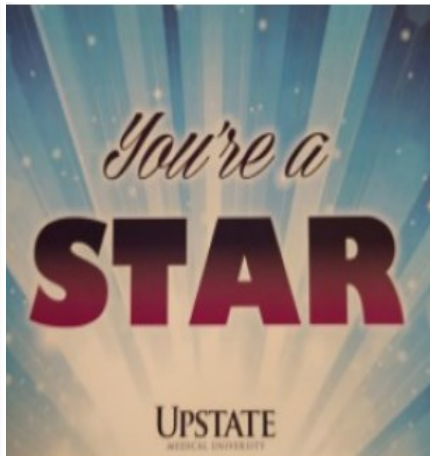
Angela Galutz is our new Team Leader for Ambassador Services, and **Genevieve O'Leary** is our new Team Leader for Central Registration at UHCC & 550.

Both Angela and Gen have been valued members of Patient Access for more than 10 years. They bring exceptional customer service skills, extensive experience, and a strong commitment to our team. I'm confident they will both be tremendous assets in their new roles.

Please join me in congratulating Angela and Gen and welcoming them to their new leadership positions! We're excited to have them step into these roles and look forward to all they will bring to our team.



STAFF KUDOS



To the Visitor Desk Staff,
Thank you so much for
the kindness you have
shown our family. we
appreciate it!! ♡

Kabarnal
Family



I unfortunately needed to visit PEDS after Hours and the Pediatric ED this past week when my daughter fell and broke her arm.

My perspective as a caregiver to a tiny patient being seen in our facility was enlightening.

The registrar (**Cora L.**) at Peds After Hours was fast and efficient and provided excellent customer service.

When the pediatrician informed us after reading x-rays that our daughter's arm was broken we were escorted across the bridge to the PEDS ED where I utilized the Welcome Kiosk and finalized registration with friendly staff at the PEDs ED.

I am very grateful for everyone that we encountered on our visit from the registrars to the doctors and nurses and am mostly grateful for the access to care that we have in our community thanks to Peds after Hours and the Pediatric ED. I feel privileged to be a part of an organization that does such important work. Thank you for all that you do each and every day.

A grateful patient/colleague,

Greg Colella

Hi team,

Yesterday afternoon I called **Bridget Dooher** because our phlebotomists at 550 Harrison found themselves overwhelmed. 19 ESF students were at 550 Harrison for TB testing, all international and none who had previously been to Upstate. Due to a misunderstanding in our department, students were not pre-registered and phlebotomists were struggling to get through full regs and draw blood.

Bridget didn't hesitate. She answered my unscheduled Teams call, quickly grasped the situation, mobilized resources and headed to 550. This is yet another example of how Patient Access staff, without fail, are collaborative with colleagues and entirely patient centric. We are so appreciative and truly feel lucky to work alongside your team. I stand in awe of how quickly and completely Bridget stepped in to help us yesterday.

Once again, a huge thank you!!!!

Stacey Keefe, MPA, CAS-HSMP, PMP, CHOP-B

Why Doug Shows Up Smiling!



Every day, hundreds of patients and families walk through the doors of Upstate's Cancer Center downtown carrying hope, fear, uncertainty, and determination. **One of the first people they meet is Doug, a Patient Access Ambassador whose warmth, humor, and compassion help set the tone for their visit.**

For the past seven years, Doug has welcomed patients with a smile. His role holds deep personal meaning. After losing his wife to cancer following 28 years together, Doug understands the cancer journey firsthand. When he learned he would be working at the Cancer Center, he was happy to accept the job.

When asked how he remains so positive each day while interacting with patients and families, Doug said it comes down to "keeping emotions in check." **For Doug, that means acknowledging the difficult moments while focusing on how he can bring comfort and kindness to the people in front of him.**

He admits he becomes attached to many of the patients, sharing that it can be heartbreaking to see someone return with declining health or learn that a patient has passed away. Despite those difficult moments, what continues to motivate him each day is the patients.

"They're happy to see me," Doug said, joking that "They'll even yell at me if I've been away for a few days."

As one of the first faces patients see upon arrival, Doug knows they are often carrying fear, uncertainty, and overwhelming emotions. **Whether it's sharing a laugh or simply listening, he tries to make each visit a little easier.**

Doug recognizes that sometimes patients don't need answers; they just need someone to listen. Over time, many of them become like family.

"People are coming in fighting for their lives," he said. "They become family."

Knowing he can make even a small difference gives his work a deep sense of purpose.

When asked about the moments that remind him why his role is so meaningful, Doug smiled as he described hearing patients celebrate good news.

Hearing a patient say they had a good exam or a clear scan—there's nothing better."

One patient interaction has stayed with him over the years. A man who was battling cancer used to come into the center in terrible pain, often crying through his visits. Doug hadn't seen him for quite some time and wondered how he was doing. Then one day, someone tapped him on the shoulder. **The man pulled down his mask, smiled, and said he was in remission.**

Moments like that are why Doug continues to show up every day with compassion, positivity, and hope. **Knowing he can make even a small difference in someone's journey reminds him why he loves coming to work.**

TOP COLLECTORS WAY TO GO

Celebrating Our Top 10 POS Collectors

We are proud to recognize the PAS team members who are leading the way in POS collections. Their performance demonstrates what is possible when we combine knowledge, consistency, confidence, and exceptional customer service.



#1 — Brett Parsons	\$23,568	154 accounts
#2 — Katelynn Jaeger	\$17,209	42 accounts
#3 — Diane Mills	\$11,258	19 accounts
#4 — Brittany Schlie	\$10,973	93 accounts
#5 — Heather Wilhelm	\$8,726	17 accounts
#6 — Christine Slicker	\$8,129	37 accounts
#7 — Tammy Hanscom	\$6,666	11 accounts
#8 — Cullen Castrello	\$5,900	35 accounts
#9 — Livingston Vincent	\$5,518	50 accounts
#10— Nakia Mobijohn	\$4,629	26 accounts



OPEN POSITIONS



Ambulatory Call Center:

Call Center Representative

Community Central Registration:

Ambassador

Patient Access Associate

UH Central Registration:

Ambassador

Outpatient Administrative Specialist

Emergency Department:

Outpatient Administrative Specialist

Nappi:

Ambassador

Patient Access Associate

PID/Float:

Patient Access Associate

Senior Registrar

Pre Services:

Central Scheduling Coordinator

Scheduler/Registrar

Verification:

Senior Admission Coordinator

Top 10 Skills for a Career in Patient Access

1. **Exceptional Customer Service** Create a welcoming, respectful, and positive experience for every patient.
2. **Communication Skills** Communicate clearly and professionally with patients, families, providers, and coworkers.
3. **Attention to Detail** Accurately capture patient demographics, insurance information, consents, and other critical data.
4. **Insurance & Benefits Knowledge** Understand eligibility, coverage, copays, deductibles, referrals, and authorizations.
5. **Technology Proficiency** Navigate electronic health records, registration systems, insurance verification tools, and multiple applications.
6. **Medical Terminology** Understand common healthcare terms, procedures, departments, and clinical language.
7. **Problem-Solving & Critical Thinking** Identify issues, research solutions, and make appropriate decisions while following established workflows.
8. **Empathy & Emotional Intelligence** Recognize that patients may be experiencing stress, fear, or uncertainty and respond with compassion.
9. **Teamwork & Collaboration** Work effectively with Patient Access colleagues and clinical, financial, and administrative teams.
10. **Adaptability & Accountability** Remain flexible in a fast-paced healthcare environment, learn new processes, and take ownership of your work.

Visit <https://careers.pageuppeople.com/872/ci/en-us/listing> to apply today!

HAPPY BIRTHDAY

September Birthdays:

Sydney Wiesing	09/02	Verification
Kimberly Cummings	09/06	UC Call Center
Nakia Mobijohn	09/09	ED Reg
Randi Proctor	09/09	CG CR
Leanne Torres	09/10	ED Reg
Kathy Libby-McAnulty	09/13	Pre Services
Zhane Holmes	09/13	ACC
Janice Gualtieri	09/14	MDD
Logan McAnulty	09/15	Pre Services
Christine Weaver	09/15	ACC
Shannon Austin	09/16	Pre Services
Jasmine Ho	09/17	Nappi
Shannon Burley	09/18	UC Call Center
Christina Nelson-Dee	09/20	ACC
Mark White	09/24	Nappi
Vanessa Marmolejos	09/26	ED Reg
Michelle Napier	09/26	UC Call Center



Welcome to the following new employees:

Magedah Abed-UH Central Registration

Mary Amadin-PID/Float

Gabriel Diaz-Emergency Department

Sydney Sigler- Pre Services

Zhane Holmes-ACC

Tyshecia Tillie-Pre Services

John Mueller-ACC

Stefanie Thurston-UC Call Center



Lexus Cage accepted OAS position in
Emergency Department



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](#)