



“Front Desk Efficiency & Management”

ALL INFORMATION INCLUDED IN THIS PRESENTATION IS FOR REFERENCE ONLY AND SHOULD NOT BE CONSTRUED AS LEGAL ADVICE. ALWAYS CONSULT WITH AN ATTORNEY BEFORE IMPLEMENTING NEW PROCEDURES/FORMS IN YOUR OFFICE

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Patient Management

General Office Etiquette

- Environment
 - Personal appearance
 - Station
 - Personal devices
 - Discretion
 - Playlists
- Conversations
 - Tone
 - Volume
 - Clarity
 - Courtesy
 - Efficiency
 - Taking control
 - Multi-tasking
 - Follow up

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Front Desk Processes

•OPENING checklist, for example:

- Arrive before patient hours
- Office appearance and environment (e.g. music, TV, scent, AC)
- Patient follow up promptly (e.g. Voicemail, text, e-mails, social media). Update schedule immediately
- Appointment confirmations (notes)
- Paperwork (e.g. sign-in sheet, NP packets)
- Announcements display
- Prepare recall list

•Create a Downtime Checklist, for example:

- Shredding
- NP paperwork packets
- Water Plants
- File labeling
- Postcard labels
- Supplies re-stocking (OTC, therapy, kitchen, bathroom)
- Supplies Inventory (front and back-end)

•CLOSING checklist, for example:

- Data entry
- OTC payments posted
- Process outgoing/incoming referrals
- Process outgoing/incoming records requests
- Insurance verifications
- Incoming faxes to respective departments & files
- Updated all trackers (NP list, Referrals, in/out records requests, settlement offers)
- Follow-up schedule for no-shows
- Appointment reminders for next shift
- Reconciled total appointments (by name) & OTC collections
- EOD documents (daily NPs, OVs, Referrals, OTC, N/S..)
- Scan/file away EOD documents
- Secure all PHI (paper, electronic)

•Use Software tools!

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Front Desk Processes

•Checking in

- Acknowledge patient
- Sign-in sheet (print)
- Timely patients first
- Pending account items
- New insurance, benefits
- Referral appointments status
- Services scheduled
- Schedule in advance, if possible
- Payment in advance, if possible

• Checking out

- Prescription update
- Schedule treatment plan
- Confirm next appointment (note)
- Referral appointments status
- OTC Payment posting
- Schedule Appointment or Recall task

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Front Desk Processes

•Answering the phone

- Enunciate!
- Say your name
- Speak clearly and with proper volume
- Smile as if you're in front of them
- If busy, delegate if possible, or ask if you may put on hold (wait for acknowledgement!)
- Have notebook and pen always handy (no post-its)
- Use message pad (with CC) for keeping record of messages
- No Post-its!

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Front Desk Processes

•Scheduling Patients

- *"When was the last time you were seen at our office?"*

•Existing Patients

- Confirm identity
- Update any needed information
- Determine services to be provided (re-exam, therapies, diagnostics, etc.)
- Summarize before closing the call

•New Patients

- Use NP Intake Form to write down all information
- Referral source
- Determine services to be provided (exam, therapies, diagnostics, etc.)
- Summarize before closing the call
- E-mail paperwork and office information prior to appointment (insurance benefits, contact information, directions, documents needed, etc.)

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New Patient Intake Call

•Notepad on each station

- Full Name
- Phone Number
- Purpose of appointment (urgency)
- Referral Source
- Insurance name, policy # and phone #
- E-mail – for instructions, paperwork

•If MVA patient:

- DOA
- Prior medical treatment, if any
- Attorney
- Patient's own PIP

•When finished with call:

- Update system appointment, notes.
- Follow up on tasks (insurance, attorney, records, etc.)
- Send e-mail with instructions, paperwork
- Scan into patient's file

• Helpful hints:

- If no appointment made, save on file
- Keep track of NPs/total calls=% conversion rate
- Have it translated
- Include brief scripts
- Summarize details of appointment at closing of call

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Front Desk Processes

•Scheduling Existing Patients

- Always refer to the Doctor's prescription for services and treatment plan
- Latest Rx visible on patient's file
- Provide summary of appointments (e.g. card, print out, email)
- Schedule consult for patients needing to discuss their Rx with physician

•Re-scheduling – refer to Rx to maintain treatment plan

•No-shows – after a few attempts, refer to physician for follow up

No one can make changes to a Rx except the treating physician

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Selling care packages

- **Always offer options at checkout**
 - Compare price of total treatment plan if paid each visit vs. care plan
 - Use system tools to create specific care packages
 - If not in system, create a form to keep track of each visit (date, services, initials)
- **Inform patient in advance of refund policy**
 - Have a form with policies written out
 - E.g. if refund requested, full price of services rendered will be discounted
 - Method of requesting such refund
 - Reasons for refund eligibility
 - Patient signature
 - Provide copy to patient
- **Periodically review list of pending CPs and recall patients**

No one can make changes to a Rx except the treating physician

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HIPAA Overview – *Reference only*

- Protected Health Information (PHI) "*individually identifiable health information*" held or transmitted by a covered entity or its business associate, in any form or media, whether electronic, paper, or oral.
- Periodic training required and employee records
- Security Rules
 - Technical safeguards
 - Physical safeguards
 - Administrative safeguards
- Privacy Rule
- Breach Notification requirements
- Penalties for non-compliance
- HITECH Act – electronic transmissions of PHI
- www.hhs.gov/regulations

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HIPAA Identifiers list

1. Names;
2. All geographic subdivisions smaller than a State, including street address, city, county, precinct, zip code, and their equivalent geocodes, except for the initial three digits of a zip code if, according to the current publicly available data from the Bureau of the Census:
 1. The geographic unit formed by combining all zip codes with the same three initial digits contains more than 20,000 people; and
 2. The initial three digits of a zip code for all such geographic units containing 20,000 or fewer people is changed to 000.
3. All elements of dates (except year) for dates directly related to an individual, including birth date, admission date, discharge date, date of death; and all ages over 89 and all elements of dates (including year) indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older;
4. Telephone numbers;
5. Fax numbers;
6. Electronic mail addresses;
7. Social security numbers;
8. Medical record numbers;
9. Health plan beneficiary numbers;
10. Account numbers;
11. Certificate/license numbers;
12. Vehicle identifiers and serial numbers, including license plate numbers;
13. Device identifiers and serial numbers;
14. Web Universal Resource Locators (URLs);
15. Internet Protocol (IP) address numbers;
16. Biometric identifiers, including finger and voice prints;
17. Full face photographic images and any comparable images; and
18. Any other unique identifying number, characteristic, or code, except as permitted by paragraph (c)

Source: <https://www.dhcs.ca.gov/dataandstats/data/Pages/ListofHIPAAIdentifiers.aspx>

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Running an office during a pandemic...

- Communicate with patient's on current office procedures
- Strict adherence to appointment scheduling – control office occupancy
- Limit on number of companions
- Seating arrangement clearly marked on waiting room
- Masks available
- Let patients see you sanitize table and equipment prior to use
- Change gloves frequently
- AC filters
- Go electronic as much as possible

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Office Efficiency Processes

Medical Records Requests Tracker

- Tracker to maintain accounting of all PHI disclosures
- Update daily
- Review regularly
- Incoming and outgoing
- Shared folder

RECORDS READY THRU:								
		6/1/2019						
Patient (Last, First)	File #	Requested By	Request Received Date/Initials	Due Date	HIPAA Authorization Status	MR Date Sent/ Initials	Billing Records Date Sent/ Initials	Notes

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Outgoing Patient Referrals

- Update daily
- Review regularly
- Keep each facility's contact info on separate tab for easy follow up

Patient's Last Name, First	Acct #	Referral Type	Provider/Facility Name	Attorney, if any	Referral Sent date	Apt. Date	Report Status	Last update/ Initials	Notes
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Personal Injury Settlements

- Update daily
- Review regularly
- Know your numbers
 - Average cost per visit (Total Office Expenses/OVs)
 - Total OVs for account
 - Total Payments on account (including possible pending insurance payments, PIP suits, etc)
 - Average payment per visit on account (Total Payments/OVs)
 - Average recovery from relationship (attorney, patient's accounts/referrals)
- Update account notes and ledger

Patient Last Name, First	File #	Law Firm	Total Amount Billed	Total Payments	Balance	Offer	Request Received Date/Initials	Response Sent Date/Initials	Final Settlement Amount	Payment Status	Last Update/Initials	Notes

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Office Statistics

- **Daily, Weekly, Monthly & Quarterly Reporting**
 - Office Visits
 - Established Patients
 - New patients
 - Free Consults (Conversion %)
 - Appointments Completed/Missed/Rescheduled/Cancelled/Reasons
 - Revenue
 - OTC Payment Method
 - Care Plans
 - Supplies
 - Mail-in payments (PIP, PIP Suits, LOPs, MM, MR)
 - Service Promotions (use discount codes)

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Office Statistics

- **Daily, Weekly, Monthly & Quarterly Reporting (cont'd)**
 - Referral Sources
 - Referrals to others
 - Providers (specialists, diagnostics, etc)
 - Attorneys
 - Services Rendered by type
 - Total Charges by type (pre-paid, PTSD, billable, LOPs, etc)
 - Projections for next month collections, OVs, etc

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New File Completion Tracker

- **All accounts**
 - Every new patient to be entered daily
 - Shared folder
 - Periodic review for pending items

ALL PATIENTS										LEGAL CASES ONLY									
Date (1st Visit)	New Patient's Full Name (Last, First)	Referral Source	Case Type	Admin Notes	Treatment Status (Active/Inactive)	System Entry	Paper work Filing	XRAY REPORT FROM RADIOLOGIST	Diagnosti Referrals	Specialist Referrals	EM C	Notes	Atty	PIP	Billing Set-up	Limit	Health Ins, LOP?	Tx Compliance	

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Thank you!

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