
Front Desk Operations: Disastrous or Dynamic?

HFMA Region 11

January 26, 2010

acumen

insight

ideas

attention

reach

expertise

depth

agility

talent

Today's Agenda

- Key Areas for Front Desk Success
 1. Recruitment & Retention
 2. Training
 3. Customer Service
 4. Telephone



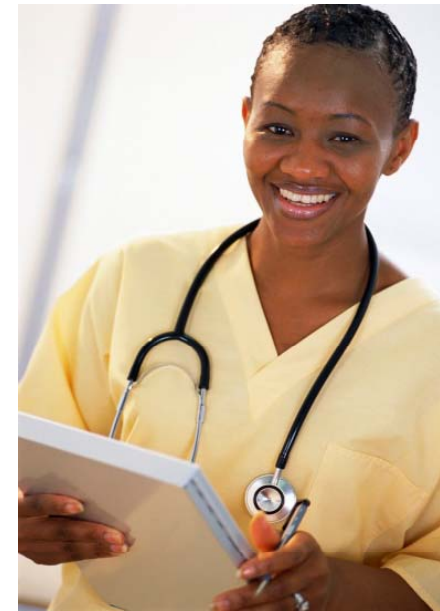
Today's Agenda

5. Patient Registration
6. Time of Service Collections
7. Claim Denials
8. Management

Recruitment & Retention

■ Recruitment

- ❖ Where are you recruiting from?
 - ✓ Colleges, banks, grocery store
- ❖ Who is your competition?
 - ✓ What's your edge?



Recruitment & Retention

■ Recruitment

- ❖ What are you paying?
 - ✓ Low pay, high impact
- ❖ What do you expect?
 - ✓ Humans or Superheroes?

Recruitment & Retention

■ Retention

- ❖ The interview process: where it all begins
 - ✓ Selecting the right employee is critical
 - ✓ Avoid hiring under pressure
- ❖ Training

Recruitment & Retention

- ❖ Opportunities for advancement
 - ✓ Does the organization support advancement?
 - ✓ Is there a place to advance to?
 - ✓ What steps are taken to assist the employee?
 - ✓ What is the plan for replacement?
- ❖ Relationships
 - ✓ Is the front desk a place employees enjoy working?

Recruitment & Retention

- ❖ Employee recognition
 - ✓ Monetary vs. nonmonetary
- ❖ Exit interviews
 - ✓ Are you learning from history?
 - ✓ Average front desk turnover 20%, as high as 40%

Training

- Training

- ❖ Non optional investment
 - ✓ Must find the time & money
- ❖ On-the-job (OTJ) doesn't always cut it
 - ✓ Should only be a component
 - ✓ Trainer must have training abilities not necessarily the most longevity

Training

- Program should include
 - ❖ Practice management system
 - ❖ Customer service protocols & expectations
 - ❖ Time of service collections
 - ❖ Regulatory requirements
 - ❖ Organizational policies
 - ❖ Coding & payer requirements
 - ❖ Insurance verification processes

Training

- ❖ Telephone communications
- ❖ Confidentiality
- ❖ Appointment Scheduling
- ❖ Charge & appointment reconciliation
- ❖ Payment plans
- ❖ Patient collection activities
- ❖ Financial policy

Training

- Training

- ❖ Helpful hints
- ❖ Write it down
 - ✓ Undocumented protocols leave room for various interpretations, understanding & dilution
- ❖ Provide uninterrupted time for training to occur
- ❖ Competency assessment at conclusion & ongoing

Customer Service

- Tone from the top
 - ❖ Leadership must be on the same page
 - ❖ Create an environment where customer service excellence is possible
 - ❖ Action every day

Customer Service

- Incorporated into training program
 - ❖ Process not an event
 - ❖ Clear Standards
 - ❖ Scripting
 - ❖ Empowerment
- Reinforce positive behavior

Customer Service

- Remove negative behavior
- Establishing a baseline
 - ❖ Multitude of tools
 - ❖ Patient perspective
 - ❖ Employee perspective
 - ❖ Clinician perspective

Customer Service

- Front desk
 - ❖ First & last impression
 - ❖ Impressions are long lasting
- Basic
 - ❖ Comfort
 - ❖ Importance
 - ❖ Informed

Telephone

- It's not just a call, it's a customer
- Does the telephone belong at the front desk?
 - ❖ Creates distractions
 - ❖ Dilemma "Who is more important? The patient in front of me or the patient on the phone."

Telephone

- Consider centralization
 - ❖ Front desk could serve as back-up
 - ❖ Allows opportunity to focus on caller
 - ❖ Average operator respond to 300 to 500 calls per day

Telephone

- ❖ Conduct phone survey
 - ✓ How many calls per day outgoing & incoming?
 - ✓ Why are the patients calling?
 - Scheduling
 - Referrals
 - Test Results
 - Prescription refills
 - Nurse
 - Other

Telephone Call Log

Date:	1/1/2010						
Position:	Check out receptionist						
	Scheduling	Referrals	Test Results	Prescription referrals	Nurse	Other	Totals
7 to 8							
8 to 9							
9 to 10							
10 to 11							
11 to 12							
12 to 1							
1 to 2							
2 to 3							
3 to 4							
4 to 5							
5 to 6							
Totals							

Telephone

- Where can efficiencies be recognized?
 - ❖ Eliminate or reduce calls
 - ✓ *i.e.*, test results
- Utilize technology
 - ❖ Understand phone system capabilities
 - ✓ Reporting
 - ✓ Call routing
 - ✓ Phone trees

Patient Scheduling

- Is your scheduling straightforward?
 - ❖ How many types of appointments?
 - ✓ Keep it simple
 - ❖ Are schedulers having to ask permission to schedule appointments?
 - ✓ Providers
 - ✓ Nursing staff

Patient Scheduling

- ❖ When is your next, second, third, available appointment?
 - ✓ Is the physician truly that busy or is it a scheduling issue?
- ❖ Does your scheduling create excessive wait times?
 - ✓ Keep the patient informed
- ❖ Consider alternative scheduling methodologies
 - ✓ Open Access
 - ✓ Wave Scheduling

Patient Registration

- Training is key!
- Paperwork
 - ❖ Is all of it necessary?
 - ✓ Yes? Ensure it is completed appropriately
 - ✓ No? Eliminate!
 - ✓ Readability

Patient Registration

- Understand revenue cycle impact
 - ❖ Insurance verification
 - ❖ Demographics
 - ❖ Accuracy is vital
 - ✓ Front desk registration audits
 - ✓ Track errors
 - ✓ Accountability
- Eliminate front desk vs. billing department

Patient Registration

- Keep front desk staff at the front desk
 - ❖ How does the encounter form go from the front desk area to the clinical area?
 - ✓ Printed to a printer in the clinical area
 - ✓ Manually retrieved
- Ensure charts are ready & reviewed
 - ❖ Are all necessary documents in the chart?
 - ❖ Chart traffic

Time of Service Collections

- Best opportunity to collect
- Educate patients regarding payment for services
 - ❖ Financial policy
 - ✓ Co-pay
 - ✓ Self-pay
 - ✓ Past due accounts

Time of Service Collections

- When are time of service collections taking place?
 - ❖ Before or after the visit?
 - ❖ Remember to collect outstanding balances

Time of Service Collections

- Eliminate obstacles to collecting at the time of service
 - ❖ Staff concerns
 - ✓ Role-play & develop responses to difficult situations
 - ✓ Lack of consequences
 - ✓ Staff perception
 - ✓ Next steps
 - ✓ Put it in writing

Time of Service Collections

- Make sure staff can determine what to collect
 - ❖ Encounter form or practice management system provide easy accessibility to information
- Accept multiple forms of payment
 - ❖ Cash
 - ❖ Checks
 - ❖ Debit Cards
 - ❖ Credit Cards



Time of Service Collections

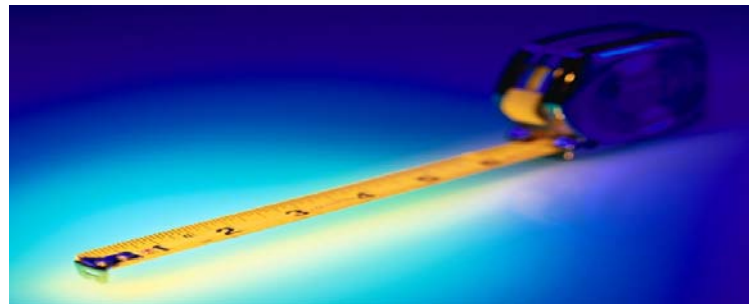
- Internal controls
 - ❖ End of day reconciling forms
 - ❖ System generated receipt
 - ❖ Ability to post adjustments
- Where is the cash kept?
 - ❖ Lockbox
 - ❖ Cash register
 - ❖ Pockets

Denials

- Track & monitor total denials
 - ❖ Identify denials generated through front desk activities
 - ✓ Charge entry
 - ✓ Demographic entry
 - ✓ Insurance verification activities

Denials

- Utilize denial information to
 - ❖ Implement operational changes
 - ❖ Measure performance
 - ✓ Identify employees in need of additional training
 - ✓ Reward superior performers



Management

- Who's managing the front desk?
 - ❖ Must be there
 - ❖ Provide direction for unpredictable situations
 - ❖ Intervene when appropriate
 - ❖ Gauge patient/staff interaction

Communication

- Essential to improving & maintaining quality front desk operations
- Lack of information - staff will draw individual conclusions
- Eliminate interdepartmental tensions
 - ❖ Front desk vs. billing dept
 - ❖ Front desk vs. nursing staff

Communication

- Reinforce positive happenings, behaviors & outcomes
- Communication should be two way – Listen to employees!

Final Thoughts

- Ongoing process
- Flexibility is key
- Be open to employee suggestions
- If at first you don't succeed...



Final Thoughts

“I have not failed. I've just found
10,000 ways that won't work.”

- Thomas Edison

Contact Information

Rebekah S. Wallace
CMPE, CPC, MCS-P
rwallace@bkd.com

Thank You

BKD, LLP
910 E. St. Louis St., Ste. 200
Springfield, MO 65806
417.865.8701

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