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Discussion

Different Types of Scheduling

Intake is the first step in documentation and the key step on the road to reimbursement

New Patient Phone Call

Data Collection Tools

Questions you MUST ask in order to be compliant



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Why We Need Schedules

- Maintain proper patient flow
- Respect the patient's time
- Reinforce patient and provider relationships

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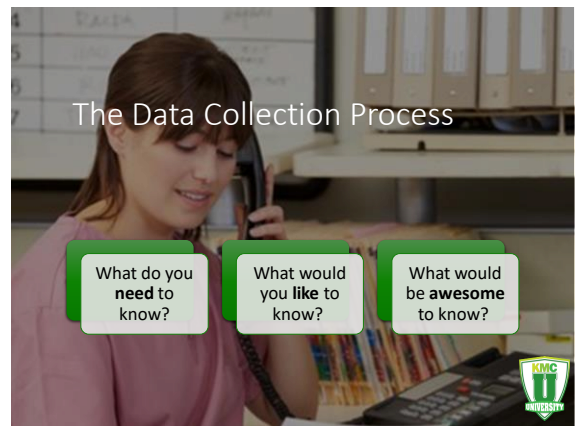
Methods of Scheduling

- Stream Scheduling
- Wave Scheduling
- Cluster Scheduling
- Double Booking
- Open Booking

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Need to Know

First Name Last Name

Type of Problem (area)

Insurance or Self-Pay (filing a claim or not)

DOB

Address

Email & Phone

Insurance Details [injury claim, Medicare, Medicaid, VA, individual health, group health, Medicare Part C (MA)]

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Good Faith Estimate

“Health care providers and health care facilities are required under PHS Act section 2799B-6 to furnish a **notification of the good faith estimate of expected charges to an uninsured (or self-pay) individual** who schedules an item or service...”



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Who Also Gets One?

“...an individual **who has not yet scheduled an item or service**, but requests a good faith estimate”



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Consumer Empowerment



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Self-Pay Patients

Uninsured

Do not plan to use their insurance benefits to pay for the services provided by the physician



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Data Equals Action

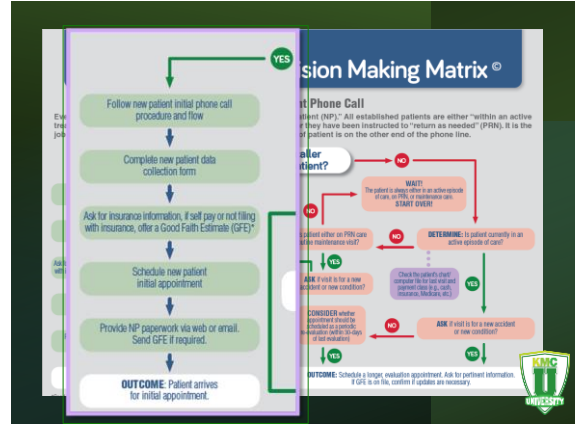
- If self-pay or uninsured, need to develop a GFE
- If insured but service or technique is not covered, need to inform patient and offer alternatives or provide advance notice of non-coverage
- If it is an injury claim need to confirm status of claim and whether doctor can take the case (WC or Auto)
- If Medicare or Medicaid or Medicare Advantage need to consider network status of provider and inform patient accordingly



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On the Initial Call ASK!



- Are they enrolled in a group health plan and, will they be using their insurance for the visit?
- Would they like a Good Faith Estimate ?

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New Patient Data Collection Form

Name: _____ DOB: _____

Address: _____ City: _____ State: _____ ZIP: _____ Phone: _____

Email Address: _____

Do you have some kind of insurance that you'd like us to assist in filing for you? Yes No

Would you please get your insurance/Medicare Card/accident information so we can review it?

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Telephone Scheduling Scripts
 A Guide to Conversations

This scheduling tool provides a general idea of what to say in certain situations. The suggestions are designed to give your front desk (FD) staff confidence as they schedule patients in your clinic. Use comfortable language, so you are as careful not to alter the intent of the message. The script with the KMC University New Patient Data Collection Form.

Telephone Scheduling Script

Front Desk: Hello there is a fall, accident, or injury that brought us here explanation?
 Patient: No, no falls or accidents. All good here.

Front Desk: That is good to hear. **May I assume we will be filing this visit with your health insurance?**
 Patient: Yes, I will be using my insurance.

Front Desk: Great. We have an opening at 10:00 am and another at 4:30. Which would you prefer?
 Patient: I will be using my insurance.

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Identifying the Needs

Once you have established that the caller is a new patient, you need to verify if the caller has this information will assist you in collecting data about the patient's insurance coverage (if any) as scheduling the appropriate time for their appointment. This script will pick up where we left phone call.

Front Desk: **Do you have some kind of insurance that you'd like us to assist in filing for you?**
 (If yes, jump to Personal Injury/KIC Callers)
 Patient: No, no falls or accidents. All good here.

Front Desk: That is good to hear. **Would you please get your insurance/Medicare Card/accident information so we can review it?**
 Patient: Yes, I will be using my insurance.

(offer two appointment times using your clinic's preferred scheduling method)

Front Desk: Great. We have an opening at 10:00 am and another at 4:30. Which would you prefer?
 Patient: I will be using my insurance.

Front Desk: Do you know how to get to our office at First and Main?
 (If the answer is no, give directions.)

Front Desk: Yes, /no.

Front Desk: Great, then you know we are right across from Fire Station #3 on Main Street. **Follow the KMC University New Patient Data Collection Form.**

If you need help to see what time time during your visit, please go to our website **give off** On the home page, you can print our New Patient forms and review our Financial Policy. If the we have to send them to you via email.

(Wait for the patient to reply, if uncomfortable with accessing electronic forms.)

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Delivery Requirements

GFE Delivery Requirements

If appointment is made:

10 business days in advance, the GFE must be provided within three business days
3-9 business days in advance, the GFE must be provided within one business day
less than 3 days in advance you ARE NOT required to provide a GFE in writing.
Notify orally upon scheduling (provide estimate of initial evaluation).

NOTE: If the patient requests a GFE on their own, while at the clinic or just shopping for care, then you need to provide one within three days of date of request. Keep all copies of GFEs as part of the medical record and provide a hard copy or electronic to the patient or prospective patient.



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Initial Phone Call Impact

Identify if patients are insured or self-pay.

If insured, do they plan to utilize their insurance by filing a claim?

Does the patient want a Good Faith Estimate?

Is the patient just shopping around?



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Front Desk Tools & Training

Customized GFE Forms	Calendar	Cheat Sheet for Delivery Requirements
Scripting Sheet	New Patient Data Collection Form	Fee Schedule
Diagnosis Cheat Sheet	Decision Matrix Flowcharts	Insurance Verification Forms



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Audit Your Current Process

- Gather**
 - Gather with your team and review your current intake process
- Train**
 - Train staff on the expectations of the newer regulations such as No Surprises Act
- Make**
 - Make note of areas that are lacking



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The New Patient Phone Call Training



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