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Meet the Presenter…

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On the topic:
Achieving Success at the Front Desk-Impacting the Patient Experience
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Achieving Success at the Front Desk: Impacting the Patient Experience

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The Patient Experience

I have learned people will forget what you said, people will forget what you did, but people will never forget how you made them feel.

-Maya Angelou
Introduction

- The role of the medical office receptionist is no longer limited to answering the phone and making appointments.
- Customer service, time management, and patient relations are now a large part of their position.
- The front desk is where the patient experience starts and ends.

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What is the patient experience hype all about?

- The patient experience is not just about making patients happy, it is about the delivery of care throughout the organization.
- It is critical to educate, engage, and activate patients as well as manage their expectations. This is critical in achieving a great patient experience.
- The success of our patients should already be a top priority because that is what we are here for, but now our reimbursement will be linked to patient engagement as well.

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Everything that a patient or family member hears, sees, touches, and feels is part of the patient experience.

Facts regarding the patient experience

• Most malpractice litigations stem from poor communication and not incompetence.
• Front desk staff are considered the “Gatekeepers” of the patient experience.
• The first and last moments of a customer interaction are what a customer is likely to hold in memory as the permanent “snapshot” that encompasses the whole event.
What do patients expect?

• We now live in an instant gratification society; if I can go on Amazon, order any item and have it shipped to my front door by tomorrow, then I expect every other industry to give me instant results.
• Patients want the staff to acknowledge that their time is valuable.
• Patients now have information at their fingertips! Patients want to be informed!

When does the patient experience start?

• The patient experience actually starts when the patient is looking for a new provider and they do a “Google search”
• 77% of Americans find a provider through the internet and by reading reviews. If there are negative comments posted, a patient is most likely to continue to search for a provider that has more positive feedback.
• When researching negative comments, most comments are not aimed at the physicians but are directed by the experience with the staff in the office.
• Remember: Every person’s perception is their own reality!!
The front desk role in the patient experience

• After a patient does their internet search, the next part of the experience is the phone call to your office.
• The front desk has an important role in how the call is handled, how the patient is educated and the way the patient feels when they hang up the phone.
• At the time of the appointment, as the gatekeeper, the front desk staff will be responsible for the patient’s first impression and the last impression.

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The patient is the customer!

A customer is the most important visitor on our premises.
He is not dependent on us.
We are dependent on him.
He is not an interruption in our work.
He is the purpose of it.
He is not an outsider in our business.
He is part of it.
We are not doing him a favor by serving him.
He is doing us a favor by giving us an opportunity to do so.

~ Mahatma Gandhi

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What impacts the patient experience?

Professional Appearance

Clothing:
• Clean and pressed
• Comply with dress code policy

Shoes:
• Closed-toe shoes
• Low to medium heel

Jewelry:
• Keep it simple
• Avoid facial jewelry

Manners

Physical Manners:
• Do not chew gum
• Do not eat foods during patient contact
• Do not use cell phones
• Do not visit social networking pages

Verbal Manners:
• Use “please,” “thank you,” and “ma’am” often
• Use titles such as “Mr.,” “Ms.,” and “Dr.”
• Be respectful at ALL times
Manners

Personal Manners:
• Arrive at work 5 minutes early
• Do not let personal issues interfere with your job
• Do not gossip at work or outside of work about your practice, physicians, patients, or coworkers
• Conduct yourself appropriately in and out of the office, as you represent that office at all times

Communication in the Medical Practice

Communication takes many forms. There is verbal and written communication. We also communicate with our body language.

Information vs. Communication
• *Information*: Giving out (Sending only)
• *communication*: Getting through (Sending – with the other party receiving and understanding)
Effective Telephone Procedures

• We are the practice!
• Present as friendly and professional an image as possible
• It’s the way we do the answering, transferring, and handling that makes a lasting impression

Effective Telephone Procedures

• Barriers to speaking on the phone
  – We know too much
  – We cannot see the caller
  – We hear, but do not listen

• Barriers to listening
  – Assumptions
  – Mental arguments and answers
  – Mood of caller / speaker
Effective Telephone Procedures

• 3-3-3 Rule:
  – No more than 3 rings
  – 3-part greeting (Thank you for calling XYZ; this is XYX. How may I help you?)
  – No more than 3 minutes on hold
• Use the caller’s name
• Provide your full attention
• Take notes
• Repeat for clarification
• Offer help

Offering help at the end of your greeting advises the caller that you are available and interested in helping.

• Transfer calls only if necessary. If you cannot assist, explain to the caller that “Sue Smith in the insurance department” should be able to help.
• Ask before placing someone on hold and don’t just put the phone receiver down.
• Do not end phone call with “Have a nice day.” Use “Thank you for calling, Mrs. Jones. Goodbye.”
Communication Within the Office

Communication is important in promoting relationships, and the practice must take time to communicate.

- Participate in periodic meetings with the office manager and staff
- Use written communication
  - Be specific and use facts
- Plan and use communication paths
- Develop a communications/message center

Communication With the Patient

- Smile
- Use eye contact and listen
- Repeat what you hear – for confirmation
- See answers – don’t provide them
- Avoid using slang:
  - “Hang on,” “Hold on,” “My bad”
  - “May I have your name please?” vs. “What’s your name?”
Communication with the Physician

- Know what the physician wants and needs
- Know when to interrupt
- Keep documentation and charting consistent
- Date and sign communications
- Ensure accuracy
- Triage messages
- Have a system with written policies

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Vocal Qualities

1. Be Alert – wide awake and interested
2. Be Pleasant – voice with a smile
3. Be Natural – not forced
4. Speak Clearly and Distinctly - enunciate
5. Be Expressive – normal tone
6. Pay Attention to your Inflection – don’t be monotone

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Vocal Qualities

7. Be Courteous – treat callers as if they are in front of you

8. Be Mindful of Tone – positive and sincere

9. Be Understandable – no food/gum

10. Be Mindful of Your Rate – not too fast or slow

11. Be Mindful of Pitch – lower pitch projects and carries better

Appointment Scheduling

• If your patients are waiting more than 15 minutes to be seen, that is too long!

• Common Errors
  – Too little time scheduled for each patient
  – Too many patients scheduled
  – Staff not working as a team

• Always notify patients of any delays
Appointment Scheduling

No matter how efficient, there will be times when patients may have to wait.

• Inform patients when they arrive approximately how long the wait will be.
• Make sure to apologize, acknowledge that their time is valuable.
• Offer the opportunity to reschedule.
• Provide current magazines.
• Have music or a TV on in the waiting area.

Tips to Help an Appointment Schedule Work

1. Start on time for office appointments.
2. Staff should be advised far in advance when delays develop.
3. Follow written appointment scheduling instructions and triage criteria for defining appointments.
4. Receive necessary training for scheduling appointments.
5. Channel all appointments through the appointment desk.
### Tips to Help an Appointment Schedule Work

6. All staff should support appointment scheduler when they are following directions.

7. Avoid interruptions, such as telephone calls, etc., when seeing patients or others scheduled appointments. Put the criteria in writing.

8. Communicate with the patients and others who have arrived for their appointment and must wait.

9. Personally apologize to patients or others when late and thank them for waiting.

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### Patient Education

- Be patient with “patients” and educate them on what is to be expected

- Educate yourself on a patient’s benefits before educating the patient

- A welcome letter or patient brochure sent to the patient PRIOR to coming into the office is an excellent way to educate

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Insurance

Advise the patient of which programs the practice participates in. Sample programs:

- Medicare
- Blue Cross/Blue Shield
- Medicaid
- Humana
- Med-Net
- HMOs and Complete Health with authorization
- Aetna
- Traveler’s PPO
- Anthem POS
- Medicaid
- HMOs and Complete Health with authorization

“If you are not a member of one of these programs, we request that you pay for office services at the time of your visit.”

Claims Process

- Patient is responsible for arranging payment for medical charges.
- Should be prepared to speak with patients about health insurance coverage.
- It is important that proper forms and billing information is provided by the patient.
- Office manager can address concerns or questions for the patient.
Obtaining Patient Information

The key to insurance processing is to get all of the necessary information up front.

1. New Patient Forms
   • Name, address, phone numbers
   • Insurance information, methods of payment, etc.

2. Established Patient Data – Each Visit
   • Re-verify insurance data
   • Re-verify home address, and phone numbers

3. General Data for all Patients
   • Referrals, authorization, pre-certifications, etc.

Billing and Collections

From both the patient collection side as well as insurance responsibilities, the front desk is the key!

To ensure adequate cash flow:

• Establish internal controls
• Establish specific policies and procedures
Evaluation of Front Desk Collections

An effective financial policy:
• Basic necessity for your office
• Benefits are multifold and will:
  – Maintain and maximize cash flow
  – Increase staff productivity
  – Reduce overhead
  – Help educate the patient
  – Provide a clear understanding of their financial obligations

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Billing and Collections

Account Payment at Time of Service:
• Increases cash flow
• Reduces overhead
  – No statements
  – No further use of administrative time on follow up calls/correspondence to insurance or patient collections
  – Eliminates small (costly) balances

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Developing Policies on Patient Education

- Tell patients everything on their first visit when they fill out forms.
- Tell patients over the phone when they schedule the visit.
- Invite patients to visit your webpage.
- Send patients a brochure through the mail after scheduling the first appointment.

Payment at the Time of Service

- Obtain payment at time of service from ALL patients.
- Reduce the cost of billing and minimize money lost to bad debt by:
  - Establishing patient expectations to pay
  - Knowing what to collect
  - Developing practice-wide support for the employees who “ask” for money
Asking for Money

- Be sure you and the patient are in a one-on-one environment.
- Have the RIGHT PERSON ask for money.
- Give the charges due and say something like, “Your bill today, is $150. Will that be cash, check, or credit card?”
- After asking, KEEP SILENT.
- Respond to the patient’s reply according to your policies.
- Be sure your attitude reflects that it is RIGHT and NORMAL to expect payment for services.

Payment at Time of Service

- Collect information while the patient is in the office, standing in front of you.
- Once a patient is no longer in your office or care – the risk of failure to collect is increased.
- Experience is an excellent factor to decide what information is required for each carrier.
Payment at Time of Service

A good collector = an effective listener, communicator and facilitator

• Your goal should be to always expect payment.

• Soon, payment will become a habit and patients may even remember their checkbook.

• Prior education of your patients on the front end, starting with the first phone call will eliminate non-payment on the back end.

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Timely Collection Tips

• The person making an appointment for a new patient should inform them that the visit is to be paid for at the time of the appointment.

• Don’t hesitate to discuss charges with the patient. It’s your paycheck too!

• If a PO Box is provided for the patient’s address, get an actual physical address as well.

• Find ways to prevent patients exiting without stopping at the front desk.

• Just ask, “Will that be cash, check, or credit card today?”

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**When Patients Question Your Payment Policies**

Show compassion for hard cases, but try to bring the situation to a higher level of understanding.

- Let the patient know that the office manager requires for payments to be done this way for the fairness of all.
- Inform the patient that rather than raising fees, the practice has instituted a payment-at-time-of-service policy.
- Let the patient know that fees are consistent with the time and degree of expertise needed. They will vary with different procedures and treatments.
- Inform the patient that this is done in order to keep billing costs at a minimum.

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**Patient Refunds**

- Review patient account to verify refund.
- Make check out to patient.
- Attach printout to check for signing.
- Note adjustment as “Patient Refund.”
- Do refunds weekly, or at least monthly.
- Public relations impact is negative if patient’s money is held.
- All insurance checks are deposited – never countersign check and mail to patient.

**NOTE: All refunds due to Medicare or Medicaid patients should be completed within 30 days.**
Handling Patient Complaints

• The first key to handling a complaint is to Listen!! The patient may have a valid reason for being upset.
• We can not add gasoline to a fire- it is our job to remain calm and to try to calm the patient.
• In healthcare, we are required to exercise empathy. We must keep in mind that people are generally at our place of business when they are not at their best.

Tips for Handling Complaints

• Listen, Listen, Listen
• Don’t take it personal
• Acknowledge the complaint, write it down. Investigate the problem.
• Resolve the issue
• Respond to the individual making the complaint
• Use the complaint as a part of your quality assurance plan.
General Time Management Tips

- Identify your energy cycle
- Plan for the next day
- Determine your optimal work area
- Vary your pace
- Keep both hands free for productive work
- Set deadlines/target times
- Establish routine for your absence
- Place most used materials near you
- Do most difficult jobs during your peak energy period

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- Keep desk organized
- Don’t get wrapped up in the work of others
- Use time-saving devices
- Develop routines for efficiency
- Block out uninterrupted times for hard tasks
- Set priorities
- Teach your system to others
- Return phone calls and emails at a set time
- Review progress during and at the end of the day
- Delegate

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Tips, Tools, and Techniques

• Learn your policies and procedures and be adept in federal and state regulations

• Practice effective communication

• SMILE at all times!

Do what you do so well, they will want to see it again and bring their friends.

-Walt Disney
Questions?

• Thank you for attending!!

• Visit PMI’s Discussion Forum to get your questions answered:
  www.pmiMD.com/pmiForums/rules.asp