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On the topic:
Optimizing Your Front Desk Operations
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Optimizing Your Front Desk Operations

Presented by:
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Importance of Front Desk Management

Let’s start with a few questions:

- How do you view your front desk?
  - Are front desk duties important to the bottom line?
  - How important is it that front desk staff are educated and well informed?
  - Do you consider the front desk as an entry level position?
  - Do you understand all of the operational functions and time elements involved in performing front desk tasks?
Importance of Front Desk Management

• A physician practice is only as good as their front desk.
• An efficient front desk is crucial to its success and important to all functions within the medical practice.
• An efficient front office will enhance the patient experience and reduce wait times.
• The major tasks for the front office are:
  – patient/customer management
  – appointment scheduling
  – capture of patient demographics
  – verification of insurance, referrals, collections
  – any other duties as assigned

How Well Does Your Front Desk Perform?

• When you consider that the front desk is the first point of contact between the patient and the healthcare practice, you should be concerned with:
  – Good impressions, as well as the efficiency of the practice.
• Attention should be focused on improving front desk efficiencies and customer service.
The Impact of Inefficiencies

- Inefficiencies in a medical practice:
  - Wastes time and effort
  - Contributes to errors
  - Reduces productivity
  - Hurts the bottom line
  - Frustrates patients, staff and physicians
  - Has potential for serious consequences

Observations on Front Desk Operations

- Front desk staff do not function solely as receptionists.
- Front desk staff has within their control the optimum flow of all patients and communication within the office.
- The front desk is the “hub” of the office.

The office will be judged largely on the image that is presented.
What is the Front Desk Mission?

• To keep the schedule full.
• To keep rescheduled appointments to a minimum.
• To keep patient flow smooth and efficient.
• To ensure that patients feel welcomed and comfortable.
• To accurately charge and collect for services.
• To accurately collect and enter patient data.
• To obtain all appropriate referrals and insurance verifications, authorizations and approvals.
• To correctly handle the patient from:
  – the first telephone contact
  – through their arrival
  – treatment at the office
  – and departure with another visit scheduled

Setting Front Desk Performance Expectations

• A medical practice must set clear performance expectations and performance monitors for front office staff members.
• Due to the importance of front desk operations and the impact on the total revenue cycle a practice must set goals not only in the customer service but also in the financial realm.
Setting Front Desk Performance Expectations

• PERFORMANCE MONITORS examples:
  – Percentage of Kept Appointments
  – Over the Counter Collections
  – Office Visits
  – Percentage of Fully Scheduled Day/Week

The Importance of a Full Schedule

• Ensures financial viability
• Reduces lag time
• Ensures peak performance
  – Most employees love a slow day, one that is wrought with cancellations, etc. The problem with this, is that employees can become complacent, begin to slow down the processes that are vital and then find it harder to meet the challenges when the schedule is packed and overflowing.
The Importance of Front Desk Collections

- Increases cash flow
- Reduces overhead
  - No statements
  - No further use of administrative time in follow up on insurance or patient collection
  - Eliminates small (costly) balances
- At times, however, there will be the need for a financial arrangement with the patient. You should ensure that the patient understands all charges and that they are ultimately responsible for charges not covered by a contracted managed care plan.

If You Build It…………

You must manage it………

- PERFORMANCE EXPECTATIONS examples:
  - 85 – 90% of patients kept to their treatment schedules
  - Over-the-counter collections total at least 35-40% of the total office collections
  - 95% Full Schedule
  - Office Visits reaching goals
The Barriers to Front Desk Success

- Staff members who can't see past “we've always done it that way.”
- Failure to address issues, like:
  - bottlenecks,
  - redundancies,
  - delays,
  - waste in workflows and,
  - complexities of the medical practice
- Mindset that “inefficiency is inevitable”.
- Not knowing where or how to address barriers.

Find your bottleneck

- Bottlenecks in any process is not uncommon. Acknowledging and identifying them is another story.
- For the front office to be as efficient and effective as they can be it is important to:
  - Tracking patient flow: can provide information about how efficiently patients flow through each stage of their visit.
  - Track the volume of patients seen each day: Separate by new patients and follow-ups.
  - Track no-shows and walk-ins.
  - Track the time the physician actually spends seeing patients.
Evaluating the Practice Workflow

Evaluation Steps:

**Step 1**: Define the existing process.
**Step 2**: Identify waste.
**Step 3**: Create an ideal process.
**Step 4**: Make a plan to take your Practice from its current state to the ideal state.

*EX*: High level overview of workflow:

1. Patient Schedules Appointment
2. Patient Arrives at the Office
3. Patient meets with Physician
4. Patient is treated, diagnosed, treatment plan assigned,
5. Patient is checks out
6. Patient leaves the office

Streamline Your Processes

- **Collect Data for Each Step in Your Process**
  - Gathering data for each step of how your front office currently works is the first step.

- **Record and Follow Each Step**
  - You’ll need to follow each step of the process and determine the impact to the complete office visit, recording exactly what happens at each step and how long each step takes.

- **Map the Process**
  - Lay out the flow with the average the times recorded for each step,
  - Connect the steps, indicating the movement and flow of the process.
  - There will be forks, and pathways, these are “decision points”.
  - Identify the flow that results from these “decision points” for additional steps or slow downs.
  - Denote any time when the process is at a standstill.
  - Analyze the areas that denote a standstill or slow down and engage in a review to reduce or eliminate the snag in the process.
Task Oriented Workflow

• Patient needs to complete a healthcare questionnaire, right?
  Suggestion: Patient checks in, give healthcare questionnaire after all other financial paperwork has been completed

• Time to room the patient but the patient has not completed the questionnaire.

• Every patient needs their vitals recorded too, right?
  Suggestion: Could these tasks be done in a staging or triage area? Could you establish another secondary waiting area.

Suggestion: Let the patient finish the healthcare questionnaire in the exam room

Consistent Workflow

• Optimizing overall practice performance begins at the front desk.

• However, keep in mind that poor workflow throughout the office will hinder everyone’s success.

• Taking a look at your overall processes and how they intersect will be key to eliminating waste and redundancy.
Front Desk Operations

- First, do not underestimate the volume of activity that occurs at the front desk:
  - ringing phone lines,
  - incoming and outgoing communications,
  - checking patients in and out,
  - scheduling of tests or appointments,
  - receiving new patients paperwork, etc.
  - collections

Tasks that Contribute to Delays

1. EHR Systems
2. Telephone Systems/Call Volume
3. Scheduling/Insurance verification/Referrals
4. Work flow Processes
5. Organization
6. Delegation
7. Time Management
8. Other unscheduled tasks

*Reengineering all of the tasks listed may not be possible.*
EHR and Paper-based Medical Practices

- Whether your practice is paper-based or utilizes an EHR system inefficiencies will still exist and must be addressed.
- EHR systems can increase operational efficiency and reduced medical error rate, however, poor utilization of an EHR system can cause severe issues.
- Paper-based systems can be cumbersome, requiring additional steps in the delivery of patient care as well as staff time.
- Regardless of the system within the practice, the same tasks must still be performed.
- The goal is to perform well and increase the bottom-line.

Making the Most of EHR Systems

- Optimizing EHR depends on how you integrate manual processes with technology.
- Understanding the steps and processes to determine:
  - how many steps does each process contain?
  - which and how many forms need to be used?
  - how many staff members are involved in each step?
  - what information needs to get collected at each step?
  - what is the end result expected for each step?
EHR Technology

• Transitioning to a electronic health record system requires time and effort to maximize utilization.

• Systems should be able to be expanded to accommodate expansion and advancements in technology

• Having the appropriate training for staff members will help in maximizing successful use of the system.

EHR Technology

Expanding your:

• Some EHR systems have limited expansion capabilities.

• Make sure you check with your vendor about the differences in services before you invest.

• Check with your vendor to weigh the cost of expanding and whether it will accomplish increased efficiency.
EHR Technology

- Continual improvement is necessary to optimize front office operations.
- Many EHR systems come with dashboards or reporting functions that let medical practices review essential data points.
- Measurements about patient wait times, treatments used, diagnosis, charges billed and much more can be reviewed in detail or as trends over time.
- Custom reports to track information relevant to your office should be priority one in selecting a system.
- EHR's that can provide information from dashboards can be used to evaluate the viability of your procedures and pinpoint where bottlenecks may be occurring in the practice.
- Measuring performance depends on credible data to provide an objective assessment of the office and employees.
- Data can be used for employee reviews or as a tool to improve the success of patient treatments.

Front Desk EHR Helps

- Batching or verifying eligibility for multiple appointments through a clearinghouse prior to appointments can reduce your practice’s denial rate by up to 50%.
- The systems ability to verify a patient’s insurance within 24 hours can make sure patients with new insurance policies are still covered before their appointments.
- An check-in kiosk linked to your practice management system will help your office run more efficiently and allow patients to:
  - update their own records
  - their reason for coming in
  - update payment information before seeing the physician
Phone Systems

• The phone system is the entryway to your practice.

• Inefficiencies can lead to stress and irritation for both patients and staff as well as a loss of productivity.

• Look for inefficiencies by asking the following:
  – Excluding any lines that your front desk staff does not have responsibility for answering, how many incoming phone lines does your office have?
  – How many staff members are responsible for answering those phone lines?

Answer the following:

• How many phone lines is each person potentially responsible to answer at any given time? If you answered:
  – more than two phone lines per person, you have a potential problem.
  – Five or more phone lines per person is a serious problem.

• A staff member should never be expected to have more than one person on hold at any given time.

• A multi-line phone system is desirable in order to keep patients from getting a busy signal, the key is to ensure they are properly staffed to keep callers from losing their patience.

**Think about your own personal experiences when you call a business and are placed on hold.**
Automated Phone Systems

• An automated phone system can streamline telephone operations, check out some key points to keep in mind:
  – Voicemail menus should be easy to navigate
  – Limit the number of choices or selections
  – Include an option that will put them in touch with a real person.
  – Call-in to your office periodically to ensure your phone system is understandable and easy to navigate.
  – Ensure accurate voicemail greetings when staff members are out of the office as well as changing greetings or checking messages when someone is out sick.

Telephone Call Volume

• Managing call volume is one of the larger obstacles at the front desk.
• Improving the handling of call volume will pay off downstream, consider:
  – Re-delegation of duties
  – Evaluate current phone protocols
  – Hire a dedicated receptionist, someone not located at the front desk who answers the phone, makes appointments and distributes calls
  – Outsourcing to an answering service
Optimizing Front Desk Phone Skills

- Aside from the phone system, ineffective phone skills can be an issue also.
- Training front desk staff to handle phone calls efficiently is a must.

The typical front desk looks like this:
- The phone will ring, a patient will appear at the front desk, and a co-worker will need something right away.
  - What is your priority?
    - First answer the phone, while you are answering the phone, make sure to make eye contact with the patient to acknowledge their presence.
    - Next, help the patient
    - Last, help the co-worker
Optimizing Front Desk Phone Skills

• Here are some questions to ask yourself:
  – Are you answering the phone in a steady, cheery, helpful voice?
  – Does the person on the phone feel like he or she has your undivided attention?
  – Did you answer the phone in the appropriate amount of time? (Three is a general rule.)
  – Are you treating co-workers the way you would want to be treated?
  – Do you take the time to ask questions?

• Prioritize tasks

Optimizing Front Desk Phone Skills

• Here are some key points for staying calm under pressure*:
  – **Control**, this is what you have at the front desk, nothing happens until you make it happen.
  – **Handle** your tasks in a steady, consistent manner.
  – **Identify** what is priority.
  – **Learn** your key points: attitude, focus, priorities, and time management.
  – **Lead** others with friendliness, calmness, and efficiency

*Keeping Your Cool at a Busy Front Desk  Ellen Jensen, Administrative Assistant - Celebrity Staff
Optimizing Front Desk Phone Skills

- Understand proper telephone etiquette
- Use a standardized greeting
- Speak clearly
- Have a triage call guide
- Have a plan for handling messages
- Have a back up plan for unforeseen situations
- Minimize personal interruptions

Effective Telephone Procedures

- Give your full attention
- Take notes
- Repeat info for clarification
- Offer help
- Learn to triage
Poor Communication Skills

- “He's not in yet.”
- “She's not back from lunch yet.”
- “She hasn't come in yet today.”
- “Oh, I don't know where he is.”
- “He's on his coffee break.”
- “This is her day off.”
- “I don't know if she is coming back or not.”
- “She's in the middle of a big patient problem.”
- “He went home early.”
- “I think maybe he will be in tomorrow.”
- “Our bookkeeper should be in on Wednesday.”

Good Communication Skills

- “He is with a patient. May I take a message, or may I help you?”
- “I am sorry. He is unavailable. May I help you?”
- “Dr. Jones is out of the office at the moment. May I help you?”
- “Our bookkeeper should be in on Wednesday. May I take a message?”
- “She is out of the office until 3:00 PM. May I take your number and a message?”
Making Your Calls

- Plan ahead what to say
- Identify yourself and your practice
- Have all of your information before you dial, especially if long distance
- State your reason for calling
- Check the area code and time zones
- Avoid your special office lingo or slang
- Speak on the level of the person that you have called
- Take notes
- Speak in your natural voice directly into the mouthpiece
- Repeat or summarize the information

Email, Text and Phone Messages

- Staff spend a lot of time organizing, filtering and dispersing information.
- In any fast-paced environment incorrectly handling of information leads to incorrect and incomplete information which could result in serious errors.
- An incomplete message or one with misinformation is not only aggravating but could have severe consequences.
  - If your practice uses paper message slips, try using customized, color-coded slips, with the different colors representing different types of callers.
  - Color coding allows identification at a glance the types of messages waiting for them (e.g., the color pink, a sick patient who warrants immediate attention and blue for a pharmacy calling about a refill request.)
  - Technology is great, but it can also add additional pressures
  - Every staff member should have a specific time to respond to messages.
  - Voicemail should specify timeframes on when the caller should expect a return call.
## Sample Phone Survey for Patients

We’re evaluating our phone system and need your help. Please fill out this survey and return it to the front desk. Please base your answers to the following questions on your experiences calling our office over the past few months.

1. When you called our office to make this appointment, how many times did you get a busy signal?
   - I didn’t get a busy signal.
   - One time.
   - Two times.
   - Three or four times.
   - More than four times.
   - I can’t remember.

2. Was your call answered promptly?
   - Yes, the phone rang less than four times.
   - No, the phone rang more than four times.
   - I can’t remember.

3. If you were put on hold, did you have to wait more than two minutes before the receptionist came back on the line?
   - No, I didn’t have to wait more than two minutes.
   - I had to wait more than two minutes.
   - I can’t remember.
   - I was not put on hold.

4. If you called and left a message, when was your call returned?
   - Within 15 minutes.
   - In about 15 to 30 minutes.
   - After 30 minutes.
   - After two hours.
   - The next day.
   - My call was never returned.
   - I can’t remember.

5. Based on your telephone contacts with our office over the past few months, how easy has it been for you to do the following?
     - Very difficult
     - Difficult
     - Easy
     - Very easy

6. Who is your doctor? ________________________________________  
   Thank you. Please return this survey to the receptionist  

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## Scheduling for Flow

Not all patients are created equal. Therefore the workflow for each patient will be different based on the patients condition and the standard medical protocols within each practice.

- Consider the variables in the patient type area: How does the handling of these patients vary?
  - New patients
  - Follow-up patients
  - Acutely ill patients
  - Chronically ill patients

- Consider also, the variables that exist in patient financial types: What additional time is required?
  - Private carriers
  - Medicare
  - Medicaid
  - Self-pay

- The last category to consider is the source. Where is the patient coming from? What additional work is required here?
  - Referral
  - Hospital
  - Nursing home
  - Emergency room
  - Consultation requests

The typical front desk handles all of the functions systematically without much thought to how much time is potentially wasted by ineffective or inefficient processes.
Scheduling

- Inefficient scheduling practices can impact the front desk staff. Having a realistic view of the culture within the practice will help front desk staff maintain efficiencies and reduce stress.

- The following are typical scheduling issues that can impact flow at the front desk:
  - Scheduling mistakes
  - Rescheduled appointments
  - Cancelled appointments
  - Forgotten appointments
  - Overbooking appointments
  - Walk-in/Work-in patients

- The average length of a patient encounter should be the basic building block of all schedules taking into account the differences in appointment times relative to the type of the visit.

Follow this example:

- A physician is scheduled to start seeing patients at 8:30 a.m. for a 3.5 hour clinic session.
- Typically the physician spends 15 minutes with each patient.
- Based on this calculation it is impossible for the physician to see 14 patients in this time when you consider travel from room to room, interrupting phone calls, paperwork delays and staff questions.
Scheduling

• Key Points:
  – Develop a realistic schedule
  – Have a plan for appointment irregularities
  – Stay organized
  – Optimize appointment scheduling software
  – Have a triage plan for same day appointments
  – Get paperwork, approvals and referrals done before the patient arrives, if possible.
  – Always call to confirm scheduled appointments

Scheduling

• Appointment confirmation
  – Calling patients to confirm their appointments is a proven strategy.
  – Make sure your system is efficient.
    • Consider this, if your front office staff are making reminder calls the day before the appointment, your system is doomed to fail for the following reasons:
      – Patients who work will probably not receive your message until 6 p.m. When your office is closed.
    • The results:
      – The front desk staff won’t get the call back until the next morning, the day of their appointment.
      – If they cancel their appointment, the front desk will have very little time to fill that appointment slot, which could cause lost revenue.
Scheduling

• Recommendations:
  – Call patients two to three days before the scheduled appointment.
  – Automated appointment reminder calls are very useful in saving staff time.

• These suggestions may not be fool-proof as you will always have an exception.

The Intentional Schedule

• Take time to understand which patients are most likely to cancel scheduled appointments.
• It may be those patients who are scheduled for an acute visit.
  – Perhaps the patient's symptoms clear spontaneously, or, after that bout gastroenteritis has resolved on its own.
• Acute visits can tend to be more straightforward than those for chronic disease.
• Schedule acute visits at the end of the day.
  – if the patient does cancel, you can end your day allowing time for catch up.
Different Types of Appointment Scheduling

<table>
<thead>
<tr>
<th>Time-specified Scheduling</th>
<th>Wave Scheduling</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Scheduling appointments at a specific time</td>
<td>• 3 to 4 patients are scheduled every half hour</td>
</tr>
<tr>
<td>• Keeps a steady flow of patients</td>
<td>• They are seen in the order that they arrive</td>
</tr>
<tr>
<td>• There should be time to accommodate for urgent visits</td>
<td>• Waiting time is often shorter</td>
</tr>
<tr>
<td><strong>Goal:</strong> To minimize the waiting time for the patient</td>
<td><strong>Goal:</strong> To always have patients waiting to be seen and arrive in “waves”</td>
</tr>
</tbody>
</table>

Different Types of Appointment Scheduling

<table>
<thead>
<tr>
<th>Double Booking</th>
<th>Open Booking</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Giving two patients the same appointment time slot</td>
<td>• Giving patients a timeframe for when they should come in</td>
</tr>
<tr>
<td>• Can be used when one patient is undergoing a procedure</td>
<td>• They are seen in the order they arrive</td>
</tr>
<tr>
<td></td>
<td>• Some practices have walk-in hours before regular office hours</td>
</tr>
<tr>
<td><strong>Goal:</strong> To allow for patients with an injury or severe illness to be seen even with a full schedule.</td>
<td>• This works best for practices that are not busy</td>
</tr>
<tr>
<td></td>
<td><strong>Goal:</strong> To allow for patients with injury or serious illness to be seen ahead of other patients</td>
</tr>
</tbody>
</table>
Different Types of Appointment Scheduling

<table>
<thead>
<tr>
<th>Clustering</th>
<th>Multiple Offices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduling patients with similar conditions into groups</td>
<td>Appointments should either be scheduled in a central system or at each office</td>
</tr>
<tr>
<td>These groups are seen on specific days and/or times</td>
<td>It is important to know which office the patient wants to go to</td>
</tr>
<tr>
<td><strong>Goal: To treat patients with similar conditions on the same day</strong></td>
<td>If paper charts are being used, it may be necessary to transport them from office to office</td>
</tr>
<tr>
<td></td>
<td><strong>Goal: To make sure patients are scheduled at the appropriate office.</strong></td>
</tr>
</tbody>
</table>

Scheduling New Patients

- **New patients - Paper-based scenario**
  - **Consider** scheduling two appointments for each new patient.
    - one with the practice
    - one with the physician
  - **Consider** having new patients to come by the office to complete paperwork prior to the appointment. The patient will then become invested in the process and reduce the possibility of a no-show.
  - Instead of asking patients to arrive 15 minutes early to complete paperwork, tell them they have an initial appointment with the practice followed by an appointment with the doctor.
  - This provides time for the front desk to obtain all the necessary information.
The Effects of Early Bird Patients

- Early bird patients are those who make it a point to arrive early, sometimes this can increase stress for themselves and for staff.
- If patients are arriving at the same time as your staff members consider modifying your schedule.
- Have a front desk staff member and tech arrive 30 minutes earlier than your usual start time.
- When the patient arrive early, your staff is prepared to work them up immediately resulting in having one or two patients ready to see the physician.

Data Integrity

- For practices it is vital to have correct information.
- Front desk staff is charged with obtaining multiple pieces of information and translating that information into the practice management system. Look for ways to:
  - Streamline your forms
  - Check for redundancy in forms and tasks
  - Ensure consistent data verification system at the end of the day
  - Expedite updating patient information by asking for the information at the time of scheduling, at the time the reminder call is made, through the patient portal or via email.
  - Use technology to its fullest
- Information errors are the main cause of billing errors and slowing down the overall revenue cycle.
Paperwork

- Even with all of the technological advances in healthcare, medical practices are still overwhelmed with paperwork.
- Sending out information packets to new patients may seem costly but it is money well spent.
  - Consider including directions to your office in the information packet.
  - Consider getting permission to email forms to the patient.
  - Consider having a patient portal on your website that allows direct access to forms.
- The goal is to reduce delays in the office caused by patients taking too long to complete the forms.
- Team appointment reminder calls with a reminder for the patient to bring all forms back into the office or to gather updated demographic/insurance information.
- You need to do more than just ASK if anything has changed.

Insurance Verification

- Insurance verification is a very time-consuming and error-prone process.
- The front desk must have tools and resources at their disposal.
- Staff must be trained in the various types of insurance plans, maintain updated carrier information.
- Time is the key factor in obtaining insurance verifications. Utilize every tool such as:
  - Insurance websites
  - Electronic verification platforms (Availity)
  - Develop telephone contacts
  - Know your carrier representative.
  - Get the patient involved.
  - Have specific financial policies that specify the patients responsibility in this process.
  - Allow for the verification process to be completed be 1-3 days before the appointment.
Patient Portals

- Patient portals are a secure, way to provide online, two-way communication between practices and patients.
- The most portals sync with a practice’s EHR and practice management and billing systems. Through a portal:
  - Patients may request appointments and prescription refills
  - Staff can communicate lab results, physicians may answer patients’ questions, etc.
  - Staff call time is reduced. Staff typically spend about five to seven minutes per patient call.
  - Patient satisfaction can be increased by faster response times.

It is projected that approx. 40% of patients who are enrolled in a patient portal use it to do stuff they would normally do on the phone.

Kiosk Check-in Services

- It is not usual today to see a waiting line when checking in to see your physician.
- Streamlining check in tasks can be achieved by the use of kiosks and media tablets.
  - A kiosk is a standalone computing system connected to the office’s PM system that sits in a specific location at a practice (usually somewhere near the reception area) and allows a patient to check in and fill out necessary forms. Patients input all their information directly using a keyboard or touch-screen.
  - Some practices are loading iPads or other media tablets with check-in software and handing them to patients at the front desk.
  - Use of kiosks and other media could assist in collecting patient balances by informing patients of any balances due. The impact on increasing collections is estimated to be 20 to 30 percent.
- If a practice wants to employ this technology, make sure the media tablet or kiosk of choice is compatible with the existing EHR and/or practice management software.
Front Desk-New Technology

• One way to optimize your front desk operations is to stay informed and look for ways to improve efficiencies through new processes and software development.

• As the first line of defense for a healthy revenue cycle, front desk staff determine how much your patients pay and how much revenue your practice takes in on the front end.

Ask yourself: How much time does your front-office staff spend checking eligibility and collecting copayments?

Front Desk-New Technology

• As a result of higher deductible plans, up to 20% of revenues are now patient-based, which has increased over the last 5-6 years when the patient portion was estimated to only be around 10%.

• New revenue cycle management technology is equipped to do a number of things it couldn’t do several years ago, such as:
  – Run eligibility reports on all patients scheduled to be seen before they come in and flag those who have eligibility issues.
  – Secure authorization to process preapproved patient payments.
  – Provide patients with an estimation of their portion of a bill for a procedure in advance.
  – Latest collections technology is highly secure and meets all payment card industry standards, credit card information is stored in compliance with PCI compliance that is inaccessible to all unauthorized staff.
Don’t Cripple Your Practice

• By not keeping in step with technology
• By not promoting education and training
• By not investing money back into the practice

Front Desk Organization

• Ensure the front desk is staffed according to the volume of business.
• Employ technologies that serve to free up staff members for more important tasks.
• Identify an employee as a team lead/patient liaison who can help spot bottlenecks and potential issues.
### Front Desk Education

- Small practices generally have limited staffing resources to enable offsite education.
  - Consider promoting lunch hour webinars for training needs.
  - Consider having a consultant come in to observe front desk operations and make recommendations.
  - Consider a requirement for front desk staff to obtain a certain number of continuing education to support customer service skills, insurance skills, and collection skills.

### Investing Back into the Front Desk

- Considerations must be made as to how long the physician intends to remain in practice.
  - Consider the ROI (return on investment) for implementing new technology.
  - Consider changing current practice management software capable of providing newer technologies such as kiosks or Ipad.
Checklist for Software

• Having the latest technology certainly helps at the front desk. Upgrading or selecting new software is a daunting task.

• Considerations:
  – Was the practice management technology created before 2005 or after?
  – Was the software designed to be user-friendly?
  – Can I access my software from any location?
  – Can I access the software through the web browser I use? (e.g., Chrome, Firefox, Explorer)

Checklist for Software

• Considerations (continued):
  – Can I access the software through the brand of computer/operating system I use in my practice? (e.g., Windows or Mac)
  – Does the software boast customizable dashboards that give each user easy access to the most important tools in one place?
  – Does it populate real-time analytics and create easy-to-understand charts and graphs that deliver reporting, managing and forecasting reports?
  – Is the software compatible with the requirements of ICD-10?
  – Can the software integrate with other software already in use at my practice? (e.g., another vendor’s EHR, patient check-in solution, etc.)
Front Desk Value

• In conclusion, the very best way to optimize front desk operations is to recognize the intense amount of pressure that office staff are under and the amount of information that is processed at this point of contact.

Commitment

• A primary focus at the front desk is to have the RIGHT people doing the job.
• Your front office staff must have an understanding of how important their job is.
• Staff members who work the front desk must know how their job impacts the bottom-line.
Support

• A medical practice has to function as a team from the front office to the physician.
• If any member of the team is unwilling to contribute to the support of the front desk, then you have a failure to support the practice in total.

Contribution

• *In a medical practice, no man/woman is an island.* Meaning, no job within the practice stands alone; it takes the team.
• Having superior technical components is only one part of a successful front desk operation.
• Having a team with Heart, willing to do what it takes - that is what will set your front desk operations on the winning track.
Questions?

• Thank you for your attendance

• Get your questions answered
  ▪ **PMI's Discussion Forum:**
  ▪ **Presenter contact information:**
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