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Part B Insider (Multispecialty) Coding Alert

Billing: Speed Up New Patient Registration With 5 Tips

A smart billing capture process can prevent claim-submission headaches.

If you're trying to grow your practice, you'll need to have a logical, simple form to obtain data from your new patients. Not only is a new patient form valuable for gathering important insurance information, but it can help you find patients who owe your practice money and perform collection activities when the patient is present. If it's been a while since your practice updated its new patient registration form or you're creating one for the first time, follow these expert suggestions to make sure you can find patient billing information quickly and easily.

1. Keep the Form Simple

Ask key questions on the patient information intake form that you require all new patients to fill out. Make sure you have basic demographic information such as:

- The policy name and number
- The insured's name
- Social Security number
- Dates of coverage
- Secondary insurance information (Households with more than one income often have more than one insurer. The patient must designate which payer is primary and which is secondary.)
- Guardian or responsible party name
- The name of the person or physician who referred the patient.

It may seem obvious, but if your form does not ask patients for their fax, cell phone number, or e-mail address, you could be missing out on valuable information.

Heads up: Limit questions to patient demographics and insurance information. Usually, the form should not include any questions related to medical conditions; its purpose is insurance and payment-related information and/or general marketing data.

Best practice: How you request this information often determines how willing patients are to complete the form. If your request is firm and professional without being aggressive, chances are you will get your required information. "The more patient-friendly and simple and concise, the better," says **Zia Clarkson,** a billing consultant and educator in Long Island, N.Y.

Having patients update their forms every year is crucial, as is keeping records up to date in case of an audit.

2. Copying the Insurance Card is a Must

In addition to having the patient fill out the new patient form, be sure to ask for, and make a copy of, his insurance card. "Always make a copy of the patient's insurance card, front and back," says **Brian Fornataro,** a billing professional with Medicorp in Cranford, N.J. "This contains vital information on where to send the claims correctly the first time, cutting down on denials and obtaining revenue faster," he says.

Since you'll make a copy of the insurance card's front and back, you don't need to ask the patient to provide that information (policy number, group number, phone numbers, etc.) on a form.

Tip: You should ask for the card upon each and every visit by the patient. Insurance information can change frequently, and the patient may not even be aware of the change. "Some payers have different addresses for different specialty billing," Fornataro points out.

Hint: Make an enlarged copy of the insurance card on your copier. This makes the small print much easier to read.

3. Get Referring Physician Details

When a new patient arrives because of a referral, be sure you have clear information on the referring physician as well. When the patient arrives, a staff member should be reviewing referral data for accuracy. Be clear, Clarkson says. Ask questions such as, "I see Dr. Jones referred you. Is that Dr. Donna or Dr. John Jones?" Clarkson advises.

4. Move Your Forms Online, Too

Consider offering an online form that your patients can fill out before even coming to your office. "Being able to register with the practice online is a great way to have patients offer demographic information," Clarkson says.

Patients can fill out the forms in the privacy of their homes, where they have all the necessary information readily available -- insurance and Social Security cards, for example.

Web-based forms also reduce patients' waiting time in your office: If Web-based applications are not an option for some patients, consider mailing out a paper copy in advance -- up to a week or two if possible. The patient "can review it and fill it in at their leisure" and submit or return it to the office ahead of time or bring it to his appointment, Clarkson says.

Pointer: Still not sure your forms are hitting the mark? "Have someone outside the practice look at the forms, and get feedback," Clarkson says.

5. Make Your Practice's Information Available

The patient will be more open to sharing data with you if you openly communicate office policies and procedures. You may want to discuss with the patient the following: Basic services for the condition and your practice's fees The patient's financial responsibility for services provided during the initial visit An estimate of the costs for a new comprehensive history and physical examination How the patient can pay for the initial visit (HMO/PPO copay, cash, check, credit card) Future-visit payment policy Whether the patient needs financial counseling before the visit.