Part B Insider (Multispecialty) Coding Alert

Front Office Strategies: 3 Steps Help Your Patient Check-Ins Move More Smoothly

Make it your policy to ask for insurance cards at each visit.

When a new patient reports to your window for his first appointment, you can either hand him a history form and point him toward the waiting room to complete it, or you can use a three-pronged system to welcome the patient to the practice and collect all of the essential information you'll need to process his claims smoothly.

Why? Without the info, the office cannot access a patient's insurance plan or medical history, which physicians need to provide optimal care for patients.

1. Ask the Patient to Complete Your Registration Forms

Don't just tell the patient, "Fill out these forms and bring them back to us." Instead, show the patient exactly what you'd like him to complete and why. Show him the registration form, which should ask for his name, address policy numbers, responsible parties, and other vital information. Then show him the history form, and let him know if there are any sections that require extra explanations. Tell him what your HIPAA privacy form is about and let him know to come back to the desk with any questions.

Even though your staff members are used to the forms, new patients could be overwhelmed with the stack of information you're requesting, so be sure to let front office staff know that they could be fielding a lot of questions and to answer them with a smile so new patients feel welcome.

2. Copy Insurance Card and Request ID

Copying a patient's insurance card is almost a necessity at every visit. Even if the patient is established and tells you that nothing has changed since his last visit, you should copy and date the front and back at each visit, since even one slight change could lead to claim denials. In addition, information that might not be obvious to a beneficiary (such as a new PO box on claim submission addresses) could be critical to your claims processes.

You should copy the card at least once a year. If patients complain, explain that often there are minor changes on an insurance card that may seem insignificant, but that you file insurance as a courtesy to your patients and want to do everything possible to ensure that their entire experience with your office goes smoothly, which includes the filing and payment of their physician office claim.

In addition, many practices request a patient's photo ID to confirm that his Medicare card matches his identity. If this is your practice's policy, you should enforce it with every patient and not just with new patients, since you want to have a uniform policy across the board.

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. It's ideal if the patient has the referring physician's name and address, but if he doesn't, at least get the other doctor's first and last name, where he practices, and his specialty so you can search for the information.