



# It All Starts at the Front Desk

Your receptionist is the first line of patient contact.

BY KARNA W. MORROW, CPC, RCC, CCS-P

While reviewing a new process for pre-authorizations, a colleague recently made the statement, “If billing isn’t happy, no one is happy!” Despite being made tongue-in-cheek, the underlying message bears remembering. The best provider can provide the most transformative care in the most efficient manner yet will not be able to care for any patients if the business side of the practice is not carefully managed. And it all starts at the front desk.

The face of the practice really isn’t the carefully crafted website. The décor of the practice may impact the overall patient experience. But nothing influences the patient experience like the interaction with the person behind the front desk. This person defines the first experience with the patient who calls to schedule an appointment, sets the tone for the actual appointment by calming the patient who is frustrated with the traffic, and establishes the relationship that brings the patient back. It is a hard reality, but many practice management surveys confirm that patients will find another provider

before dealing with an unfriendly or non-responsive front desk.

It is also a hard reality that for many practices, the highest place for staff turnover is the front desk. A new face every time the patient checks in does not communicate the

demographic screen, including but not limited to the insurance plan. If the plan is loaded as a Medicare, Medicare Advantage, Gap coverage, or even if the day’s visit is appropriately linked to the workers compensation case, this clearly has an im-

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stability a patient needs when they anticipate reoccurring appointments over an extended period of time. Finding the perfect fit for this critical position is necessary, but there are also common check points to improve the odds of making sure your front desk staff is the beginning of a carefully managed practice and a great patient experience.

#### Before the Visit

The front desk “owns” the accuracy of the data within the patient’s

pact on both when and at what rate the practice is reimbursed for services rendered. Contrary to traditional training procedures, the front desk is not the spot to train someone on the nuances of insurance plans. This is a skill set that is brought to the role or risks being a skill that quickly becomes secondary to the chaos of phone calls and patients’ needs. Picking “something close” from the list of plans on the insurance tab may complete the check-in process, but

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the error becomes a denial multiplied by the number of visits provided.

A savvy front desk staff member will utilize the insurance plan alerts within the electronic health record (EHR) and avoid making an appointment with a non-credentialed provider and manage other payor limitations prior to services being scheduled or provided. Informing the patient at the time an appointment is scheduled of known limitations or out-of-pocket expenses reduces confusion, frustration, and increases probability of prompt payment.

## Day of Appointment

On the day of the appointment, a skilled team member will use the patient photos captured by the EHR for security purposes to greet each patient by name as they approach the desk. The personal welcome starts the visit off on a positive note. Patients grow weary of responding to the same questions when their visits are in short sequence. If their insurance eligibility has been checked against the scheduled appointment, there should be even less reason to ask, “Is your insurance still....” Rather the messaging can be more direct, “the insurance eligibility was checked for today’s visit, and your co-payment is \$35. Would you like us to use the card on file?”

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The front desk staff should work closely with the billing team to ensure that changes to payor policies are understood and shared with the providers. Each team member has the opportunity to review the payor ListServ and email notifications routinely without waiting for the denials to indicate change.

## General Housekeeping

Before any candidates are considered for the job, take the time to define the scope of the position. It sounds over-simplified, but this exercise will draw attention to

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the priority of specific functions and the priority of this specific role to the practice. It is not uncommon within a podiatry office for the staff to function as a team—everyone covers for everyone. But unless carefully navigated, this approach can lead to staff being the jack of all tasks and expert of none. Think about the knowledge and level of detail really needed to successfully manage the front desk.

The ability to multi-task is an essential skill. The ability to respond to multiple tasks without losing the personal touch involves skills that should always be rewarded. Track the task and have the tangible evidence of the positive impact of the front desk staff on the practice. Consider monitoring the decrease in rejections due to eligibility or insurance identification issues; utilize the daily scheduling reports to confirm the number of anticipated copayments against those collected—even the number of no-show appointments that are rescheduled can be attributed to the efforts of the front desk. The performance indicators may vary by practice but the need for vital staff members to feel valued and understand their key role in the overall success of the practice is universal.

It is important to have qualified clinical staff and the most current technology and resources to care for the patient. Running a successful medical practice requires constant attention to the entire workflow and being open to opportunities for improvement. And it does all start with the front desk. **PM**



**Karna Morrow** is an implementation manager for Practice EHR. She has spent nearly three decades in the industry leading electronic health record (EHR) implementations and providing consulting and training for a variety of healthcare organizations. Morrow is a frequent contributor to highly regarded industry publications and national conferences, providing insights on practice management, coding, billing, and other industry-related topics.