

Front Desk Proficiency Test - General

INSURANCES

What is specifically required for the proper processing and intake of patients with the following types of payment in order to properly get paid for service. ***You need NOT list the standard intake items (ie. Insurance card, referral, etc.)*** (1 point per answer unless otherwise noted.)

1. Liens
 - a. special document(s) required: **AOB, lien agreement**

 - b. any special procedure? **Sign 2 copies and send to attorney's office**

2. PPO
 - a. special document(s) preferred: **AOB, Evidence of Benefits**

 - b. any special procedure? **Make sure patient is informed of their coinsurance and deductible by their insurance rep NOT you.**

 - c. What if you are not participating with that particular plan? (3)

Do NOT say you are not a “preferred provider” or that you are “not in their network”. Say “we do not participate with that plan because they’ve asked us to reduce our fees to low. You can still come to us but may have to pay a little more out-of-pocket. Do you know your Out-of-Network benefits (if no, inform them you can help get the info and determine what the difference will be). You may pay a little more but the quality is higher.”

3. Workers Comp - Standard
 - a. any special procedure? **Get authorization directly from the insurance adjuster PRIOR to tx/session.**

 - b. What if they are a green lien? **Sign a green lien and get attorneys info.**

4. Auto
 - a. special document(s) required: **AOB, auto policy info.**

 - b. any special procedure? **Call and get authorization and billing address.**

5. Third Party Auto
 - a. special document(s) required: **AOB, police report. “at fault” party’s insurance info.**

 - b. any special procedure? **Call and get authorization and billing address.**

6. Medicare
 - a. document required: **card only**

 - b. any special procedure? **Deductible. Collect coinsurance or secondary policy info.**

7. POS wanting to use their PPO portion
 - a. document(s) required: **AOB, card only**

 - b. any special procedure? **Calculate what the difference would be from using HMO (with copay) versus POS (coinsurance, deductible.)**

8. HMO
 - a. document(s) required: **usually a colored referral.**

_____ /18

PATIENT HANDLING

Give your best response when confronted with the following scenarios. (2 points for each answer)

1. A patient asks “Do I have to pay that copay every time I come?”

Ask “are you having financial difficulty?”. If they say yes, give hardship form.

2. What do you say if the above patient replies with “*I didn’t have to pay that at the last place I went!*”

Ask “how was their care/service?”. If they say they were good, reply “I’m surprised they didn’t make you pay it!” If they say service was poor, reply “that’s probably why they discounted!”

3. A patient says “I’m having a hard time financially.”

Always reply with “No problem. Let’s see what we can do.” And go over the hardship form with them.

4. A patient says “I forgot my wallet, sorry.”

“No problem. Just complete this extension form and you can still be seen today.”

5. A patient walks in for their appointment 14 minutes late...

- How do you greet the patient? (2)

“Hello _____ . Let me see what I can do for you. Go and have a seat and I’ll be right back.”

- How do you determine whether or not to accommodate? (2)

2 factors. Their history of lates, cx, no-shows and if you, at the moment, are busy or not.

- If you decide to reschedule the patient how do you go about saying it? (2)

Give 2 options. “you are welcome to wait and see if there is a cancellation or we can get you scheduled first thing tomorrow.”

- If you decide to accommodate, what do you say? (2)

Overplay the act of courtesy. “Great news. We are able to get you in still.” Or “It must be your lucky day.” Etc.

- If it’s the patients first time late, do you consider that? (2)

Yes. Always try and give one free pass.

6. A patient calls to reschedule on the same day of their appointment.

Go ahead and reschedule but at the end remind them, “just make sure to have your \$10 fee with you at the time of the appointment.” Give them a break if it’s their first time but let them know that you are “waiving the fee but if it happens again you’ll have to apply the fee.”

7. A patient comes for their appointment and they “no-showed” their prior appointment.

- What do you say?

“Hi _____. Is everything okay?” If they reply “yes. Why?” than you say “Oh, because you didn’t come to your last appointment and we thought maybe something was wrong.”

8. A patient comes for their appointment but you recognize they are not on the schedule.

- What do you say? What do you do? (2)

“Hi _____. What can I do for you?” If they say they are there for their appointment than ask if they have their card with them. Always try and accommodate if they are a good patient but always say “let me see what I can do for you.” If they are a bad patient and you want to reschedule them, give them the option of waiting and seeing if there is a cancellation. Do NOT merely say “we can’t see you today.”

9. A Patient requests an earlier appointment even though he/she does not qualify medically.

- What is your immediate response? (2)

Ask “is there a specific reason why you want to be seen urgently?”

- If you decide you want to try and accommodate the patient, what do you say? (2)

“Let me see what I can do for you and I’ll call you right back.” Do NOT merely give them one and say “no problem” because that’s exactly how they’ll receive it.

- What if they DEMAND it? How do you respond? What do you do? (2)

“Well Mrs._____ if you are that desperate I can see if one of tomorrows patients will be willing to give up their appointment to create an opening for you. Would you like me to do that?”

10. A patient complains that they left many messages with no return call.

Get all the details (ie. When, who, etc.) and let them know that you all take complaints seriously and ask if they want to make this a formal complaint to initiate an investigation.

SCHEDULING

Describe the main points to each stage during the New Patient Scheduling process. (2 points each)

1. Greeting – **Use the words “Welcome”. Say their name.**
2. Injury/Illness – **Determine their medical urgency. Find out the Area, Mechanism of injury, DOI, current pain level, any impairments.**
3. Payment – **“How do you intend to pay for services?”**
4. Appointment – **Narrow down to days and time of day. Give 2 options. Offer an appointment according to their medical necessity.**
5. Educate – **“A-P-P-L-E” Attire-Payment-Paperwork-LatePolicy-Early**

_____ /10

Determine when to schedule the following patients according to their medical necessity. UP = urgent post operative, UI = urgent impaired, N = non-urgent

N 43 y/o male with chronic lower back pain. No mechanism of injury. Pain 4/10. No impairments.

UI 22 y/o female with right ankle injury from soccer. Pain is severe at 9/10. Trouble sleeping, walking, standing, sitting.

UP 72 y/o female underwent a total knee replacement 4 weeks ago. Pain is 4/10. Limp when walking.

N 39 y/o male with right shoulder pain. Had surgery on it last year. Pain is 5/10. Unable to throw baseball. Has difficulty taking off his shirt but able. Pain increases when reaching overhead.

UI 7 y/o female with lower back pain. No injury. Pain is moderate 6/10. Trouble sleeping.

_____ /5

Your name _____ Date _____

Score _____ Grand Total (out of 66 points)