

Resolving the Top Three Pre-Registration Issues

Issue 1: Check List (verify guarantor and encounter)

Error

Multiple Registration Errors on the patient's appointment

Errors

- Patient [REDACTED] has not been verified. Please verify this patient. [CER 100072]
- A visit account is not created for this scheduled appointment. [CER 100173]
- The patient's housing status is blank. [CER 100412]
- This patient has not indicated that their agricultural worker status for this visit date. Please ask them again, as the answer may have changed. [CER 100415]
- 'Needs interpreter?' is missing. [CER 104712]
- Patient's written language is missing. [CER 146818]
- Patient's Seasonal and Migratory worker status is missing. [CER 717595]
- Patient is missing gender identity [CER 717559]
- Patient is missing sexual orientation [CER 717558]
- The Patient has a Possible Coverage to Create. Return to the Interactive Facesheet to review [CER 701672]
- Patient has an externally loaded coverage that has not been acted upon. Take the appropriate action on the external coverage. [CER 677515]



How to Resolve

1. Open patient registration by double clicking patient's name in workqueue.
2. On the side of registration, you will see a green arrow.
















- i. Click it to expand our registration checklist.
3. **Registration Checklist will tell you what needs to be finished for pre-registering the patient.** You will find this information in NextGen.

Patient
Cadence, Arthur


Verify  


New


-  Missing item: Address
-  Missing item: Ethnicity
-  Missing item: Race
-  Missing item: Written language
-  Missing item: Language
-  Missing item: Need interpreter?
-  Patient marital status information is missing. [R-4020]
-  Patient address is missing or incorrectly formatted. Please check for an extra line after the street address, and please check for additional spaces in the middle of or after the address. [R-100103]
-  Patient's city is missing. [R-100104]
-  Patient's state is missing. [R-100105]
-  Patient's ZIP code is missing, invalid, or doesn't match the city/state. [R-100106]
-  Patient does not have a home, work, or mobile phone number listed. [R-100107]
-  This patient's veteran status has not been collected. Collect Veteran Status on the Demographics form [R-100413]

i.

4. Click a Hyperlink (blue text) for Epic to take you to the field that needs to be filled out. You will

i.  [Missing item: Address](#)

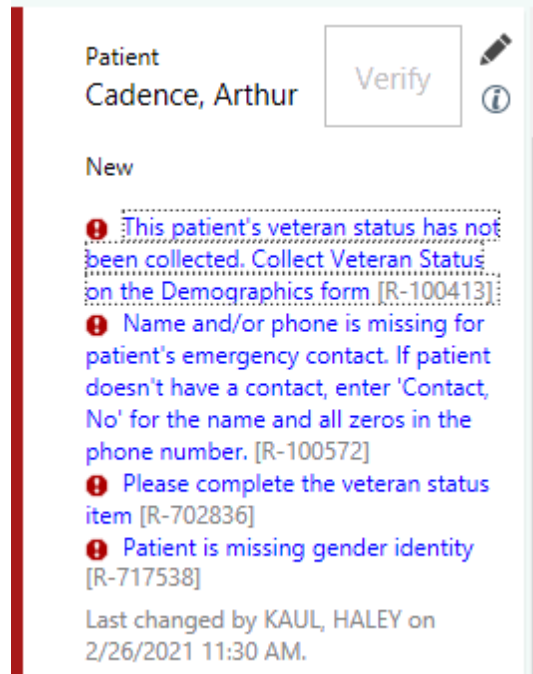
ii.  Missing item: Ethnicity

iii.  Address:  Cc inf

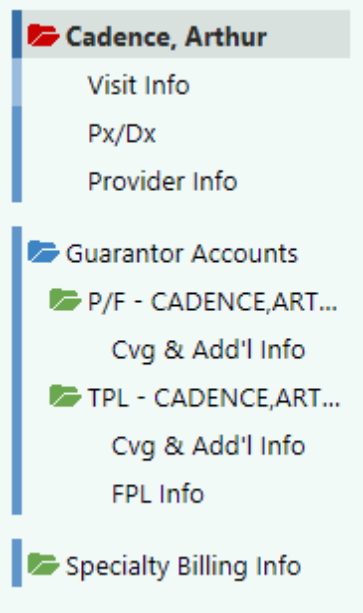
ii.

- iii. Note: There is one hyperlink that doesn't work that will be addressed at the end.

5. As you complete item, they will fall off your checklist.



- i.
- ii. If you complete an item and it doesn't fall off your check list, try opening up a different form (e.i Visit Info or Provider Info) and going back to the original one.



- 1.
6. There are 6 different sections that will have Hyperlinks or Errors.
 - i. Patient
 - ii. PCP
 - iii. Member (Coverage)
 - iv. Guarantor
 - v. Encounter
 - vi. Workflow
7. For adding a PCP, the Hyperlink isn't active. Instead, click the *Care Team* section of the Story Board.

AC

Arthur Cadence
Male, 30 y.o., 02/26/1991
555-555-5555
MRN: 204780

MyChart: Inactive
No HIPAA
Sliding Fee Classification: None
Care Team: No PCP

i.

8. Once all registration items are complete, you will get a prompt to verify the appointment. If you do not have the patient on the phone to verify all the information is correct, you should not verify the appointment.

4 Verifications Remaining

Patient
Cadence, Arthur ⓘ

New

PCP
Cadence, Arthur ⓘ

New

Guarantor
P/F - CADENCE,A... ⓘ

New

Member
✓ E-HPSJ CAP MN... ⓘ
E-HPSJ CAP MN...
E-Verified until 3/28/2021 - [Response History](#)

Encounter
On 2/26/2021 ⓘ

New

❗ Patient CADENCE,ARTHUR has not been verified. Please verify this patient. [R-100072]
❗ P/F - CADENCE,ARTHUR [100000287] has not been verified. Please verify this guarantor. [R-100136]
Last changed by KAUL, HALEY on 2/26/2021 11:58 AM.

i.

ii. If you aren't able to verify, you can still click *Finish* to close the appointment.

9. If everything is complete that we can do without the patient and they are still on the workqueue, defer the patient on the workqueue to 3/29 with a reason of "Waiting for Information."

Why it Matters - Downstream Effects

- By pre-registering the patients, we are saving PSRs time later during check-in.

Issue 2: Creating a Guarantor (P/F, Confidential, Third Party)

How to Resolve

1. Open Hyperspace.
2. Open Patient registration through your Pre-Reg workqueue or through the Appts activity.
3. Verify in NextGen who their Guarantor is.
4. Click “Add Guarantor”



5. Determine if the patient should be their own guarantor (in NextGen) and what type of account we should create.
 - i. If the patient is coming in for a Confidential (Code Jane) visit, create an Other>Confidential guarantor account.
 - ii. If the patient is coming in for a visit related to an accident, create a Third Party guarantor account. Use notes in EHR to determine.
 - iii. If the patient is a foster child, create a Personal/Family guarantor under the patient’s name.
 - iv. All other patients will have Personal/Family guarantor.



6. If patient is not their own guarantor, mark appropriate relationship for *Who is responsible for this guarantor account?* and enter guarantor’s name in *Name/ID* field (for more details check out the Guarantor-Coverage Tip Sheet).
7. Click Find Existing Account to see if the guarantor is already created.
8. If no guarantor account is found, click *Create New Account*.



9. Use NextGen to fill out their patient’s missing demographics. Ex. Address, phone #, SSN, etc.



10. Click *Finish*.

Why it Matters - Downstream Effects

- Are we billing the correct person?
- Are we keeping confidential appointments confidential for patients?
- Are we making sure not to send a claim for a visit related to an accident?

Issue 3: External Coverage, RTE

Error in Workqueue

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How to Resolve

11. Open patient registration by double clicking on patient in workqueue.

12. Create their guarantor account.

1. Read above.

13. Send Query to Patient's Coverage

i. You will now see *Possible Coverages to Create* under the Guarantor and Coverages section of registration.



ii. Click *Send Query* for the coverage.



iii. Verify Patient's Coverage information (Patient relation to subscriber, Sub ID, Name, etc) in the *Coverage Eligibility Query* screen with information in NextGen.



iv. Click *Send*.



1. We are sending a query to the payer to see if the patient is still active of this insurance.

14. Wait for Query to Run.

i. You will have a greyed-out button on the bottom of your screen that says *Awaiting Response* while we wait for the payer to respond.

15. Check Response.

i. Once we receive a response, the button will say *Response Received* and flash.



16. Create Coverage.

i. If the patient's coverage comes back as Eligible, click *Create Coverage*.

*

ii. If the patient's coverage comes back as Ineligible, click *Ignore Response*.

17. Go to the Visit Info form.



18. Link the coverage to the visit.
 - i. Select *Use Default Coverages*.



Why it Matters - Downstream Effects

- By checking eligibility now, we are saving time for the PSRs when the patient comes in for their appointment during those first two weeks.

Issue 4: Accident Related

In Epic, we require you to fill out the accident-related field at the point of scheduling.

Error



How to Resolve

1. **Open the appointments registration.**
2. **Go to the Visit Info form.**



3. **Check the Appointment Notes in NextGen and see if the appointment is related to an accident.**
4. **Fill out Yes or No in the *Accident related?* Field in Epic.**



5. **If yes, create a Third Party liability guarantor.**
 - i. Read above.
6. **If yes, link the Guarantor account to the visit.**
 - i. Go to Visit Info form.

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- ii. Select correct Guarantor under *Guarantor Accounts*.



Why it Matters - Downstream Effects

- We want to make sure we aren't seeing Worker's Comp patients.
- We want to make sure we aren't sending claims to insurances for Accident related visits.

Issue #5: Confidential Appointments

How to Identify

Look at the Reason of visit STD, Birth Control

How to Resolve

1. Click on the **Appt activities**  to search for your patient
2. On the **Appt Desk** select the
3. Enter the Appt Notes, Visit Type, and Provider



4. Deselect the
5. Select Search
6. Select the appt time from the provider's schedule



Click **Schedule**

7. Click Accept on the Appointment Review activity



8. On the Interactive facesheet
9. Select Additional Demographics



10. Ensure to select the Confidential on the **Patient type** field
11. Click **Accept**
12. Go to Visit Info form to mark this is not an accident related visit



Got back to your patients Interactive Facesheet by clicking their name



13. Click **Add Guarantor** on Guarantor & Coverages



14. The account coverage wizard opens

15. Select Other

16. Select Confidential

17. Click Create new Account



On the Guarantor Info make sure the Address Link is set to NO



Click **Finish**

18. On the Visit info form select the Confidential Guarantor



19. Click Accept.

Why it Matters - Downstream Effects

To ensure we don't send out statements for our confidential sensitive visits

Reference Material

Confidential Quick start guide