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## Tool records 'everything related to patient'

*'It's great as a training tool'*

What began as an automated telephonic tool to streamline the pre-certification process at the University of Arkansas for Medical Sciences (UAMS) in Little Rock has expanded into a multi-faceted system that provides "a communication record for everything related to the patient," says **Holly Hiryak**, RN, CHAM, director of hospital admissions.

"If I'm on the phone talking with a payer about a patient and realize I should be recording the conversation, I click on an icon on the computer and it automatically starts recording," Hiryak notes. "When I complete the call, I can go in and index it so it is easily retrievable."

The tool is "not just for calling insurance companies," adds **Nikki Gray**, a UAMS revenue integrity specialist. "We use it for physician referrals, for calling different physician offices, and for preadmitting patients over the phone."

In the case of employees doing preadmit calls, she says, the system "becomes not just a reference tool, but also a productivity tool."

"We can see how many calls the person made and what kind of transaction it was, and [the information] can be sorted by date, by tracking number, by patient account number," Gray notes. "Whatever information is on the account is pretty much recorded."

One of Gray's duties is to manage activities related to TRACE (Tracking All Communication Events), a product of the Knoxville, TN-based White Stone Group.

"It's a never-ending project," says Hiryak. "We continually implement as they enhance the product." The earlier version of the system was known as VoiCert, she adds, which now describes the product's call management features.

"It's great as a training tool," Hiryak notes. "One of the [access] managers recently overheard an employee speaking inappropriately to a patient, and played back the call for that person, who was cringing the whole time."

### IN THIS ISSUE

**EMPI:** It's part of patient-centered focus at 12-hospital system . . . . . cover

■ **Patient identification:** New name-entry policy paves way for master patient index . . . 52

■ **Access feedback:** Director seeks input on ED procedures to ensure accurate patient identification. . . . . 53

■ **Technology:** UAMS tool provides 'communication record for everything related to patient' . . . . . 54

■ **Discharge:** Assigning specific departure times challenging, but a real patient pleaser . . . . . 56

■ **Staff turnover:** Director's key to retaining employees is 'be flexible when you can' . . . 57

■ **EMTALA:** Court ruling casts doubt on CMS' inpatient exclusion . . . . . 58

**News briefs** . . . . . 59

**Also included**  
**HIPAA Regulatory Alert**

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"This [employee] is not usually rude, but the patient had been challenging," she explains. Having the recording at hand gave management the ability "to show her she needed to rethink her behavior, and gave the opportunity for her to call the patient back and apologize. It was a quick customer service recovery."

The UAMS transfer team uses the tool to receive transfer requests from outside physicians, many of whom are from other countries and have very strong accents, Hiriyak says. "If the transfer team misses something, they can go back and pick up the information they missed or misunderstood and they don't have to keep calling the physician back."

In addition, when arranging a transfer they can refer to the recording to confirm that the type of patient the facility indicated was being sent is in fact what UAMS receives, she notes. If there's an issue, Hiriyak says, "they can call back and clarify."

With the call-recording feature, known as PC Call, there is a disclaimer that can be set to play that automatically indicates that the call is being recorded, she says. "Some states require that both parties know, and some don't, so depending on what the requirement is in your state, you can set it as the default, or not."

UAMS recently implemented a feature called FaxCert, whereby users can send, track, retrieve, view, and print faxes and paper documents through the Trace server, Hiriyak says, "so we always have a record of our faxes."

"Again, it's about quality, productivity, and information," she adds. "If a payer says, 'I never got your [admit] notification fax,' we have the record. It documents time, date, and image."

The fax machine also can serve as a scanner, Hiriyak notes. "If we need to have [a document] in the system as part of account information or an e-mail, we can put the document in, hit a couple of keys coded to the server, and it scans the image into FaxCert. We always have that image, whether a referral or an admit notification, and we can index it to a particular patient."

Another feature, a PC-based application known as PixCert, makes it easy to capture images of entire web pages — such as an on-line eligibility document — or anything received via email or the web, she adds.

Before, when access employees went on-line to check eligibility, they had to manually document or print out the information, which sometimes encompassed multiple pages, Hiriyak notes. "Now it can all be captured on the server, so

everybody sees what was captured that day, and it saves the person from later having to look it up again."

## ***Overtuning denials***

The centerpiece of the tool is something called a DCR (Digital Communication Record) Tracker, which allows users to access completed and pending transactions, she says. "It sorts all of our communications — by fax, PixCert, monitored call, etc. We can go into the server and pull them up by patient name, date of service, and other search parameters."

DCR Tracker, she explains, enables the user to:

- play back phone recordings.
- view, print, and route faxes and paper documents.

- view and route electronic documents, web pages, and e-mails.

The end result, Hiriyak points out, is that the business office has a single tool to go to for everything involving the front end. "If they're researching a denial or trying to find out what was going on with a patient on a particular date of service, they have that information readily available."

UAMS has had denials overturned because of the precise documentation provided by the TRACE tool, notes Gray, and those positive outcomes can be tracked with a program called Ascent.

"Ascent allows the business office and areas such as admissions or outpatient clinics to communicate information about denials," she explains. "There is a report that lists denied claims, the reasons for the denial, and how much money was denied."

Admissions staff go through the report to identify the denials for which that department was responsible, Gray says. "For instance, if the claim was denied due to not having a pre-authorization or referral on file, it is counted as an admissions denial."

Employees then look through the notes on the account and determine if the pre-authorization or denial was, in fact, already done, and whether it had a tracking number associated with it from using TRACE, she adds. If so, the admissions department is able to count that as an overturned denial, because there is documented proof (voice or image) that the required work had been done, and the money attached to the account can be recovered.

Since 2005, Gray says, TRACE has been directly responsible for at least 12 denials being overturned, with a dollar value of just more than \$410,000.

"We do the overturned denials process once a year," she adds. "[March 2007] was the second time we've done it since we started using the products in 2005."

### ***It's the 'go to' place***

"The tool has enhanced the ability of end users to document their findings and record them in a centralized fashion, so there is one 'go to' place for everybody to find that information," Hiryak says. "It's web-based, so they just have to log in."

Depending on the security level that is set, users can access all or part of the functions, Gray says. "'Permissions' are set according to whether you need to see all transactions going through the server, only the ones sent/received by your department, or only the ones you send/receive individually.

"For instance, one of the admissions insurance people sees all faxes going through the server, and she can distribute them to various individuals or groups listed in the Tracker software," she adds. "Of those individuals or groups, some have the ability to see everything sent to that particular group, and some only can see what is specifically sent to them. It depends on your job duties, and what you need or want to see."

Some users are able to amend a call, Gray notes. That means, she adds, that if a voice mail message related to a particular account is recorded on PC Call, the user can attach it to the existing record instead of creating a whole new tracking number.

"If they only use one part of [the tool], like VoiCert, or use it only for certain calls, we can set the security levels accordingly," she says.

The settings can be configured based on location, Hiryak says. "The ENT clinic staff, for example, sees only their ENT transactions."

Other departments don't need to see, for example, internal communications between access and the nursing unit, she notes, "which are recorded in case there is any discrepancy."

Another component of FaxCert has not yet been rolled out, Hiryak says, because of a decision to initially focus more on the access process.

"With FaxCert, you can also receive and send broadcast faxes related to patient transfers," she notes. "Say you're trying to place a patient in a rehab or SNF. You can broadcast-fax the information to notify different facilities that you are looking for a placement.

"If they need clinical information, you can fax that," she adds, "and if a facility calls and says, 'I didn't get page 7,' you can go back in and just send that page."

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TRACE, "Tracking All Communication Events," is designed to capture, archive, and index routine healthcare communications for retrieval through a web-based digital communication record. Searchable records of phone, fax, paper, and electronic communications provide evidence to resolve denied claims, expedite appeals, and save time in revenue recovery.

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