

Hiring and Onboarding an Intake Specialist or New Patient Coordinator

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Objectives

- Learn about New Patient Coordinator and Benefit Specialist roles.
 - Impact of these roles on a cancer program or practice's revenue cycle.
- Learn what information is needed before patients start in the clinic.
- Learn what to look for in a prospective candidate.

Summary of Information Needed

Patient Information	Insurance Information
<ul style="list-style-type: none">• Correct spelling of patient's name• Date of birth (DOB)• Current address• Social Security number• Referring provider	<ul style="list-style-type: none">• Insurance Company<ul style="list-style-type: none">• Member ID• Group number• Claims mailing address• Benefit verification to determine network status

New Patient Coordinator Role

What do they do?

- Serve as an introductory liaison to the cancer program/
practice for:
 - Patients
 - Referring physicians/clinics
- Collect information from referring physicians
- Prioritize and schedule patient visits according to need and urgency

New Patient Coordinator Role

What do they do?

- Provide information and education
 - Answer questions
 - Set expectations
- Complete a new patient assessment



How To Contact

- Option in phone menu to reach New Patient Coordinator
- Direct phone line
- Voicemail
- Telephone encounter
- Electronic health record (EHR) referral
- Fax
- Two additional staff to assist as needed

If Unavailable To Take Call

- Create a “Telephone Encounter”
 - Route it to "NEW PT [Patient] SCHEDULING"
 - Include diagnosis and referring provider name
- Leave voicemail
- Check if backup team member is available



1

New Patient Assessment Form

For every new patient referred, a “*New Patient Assessment*” must be completed.



New Patient Assessment Form

Time taken: 4/21/2022 1400 + Add Group + Add Row + Add LDA Responsible

Show Row Info Show Last Filed Value Show All Choices

Referral Intake:

Referral Type

Benign Hematology taken today

Benign Hematology Brain Breast Bone Connective & Soft Tissue GI GU GYN Head & Neck Leukemia Lung Lymphoma Melanoma Myeloma Skin
 Thorax Other

Referred By

Self Referral taken today

Provider Self Referral

Provider Name

Referring Department

Is patient aware of diagnosis?

Yes taken today

Yes No

Date of Referral

4/21/2022 taken today

Date appointment made by New PT Coordinator

4/21/2022 taken today

Contact delay with scheduling

No delay taken today

Could not reach patient Provider request delay in contacting patient Other No delay

Date of consult appointment

5/2/2022 taken today



New Patient Assessment Form


Reason if delay with scheduling

No delay taken today

Physician request Location request Date request Time of day request GBO Availability No delay 

Scheduled location

SVG Med Onc at DCCC taken today

SVG Medical Oncology SVG Med Onc at SMG SVG Med Onc at SNS SVG Med Onc at DCCC SVG Med Onc at SCO SVG Radiation Oncology SVG Rad Onc at DCCC 

SVG Rad Onc at SMG SVG Rad Onc at SNS

Oncology provider scheduled with

Dr. Jaslowski taken today

Benefits of New Patient Assessment

Capture data for reporting patient volumes by:

- Diagnosis category
- Who and where patients are referred from
- Date of referral to date of appointment
- Reason if delay in appointment
- Location of scheduled appointment
- Physician scheduled with

New Patient Data Collected

What Do We Do Now?

Notifications



Two teams are notified:

- Benefit specialist team
- Medical records team

Insurance Benefit Specialist Role

What do they do?

- Obtain patients' current insurance information and check eligibility
- Create a “Patient Benefit Sheet”
 - In-network or out-of-network
 - Deductible and out-of-pocket costs
 - Co-pay

Insurance Benefit Specialist Role

What do they do?

- Obtain referral if needed
- Make appropriate referrals to financial advocates

Notifications to Financial Advocates

- Insurance is out of network
 - Notify New Patient Coordinator
- Medicare-only coverage
- Uninsured
- Out-of-pocket cost is greater than \$5,000
- No referral
 - Veterans Affairs
 - Tribe
- Other insurance concerns:
 - White bagging, etc.



Benefit Sheet

Provided at first visit:

- Medicare
- Medicare Advantage
- Commercial/Private

• Definitions

- Out-of-pocket cost
- Co-pay
- Deductible

• Dollars met and dollars remaining

Include:

- Financial advocate's business card

Disclaimer

- “Benefits were accurate at the time of the benefit review.”

Finding The Right Candidates*

New Patient Coordinator

- Solid understanding of oncology/hematology diseases
- Patient
- Good listener
- Good with giving directions
- Critical thinker
- Works well under pressure
- Internal candidate

*Job descriptions need to be clear and accurate/Allow job shadowing

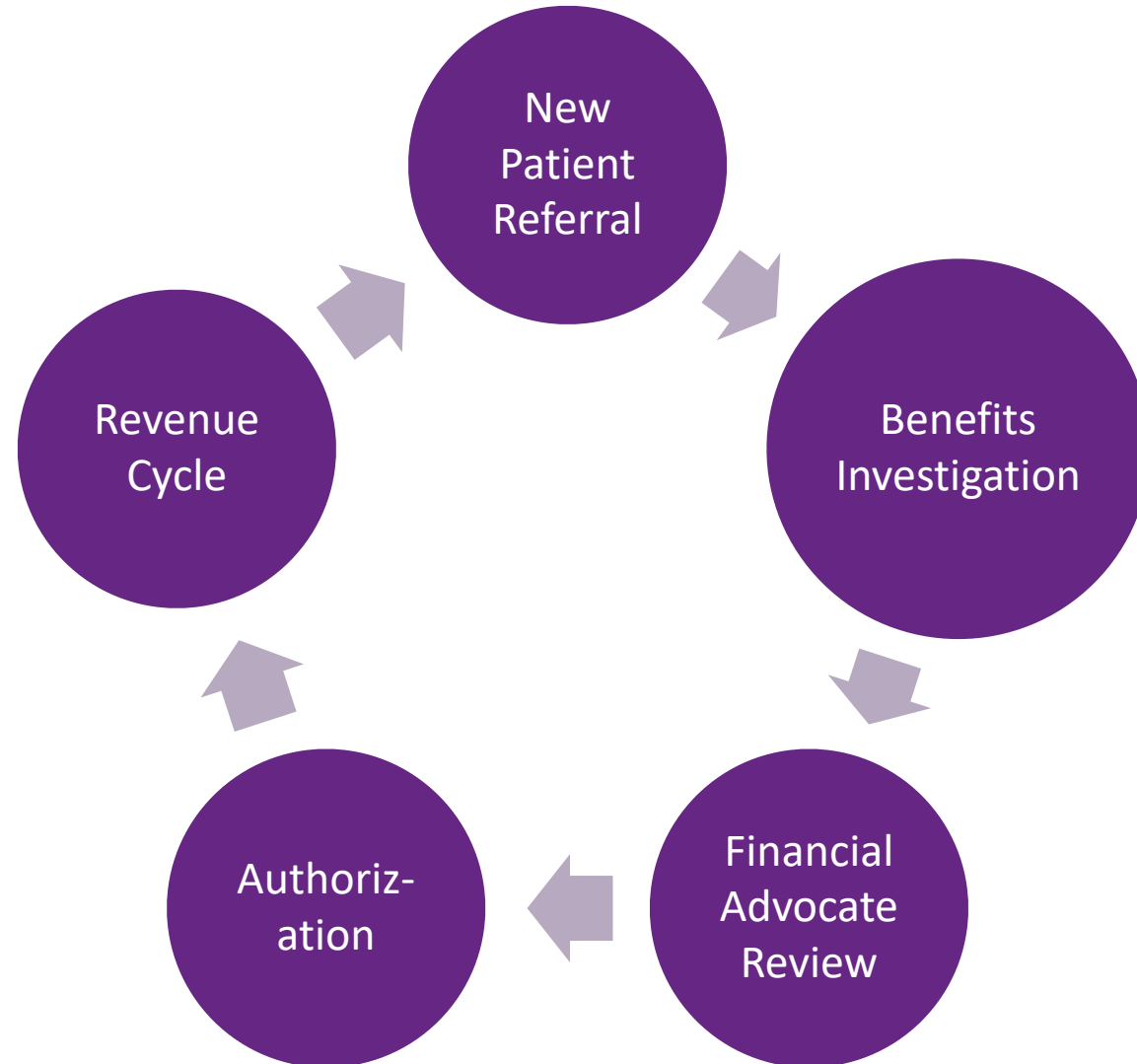
Finding The Right Candidates*

Benefit Specialist

- Solid understanding of insurance terminology
- Detail oriented
- Good multi-tasker
- Excels at written and oral communication
- Background in insurance recommended

*Job descriptions need to be clear and accurate/Allow job shadowing

Impact to Revenue Cycle



Questions?

Thank You

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References

1. Videoplasty.com. Vintage phone vector.svg from Wikimedia Commons. Published March 1, 2018. Accessed April 27, 2022. https://commons.wikimedia.org/wiki/File:Vintage_Phone_Vector.svg