

Pre-Encounter Unit Self Assessment Guide

The following worksheet will help you identify areas of opportunity. Is your team meeting or approaching Best Practice standards, or are there opportunities for improvement?

Examine Your Facility's Processes and Technology

Best Practice Process Indicator	Current Practice	Opportunity
Do you have a process in place for order reconciliation?		Yes or No
Is there a process to financially secure the account prior to delivery of non-emergency services such as diagnostics, surgery, and clinic visits?		Yes or No
Is a medical necessity check performed prior to, or at the time of, scheduling?		Yes or No
Is there an organized process to ensure pre certifications are obtained for elective procedures and diagnostic testing?		Yes or No
Are referrals received prior to the delivery of service?		Yes or No
Is insurance verified, and are benefits determined prior to the delivery of service?		Yes or No
Does your organization have policies that make it "ok to delay" service under clearly-defined circumstances and in observance of specified protocols?		Yes or No
Does your team identify and collect deductibles, co-insurance and co-payments prior to delivery of service?		Yes or No
Is there a streamlined (fast track) check-in process on the date of service for pre registered patients?		Yes or No
Is there a process in place to validate data on recurring visits each month?		Yes or No



Best Practice Technology Indicator	Current Practice	Opportunity
Is your call center equipped with Interactive Voice Response (auto attendant)?		Yes or No
Do you have up-to-date medical necessity software?		Yes or No
Do you utilize an auto-dialer for appointment confirmation?		Yes or No
Does your dialer have recall capability?		Yes or No
Are benefits verified through an Integrated Benefit Engine solution?		Yes or No
Does your facility utilize self-service kiosks?		Yes or No
Does your facility have an out-of-pocket estimator?		Yes or No
Does your facility have electronic check and credit card processing?		Yes or No
Does your facility have a web-based portal equipped with scheduling options, pre-registration, and payment capabilities?		Yes or No
Does your team utilize software to check the quality of the pre-encounter and encounter Patient Access processes?		Yes or No

Examine Your Facility's Performance on a Select Group of Key Performance Indicators

Indicator	Best Practice	Opportunity Your Score (Performance Below Best Practice)	Great Job! Your Score (Meets or Exceeds Best Practice)
Call Abandonment Rate	< 4%		
Maximum Wait Time	≤ 2 minutes		
Average Length of Call	≤ 3.5 Minutes		
Appointment Utilization	95%		