

Item #	Task Description	Task Explanation	Done (date)
1	Identify training needs	To ensure success of the POS redesign the time must be taken to provide adequate staff education and training. Training should be comprehensive and provide staff with a thorough understanding of why POS collection/Account resolution is important to your organization. Here is a sample listing of what should be included as part of the staff training.	
1.1	Information of why implementing POS collection/account resolution including any customer service goals.	Include information regarding your organization's bad debt compared to industry practice, increasing pt. liability expectations based on insurance benefits, goal for identifying financial assistance needs at the earliest opportunity and any other reasons identified by your organizations of why implementing POS collections/account resolution.	
1.2	Insurance basics for major insurance categories - Medicare, Medicaid, HMOs, PPOs, Commercial Insurance, Workers Compensation, VA,	Should include an overview of the basic components of each insurance type. i.e. Medicare Part A & B, Medicare Secondary Payer, Medicaid including general eligibility criteria, HMO/PPO including out-of-network and non-authorized service coverage limitations, self-insured coverage's, traditional commercial, Veterans Administration, Workers Compensation, COBRA, etc.	
1.3	Insurance terminology	It is important that staff have a basic understanding of insurance terminology. A basic understanding of terminology helps them to interpret insurance cards, insurance verification information and benefit information as they determine insurance coverage and pt. liability information as part of POS collections/account resolution.	
1.4	Copies common insurance cards and how to interpret information on insurance cards.	There is no stand for insurance cards. Because of this, it is important to review samples of as many common cards as possible with staff. This will help them identify and interpret the information presented on individual cards.	
1.5	Finalized departmental workflows	The finalized workflows developed as part of Ideal department processing should be part of the education and training. Reviewing all aspects of departmental processing steps for scheduling, pre-service and time of service activities give staff the complete picture of how all steps in the process support the successful implementation of POS collection/account resolution.	
1.6	Departmental procedures based on finalized departmental workflows	The finalized procedures developed as part of redesign process provide staff with the detailed guidelines for completing departmental activities that support POS collection/account resolution.	
1.7	Step by step instructions for determining patient's liability incorporating common insurance benefit coverage situations	Take multiple pt. liability scenarios and develop instructions for determining the pt. liability in case. Include examples of different types of patient liabilities including co-payments, deductible/co-insurance, non-coverage. Also include examples of each major financial class.	

Item #	Task Description	Task Explanation	Done (date)
1.8	Financial Counseling interview scripts that will provide guidance to staff as they complete bedside registrations, request payments and provide financial counseling when required.	Financial counseling scripts should be developed for as many scenarios as possible. Include co-payment, deductible/co-insurance, previous unresolved balances, self pay, financial assistance needed, referral for Medicaid, referral for charity care, uncooperative patient, patient unhappy with care, etc. Include any additional scenarios that you feel are important.	
1.9	Post learning assessments to evaluate staff understanding of the material presented	Develop learning assessments developed that include a cross-section of the material that will provide an evaluation of the staff understanding of the material.	
2	Prepare class schedules, reserve training rooms; schedule staff	Identify all staff that require education. This should include all staff that will be part of POS collections/account resolution.	
2.1	Determine number of sessions that are required to ensure all staff have the opportunity to attend sessions	Number of sessions should be based on the # of staff to be trained; Classes should not be too large and each class should be a cross-section of all positions to ensure staff interaction based on their various experiences. Class time should be reserved to allow attendees that work different shifts to attend (early morning, day shift, evening);	
2.2	Reserve training rooms	Schedule training far enough ahead to allow time to reserve training rooms and ensure any required presentation equipment will be available for the classes.	
2.3	Develop departmental staffing schedules for dates of training that incorporate part time staff for additional coverage to free time for all staff to attend classes without jeopardizing departmental operations.	Departments still need to operate during educational training. To ensure, staff can attend sessions, develop schedules that provide for alternative coverage. If this is not possible, obtain overtime approval for staff to attend classes.	
3	Conduct staff work sessions as necessary to develop questions that will become the basis for staff interviewing scripts for bedside registration, POS payment requests and financial education/account resolution activities.	Make staff part of the development of POS collection/account resolution scripting materials. Have staff identify as many scenarios as possible of questions, concerns, etc. that patients may have related to POS collections/account resolution.	
4	Complete staff scripting	When all questions have been identified develop appropriate responses based on the Organization's Financial Policy and available account resolution options always ensuring that responses incorporate best practice customer service.	
4	Complete training materials	For each training need identified in step #1 above, develop training material	
5	Provide Education		

Item #	Task Description	Task Explanation	Done (date)
6	Document training issues and resolve as necessary	Keep a list of all questions asked during the class, any areas where staff remain confused and any problem areas identified as part of the post class assessments. Take any action needed to resolve issues identified during training classes.	
		Note: Education specific to the Patient Financial Communications Best Practices is available through HFMA's Education Department. This customizable material includes a train the trainer module as well as on-line training designed for all patient access staff who have financial conversations with patients. Details are available at www.hfma.org/education	