Name of Policy: Patient Access Policy		THE UNIVERSITY OF TOLEDO **MEDICAL CENTER**	
Policy Number: 3364-132-27			
Approving Officer: Chief Operations Officer - UTMC		**Effective Date:** 9/28/2022	
Responsible Agent: Patient Access Director		**Original Date:** May 1, 2016	
Scope:			
	New policy proposal	X	Minor/technical revision of existing policy
	Major revision of existing policy		Reaffirmation of existing policy

(A)   Policy statement

It is the policy at the University of Toledo Medical Center (UTMC) to implement Patient Access procedures that will provide a positive patient experience while gathering necessary patient and insurance information critical to downstream processes and reimbursement.

(B)   Purpose of policy

To apply a set of standards for properly update patient accounts. This policy is also intended to protect patient Protected Health Information (PHI), avoid patient safety events, and ensure timely and accurate billing and reimbursement.

(C)   Definitions

Permanent Patient Identifier: Demographic information that each unique patient must have within a registration. They are:
- Patient's legal first, middle and last name
- Social Security Number
- Date of Birth

(D)   Procedure

    1. Proper Patient Identification
        a. Prior to creating, activating or updating a patient account, staff will:
            i. Obtain TWO permanent patient identifiers from the patient.
            ii. Utilize search methods to find the patient's medical record number (MRN).
            iii. If no MRN is found, a new MRN will be created following training standards.
            iv. In the event of a patient has duplicate MRN, staff will immediately report the information to their Team Lead, Supervisor, or Manager by email marked as urgent.

2. **Staff will perform the following according to SOP, job aids and training standards:**
   a. Follow AIDET principles
   b. If the patient appears to have an upper respiratory issue (e.g., cough, sneezing, runny nose), hand a "Procedure Mask" or regular face mask to them and request the patient to place over their nose and mouth
   c. Take the sick patients and/or patients that are not up to date on their childhood vaccinations, to an area where the risk of illness to other patient is decreased (e.g., exam room , designated waiting room for sick patients) to complete the registration process Scan a form of identification and insurance card(s) at every encounter
   d. Accurately collect and update patient demographic information within all required systems
   e. Verify insurance eligibility and complete all elements of financial clearance
   f. Verify all other necessary registration elements for accuracy
   g. Follow requirements for forms according to UTMC policy: Patient Access Forms #3364-132-05

3. **Changing/Updating Permanent Patient Identifier**
   a. In the event a patient or legal guardian requests to update a permanent patient identifier within the patient account, staff will:
   b. Only perform such updates with proper documentation and patient present.
      i. UTMC accepts the following forms of identification: social security card, birth certificate, marriage certificate or divorce decree, driver's license, state ID or valid Student ID.
      ii. Identification is required to be scanned and added to the medical record
      iii. Update the account following the SOP, job aid and training standards.
   c. When registering a newborn, staff will:
      i. Complete registration
      ii. Enter parent's insurance information
      iii. Assign patient name as mother's last name, baby girl or boy and mother's first name
         1. Multiple births:
            a. Include birth order in name (i.e. mother's last name, baby girl one and mother's last name, baby girl two)
            b. Place a sign in chart noting newborns with similar names
      iv. Place newborn band(s) on mother
      v. Place newborn band on the newborn's wrist and a mother's armband on the newborn's ankle

4. **Correcting a Bad Address**
   a. The patient's address field will be populated with 1234 Bad Address by the Patient Financial Services department following receiving returned mail.
   b. Upon encountering a bad address during the registration process, staff will verify the proper address and update the patient account.

3364-132-27
Patient Access Registration

Approved by: _/s/_____ _10/04/2022___ Laura Kern Date Patient Access Director _/s/_____ _10/03/2022___ Chris Stesney-Ridenour Date Chief Operating Officer - UTMC *Review/Revision Completed by: Laura Kern* Policies Superseded by This Policy: *3364-132-14 Address* *Correction; 3364-132-15 MISYS and STAR; 3364-132-20* *Changing/Updating Patient Information; 3364-132-26* *Scanning Insurance Cards and Photo ID; 3364-132-01* *Registration Data Accuracy*	Initial effective date: 5/1/2016 Review/Revision Date: 5/1/2016 7/1/2019 11/4/2019 9/28/2022 Next review date: 9/28/2025