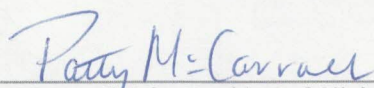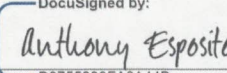**TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER-EL PASO**
MEDICAL INCOME PRACTICE PLAN-POLICY AND PROCEDURE

Revised Date: 03/17/2021   Effective Date: 04/01/2021

Ana Deslongchps
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Ana Deslongchamps, Senior Director

Patty McCarroll
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Anthony Esposito
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Anthony Esposito, MPIP Executive Director

Department: Central Registration

TITLE: Patient Registration Workflow in CBIZ

Policy: #2

Policy: Patient registration occurs daily based on a data feed from multiple sources.

Procedure:

1). Registration
   a. Initiate patient search in CBiz.
   b. Search by first 3 letters of patient last/first name; followed by year of birth; MRN#, SS#, DOB
   c. In Patient Services page under Demographics; please complete/enter required information for fields Highlighted in yellow. If patient is a new registration, Enter. Patient Name; Email; Pt Relation to Guarantor; Ethnicity; DOB, Sex; Race; Language; Address 1; City; Zip; Phone #; Primary

Phone/Type;
       And Registration Location. Click OK to Save.
   d. Additional registration Info Tab: Enter: Written Language.
   e. Guarantor Tab: Enter name and relation to guarantor. (If patient is a minor, guarantor information Needs to be entered). If the patient information is the same –click on Field: Bring in Patients Information.
   f. Contact AKA Tab: Enter Emergency contact Name and Phone information. (This is used when Patient is present) this information is not provided on UMC & Tenet reports. Additional patient AKAs need to be added in these fields.
   g. Comments Tab: Enter comments when CBIZ users request patient demographics updated/changed; Financial Assistance interview notes; Duplicate Accounts Merged.
   h. Other Numbers Tab: Enter Patient MR#s from daily Hospital reports.

2). Adding a FSC at patient registration or account update
   a. in Main Menu under Patient Services
   b. Select Insurance
   c. Click on B (Determinator) to add
   d. Enter Key Word Search field: (Plan name; Payer ID; Select match/OK; Click on Financial Class Drop Box and Select correct FSC.
   e. Enter information in Fields hi listed in Yellow (Certificate #; Effective Date; Received Date field; Relationship to Subscriber & Eligibility Variance Name if applicable). Click OK/Save.
   f. Assign or Update FSC Priority if necessary (Click on H/Change Order).
       Each time a staff member changes a FSC they must enter a note stating why the FSC was changed.

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