Patient Services Representative
Workforce Development Program

Course Number: HLTH 5700
Hours: 100 Instructional Hours
Dates and Time: Monday, Wednesday, Thursday 8:30am – 2:30pm, 7 weeks
Location: Leeward Community College
Tuition: $1600
Optimal Class Size: 8 – 20 participants

Textbook(s):
> › Patient Services Representative Student Manual; Leeward Community College.
> › Patient Services Representative Workbook; Leeward Community College.
> › Patient Services Representative Appendix; Leeward Community College.

Description:
The Patient Service Representative (PSR) program will provide participants with the foundational understanding of the healthcare delivery system, the role of the Patient Service Representative and the tools needed to provide exceptional customer service. This course is intended to prepare PSR's as a frontline customer service agent in a medical office or hospital setting. Five modules are tailored to the entry-level healthcare professional and is intended for individuals with little to no experience but wish to pursue an entry level career in a healthcare setting. The PSR program is nationally accredited by the National Association of Healthcare Access Management (NAHAM). Participants who complete the program are eligible for the NAHAM Certified Healthcare Access Associate (CHAA) credential exam.

Program Learning Outcomes:
1. Utilize effective therapeutic communication knowledge and skills in a professional setting.
2. Demonstrate competency in the technological skills needed for working in health care systems
3. Utilize appropriate skills/tools to guide patients attempting to navigate health care resources.
4. Perform entry-level coordination of care by understanding needs of the patient.
5. Employ an active understanding of medical terminology, diagnosis and appropriate treatments for such.
6. Respond appropriately to the social and mental health needs of the patient's related to the cultural differences and/or language barriers.
7. Demonstrate understanding of basic ethical and legal issues in health care.

Methodologies:
Methodologies will include lecture, organizational team projects and active demonstration. Curriculum introduces anatomy, physiology and medical terminology and offer specialized training in appropriate responses to telephone protocols, point of service processes, and an understanding of professional standards of conduct. Soft skills modules will require active participation. Homework assignments and active review of materials will be required for all participants.

Grading and Attendance:
Attendance is mandatory. Students who are unable to attend in cases of emergency must notify the instructor as soon as possible. Successful completion of the program will be based on participation (20%) and the results of a written final exam (40%) and skills simulation exam (40%).

CHAA Examination Content Outline:

The CHAA examination addresses the following subject matter. Candidates are required to demonstrate proficiency by answering examination questions that evaluate their knowledge of facts, concepts, and processes required to complete the tasks described below.

I. Pre-Encounter (40%)

A. Customer Service
1. Internal Customer Service
2. External Customer Service
3. Patient Rights and Responsibilities
4. Staff Behavior towards Customer
5. Caring and Compassionate
6. Technically Competent
7. Sensitive to all Customer Needs
8. Respect and Maintain Privacy

B. Customer Assessment
1. Age Specific Criteria and Concerns
2. Customer Expectations and Concerns
3. Clinical Concerns and Patient Needs
4. Financial Concerns and Patient Needs
5. Customer Literacy and Comprehension

C. Resource Scheduling (e.g., Equipment, Service, and Staff)
1. Availability
2. Scheduling
3. Documentation
4. Communication
5. Scheduling System Applications
6. Referral Services

D. Pre-Registration
1. Registration Systems
2. Medical Record Initiation
3. Collection, Storage, and Dissemination of Patient Information
4. Respect for Patient Needs (e.g., Confidentiality and Security)

E. Patient and Family Education
1. Wayfinding
 - Directions
 - Parking
 - Maps
 - Drop-off and pick-up
2. Provide Information to Customer about Assessment using Appropriate Materials and Methods

F. Prerequisites
1. Service
 - Testing and Procedure Prerequisites (e.g., blood work, fasting, or stop medication)
 - Reviewing Service/Procedure Information with Patient
2. Financial
 - Financial Obligations Prior to Service
 - Regulatory Requirements
 - Payment Programs
 - Insurance Plans or Contracts
 - Information Systems and/or Web Sites for Payers

G. Payer Authorization and/or Determination
H. Verification of Benefits

II. Encounter (45%)
    A. Customer Service
    B. Patient Check-in, Admission, or Registration
        1. Identification of Patient
        2. Special Needs of Patient
        3. Patient Placement
        4. Notification and Communication of Admission
            - Internal
            - External
        5. Level of Care (e.g., Inpatient, Observation, and Outpatient)
        6. Processes Related to Registering Patient
            - Demographic information
            - Explaining and obtaining consents, forms, and signatures
            - Insurance and payment information
            - Physician orders
            - Medical terminology
    C. Wayfinding
        1. Maps and Signage
        2. Parking
        3. Patient Drop-off and Pick-up Points
    D. Patient Tracking
        1. Locating Patient
        2. Transporting Patient
        3. Routing Patient
    E. Census Management
        1. Account for Patient Activity across Entities
        2. Patient Data Interfaced with Other Systems
    F. Customer Information (e.g., HIPAA Compliance on providing information)
    G. Departure or Discharge
        1. Collection of Patient-portion Payment
    H. Billing
        1. Capturing all Data Elements necessary for Accurate Billing

III. Future Development (15%)
    A. Data Integrity
        1. Used to measure Quality and Accuracy
        2. Statistics Reporting of All Data
        3. Reporting and Accessing Database
    B. Resource Management
        1. Staff
        2. Equipment
        3. Supplies
    C. Customer Satisfaction
        1. Survey Results
        2. Quality Improvement
    D. Staff Education and Competency
        1. Performance Indicators