

PATIENT BENEFIT COORDINATOR BEST PRACTICES

Lawton Service Unit



Agenda

- ❖ Patient Benefit Coordinator (PBC) Clinics
- ❖ Patient Screenings
- ❖ Outreach Events
- ❖ Networking
- ❖ Health Fairs
- ❖ Tribal Outreach



No-Count Clinics/Screenings

- ▶ Emergency Department Screening Clinic
- ▶ PBC Staff Clinic
- ▶ Insurance Clinic
- ▶ Appointment Schedule Tracking
- ▶ Purchase Referred Care (PRC) Screening
- ▶ PRC Care Coordinator Pre-Screenings

Emergency Department Screening Clinic

- ▶ Uninsured ED patients
 - ▶ ED Patient Registration checks in patient. If the patient does not have 3rd Party resources or has not been screened within the last year, the clerk adds name to the Patient Benefits schedule.
 - ▶ PBCs check schedule daily and screen patients for benefits.
 - ▶ If PBC is unable to reach pt, a PBC letter is sent.

The screenshot shows a software interface titled "PATIENT BENEFIT REFERRALS". At the top right, there are two icons: a gear for settings and a clipboard for printing. Below the title, the date and day are displayed as "Fri 08". The main area is a schedule grid with time slots on the left: 07 AM, 08 AM, 09 AM, 10 AM, and 11 AM. The 08 AM slot is highlighted in blue and contains the text "10 Min". The rest of the schedule is empty.

Time	Referrals
07 AM	
08 AM	10 Min
09 AM	
10 AM	
11 AM	

PBC Staff Clinic

- ▶ Patient seen on site
 - ▶ Registration sends patient to PBC or enters patient on PBC schedule as a request for screening.
 - ▶ PBC enters patients on schedule to be screened at a later time, if PBC is not available to see patient at that present time.
- ▶ Used for tracking/time management
 - ▶ Shows PBC's availability/helps other depts see who is available.

Insurance Clinic

▶ Patient Registration/Pharmacy

- ▶ PBC adds patient to Insurance Updates schedule with request entered in the appt detail 'Other info' section.
- ▶ PI room & Pharmacy check schedule to complete update for patient.

INSURANCE UPDATES	
	Fri 08
08 AM	10 Min
09 AM	
10 AM	
11 AM	

Created On 08-07-2025 08:17 AM	Scheduled Time 08-06-2025 09:30 AM	Scheduled By KASSANAVOID,ROMELIA	Type Of Visit REGULAR
Check-In Time 08-06-2025 08:17 AM	Check-In By KASSANAVOID,ROMELIA		
Other Info NEW PI/**PLEASE OBTAIN NEW PI CARD/SIGNATURE**THANKS RK HAS AETNA IDW289498669 EFF 120124/HAS DOB WRONG 03062d			

Appointment Schedule Tracking

- ▶ PBC reviews clinic appoint schedule daily and screens patients with no 3rd party resources or those whom haven't been screened w/in a year. Screening is done via phone prior to appointment date- if unable to screen before appt, PBC adds patient to list to be provided to that Physician's nurse.
- ▶ Nurse or clinic clerks will bring patient to PBC before or after appointment to be screened in person.

PRC Screening

- ▶ PRC adds those patient's who has a referral pending and they have not had a screening within one year.
- ▶ 2 PBC focus on this list primarily while the other PBC assist when requested by PRC. Ex: they have patient on phone and need to transfer for screening.
 - ▶ PBC Sean- primarily works list of patient's 3rd party resources but no updated screening.
 - ▶ PRC PBC Charlotte- primarily works list of patients with NO 3rd party resources.
- ▶ PRC also sends letters out to inform patient they need to complete a screening before referral can be processed.

PRC Care Coordinator (CC) Pre-Screening

- ▶ PRC CC attempt to do a pre-screening on those patients who have 3rd party.
 - ▶ Pre-screening is simply to assess patient's household size & income to determine if they are eligible for Medicaid as secondary ins.
 - ▶ If a CC thinks patient may be eligible for Medicaid they are transferred to a PBC to complete Medicaid application. If a PBC is not available, patient is then added to PRC list for Sean to reach out to them at a later time.
 - ▶ If it is determined they would be over income, CC informs PRC PBC to review and add note that patient is over income- referral gets processed.
 - ▶ This pre-screening was implemented to cut down the number of patients on the PRC screening lists and to get those patient's whom are insured & over income, processed faster.

Outreach and Networking

- ▶ The Idea
- ▶ The Ask
- ▶ The Location
- ▶ The Outcome

The Idea

- ▶ “Back to the basics.”
- ▶ Help our patients and staff, the purpose.
- ▶ Build rapport, gathering resources and making the connections.
- ▶ Increase efficiency with processes and communication working with outside agencies.

Networking

- ▶ Trainings (MAP/SHIP, ACA, OHCA, AND VA, etc.)
- ▶ Building resources
 - ▶ OKDHS Mobile Office
 - ▶ OKDHS Tribal Liaison
 - ▶ Non-Profit Programs
 - ▶ ACA Navigator
 - ▶ Federal Agencies
 - ▶ Tribal Programs
 - ▶ State Agencies
 - ▶ Veterans Administration
 - ▶ Advance Diabetes for Continuous Glucose Monitors
 - ▶ Native American BCBS Liasons

The Ask

- ▶ “Hey, I have an idea. How should we do this?” Direct to the resource.
- ▶ The type of event, concept or subject matter.
- ▶ Do you need help? Co-workers, agency volunteers.
- ▶ Event planning.

The Location

- ▶ Lawton Service Unit.
- ▶ Area Office.
- ▶ Ft. Sill Apache Tribe Casino Event Center.
- ▶ Absentee-Shawnee Tribe Community Center.
- ▶ Comanche Tribe Watchtaker Hall
- ▶ Lawton Farmers Market.

Outreach Events

- ▶ Annual VA PACT Act.
- ▶ Annual SSA/Tribal Advocate Summit.
- ▶ Annual Medicare Open Enrollment.
- ▶ Annual Medicare General Enrollment.
- ▶ Bi-weekly ACA Enrollment
- ▶ Facility and Area Trainings.
 - ▶ VA
 - ▶ ACA
 - ▶ MAP/SHIP
 - ▶ SSA
 - ▶ OHCA
 - ▶ New resources

The Outcome

- ▶ Resources
 - ▶ Tribal
 - ▶ MAP/SHIP
 - ▶ ACA
 - ▶ Social Security
 - ▶ Oklahoma DHS
 - ▶ VA
 - ▶ Oklahoma MIPAA
 - ▶ Area Office
- ▶ Increased program awareness.
- ▶ Increased collaborations with other agencies.
- ▶ Efficiency in program usage.

Facility Health Fairs

- ▶ ACA/Affordable Care Act/Blue Cross Blue Shield
- ▶ Breast Cancer Awareness
- ▶ General Open Enrollment Event
- ▶ Health & Wellness Fair
- ▶ Medicare Open Enrollment
- ▶ Men's Health Fair
- ▶ VA Event
- ▶ Women's Health Fair
- ▶ Women's Resource Fair

Tribal Health Fair Presentations

- ▶ Patient Benefit Coordinators Present On:
 - ▶ Medicare, Medicare Retirement, SSI, SSDI, Extra Help
 - ▶ Affordable Care Act
 - ▶ Soonercare, Aged, Blind, Disabled (ABD) Medicaid
 - ▶ Private Insurance

Tribal Health Fair Vendors

▶ Hand Outs Provided:

- ▶ VA Benefits/Medical Coverage/Tribal Documentation/VA Form 10-344
- ▶ Medicare, Disability, Social Security, SSI, SSDI, Extra Help
- ▶ Medicaid, Oklahoma Cares, ABD Medicaid
- ▶ Affordable Care Act, Obama Care, also know as ACA
- ▶ DME Products

Local Tribal Outreaches

American Indian Exposition

Comanche Nation Back To School

Comanche Nation Elders Council

Delaware Elderly Program

Kiowa Tribe CHR/AOA

Lawton Community Health Fair

Wichita Tribe Elderly Program

Caregiver Orientation Kiowa Tribe

Comanche Nation Career Expo

Comanche Nation Disability Awareness

Kiowa Tribe Back To School

Kiowa Tribe VA Pact Event

Comanche Nation Oklahoma City Outreach

Comanche Nation Vocational Rehab

Handouts

▶ PBC Pamphlet

- ▶ Names
- ▶ Telephone Numbers

Handouts For Resources

- ▶ SoonerCare, Soonerride,
- ▶ Medicare, Social Security, SSI, SSDI, Extra Help
- ▶ Department of Health and Human Services
- ▶ Affordable Care Act/Blue Cross Blue Shield
- ▶ Prescription Assistance
- ▶ VA/Medical/Tribal Documentation Form 10-334



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PATIENT BENEFIT COORDINATION (PBC)



**INDIAN HEALTH SERVICE
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thank you