UCLA Health Ambulatory Practices
Revenue Policy and Procedure

Policy Name: Check-Out Policy		
Policy #: 008	**Developed Date: April 2014**	**Approved Date:**
Approved By:	**Revision Date: March 2016**	**Revised By:**

I. Purpose

To efficiently and accurately check-out patients immediately following the office visit.

II. Policy

To ensure that patients meet all financial obligations, UCLA Health ambulatory practice staff will adhere to the check-out procedure for each patient following every office visit. All patients should be requested to stop at the check-out desk (or applicable location) prior to leaving.

At the time of check-out:
- Patients will be requested to pay for any balances on additional services rendered at the time of the visit if known or any amounts not collected at time of check-in
- Patients will be scheduled for follow-up appointments as directed
- Patients will be provided an After Visit Summary (AVS) by paper or myUCLAHealth
- An activation code for myUCLAHealth will be provided to patients, if applicable.

<p style="text-align: center;">008 UCLA Patient Check-Out
Policy Standard Operating
Procedure</p>

Procedure

1. Following the patient's office visit, the patient will be checked out by the check-out staff or clinical staff, in the CareConnect system
2. Review the provider's notes to process follow up visits and/or ancillary orders, view the AVS (printed or electronic version)
3. Review the patient payment status for the visit and determine if the patient has met all financial obligations (i.e. self- pay balance, co-pay, co-insurance, or deductible)
4. If patient has any additional questions regarding their bill or visit charges and or payment arrangements, provide the patient with the Customer Service business card
5. Post or document payment in CareConnect as instructed. All patients will be provided with a generated receipt indicating payment amount and method
6. Patient will be provided with an AVS at the time of check out or via myUCLAhealth
7. Patient to be informed of myUCLAhealth at time of check-out, an activation code will be handed to patient when appropriate and circled

Script for Check-out (excluding procedures, authorizations, test result workflow)

"Hi, Mr. /Ms. /Mrs., my name is…

<u>If possible:</u>

Before you leave the office today, we want to make sure that all of your doctor's orders for exams and follow-ups are arranged. I will assist you in scheduling your appointments and exams

If patient is on myUCLAhealth:

Mrs./Ms./Mr, I see that you are activated on myUCLAhealth. Your After Visit Summary for this visit will be sent to your account so that you may review at your convenience. Also, please remember that you can use myUCLAhealth to access your medical records, request medical appointments and email your provider's office

If patient is not on myUCLAhealth:

Mrs. /Ms. /Mr.   I see that you are not activated on myUCLAhealth. myUCLAhealth is a free service we offer to our patients to allow you to access your medical records, request medical appointments and communicate with your provider's office on the Internet. Would you like to be activated today? You can go on the Internet and use this activation code (refer to printed AVS) to set up your account.

It has been my pleasure assisting you today. Is there anything else I may help you with?

Thank you for choosing UCLA Health and have a great day.