

Signing Off On A New Doctor's Billing Sheets

- When making the billing sheet, the front office will put a yellow sticker on the top right of the sheet to indicate an initial is needed by an overseeing doctor.
 - o If there is no yellow sticker it means the billing sheet will not require an initial because the new doctor is credentialed with that patient's insurance.

The form is a detailed medical billing sheet with the following sections:

- Header:** Patient Name, DOB, M/F, New Patient?, Yes/No, Acct No., Date of Service.
- Diagnosis (Indicate I,2,3, etc. for more than 1 diagnosis - a max. 4):** A large grid of ICD-9 codes for various conditions like hypertension, diabetes, asthma, etc.
- Medications:** A list of prescribed drugs with their dosages and frequencies.
- Lab (In Office):** A section for recording lab test results.
- Immunizations:** A section for recording vaccination status.
- Regulatory Therapy:** A section for recording physical therapy or other regulated services.
- Other:** Additional notes and checkboxes for services like spirometry or chest X-ray.
- Right Side:** A section for patient information, including name, address, phone, and insurance details. It also includes a 'Checked Off By' field and a date.

- When the MA pulls the patient back, they will place the clipboard with the billing sheet vertically on the doctor's rack to indicate the patient needing to be greeted by the overseeing doctor.
- If a doctor is free at this time, they may go into the room and quickly greet the patient. After greeting the patient, the doctor will initial over the yellow dot and place the clipboard horizontally back on the rack (the normal way).
 - o If there is no overseeing doctor available, the clipboard will remain vertical until the patient has been greeted and the billing sheet gets initialed, even if it goes onto the orders rack.
- Once the appointment is over the billing sheet will go back to the front office.
- The next morning, a designated front office staff member will count the number of initials and record that number on an excel (i.e. "Sumith Billing Sheet Sign Off Excel").
 - o The front office supervisor is the best option for this designation.
- The billing sheets will go to the office manager to create a list of patients the signing off doctor will need review chart, push "chart reviewed-pt seen" template into progress note, then lock the chart. The office manager will text the list of patients to the signing doctor.

- For unsigned billing sheets, the office manager will send that list to Drs. Jung and Pielop to review the chart and push “chart reviewed only” template into the progress note, then lock the chart.
- **ALL CHARTS MUST BE REVIEWED AND LOCKED BY THE END OF TWO BUSINESS DAYS.**
- *Office managers and supervisors need to keep up to date on which insurances the new doctor is credentialed with weekly.*