

Most Common Mistakes on Intake

Personnel Tab – No Middle Initial, DOB, County and same as billing address

Contacts Tab – Responsible party and Emergency contact

Clinical Tab - Gender, Height, Weight, ordering physician and diagnosis

(it is also good to get primary doctor and additional diagnosis)

Insurance Tab – Verified and every detail listed and screenshot to notes

Notes Tab - Document contacted patient received order, then update regular until conclusion

Sales Order Tab – Sales order started, check tabs under Sales order to ensure correct address, height, weight, insurance verified, diagnosis works for item and physician

Scripts to be Valid need –

1. Patient Name
2. Start Date
3. Detail of items
4. Physician Signature
5. NPI Number
6. Date signed

Progress Notes – list page of pertinent information, highlight key information, and why is item needed

Delivery Ticket – Need height weight, date signed – signature from patient or representative and tech doing delivery

Attach any other information needed like test results, sleep studies etc. to build case of need