



JAYNE'S PRACTICE MANAGEMENT & BILLING CONSULTING SERVICES LLC

EXPERT BILLING REVIEW | MATTER INTAKE

Attorney-directed case screening • UCR analysis • Coding review • Testimony support

01 COUNSEL & MATTER PROFILE

Firm / requesting organization: _____

Attorney / contact / email: _____

Matter name / reference no.: _____

Jurisdiction / court / venue: _____

Matter type: ☐ Civil ☐ Arbitration ☐ Administrative ☐ Other _____

Party represented / expert role requested: _____

Key deadlines (report / discovery / deposition / trial): _____

02 SELECT ENGAGEMENT PATHWAY

◆ INITIAL CASE ASSESSMENT

Record scope, feasibility and conflicts

◇ UCR / CHARGE REVIEW

Billed charges, comparators and methodology

▣ CODING & DOCUMENTATION

CPT/HCPCS, ICD-10, modifiers, medical necessity

⚡ EXPERT TESTIMONY

Report, rebuttal, deposition and trial

03 RECORDS AND CASE REQUIREMENTS

☐ Itemized bills ☐ Medical records ☐ EOB/ERA ☐ Contracts ☐ Payer policies ☐ Prior expert reports

Service dates / specialties / states involved: _____

Approx. number of bills / pages / claims: _____

Specific questions or opinions requested: _____

Preferred deliverable / due date: _____

Data transfer method (secure): _____

04 INDEPENDENCE & CONFLICT SCREENING

List all known parties, insurers, facilities, counsel, and retained experts for conflict screening. Do not upload PHI or privileged files before secure transfer instructions and an executed engagement agreement.

Relevant entities / opposing parties: _____

Prior involvement or relationships to disclose: _____

Authorized firm representative / date: _____

Submission is a request for review only; no retention, legal advice, expert opinion, or commitment to testify arises until acceptance in writing.