**FILE FOLDERS:**

**A screenshot of a computer

Description automatically generated**

**CORRESPONDENCE SAVING PROCEDURE**

In this document you will find how we save our correspondence while the file.

The first step is we are going to create a folder labeled CORR

We will save the letters we send out to the client and insurance companies in this folder. If we follow the saving procedure it will looks as follows:

A screenshot of a computer

Description automatically generated

**CLIENT LETTERS LABELING FORMAT**

The General Format for the client Ltr is as follows:

Four digit year, period, two digit Month, period, Two digit day, space, dash, Name of letter

YYYY.MM.DD - Subject

* 2022.07.28 – Welcome Ltr
* 2022.07.28 – Ltr to Contact office

**INSURANCE LETTERS LABELING FORMAT**

The General Format for the INSURANCE Ltrs. is as follows:

Four digit year, period, two digit Month, period, Two digit day, space, dash, - Type of Ltr to 1p or 3p Parenthesis (name of Insurance Co.)

* YYYY.MM.DD – Type of Ltr to 1p/3p (Insurance name)
* 2022.07.22 – LOR to P-Ins. (Infinity)
* 2022.07.22 - LOR to D-Ins (Geico)
* 2022.07.22 - Ack Ltr from D-Ins (Geico)
* 2022.07.22 – Ltr from D-Ins (Geico) – Denied Coverage
* 2022.07.24 – Ltr from P-Ins (Infinity) – Medpay Adjuster

## DEMANDS Folder

**Document SAVING PROCEDURES**

When we mail out a demand we will save is as follows:

4 digit year, two digit month, two digit day – Demand Type - Insurance Name (amount demanded)

* 2023.01.22 – 3p Demand – Infinity ($15,000)

When we receive an offer, we will save it as follows:

4 digit year, two digit month, two digit day – Demand Type - Insurance Name (insurance offer)

* 2023.02.15 – 3p Offer – Infinity ($15,000)

**RFD Forms: (Ready for Demand Form)**

4 digit year, two digit month, two digit day – 3p or 1p RFD (Client name)

* 2024.01.10 – 3p RFD (Jane Doe)
* 2024.05.01 – 1p RFD (Jane Doe)

## EVIDENCE FOLDER

The evidence folder will help keep the Evidence documents organized. It will look like the

A screenshot of a computer

Description automatically generated

The first step is to have a Requests folder. In there you will put any work requests such as policy limits, police reports, insurance searches etc. Please see an example below:

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Description automatically generated

The results or other EVID will be saved outside the folder.

# MEDICAL DOCUMENTS SAVING PROCEDURE

Medical document organization is extremely important to help us understand the treatment the client has received in an easy manner.

We will also label the medical records and bills differently. This format will allow us to sort the treatment in the order it was received. We will also quickly recognize what kind of documents they are without opening them.

**Abbreviations Table**

| **Abbreviation** | **Meaning** | **Specialist or Description** |
| --- | --- | --- |
| SCS | Spinal Cord Stimulator | these are done by Neurosx and PM |
| SX | Surgery |  |
| CS | Cervical spine | Neck |
| LS | Lumbar Spine | Back |
| LESI | Lumbar Epidural | Disc injection for LS |
| CESI | Cervical Epidural | Disc injection for CS |
| MBB | Medial Branch Blocks | confirms nerve damage for CS and LS |
| FACET | Facet Blocks | Confirm joint pain |
| RFA | Radio frequency Ablation | Burns the nerves that cause pain |
| PNS | Peripheral Nerve Stimulator | Stimulator for extremities |
| RX | Recommendation | What the doctor recommends |
| RT | Right |  |
| LT | Left |  |
| XR | X-ray |  |
| EXT | Extremity | Joints, knees, shoulder, elbow, foot |
| IM | Internal Medicine | General doctor – preops, imaging rx, etc |

**MULTIPLE CLIENTS:**

When we have multiple clients in a case, we will need to create a separate folder for each of them, see a sample below:

A close-up of a white background

Description automatically generated

**MEDICAL PROVIDER FOLDERS:**

When a client receives treatment from a facility, we will create a folder for each provider. We will number the provider folder in chronological order that services were rendered.

**Format:** Two-digit number, period (Two spaces) FACILITY NAME or PROVIDER.

A list of medical personnel

Description automatically generated

**MEDICAL BILLS ORGANIZATION**

The general format for billing will be as follows:

Four-digit year, period, two-digit Month, period, Two-digit day, space, dash, space, Bill

* YYYY.MM.DD – Bill
* 2023.04.16 – Bill

A number with black numbers

Description automatically generated with medium confidence

If the facility sends us an itemized bill for all dates of service, (chiros do this often), we will use a similar format, we will put the first date of service to last date of service listed – Itemized bill.

**Example:**

* YYYY.MM.DD – YYYY.MM.DD – Itemized Bill
* 2020.08.05 – 2020.11.04 I Itemized Bill

A number and text on a white background

Description automatically generated

**MEDICAL RECORDS ORGANIZATION:**

This part is very important and the details matter. Please use the following format when we get reports. The exception will be op reports and imaging reports. Those will be labeled differently. This format will automatically organize the treatment in chronological order.

**General Records Format:**

Four Digit Year, period, Two Digit Month, period, Two Digit Day – Report

YYYY.MM.DD – Report

A black text on a white background

Description automatically generated

There are times when the facilities send the imaging reports bundled together. It will save us time if we separate the imaging studies. When we open the folder, we will know right away what imaging the client has had and when, without opening the document.

**Imaging Report Format:**

Four Digit Year, period, Two Digit Month, period Two Digit Day – Body Part Abbreviation type of imaging.

If a client gets a back MRI it will look like the follows:

2020.12.15 - LS MRI

LS is short for lumbar spine which is your lower back. The abbreviation table above will help with this.

A number with black text

Description automatically generated with medium confidence

Please take note that when a client gets a procedure there are usually multiple charges for services rendered.

**Charges:**

**Facility Fee** – Surgery Center used to do the injection. | ie Hawthorne Surgery Center

**Physician Fee** – Doctor that did the injection | ie (Rakeesh Patel, MD)

**Anesthesia** – Doctor that put the client to sleep for the procedure | Skye Anesthesia

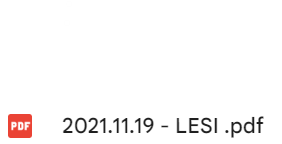
**PROCEDURE LABELING**

Injection Format Label (Op Reports)

Four Digit Year, period, Two Digit Month, period, Two Digit Day – Type of injection

**Sample for Lumbar Epidural Steroid Injection**

YYYY.MM.DD – LESI



**Sample for Cervical Epidural Steroid Injection**

YYYY.MM.DD – CESI

A black background with a white rectangle and red text

Description automatically generated

Sample for Neck Medial Branch Block

YYYY.MM.DD – CS MBB

A number with black text

Description automatically generated

Sample for neck Radio Frequency Ablation

YYYY.MM.DD – CS RFA

A number with black text

Description automatically generated

**Surgery Reports:**

When the clients get a surgery, please follow the following format:

Four Digit Year, period, Two Digit Month, period, Two Digit Day – Body part abbreviation SX Op Report

If the client gets back surgery, it will look like the below:

YYYY.MM.DD – LS SX Op Report

A close up of a number

Description automatically generated

When all the documents are saved as indicated above this is how the inside of the folders will look:

Before opening the folders:

A screenshot of a medical report

Description automatically generated

**INSIDE CHIRO FOLDER:**

A screenshot of a computer

Description automatically generated

**INSIDE IMAGING FOLDER:**

You can right away see the type of imaging the client has had and the dates in chronological order.

A screenshot of a file

Description automatically generated

**INSIDE PAIN MANAGEMENT FOLDER:**

You can right away see how many visits the client had before getting the injection and what kind of injections at a glance.

A screenshot of a document

Description automatically generated

**INSIDE SURGERY CENTER FOLDER**

You tell right away what bills may be missing if any and all the injections have had at a glance.

A screenshot of a computer

Description automatically generated

**INSIDE SPINE SURGEON FOLDER**

Here you can see the doctor recommended surgery after the first visit and what kind of surgery the client had.

A screenshot of a file

Description automatically generated

When it comes to prior records or health insurance, create a folder in front of them with a 00 in front.

00 – Health Insurance

00 – Prior Records

A close-up of a blue box

Description automatically generated

**MEDREQ FOLDER**

When we request medical records and bills, we will save them as follows:

A black and white screen with text

Description automatically generated

We will do the 4 digit year, 2 digit month, 2 digit day – Name of Facility dash and request type (records, bill or both B&R)

Make sure you save the Hipaa in the request.

**RETAINER DOCS FOLDER**

HOW TO SAVE/LABEL RETAINER DOCS

If we have multiple clients, make a folder for each client. See example below:

A screenshot of a computer

Description automatically generated

Each document will need to be separated and labeled as follows:

* Retainer agreement
* Medical Authorization
* General Authorization
* Designee Form

See example below:

A screenshot of a computer

Description automatically generated

**SETTLEMENT FOLDER**

All the documents to need to disburse the case will be saved in this folder. We need the following subfolders inside.

A screenshot of a computer

Description automatically generated

Closing docs will include the following documents:

* DNAI (Decl of No Assets or Insurance)
* Release
* Checks
* Declarations page
* Disbursement Sheet

**COSTS:** Will include receipts of any costs associated with the file.

**LIENS**: Any provider liens you signed

**PAYMENTS**: Any loans the client received

**REDUCTIONS:** Letters confirming the providers are reducing their liens.