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**Policy and Procedure: New Patient Acceptance and Intake**

**Policy:** Fairview Pediatrics is currently accepting new patients aged 17 years or younger for all of its providers. The processing of all new patient requests will follow the New Patient Protocol (below). Patient acceptance decisions shall be based on the medical needs of the patient in relationship to the scope of our providers' expertise. A patient will not be accepted into this practice until a provider receives and reviews the complete patient medical record, and indicates that the patient will be accepted as a patient of Fairview Pediatrics. Upon receipt of the complete patient medical record, a provider will review the patient's history and medical needs in order to determine if this practice will be able to provide the appropriate care to the patient. This decision will be made within 7 to 14 business days after the receipt of the patient's complete medical record. Until the provider determines whether or not the patient will be accepted into this practice, we will not provide medical care, services, or prescriptions to the patient. Fairview Pediatrics does not discriminate based on race, color, national origin, religion, sex, disability, or familial status. This policy does not apply to newborn patients.

**Scope:** This policy applies to all patients requesting to become accepted as patients of Fairview Pediatrics, including patients who have been established patients of this practice previously but have transferred out of the practice for any reason and for any length of time.

**Procedure: New Patient Intake**

1. All new patient acceptance requests will be referred to the New Patient Intake Coordinator, regardless of the method that the request is received (phone, fax, or visit in office). If the New Patient Intake Coordinator is not available at the time of the request, the staff member receiving the request will record the patient's or parent's contact information and will inform the person making the request that the Intake Coordinator will contact them within 2 business days to start the intake process.
2. The parent or legal guardian of the new patient will provide a copy of the complete medical record, which will include all medical care provided to the new patient from his/her birth until the present, to Fairview Pediatrics, including the patient's complete immunization record.
3. A patient demographic form will also be completed in full, including the patient's current health insurance information, by the parent or legal guardian at the time of the new patient acceptance request, and will be kept on file by the intake coordinator. If the parent/guardian is not able to travel to this office to complete the demographics form, the parent/guardian will be required to send the completed demographics form to this office via fax.
4. The parent or legal guardian of the new patient will be given a copy of the New Patient Acceptance Policy and Procedure and the Office Policy at the time of the new patient acceptance request, if possible. If the parent or legal guardian is not able to come in to this office at the time of the new patient acceptance request, the parent/guardian will be referred to the FVP website to review these policies.
5. The intake coordinator will fax a completed and signed release form to the new patient's prior primary care provider(s) upon request, however, the parent or legal guardian is responsible for providing the full name, address, and fax number of each of the new patient's previous PCP's before the release form will be faxed.
6. A copy of the new patient's most recent physical exam and immunization record is **NOT** considered to be the patient's complete medical record, and new patient acceptance requests will not be considered until the new patient's complete medical record, the complete immunization record, and a completed demographics form are received by the intake coordinator.
7. It is the responsibility of the new patient's parent or legal guardian to be aware of and comply with the record release policies of the new patient's previous PCP offices. Fairview Pediatrics will not contact a new patient's previous PCP offices, other than by faxing a record release request completed in full by the new patient's parent or legal guardian.
8. Upon receipt of the new patient's complete medical record, the complete immunization record, and a complete patient demographics form, the intake coordinator will confirm that the record is complete, and will then forward the record to a provider for review.
9. The provider will complete the review of the new patient's record within 10 business days, and will return the new patient's record to the intake coordinator's inbox upon completion of the review. If the new patient is to be accepted into this practice, and no further action is currently needed, the reviewing provider will initial and date the new patient's record.
10. If the reviewing provider feels that the new patient is in need of an appointment, the provider will inform the intake coordinator of this decision when returning the records.
11. If the reviewing provider feels that this practice would not be able to provide appropriate medical care to the new patient, the provider will inform the intake coordinator in writing that the intake request is denied. The new patient's parent or legal guardian will be notified of this decision in writing. The decision will be mailed to the patient's parent or legal guardian at the address listed on the patient demographic form within 2 business days of the denial decision.
12. **The new patient is not considered to be a patient of Fairview Pediatrics until the new patient's records and demographics form are received, reviewed, and accepted by a provider of this practice. Fairview Pediatrics will not provide medical care or prescriptions to the new patient until the patient is accepted as a patient of this practice.**
13. Acceptance of a patient in no way guarantees that this practice will provide prescriptions for medications previously prescribed for the new patient. Fairview Pediatrics reserves the right to refer a patient to a specialty provider for medications and medical conditions considered to be outside of our providers' scope of practice or skill set. The parent or legal guardian will be informed of any such decision when the patient is accepted into this practice.
14. The decision of the reviewing provider regarding acceptance of the new patient into the practice, and also regarding prescription requests for previously prescribed medications, is final.
15. If the new patient is accepted into the practice, the intake coordinator will create a chart for the patient in the practice's EMR, and will scan the patient's prior record and demographics form into the new patient's chart. The parent or legal guardian will be informed of the patient's acceptance into our practice, and that the patient's previous records will be kept on file for the parent/guardian to pick up for 30 days. After 30 days, the previous records will be disposed of per HIPAA regulations.
16. The intake coordinator will create an alert in the patient's chart informing any staff member who opens the patient's chart that this patient is new to this practice.
17. If the reviewing provider has indicated that the new patient requires an appointment, the intake coordinator will contact the patient's parent or legal guardian and will schedule the necessary appointment(s).
18. If the reviewing provider has indicated that the new patient requires any services or prescriptions at the time the patient is accepted into this practice, the intake coordinator will forward this information to the appropriate administrative medical assistant
19. The intake coordinator will check the health insurance eligibility of the new patient upon creating the patient's chart, and will inform the parent/guardian of any problems with the patient's insurance, including ineligibility or incorrect PCP issues.
20. It is the responsibility of the new patient's parent or legal guardian to inform the patient's health insurance provider that the patient has been accepted as a patient of Fairview Pediatrics, and to name of our this practice's providers as the patient's PCP, if required by the patient's insurance.
21. If the new patient has any provider other than one of the providers at Fairview Pediatrics listed as PCP on their insurance at the time of any appointment at this practice, Fairview Pediatrics reserves the right to reschedule the appointment until the parent or legal guardian provides proof that one of our providers is listed on the patient's health insurance policy as PCP.
22. Proof of health insurance coverage is not required in order to be accepted as a patient of Fairview Pediatrics. However, if the new patient does not have health insurance coverage, the parent or legal guardian named as guarantor on the demographics form will responsible for paying for all charges in full at the time of service.
23. If the intake coordinator will consult with management regarding any issues or problems relating to a new patient acceptance request or the new patient intake process. The management of Fairview Pediatrics reserves the right to modify or amend this policy and procedure at any time.

**Policy and Procedure Implementation Date: August 15, 2014**