**FAIRVIEW PEDIATRICS, LLC**

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**POLICY AND PROCEDURE: PATIENT REQUEST FOR FORM COMPLETION**

**Policy:** Fairview Pediatrics will complete patient PE, Sports, Camp, Immunization, and other miscellaneous forms for our patients within 7 business days of receipt of the form in this office. Forms are completed on a first-come, first-served basis during normal, non-holiday business hours: Monday through Friday from 8:30am to 5:00pm. The patient must have had a physical exam within the last 12 months in order to complete the form, and the parent/guardian is responsible for completing the parent portion of the form before it is processed here.

**Purpose:**  This policy and procedure will standardize the procedure for processing and completing patient forms, in order to minimize misunderstandings, delays, or lost forms.

**Scope:** This policy applies to the entire practice, but mainly involves reception, the providers, and the administrative medical assistants.

**Procedure:**

**1. Accepting and Processing Incoming Forms (No appointment):**

* When the parent / guardian drops off a form for completion, the receptionist will check that the form has the **patient's name and DOB** written on the form, and will check the **date of the patient's last physical exam.** 
  + If the patient does not have an up to date physical exam on file, reception will schedule an appointment for the patient to have a physical exam, and the parent will be informed that the form will be completed at the physical exam appointment. The parent can keep the form, or it can be given to the appropriate administrative MA to keep on file until the appointment.
* For **medication forms**, the receptionist will check that the name, form, and dosage of the patient's medication is written on the form. If not, the parent will be asked to complete this information.
* The form will be **scanned** into the patient's chart by reception, and then placed in the appropriate administrative MA inbox.
* If a form is received via mail or fax, the receptionist will scan the form into the patient's chart and will check the patient's most recent physical exam date upon receipt of the form, before giving the form to the administrative MA.
  + If the patient is overdue for a PE, reception will contact the parent to schedule a physical exam appointment and will keep the form until the parent is reached and the appointment is scheduled.
* The administrative MA will complete forms on a first-come, first-served basis, referencing the most recent physical exam on file in the patient's chart.
* All forms will be completed within 7 business days of receipt of the form in this office. If there is any reason why the form will not be completed within 7 business days, the administrative MA will notify the parent/guardian as soon as possible.
* Unless indicated otherwise on the form, the administrative MA will stamp the signature of the provider who performed the patient's most recent PE on the form.
* If immunizations or lab work is required in order to complete the form, the administrative MA will contact the parent/guardian to schedule a nurse visit. The administrative MA will keep the form at her desk until the form is ready for completion.
* Medication forms require a provider signature, so the completed form will be placed on the provider's lab area desk for signature, and returned to the administrative MA once signed.
* If the administrative MA is unsure how to complete a form or is unsure if a patient can be cleared for participation, she will **consult with the provider** that performed the patient's most recent PE and will **document** this in the patient's chart.
* A printout of the patient's immunization record and / or any pertinent lab results (lead level, titers, etc) will be attached to the form if necessary.
* The completed, signed/stamped form will be scanned into the patient's chart and the scanned copy of the blank form will be **deleted.**
* The administrative MA will **contact the parent** to inform him / her that the form is complete, and will place the form in the **file cabinet** at reception used for completed forms.
* The completed form can be mailed if the parent has supplied a SASE.
* The completed form can be faxed if the parent has completed a record release form. It is the parent/guardian responsibility to supply the destination fax number for the form.

**2. Accepting and Processing Incoming Forms At An Appointment:**

* During pre-visit workup, the provider's clinical MA will ask the parent/guardian if there are any forms to be completed at today's visit.
* The clinical MA will review and complete as much of the form(s) as possible before the appointment
* The clinical MA will give the form(s) to the provider prior to the patient's visit
* The provider will complete the provider portion of the form(s) and will give the completed form(s) to the parent/guardian at the end of the appointment.
* Any immunizations or lab tests necessary to complete the form(s) will be performed at the visit and any needed documentation given to the parent/guardian.
* If lab test results are pending at the time of the visit, it is the clinical MA's responsibility to give the form to the administrative MA for completion, and to inform the administrative MA that results are pending that are needed to complete the form.
  + Once the form is given to the administrative MA and she is made aware of the pending results, it is now the administrative MA's responsibility to complete the form(s) and notify the parent/guardian. The form(s) will be completed within 7 business days of receipt of the form, unless lab results are still pending at that time. If pending results prevent the completion of the form(s) within 7 business days, the form will be completed as soon as the results are received.

**Policy and Procedure Implementation Date: January 23, 2015**

Implemented By: James Bell MD, Medical Director

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Signature Date Signed