



**SUBJECT:** FORMS PROCEDURE

**APPROVAL DATE:** 3/2008

**IMPLEMENTATION DATE:** 3/2008

**REVISION DATE(S):** 2/2011; 12/2016

**REVIEWED DATE(S):** 12/2016

### **PURPOSE**

To ensure forms are completed accurately, include required assessments and done in a timely manner.

### **PROCEDURE**

- Form completion timeframe is: 7-10 business days from date received in HIMS or at clinical appointment for the form.
- The Health Information Management Services Department (HIMS) will receive forms to be processed according to guidelines whether an appointment is required or not and HIMS Department procedure.
- Forms will not be held. All forms will be processed to provider for completion or returned to patient or company/agency with information regarding information why not – such as patient needs an appointment, declined service/equipment by provider, etc. – per procedure.
- All forms that are completed by a provider should be directed to HIMS for handling and final processing to patient and/or company/agency.
  - It is expected that in the majority of cases that services are approved then the provider will complete the form at the visit. The provider/clinical staff should photo copy the completed form, indicate it has been provided to the patient and/or submitted to the agency/company as part of the visit on the copy. Copy is to be sent to HIMS Department for placement in the patient's record.
  - If the form requires a co-signature by an Advanced Practice Professional (APP) by the supervising provider who is not available during the visit, the form will be held and submitted to HIMS upon completion to process to the patient and/or company/agency.
  - If the form is processed to the provider without patient visit required, the provider will complete the form or indicate declination with reason and return the form to HIMS department.
- When an appointment is required, the patient is to be instructed that an appointment will be required to have their request reviewed by the provider and the patient must bring the form to the appointment.

Script to be used to inform patient or company/agency:  
"Lincoln, and in some cases the law, requires that you be assessed by the provider in person before this form can be completed. You/Patient will need to make an appointment specifically for the completion of this form. You/Patient will need to bring the form with you. Other additional issues will not be able to be addressed during this visit."
- Scheduling personnel will ask the patient what the form is for and how many pages it is, and will schedule the patient for either a forms/follow-up visit (15-min) or a physical visit (30-min) based on scheduling guidelines.
- Lincoln does not perform nor accept forms for Commercial Driver's License (CDL) physicals.
- Lincoln does not accept disability questionnaires from attorneys. Patients may request letters supporting disability claims from the providers, which may be provided at the providers' discretion.
- If the patient does not qualify for the item/service in question, the provider should inform the patient of this and the form not be completed.

- If the patient presents to the appointment without the form in hand, they will need to reschedule and bring the form to the new appointment to have the form completed.
- Patients wanting to raise other clinical issues not pertaining to the form assessment and completion will be instructed to schedule an appointment for those issues.

**Appointment not necessary if seen in 6 Months (unless requested by provider)**

Physician orders, i.e. hospice care, PT/OT  
 Diabetic testing supplies  
 Intellectual/Developmental Disability services  
 Oxygen/Albuterol nebulizer renewal forms (nurse managers will facilitate these when possible)  
 CPAP oxygen supply machine  
 Personal Care Services (PCS) renewals

- Forms that are incomplete or require clarification, as long as form is not older than one (1) month and clearly indicates what is lacking/needed.

**Appointment Required**

- HIMS staff will check patient's appointment desk/chart for recent visit with provider (last 1-2 months) for what the form is about, if so will at HIMS discretion take the form.
  - Form will be logged day received and processed to provider
  - Patient/Agency will be informed that form is being directed to provider who may complete or return with indication that the patient needs an appointment with provider in order for the form to be completed.
    - Patient/Agency will be notified if need an appointment and will need to bring the form to the appointment.
    - Patient/Agency will be notified or form submitted if completed by provider.

FL2  
 FMLA  
 Home health orders/Care Plans/Assessments/Certification of Medical Necessity  
 Personal Care Services (PCS) initiation  
 DMV/ DATA transportation/ACCESS van  
 DOT Physical/Medical Evaluation to maintain license  
 Job Physical form  
 Disability/Disability letter/Insurance forms  
 Jury Duty/Air Conditioners/rent/credit card deferment/alimony, child support/probation deferment/Food stamps  
 Housing: request for first floor apartment/have space for 24-hr attendant  
 Durable medical supplies (DME) –unless accompanied by a current prescription from the provider  
 Examples of DME: diabetic shoes, heating pads, walkers, wheelchair/scooters, home supplies: hospital bed, toilet seat, lift chair, etc.

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