Optometry Coding & Billing Alert

Craft a New Billing Policy in 6 Steps

This easy policy-writing tutorial will guide you from start to finish

The key to optometry billing compliance is writing and consistently adhering to set policies--which means you need to know how to write them.

Whether you-re writing or revising a billing record retention strategy, a policy on financially needy discounts, a new office collections policy, or any other set of rules, you must be able to organize the information in a professional and coherent manner. Next time one of your office policies needs work, follow these easy steps provided by **William Brouwer**, president of PRIMA Healthcare Management Resources in Visalia, Calif.

1. Identify the intent of your policy. State the intent and a brief policy summary at the beginning of your document.

2. List the department(s), service(s) and/or people the policy will affect.

3. Break down your policy into key elements, and include all relevant information in each section accordingly. For example, a billing record retention policy may list key elements such as charge tickets, deposit slips and EOBs. So for each element, you would state the length of time your office should retain it, as well as any other directions for storage and destruction.

4. Describe the procedure you will follow for monitoring your policy compliance. For a billing record retention policy, you might answer questions such as -How do we keep track of how long we retain records?- and -How often do we review and destroy old records?-

5. Cite any references you used in creating your policy, such as legal documents or CMS transmittals.

6. Conclude by listing the policy's date of original approval, effective date, and distribution date to office staff. You should also leave space to record dates of revision--and don't forget to note any relevant attachments to the policy.