



## Collaborative Patient Care is a Provider Partnership



### What's Changed?

No substantive content updates.

As a physician, supplier, or other health care provider, you may need to collaborate with other providers when providing care to your Medicare patients. For example, you may:

- Write orders
- Make referrals
- Request health care services or items for your patient

It's important to understand Medicare coverage criteria and documentation requirements for those services or items. This helps to assure:

- Quality care for your patient
- Correct and prompt processing and payment of:
  - Your claims
  - The claims of other providers or suppliers who provide services or items for your patient

**Note:** We've limited this fact sheet to the information and documentation you need to support medical necessity when you partner with other providers. Other coverage and payment rules may also apply.

Together we can advance health equity and help eliminate health disparities for all minority and underserved groups. Find resources and more from the [CMS Office of Minority Health](#):

- [Health Equity Technical Assistance Program](#)
- [Disparities Impact Statement](#)

## Background

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Section 1862(a)(1)(A) of the [Social Security Act](#) says, "No payment may be made under Medicare Part A or Part B for any expenses incurred for items or services which...are not reasonable and necessary..."

To make sure Medicare correctly processes and pays claims, various Medicare review contractors conduct claims audits such as Medicare Administrative Contractors (MACs), Recovery Audit Contractors (RACs), and others. Find your [MAC's website](#).

Medicare audits often show that provider and or supplier-submitted documentation doesn't provide enough information to establish medical necessity. For proper claims processing and payment, you must follow documentation requirements and meet Medicare coverage criteria.

If your documentation is incomplete:

- Medicare may not pay for the services or items you ordered, requested, or performed
- Your patient may have to pay added costs

Also, if you don't provide enough information to support medical necessity when you make referrals or write orders, the other provider or supplier may delay or deny care to your patient.

## Share Information with Your Partners

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Other providers or suppliers may need your documentation or certification supporting the medical necessity of the services or items they provide based on your referral or order.

See Section 1842(p)(4) of the [Social Security Act](#) that requires the cooperation of all providers and or suppliers of services or items to supply the necessary documentation and information. It states in part:

In the case of an item or service...ordered by a physician or a practitioner...but furnished by another entity, if the Secretary (or fiscal agent of the Secretary) requires the entity furnishing the item or service to provide diagnostic or other medical information in order for payment to be made to the entity, the physician or practitioner shall provide that information to the entity at the time that the item or service is ordered by the physician or practitioner.

When you collaborate with another provider and or supplier, be sure you document everything needed to meet Medicare payment requirements.

If you:

- Write orders or make referrals to another provider and or supplier
- Provide services or items based on an order or referral from another provider and or supplier

Be sure you document, share, and maintain all necessary documentation related to an order, referral, supply or service.

[The Health Insurance Portability and Accountability Act \(HIPAA\) Privacy Rule](#) allows you to disclose protected health information without patient authorization to other health care providers also covered under the HIPAA rule to carry out treatment, payment, or health care operations. You can't charge for providing requested documentation to another health care provider. It's not a HIPAA violation, provided you need to provide the information for patient treatment, payment, or health care operations.

## What to Document

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You need to provide thorough and accurate documentation to support medical necessity for services or items you provide or order. The documentation should provide a thorough picture of what happened during the patient's visit and tell why services or items you ordered or provided are medically necessary. Make sure you meet all policy and coverage specific requirements.

**Documentation Supporting Medical Necessity** may include:

- Name of person providing the services or items
- Date of services or items
- Patient's signs, symptoms, and any conditions supporting the need for the services or items
- Details of the services or items you provided
- Where you provided services or items
- Signed orders, or clear intent to order for services or items and the clinical rationale
- Rationale for the level of care provided
- Intensity, frequency, duration, and scope of services
- Legible signature of the person providing the service and the provider ordering and approving treatment plans

For Medicare Advantage (MA) plan patients, check with the MA plan for information on eligibility, coverage, and payment. Each plan can have different patient out-of-pocket costs and specific rules for getting and billing for services. You must follow the plan's terms and conditions for payment.

## Resources

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### [Complying with Medical Record Documentation Requirements](#)

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