

PROJECT STATUS REPORT for client

MONTHLY RETAINER HRS CONTRACTED FOR: 12

Project:

To develop a comprehensive business plan for a new Nutrition Private Practice and facilitate its implementation in order for the Practice to become operational.

TIMEFRAME: 3/10/05 TO 4/17/05

Hrs Used 3/10/2005 -1.25

Visit Date 3/10/2005 Visit #: 1 From: 10:00am To: 12:30 First report issued: 3/17/2005 Updated report issued:

Type: In Person Email Teleph Mail Fax # of 20 Min. Units of Email/Tele/Mail/Fax Consulting = (_____)

Action Steps For Client	Status	Action Steps for Consultant	Status	
1) Check w/ MBC re: processing of self-pay pts	meeting w/ MBC 3/20/2005 ↑ ditto	Gave client comprehensive business plan for developing dietitian private practice	C: 3/10/05	
2) Check w/ MBC re: collection of insurance co-pays				
3) Check w/ MBC re: who determines if Medicare is pt's primary insurance				
4) Contact ADA (1-800-877-1600) for info on Seabury & Smith malprac ins.	I/P			
5) Access IL Dept of Prof Regulation website, or call, for info on licensure	I/P	5) Gave client printed materials	C: 3/10/05	
6) Once received, mail application for dietitian licensure in Illinois	P			
7) Customize your own pt waivers and pt responsibility statements	P	7) Gave client all samples	C: 3/10/05	
8) Contact Provider Relations Dept at major ins. companies for applications to be RD provider in all plans	P	8) Gave client list of major co's + sample "letter of intent" to to be provider (may be required)	C: 3/10/05	
9) Complete ins. Provider Applications when dietitian licensure obtained	P			
10) Call Wisconsin Physician Services (Medicare Part B Carrier for IL) and request individ. provider application CMS 855 I form; will need licensure	I/P	10) Gave client contact info	C: 3/10/05	
11) Check w/ office personnel in building to ID health ins. companies that have most subscribers being seen by physicians in this suite ("What is payer mix?")	C: BC/BS Medicare UnitedHC			
12) Begin drafting company brochure and business card content and design and "Welcome To My Office" document	P	12) Reviewed what to include in <i>Welcome</i> document + gave my brochure, card and folder + contact info of excellent printer in client's area (Wheeling)	C: 3/10/05	
MBC=Medical Billing Company; I/P=In Progress; P=Pending; C=Completed			Hours left:	10.75