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iTrust Wellness Practice Policies

Updated 08/25/2024

The following policies are set forth by iTrust Wellness Group, LLC hereby referred to as iTrust or iTrust Wellness.

General Office Information

Standard Business Hours

- Monday-Thursday: 8:00 AM-4:00 PM
- Friday: 8:00 AM-12:00 PM

Our offices close Monday - Thursday from 12:00 - 12:45 PM to allow lunch breaks for our team.

Outside of business hours, we are unable to respond to voicemails, text messages, or emails until the following business day. If a situation arises that poses a threat to the safety of our patient, such as active suicidal or homicidal ideation, the patient must call 911 or report to the nearest Emergency Room for the best possible care.

In the event of a mental health crisis, we encourage individuals to utilize the following 24-hour resources:

- Suicide and Crisis Lifeline - Call or Text 988
- Mental Health America Crisis Line: (864) 271-8888
- Greenville Mental Health Center: (864) 241-1040
- National Suicide Prevention Hotline: 800-273-8255

2024 Holiday Calendar

All iTrust Wellness offices will be closed to observe the following holidays:

- New Year's Day - January 1
- Memorial Day - May 27
- Independence Day - July 4
- Labor Day - September 2
- Thanksgiving Break - November 28-29
- Holiday Break - December 24-31

Communication

Our office uses a HIPAA-compliant platform that handles both phone and text. Patients have the option to either call or text the office regarding their concern.

Phone & Voicemail Communication Notice

All calls are recorded for quality and training purposes. Any information left via voicemail is answered by our staff on a priority basis. Our staff gives priority to voicemails that include information which may jeopardize a patient's safety, such as side effects or adverse reactions. We will return all voicemails within 24 business hours.

Instructions for voicemails:

- Provide us with your name, date of birth, preferred number, and reason for calling.
- Keep the message as brief as possible.
- Please refrain from calling more than once per day for the same issue.

Providers cannot take time out of appointments to accept or return a patient's phone calls unless there is an emergency. iTrust Wellness support staff will relay messages to providers so that the concern can be resolved in a timely manner. If the patient needs to speak directly with their provider, this must take place in an appointment to ensure the treatment plan is comprehensively and safely updated.

Email Communication Notice

iTrust Wellness may use unencrypted email to communicate low-sensitivity updates, such as appointment reminders, and office updates. Unencrypted emails have a risk of being intercepted. Encrypted email will be used for communication that requires higher sensitivity.

The patient consents to receiving unencrypted email communications from iTrust Wellness for low sensitivity notifications. The patient understands that while email is a convenient means of communication, it may not provide the same level of security as encrypted methods. The patient acknowledges that there are inherent risks associated with unencrypted email communication, including the possibility of unauthorized access and the exposure of personal health information (PHI). Despite these risks, the patient authorizes iTrust Wellness to use email as a means of providing low-sensitivity updates. The patient understands that iTrust Wellness will take reasonable measures to protect their privacy and the security of their PHI. However, the patient also recognizes that the confidentiality of email communication cannot be guaranteed. By signing this consent, the patient acknowledges that they have been informed of the potential risks and still choose to receive communication via unencrypted email for appointment and office-related matters and agrees to not hold iTrust Wellness liable for any unauthorized access to these communications.

Appointment Reminders Notice

Our practice utilizes appointment reminders via text and email to keep patients informed of their appointment times. You can expect to receive a reminder at the following benchmarks:

- Email – 7 days before
- Text – 36 hours before
- Text – 2 hours before

Please call our office if you need to reschedule or cancel your appointment, noting accepted time frames to avoid any cancellation fees.

Billing Communications Notice

By consenting to iTrust Wellness's policies and procedures, the patient consents to being contacted via phone, email, and text message about billing related concerns. The patient reserves the right to opt out of billing-related text messages by informing our office, but phone calls and emails will still be used to maintain transparency and discuss all billing-related topics and transactions.

Patient Care Policies

Treatment Acuity & Scope of Practice Statement

iTrust is an outpatient practice that strives to help as many individuals as possible. However, our practice has limitations with respect to scope of practice and conditions that require higher levels of care. Practitioners of iTrust Wellness can *only* provide treatment to patient concerns that fall within the psychiatric scope of practice, meaning that they are not able to manage conditions outside of this scope, including but not limited to treating neurological disorders or providing pain management services.

iTrust's referral coordinators are trained in assessing levels of acuity for each patient and can assist if an alternate form of care is needed. iTrust is unable to assist patients seeking court-ordered psychiatric treatment or long-term disability evaluations.

Higher Levels of Care Notice

In certain cases, the patient may need to be permanently transferred from iTrust Wellness to another facility in order to receive ongoing higher levels of care. Our staff members will assist as needed to ensure smooth facilitation and transfer of care, but no future appointments will be scheduled with iTrust Wellness as the patient will be considered released from iTrust Wellness' care.

Patient Conduct Expectations

iTrust Wellness staff members and their patients should be treated with respect and safety at all points of interaction. If there is any behavior or action that is deemed disrespectful or harmful or abuses the status as a patient, patients may be discharged from iTrust Wellness. This includes real or perceived threats to any staff member or other patients, both within and outside of appointments.

- *Solicitation.* Patients may not solicit or engage with iTrust Wellness staff members for money, services, or relationships outside of their job duties.
- *Weapons.* To ensure a safe practice environment, no weapons of any kind are allowed in the office. If any weapon or object used in the capacity of a weapon is brought into the office, thereby in direct violation of this policy, the proper authorities will be notified, and the offending individual will be removed from the premises and/or discharged from services.

Patient Safety Disclaimer

If the patient expresses active suicidal or homicidal ideation and/or presents in a manner that appears to be unsafe to themselves or others, iTrust Wellness will take appropriate action to ensure safety, including involvement of local resources like 911, EMS, and other emergency contacts. In cases of expression of active suicidal or homicidal ideation, iTrust Wellness staff may also reach out to law enforcement to initiate a welfare check. iTrust is not liable for any actions taken by these entities but will uphold its responsibility to prioritize patient safety.

Personal Representatives Policy

Patients may exercise their rights through a personal representative. The personal representative will be required to produce evidence of their authority to act on a patient's behalf before that person is given access to the patient's PHI or allowed to take any action for the patient. Proof of such authority may take one of the following forms:

- A power of attorney for health care purposes, notarized by a notary public;
- A court order of appointment of the person as the conservator or guardian of the individual; or
- An individual who is the parent of a minor. iTrust Wellness retains discretion to deny access to PHI to a personal representative to provide protection to those vulnerable people who depend on others to exercise their rights under these rules and who may be subject to abuse or neglect. This also applies to personal representatives of minors.

Notice for Minors

All minors (persons under the age of 18) must be accompanied to their appointments by a parent or legal guardian, who must be available during the entire time of the appointment. This includes both in-person and virtual appointments. If a parent or guardian is unavailable to attend the appointment, the appointment will need to be rescheduled.

Limited English Proficiency Policy

iTrust Wellness will take reasonable steps to ensure that persons with Limited English Proficiency (LEP) have meaningful access and the best possible opportunity to participate in our services, activities, programs, and other benefits. The policy of iTrust Wellness is to ensure meaningful communication with LEP patients/patients and their authorized representatives involving their medical conditions and treatment. If specific needs cannot be met by iTrust Wellness, our office reserves the right to refer to an external practice that can better meet the needs of the individual patient.

For language assistance measures or procedures that are not able to be covered by iTrust Wellness staff or policy, efforts will be made to attempt to contact the patient with an appropriate agency.

Appointment Policies

In-Office Appointment Policy

Patients are seen by appointment only; no walk-in appointments will be scheduled. Please plan to arrive 15 minutes prior to your scheduled appointment time to ensure completion of all check-in procedures and be prepared to provide our front desk staff with any updated demographic, insurance (if applicable), and payment information.

Virtual Appointment Policy

It is iTrust policy to allow for telehealth appointments on a case-by-case basis. Generally, patients who are not prescribed controlled substances are permitted to be seen solely via telehealth. This policy is subject to change in accordance with state and federal regulations, including but not limited to the [Ryan Haight Online Pharmacy Consumer Protection Act of 2008](#).

Telehealth appointments should be conducted in a quiet and secure environment. The patient is responsible for ensuring their device is compatible with the telehealth platform and there is a reliable internet connection before the appointment. We ask all patients to log into the virtual waiting room at least 15 minutes prior to your scheduled appointment time to troubleshoot any technical issues ahead of time, as well as complete all check-in procedures.

We advise that telehealth appointments are conducted while in a stationary place and strongly discourage patients from holding telehealth appointments while driving, walking, etc. iTrust reserves the right to cancel the appointment should the patient be performing another activity that endangers themselves or interferes with the appointment. If the patient elects to hold their appointment while performing another activity, iTrust Wellness is not liable for any issues, complications, or accidents that arise from this decision.

The practitioner is not held responsible if the patient's protected health information is overheard by other people or other parties around the patient in their chosen environment.

Appointment Service Descriptions

Initial Appointment (60 minutes)

For all patients new to iTrust or those re-starting services with our practice after three (3) year lapse of receiving services, per CMS guidelines.

Initial appointments may be held in-office or via telehealth. It is iTrust policy that all new patients entering our practice actively prescribed controlled substance(s) are required to be seen in-office for their initial appointment to allow for proper safety assessments to be completed by the provider.

All patients, regardless of medication regimen, will be administered a urine drug screen (UDS). Patients whose initial appointment is via telehealth are required to complete their UDS within 24 hours of their first appointment. Patients who live a considerable distance from one of our office locations will be provided with an order to complete the UDS at a third-party lab near them.

Re-Establishing Services Appointment (60 minutes)

For established patients who have not had an appointment within the last one (1) year. These appointments will be billed as a follow-up appointment (see Fee Schedule below) as they require more time to update and complete all necessary information, but the appointment does not qualify as an initial appointment per CMS guidelines.

Follow-Up Appointment (30 minutes)

iTrust believes that building a strong provider-patient relationship is imperative for success; therefore, it is iTrust's policy for the first follow-up appointment to be 30 minutes.

Beyond that, these appointments are utilized for the following reasons:

- *Integrated psychotherapy*: For patients who want more time to dive into their concerns through psychotherapy with their provider in addition to the medication management services we provide.
- *Medical complexity*: In the same way patients may request more time for psychotherapeutic purposes, the provider may decide that they need this time allotment to address patient cases with more complex treatment plans or newer regimens.
- *Injection administration*: For patients who need injectable medications administered during the appointment.
- *Suboxone*: For patients receiving medication assisted treatment (MAT) services.
- *Transfers of care*: For patients who transition from one provider to another within the practice.
- *Patient dismissal*: For final appointments for patients dismissed from the practice (regardless of reason) to ensure patient care is appropriately closed out.

Follow-Up Appointment (15 minutes)

For patients who are consistently stable on their treatment plan and do not request integrated psychotherapy, as agreed upon by the provider and patient.

Cancellation Policies

Same Day Cancellation Policy

“Same Day Cancellation” shall mean any appointment cancelled less than 24 hours before the scheduled start time. See the Fee Schedule below for applicable fee(s).

Late Arrival Policy

“Late Arrival” shall mean any patient who arrives later than the accepted window to carry out the scheduled appointment.

- Initial appointment (60 minutes) – arriving more than 15 minutes late.
- Follow-up appointment (30 minutes) – arriving more than 10 minutes late.
- Follow-up appointment (15 minutes) – arriving more than 5 minutes late.

iTrust Wellness staff will make their best effort to reschedule patients for the next available appointment on their provider’s schedule; however, iTrust cannot guarantee a specific time frame the provider will be available. See the Fee Schedule below for applicable fee(s).

No Show Policy

“No Show” shall mean any occasion in which a patient fails to arrive for a scheduled appointment without notice. See the Fee Schedule below for applicable fee(s).

Excessive no-shows, defined as missing more than three (3) appointments in a rolling calendar year, will result in dismissal from iTrust Wellness.

Students/Interns/Clinical Preceptorship Disclaimer

iTrust Wellness believes in offering a learning and teaching environment for upcoming practitioners entering the healthcare industry. As such, iTrust practitioners or staff may have student interns, clinical student residents, or other such staff on-site during the clinic's hours of operation. Students, interns, and other such people engaged in this educational opportunity are bound to the same codes of ethics as iTrust staff and agree to abide by HIPAA privacy policies. All patients have the right to refuse a student or resident entry into an appointment.

As student interns or residents become more knowledgeable, attending providers may allow the student to lead the interview during appointments. A licensed provider will always be present to make the final medication decision and direct the overall medical outcome of each appointment. Standard billing policies apply to such appointments.

Patient Dismissal Summary

If patients are not adherent to iTrust policies, they will be issued a warning notice. Further nonadherence may result in full dismissal from iTrust Wellness. However, there are cases where a patient will be immediately dismissed from the practice based upon presentation or behavior.

Please note that dismissal warnings and dismissal notices will be sent to the email on file and/or delivered in person during an appointment.

Practice Policies

Controlled Substances Policy

Controlled substances are drugs or medications that are regulated due to their potential for abuse, addiction, and misuse. The regulation of controlled substances aims to prevent their misuse while ensuring access for legitimate medical purposes. Below are the policies set forth to ensure patients are safe throughout their care with iTrust:

- Patients seeking care while actively taking concurrent, long-term (defined as 3 consecutive months) opioid and benzodiazepine prescriptions are not permitted to continue this regimen while with iTrust.
- Prescriptions of concurrent dual benzodiazepines are not permitted for patients while at iTrust.
- New patients actively prescribed controlled substances are required to be seen in-office for their initial appointment.
- New patients who are looking to potentially start a controlled substance will be required to be seen in-office prior to the prescription being provided.
- Established patients must be seen in-office prior to the provider prescribing the controlled substance(s) if they have not had an in-office visit within the rolling calendar year.
- All patients actively prescribed controlled substance(s) must be seen in-office at least annually.
- All patients will be subject to an annual urine drug screen (UDS). It is within the provider's discretion to order additional screenings if there are concerns of non-compliance or other safety risks.
- Patients may be subject to periodic random pill counts at the provider's discretion.
- Controlled substance prescriptions will only be written for a maximum of 30 days at a time. If an insurance policy requires a 90 days' supply of a controlled substance, it will be written by the provider as a 30-day supply with 2 refills.
- Patients will not receive a replacement for any lost or stolen medication, regardless of the circumstance, unless an official police report is filed and submitted to the provider.

Long Acting Injectable (LAI) Medication Policy

If an injectable medication is agreed upon as the course of treatment for the patient, the medication will only be administered during an in-office appointment, so that the provider may assess for adverse reactions and document all results accordingly.

There is an inherent risk in receiving these medications, including adverse/allergic reactions, lack of toleration, or inefficacious results. Should any adverse reaction occur, the patient must notify iTrust Wellness immediately to determine the best course of action to move forward.

Prior Authorizations Notice

We work on behalf of our patients to complete and advocate for the approval of the prior authorizations. However, we cannot guarantee that the insurance company will cover the medication, as it is the insurance company's decision to cover the medication. Our goal is to complete all prior authorization requests within 72 business hours. Should a denial occur, our providers will identify an alternate treatment method.

Medication Sample Policy

Samples are provided to our patients as a courtesy when trying a new medication. Medication samples will only be administered when a written order from the provider is on file. We cannot mail samples, nor can we render a substantial quantity of medication samples to any one patient.

Prescription Refill Policy

All prescription requests or questions, such as possible dosage changes, refills, difficulties filling medications, etc. should be addressed during appointments. However, if you need a refill renewed between appointments, please provide at least 3–4-days' notice prior to your prescription running out.

No new medications or alterations to the dosage of a current medication will be prescribed outside of an appointment. Providers will not issue a medication refill to patients who have not had an appointment within the last 90 days and/or they have no future appointment scheduled. Under these circumstances, a refill will only be provided after the patient is seen by the provider during an appointment.

It is practice policy that if the patient runs out of medication early related to non-compliance with the prescribed medication regimen, it is their responsibility to present to the Emergency Room or a higher place of medical care as they understand that seizures, blackouts, and tremors are potential side effects of abrupt discontinuation.

Emergency Prescription Policy

“Bridge” prescriptions are short-term prescriptions that are meant to ensure a patient has their medication in the event of an emergency or a lapse in scheduling. Bridge prescriptions are reserved for emergent situations only.

Bridge prescriptions for non-controlled substances are eligible to be prescribed for up to two (2) weeks. Controlled substances will only be extended up to one (1) week from the date of lapse to patients who are considered to be compliant with their treatment plan.

Treatment Plan Adherence Policy

Compliance and adherence to the treatment plan is expected as part of being a patient with iTrust Wellness. For as long as patients are receiving care with our practice, it is expected that patients will only seek and receive prescriptions for mental health medications from an iTrust Wellness provider. If a patient is receiving mental health medication prescriptions from another provider, we will work with the other entity to take over prescription duties or dismiss the patient from services because of safety concerns.

Our practice strictly monitors controlled substances and requires our patients to be responsible and accountable for following their treatment plan. It is standard practice that our providers will enter patient data into PMP Aware Rx, a database tool used by medical professionals to identify potentially hazardous or fatal drug interactions, prior to prescribing or renewing any controlled substances to ensure treatment compliance and safety is upheld. The patient is subject to dismissal from our practice if PMP Aware Rx reflects, or iTrust is informed by a pharmacy or another medical provider that the patient:

- is filling multiple controlled substances at multiple pharmacy locations;
- is not being forthcoming with their provider(s);
- is selling or otherwise diverting their medications;
- is forging the identity of or falsifying prescriptions from iTrust Wellness Group providers

If the decision is made to stop a medication, iTrust Wellness providers will create a tapering plan to safely discontinue the medication. It is important that patients adhere to these directions, as they are just as important to patient safety as correctly starting a new medication.

Medication and Substance Use Policy

Taking illicit (or certain legal) substances with medications that our providers prescribe can lead to harmful or life-threatening side effects. It is the patient's responsibility to notify their provider if they engage in any additional substances so their provider can create the safest and most efficacious treatment plan.

If a patient is found to be dishonest regarding the use of illicit substances, is found to be selling or distributing prescribed medications that are prescribed by our physicians, or is not adhering to treatment about illicit substance use against the professional advice of our staff, iTrust Wellness reserves the right to dismiss the patient from services and make appropriate referrals either to facilities that iTrust providers feel are better equipped to treat the patient or to law enforcement personnel.

Service Policies

Laboratory Results/Records Notice

If laboratory tests are prescribed, patients are entitled to copies of the results. iTrust Wellness will recommend laboratory tests based on the safest and best practices but is not responsible for costs or fees our patients incur as a result of having these diagnostic tests completed.

Urine Drug Screening (UDS) Policy

Urine drug screens are ordered by our providers to ensure patient safety is maintained as the use of illicit drugs or the act of taking medications not prescribed by our providers poses a threat to the patient's overall safety.

It is iTrust policy to administer a UDS on the following schedule:

- At the initial appointment regardless of medication regimen.
- Annually to patients prescribed controlled substance(s).
- Before initiating a controlled substance prescription, if it has been longer than one (1) year since previous UDS.
- At the provider's discretion, if there is suspicion of medication regimen non-compliance or other safety concerns.

All urine drug screens administered at an iTrust location will be charged a flat fee to cover the cost of the medical supplies; see the Fee Schedule below for applicable fee(s). Should the provider order the UDS to be completed at a third-party lab, iTrust is not responsible for any charges or patient responsibility resulting from the visit.

Before a drug screen occurs, the patient must empty their pockets of any items or valuables. No bags or containers other than those explicitly used for the UDS are permitted into the restroom should this screening be required by the provider. Attempts to falsify or invalidate urine drug screen results will be considered non-adherence to treatment and may result in dismissal from the practice.

Genetic Testing

If a provider and patient agree to the patient's participation in a pharmacogenomic test to determine the best course of treatment, the patient understands that all components of the testing are handled separately from iTrust. The patient's sample is sent solely to the genetic testing facility and is not stored or kept in at any iTrust location. If there is an issue with the collected sample, the patient may need an additional appointment with their provider to re-collect the testing sample, and/or another sample may need to be sent by the patient via mail.

iTrust Wellness is not responsible for any billing related to the genetic test. The genetic testing company will bill the patient, or their insurance directly, for any charges and fees related to testing.

iTrust Wellness currently collaborates with Genesight, a subsidiary of Myriad Genetics, Inc. to process and analyze our patients' genetic samples. For more information, visit [Genesight.com](https://www.genesight.com).

Letters and Form Requests

A minimum of three (3) appointments with a provider is required for most paperwork/letters, including FMLA or short-term disability paperwork. This paperwork will only be filled out at the discretion of the provider and is not guaranteed. Prior approval by the patient's iTrust provider is required. Upon provider approval, please allow 5 business days for processing once all necessary information is received. See the [Fee Schedule](#) for applicable fee(s).

The patient's primary provider may be a mid-level provider such as a Nurse Practitioner or Physician's Associate. If a letter or document is not accepted due to the scope of their license, such as the requirement of a Medical Doctor's signature, iTrust Wellness will not involve the collaborative physician or another Medical Doctor for their signature as they are not the primary provider.

For FMLA/short-term disability requests, please note:

- Patients must be seen by their regular provider at least every two (2) weeks while under short-term disability or FMLA coverage. If regularly scheduled appointments are not kept, we will notify the disability carrier.
- Providers may only approve 30 days of FMLA or short-term disability coverage at a time. This coverage may be renewed or extended to a maximum of 90 days, consecutively or combined, per calendar year for each.
- We can only report symptoms and response to treatment to the company that handles the disability insurance.
- Requests for records for disability applications or additional paperwork/letters may be subject to additional fees.

For emotional support animal letters, please note:

- Our office requires confirmation from a veterinarian of up-to-date vaccines.
- The animal needs to be greater than 1 year of age.
- For dogs or otherwise trainable animals, our office must have proof of obedience training that the animal has participated in.

Even if these qualifications are met in completion, it is still at the provider's discretion to complete the letter on behalf of the patient.

Medical Records Requests

Request for Coordination of Care Policy

As part of coordination of care, printed or electronic medical record copies can be made available to another provider at the request of the patient free of charge if a signed release of information is on file.

Request for Individual Use Policy

Records and other documentation from the patient's comprehensive medical chart will be provided to the patient or their authorized representative upon request. Please allow a minimum of 7 business days for records to be prepared.

In accordance with state and federal law, providers may charge a reasonable fee for the search and duplication of medical records. The table below demonstrates fees applicable based upon the number of pages and fees as dictated by the state of South Carolina. A clerical fee of \$25 will apply.

Electronic Records Fees

First 30 pages	\$0.83 per page
Beyond 30 pages	\$0.63 per page
Clerical Fee	\$31.06
Max Fee per request	\$192.44

*These fees are assessed and adjusted annually by the South Carolina Department of Health and Environmental Control (DHEC) the most up to date fees will be applicable regardless of amounts listed in these policies. [SC DHEC Search & Duplication of Medical Records](#)

Practice Financial Policies

Insurance Procedures

We accept most major insurance plans. To properly bill the insurance company, iTrust requires that the patient discloses all insurance information, including primary and secondary insurance, as well as any changes of insurance information. Failure to provide complete insurance information may result in patient responsibility for the entire bill.

As a courtesy to the patient, iTrust will bill the insurance carrier(s) for the services provided. Prior to billing insurance, the iTrust provider will choose the appropriate [CPT code\(s\)](#) that represent the services provided during each appointment. Given the frequency in which changes happen in the insurance marketplace, we routinely check patients' insurance eligibility at least five (5) days in advance of each appointment. Patients whose coverage is found to be inactive or out-of-network will be contacted to discuss alternative options, such as:

- The patient provides iTrust with updated insurance information, resulting in active coverage
- The patient opts to utilize out-of-network coverage, if applicable to their plan
- The patient opts to utilize our self-pay rates (not applicable to patients covered by Medicaid)

Although iTrust may estimate what an insurance company may pay as a part of plan coverage, the insurance company ultimately determines final eligibility and benefits. Patients utilizing their insurance benefits are responsible for any uncovered charges; therefore, we encourage all patients to familiarize themselves with the health plan benefits before their appointments. Patient responsibility is defined as any portion of healthcare costs that a patient is required to pay out-of-pocket; patients utilizing their insurance coverage are responsible for costs related to deductibles, co-payments, co-insurance fees, annual limits or maximums, and out-of-network or non-covered service charges.

Self-Pay Procedures

iTrust Wellness offers an alternate method of payment for patients who do not have insurance or do not wish to use their insurance coverage*. See the [Fee Schedule](#) below for applicable rates. Please note that self-pay rates will be reassessed or adjusted periodically. Patients will be notified of any rate adjustments in writing at least 60 days before receiving any self-pay rate changes.

* Per Medicaid guidelines, iTrust is not able to accept out-of-pocket payments, including self-pay, from individuals with active insurance coverage through Medicaid.

Payment Policies & Procedures

Accepted Forms of Payment

iTrust Wellness accepts the following forms of payment. Please note that all charges, with the exception of cash and check payments, are subject to a 2.5% processing fee.

- Cash
- FSA/HSA
- Debit & Credit Cards
 - Visa, Mastercard, American Express, Discover
- Checks
 - Please make checks payable to iTrust Wellness Group, LLC
 - Mailed checks should be sent to:
iTrust Wellness Group, LLC
121 Commons Way
Greenville, SC 29611

Time of Service Payment Policy

It is our priority that patients get the care they need without incurring undue financial burden; therefore, our practice policy is to collect any co-pays or other patient responsibility in full at the time of service to prevent potentially large balances from accruing over time.

IN-OFFICE PAYMENTS

Payments for in-office appointments and services are due at check-in. Payments will be processed no later than 5 PM (EST) on the date of service. In-office patients with questions or concerns regarding payments are encouraged to arrive early for their appointments to speak with a member of our staff.

TELEHEALTH PAYMENTS

Patients who partake in telehealth services are required to keep a valid payment method on file (debit/credit card, ACH draft). It is our policy to charge the on-file payment method for any co-pay fees or other balances on the date of service or no later than 12 PM (EST) the following business day.

If the on-file payment method for a telehealth patient proves invalid, it is the patient's responsibility to provide iTrust with a updated valid form of payment within five (5) business days of the attempted payment. If payment is not received, iTrust may require the patient's next appointment to take place in-person to resolve outstanding balances.

Payment Communication Procedures

iTrust Wellness utilizes multiple methods of communication to inform patients of balances owed for services. All payments are due upon receipt or no later than the date of the patient's next appointment.

ELECTRONIC COMMUNICATION

iTrust relies on electronic communication as a default method of contacting patients. Patient responsibility for payments is delivered via email and SMS texts (rates may apply). Email and text notifications are sent out automatically between appointments, after payment responsibilities have been assessed and assigned.

PAPER STATEMENTS

iTrust offers an alternative communication option of paper statement notifications for patients who do not wish to receive electronic communication. Paper statements will be sent to the mailing address on a monthly basis.

PAYMENT PORTAL (COMING SOON)

Regardless of patient communication preferences, iTrust also offers the convenience of the PayNowLite Portal via our website. Once a secure login is established by the patient, they may log in and view account balances, make payments, and update payment methods at any time.

Unable to Pay-in-Full Options

iTrust offers the following options to patients who expect they won't be able to pay in full on the date of service.

SCHEDULED PAYMENT

A one-time charge is processed using the payment method on file at an agreed upon date, no more than 5 business days after your appointment.

PAYMENT PLAN

Scheduled charges are calculated to pay off an outstanding balance. A down payment is required to initiate a payment plan. No penalties will be assessed for early payments or early balance pay-offs.

- **PAYMENT FREQUENCY:** A payment plan may be set up to run as often as weekly, but no less than monthly, throughout the payment period.
- **PAY-OFF PERIODS:** For outstanding balances less than or equal to \$500, charges will be calculated to establish pay-off within three (3) months of enrollment in a payment plan. For outstanding balances exceeding \$500, charges will be calculated to establish pay-off within six (6) months of payment plan enrollment.
- **ADDITIONAL TERMS:** Please note that future appointment and/or service charges will not be incorporated into an established payment plan. Any patient responsibility accrued after a payment plan is established will be due in full separately. Patients may not enroll in more than one payment plan at a time and may be required to schedule in-office appointments for the duration of their payment plan.

Failed Charges Policy

Patients are solely responsible for updating payment methods if charges are declined. Payment methods can be updated by contacting an iTrust office or accessing the PayNowLite portal. iTrust staff will attempt to contact patients via their preferred communication method(s) on file if payment declines and will attempt to obtain updated payment information. However, if payment is not received within five (5) days of the original due date, iTrust will require the patient's next appointment to take place in-person at a designated iTrust office location. Any failed payments, including declined checks, are subject to a \$15 surcharge, which will be added to the balance of the patient's account.

Disputed Payments Policy

If a debit or credit card charge is disputed, there will be a \$60 surcharge added to the account, to compensate for dispute fees as well as time spent by our staff.

Collections

If iTrust has contacted a patient repeatedly, and collection attempts have been made for an outstanding balance beyond 90 days of an appointment with insufficient payment received, the account will be turned over to a collection agency. In this circumstance, the patient becomes responsible for their outstanding balance plus the collection fees (typically 50% of the total balance). Once the account has been turned over to a collection agency, iTrust cannot accept direct payment from the patient without collecting the applicable collection fees as well.

Consent for Payment from a Third-Party

If someone else is making payments on the patient's behalf, there must be a consent form on file to allow our office to communicate with that person given the financial involvement in the patient's treatment. Payment will still be due at the time of the patient's appointment(s), and this consent form must be on file before any payments can be made to the patient's account via this third-party method.

Financial Hardship Statement

Patients who are experiencing financial hardships that interfere with their ability to receive care with our practice long-term should contact an iTrust office to discuss options with our staff.

Bankruptcy

For legal compliance purposes, iTrust may not take any action to collect the patient's outstanding balance while pertinent bankruptcies are pending. The patient will be required to inform iTrust of all related updates, including the case number and all relevant documentation. While pending determination from the court, iTrust will treat the balance as an unsecured claim. General outcomes are bankruptcy **approval**, meaning that the patient is required to pay a portion of their debts back, bankruptcy **discharge**, meaning the patient is released from all debts, or bankruptcy **dismissal**, meaning the bankruptcy case was not approved by the courts. In both approvals and dismissals of bankruptcy, the patient must continue to make payments as determined by the courts. If a patient receives a bankruptcy discharge, any outstanding balance will be released from the patient, and iTrust will not pursue any further collection activities.

Any questions or concerns can be relayed to the iTrust billing team at the main office number or via email at billing@itrustwellnessgroup.com.

Policy Change Notice

iTrust Wellness reserves the right to change this notice at any time and to make the revised or changed notice effective for health information iTrust Wellness already has about the client, as well as any information iTrust Wellness receives in the future. A copy of our most up-to-date policies will be available on our website. Any revised version of this notice will be posted on the Policies section of the site (www.itrustwellness.com). Clients of iTrust Wellness are required to abide by the most updated policies and procedures, as are posted on the website or made available upon request.

Fee Schedule

Appointment Codes – Insurance (Medication Management)

The following codes represent the procedural code options billed to a patient’s insurance following each office visit. In line with American Medical Association (AMA) guidelines, the provider will choose the appropriate code based on the type of appointment (new vs. established) and complexity of the medical decision making. Additionally, the provider may bill CPT codes that represent integrated psychotherapy was incorporated into the appointment. Please note these codes are only a reference point when looking at your Explanation of Benefits (EOB) or statement. Our reimbursement rates vary per insurance, per plan.

CPT Code:	Description:
99202	Evaluation & Management (Office visit) – New patient appointment, straightforward complexity.
99203	Evaluation & Management (Office visit) – New patient appointment, low complexity.
99204	Evaluation & Management (Office visit) – New patient appointment, moderate complexity.
99205	Evaluation & Management (Office visit) – New patient appointment, high complexity.
99212	Evaluation & Management (Office visit) – Established patient appointment, straightforward complexity.
99213	Evaluation & Management (Office visit) – Established patient appointment, low complexity.
99214	Evaluation & Management (Office visit) – Established patient appointment, moderate complexity.
99215	Evaluation & Management (Office visit) – Established patient appointment, high complexity.
90833	Psychotherapy integrated into Evaluation & Management, 16-37 minutes.
90836	Psychotherapy integrated into Evaluation & Management, 38-52 minutes.
90785	Interactive complexity during psychotherapy

Appointment Codes – Insurance (Therapy/Counseling)

The codes listed below represent the procedural code options to be billed during an appointment with one of our licensed counselors or therapists. Psychotherapy is a solely time-based service; therefore, the provider will choose the code most appropriate to the appointment length. Traditionally, our therapy appointments are ~60 minutes. Please note these codes are only a reference point when looking at your Explanation of Benefits (EOB) or statement. Our reimbursement rates vary per insurance, per plan.

CPT Code:	Description:
90832	Psychotherapy, 16–37 mins
90834	Psychotherapy, 38–52 mins
90837	Psychotherapy, 53+ mins
90846	Family psychotherapy, without patient present, 50 mins
90847	Family psychotherapy, with patient present, 50 mins
90785	Interactive complexity during psychotherapy

Appointment Codes – Self-Pay (Medication Management)

The following codes are applicable to patients who do have an insurance plan or opt not to use their plan for payment.

Code:	Description:	Charge:
0199	New patient initial appointment	\$199
0129	Established patient follow up appointment (30 minutes)	\$129
0099	Established patient follow up appointment (15 minutes)	\$99
1199	Established patient last appointment over one (1) year ago, re-establishing care.	\$199

Appointment Codes – Self-Pay (Therapy/Counseling)

The following codes are applicable to patients who do have an insurance plan or opt not to use their plan for payment.

Code:	Description:	Charge:
0120	Therapy appointment (new or established patient)	\$120

Ancillary Fees

The following fees are applicable to all patients regardless of payment profile (insurance or self-pay).

Code:	Description:	Charge:
0225	Reschedule/Cancellation Fee*	\$25
007	No Show Fee*	\$100
006	Lab Work (Urine Drug Screen (UDS)/Pregnancy Test)	\$10
0035	Paperwork/Letter Completion Fee	\$35
0025	Medical Records Clerical Fee	\$25
005	Disputed Charge Fee	\$60
015	Failed Payment Fee	\$15

*Not applicable to patients with Medicaid.