



## Getting Started is as Simple as 1, 2, 3

### Step 1: Medical History

We begin working with each client by constructing (and maintaining) a comprehensive, personal medical history & records file. We provide the client with a portable copy of the file in a notebook that can be taken to physician appointments, etc. We format the file on the computer so that it can be electronically forwarded using HIPPA compliant encrypted e-mail to physicians, service providers and/or family members, when requested and authorized.

**Call for our current fee schedule.**

### Step 2: Patient Advocate Services Agreement

Each client will sign a written Patient Advocate Services Agreement that spells out all of the details and responsibilities of each party, including privacy responsibilities, services to be provided under the agreement, fees and payment for services rendered, etc.

**Ask to see a copy of our Patient Advocate Services Agreement for details.**

### Step 3: Patient Advocate Services Account

We will establish a patient advocate services account once we have created a complete medical history file on a new client and they have signed an Agreement. This account is a retainer and all advocate services will be charged against the balance on account.

We require a minimum initial deposit of \$\_\_\_\_\_ (5 hours of patient advocate services at \$\_\_\_\_/hr). An invoice will be sent to the client any time their account balance falls to four (4) pre-paid hours or less on account.

We provide each client with a detailed account statement at the end of each month showing all billable services provided during that month, along with the current balance on account.

All funds held on account are refundable upon termination of the Patient Advocate Services Agreement and are subject to the terms of the agreement.

**Please contact us for a current fee schedule.**

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[www.goldenisplespatientadvocate.com](http://www.goldenisplespatientadvocate.com)

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