Good Faith Estimate

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Use when an uninsured or self-pay person schedules care at least three business days ahead, asks for an estimate, or raises a question about cost.	This is not itself the estimate and should not be handed to a client as a substitute for the required written or electronic Good Faith Estimate.

Working record

Prepared by	
Reference (no names)	
Date opened	
Next review date	

Six review points

1	**[ ] Confirm why the person is self-pay** Record whether the person has no coverage or does not intend to submit the scheduled service to coverage. Do not infer the answer from silence. **Your record:** _____ **Source:** CMS: rights when not using insurance
2	**[ ] Capture the trigger and due date** Record the request or scheduling date, the service date, and the delivery deadline. CMS distinguishes requests from services scheduled at least three business days ahead. **Your record:** _____ **Source:** CMS Good Faith Estimate decision tree
3	**[ ] Describe the primary service** Write the scheduled or requested service, date range if known, and diagnosis information if it has been determined. Do not invent a diagnosis to complete a field. **Your record:** _____ **Source:** CMS sample Good Faith Estimate
4	**[ ] Estimate the course and expected charges** List each reasonably expected item or service, its expected charge, and the expected total. For recurring therapy, state the assumptions that produce the estimate. **Your record:** _____ **Source:** CMS sample Good Faith Estimate

5	**[ ] Add the required notices** Use the CMS sample and 45 CFR 149.610(c) as the completion standard, including the estimate-not-a-contract and dispute-right information. **Your record:** _____ **Source:** CMS sample Good Faith Estimate

6	**[ ] Preserve what was delivered** Keep the dated estimate and the later bill. CMS may ask for both if the client starts the federal patient-provider dispute process. **Your record:** _____ **Source:** CMS: provider payment resolution with patients

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- CMS: rights when not using insurance
- CMS Good Faith Estimate decision tree
- CMS sample Good Faith Estimate
- CMS: provider payment resolution with patients

Educational information only. Not legal, clinical, tax, billing, or regulatory advice. Recheck every source before relying on an older saved copy. Do not put client-identifying information in a copy you cannot secure.