

Insurance Billing Workflow Guidance

The following workflow guidance is an example of a structure that many doulas on our team have found success with while helping ensure that their reserved birth time, travel, administrative work, communication, and other related expenses are appropriately accounted for. This guidance is also intended to help reduce the likelihood of leaving insurance-covered appointments unused.

This is not intended to be a direct instruction on exactly how all doulas must structure their workflow, but rather an example of a commonly used approach that many doulas have found sustainable and effective while remaining aligned with insurance guidelines.

Important Insurance Billing Guidance

- **Initial phone or virtual consultations should not be billed as the “Initial Visit” within Doulado.** If an initial phone or virtual consultation is entered as the Initial Visit, the billing team will place that claim on pause until the first in-person prenatal visit has occurred.

We understand that some other doula groups may structure their workflows differently. However, within the Fox & Cub group practice, we want to ensure we are maintaining strong long-term relationships with insurance providers and staying aligned with insurance guidelines.

Example Workflow Structure

1. During the first in-person 90-minute prenatal visit, bill the Initial Visit first.
2. Using the available 8 additional 1–2 hour visits included in the package, many doulas then bill 4 of those visits on the next 4 consecutive days following that prenatal meeting — even though they only met in person on the original day.
3. These additional billed visits help account for travel time, gas, care coordination, charting, documentation, messaging, scheduling, and administrative work related to the client.
4. At the second in-person 90-minute prenatal meeting, the remaining 4 prenatal visits are commonly entered on 4 consecutive days surrounding that visit in the same way.
5. If a client is approaching their due date quickly and there is only enough time for one prenatal meeting, then the prenatal visits are commonly entered on separate days around that one prenatal timeframe.
6. Please make sure all billed appointments occur on separate days and at different times from any other insurance appointments you are billing for.

Remaining Covered Appointments

- The birth itself to bill for
- Two 3-hour extended postpartum visits remaining

After Birth Billing Structure

7. The birth support and one of the 3-hour postpartum visits can both be billed on the same day since immediate postpartum support is provided directly after delivery.
8. This leaves one final 3-hour postpartum visit remaining.

Postpartum Visit Guidance

During the first prenatal meeting, doulas should clearly explain the postpartum visit structure to the patient. Families should understand that the final 3-hour postpartum visit is intended to be used within the first two weeks after returning home from the hospital.

If the family chooses not to use this visit in person, it may instead be provided virtually through:

- A phone support appointment
- A telehealth appointment through a HIPAA-compliant platform
- The HIPAA-compliant telehealth option directly within Doulado

If the family declines both an in-person and live virtual/phone meeting, the doula should still call the patient and leave a detailed, personalized voicemail providing support, recovery guidance, feeding support, emotional check-in guidance, newborn suggestions, and postpartum recommendations specific to their situation.

This helps ensure that the time reserved on the doula's calendar for the patient's birth and postpartum support is still being appropriately honored, including the daytime postpartum support visit included within the package.