



## Exome and genome ordering checklist

### Take the guesswork out of placing a GeneDx order.

When placing an order with GeneDx, please be sure to follow each of these steps:

- Obtain informed consent** from the patient and/or their legal guardian
- Clearly mark the patient's status** within the payment section:
  - Not a hospital patient (private practice/telehealth)
  - Hospital inpatient (extended/overnight stay)
  - Hospital outpatient (clinic owned or affiliated with a hospital system)
- Upload or attach at the time of order:**
  - Prior authorization (PA) approval documentation, if obtained in advance
    - A PA is almost always required by insurance for genetic testing. GeneDx encourages ordering providers to obtain a PA in advance of placing an order.
    - In most cases, GeneDx can also submit the authorization request to insurance on behalf of the ordering provider through our third-party vendor, careviso. To register with careviso, please visit [careviso.com/enrollment](https://careviso.com/enrollment).
  - Insurance-required prior authorization form, if applicable
  - A clinical note that helps demonstrate why the test is medically necessary, including:
    - Documentation of why exome/genome is the most appropriate test for your patient based on their personal and family history (e.g., clinical notes and previous test results)
    - Documentation of how testing results could potentially impact management, including explicit details and examples (e.g., clinical notes)
    - If applicable, documentation that genetic counseling was performed (e.g., separate genetic counseling consult note or documentation of counseling by the ordering provider)
  - All relevant diagnosis codes (ICD-10)
  - A copy of the patient's primary insurance card (front and back)

*Please note: Missing information could result in delayed or canceled testing. If you need to send information after submitting your order, please upload it in the Provider Portal or email the documents to [Support@GeneDx.com](mailto:Support@GeneDx.com), including the accession or portal order number. If using secure email, please also include patient name and date of birth.*

- The ordering provider must sign every test order**, either on the paper test requisition form (TRF) or electronically via the Provider Portal
- Provide the patient or legal guardian's phone number** in case GeneDx needs to contact them directly regarding insurance or billing
- If requesting genetic counseling services, please **complete the [referral form](#)** and email it to [Referral@GeneDx.com](mailto:Referral@GeneDx.com)

The information described here applies to orders placed within the United States.