Checklist for Bariatric Surgery:

We have created the following worksheet to help you prepare for surgery. Please bring this worksheet with you to every appointment. Many of the items listed below are Required for Insurance Authorization prior to Surgery. If you have already completed any of these items, please bring a copy of the records with you to your next appointment.

**Laboratory/Blood Work**

- CMP____  
- CBC w/ diff. _____  
- Ferratin_____  
- Folate_____  
- Iron_____  
- B12_____  
- HgbA1c____  
- Amylase_____  
- Lipase_____  
- Vitamin D25 hydroxy_____
- Total Cholesterol_____
- HDL_____  
- LDL_____

Most important Labs for Insurance approval are:

- **TSH_____** If this is abnormal it has to be treated by your primary care physician. We will need documentation of that treatment. For example: Many doctors will prescribe levothyroxine also known as synthroid.

- **H.pylori IGG_____** If this is positive it has to be treated. Either your primary care physician or the bariatric office can provide a prescription for this. Testing for H.pylori can be done by blood work, stool, or Biopsy at the time of EGD.

**Letter of Medical Necessity**

- _____ A letter of Medical Necessity is needed from the either your primary care or your referring physician.

**Psychological Evaluation**

- _____ Every patient will need a psychological evaluation. Please ask us if you need some names to call for appointments. ***If you happen to have psychological issues, you will need clearance prior to surgery. The insurance companies will not approve the patient for surgery without a psychological clearance.
**Sleep Apnea Testing/Clearance**

___ If you have not already had one, you may need a Sleep Study. If the sleep study shows you would benefit from it, you will need a CPAP Titration. This is a two step process if you have not had it done in the past.

___ In some cases your Primary Care provider can provide Sleep apnea clearance for you. Please discuss this if you have any questions.

___ If you have already been diagnosed with sleep apnea, we need to know if you have a **CPAP MACHINE and if you use it.** This is very important for the surgery, and the anesthesiologists.

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**Cardiac Clearance**

All patients will need some form of cardiac testing.

___ If you are under 50 years old and do not have Diabetes, you will need an EKG.

*** If the EKG is abnormal you will need Cardiac clearance.

___ If you are older than 50 years old you will need cardiac clearance.

___ If you have Diabetes and over 35 you will need Cardiac Clearance

___ If you have a known history of Cardiac problems you will need Cardiac clearance.

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**Three or six consecutive months of diet and exercise.**

___ Needs to be documented on office notes. Not just weights written on a paper.

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**Medical Nutrition Therapy**

___ You will have private Consultations with a Registered Dietitian. At a minimum, you will need to have an initial consultation, one pre-operative visit and one post operative visit.

___ You will be scheduled to attend a nutrition Class. This class is needed for every patient. You must have this class completed before surgery. This class cannot be billed to insurance. You will have to pay $40 for the class.

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**EGD or Upper GI Endoscopy**

___ Many patients will be schedule for an EGD prior to surgery. Please ask your surgeon or Nurse Practitioner if you need this.

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**Support Group**

___ You will need to attend one support group session prior to your surgery. Please see our website at: [http://www.upstate.edu/community/services/bariatric/local_support_groups.php](http://www.upstate.edu/community/services/bariatric/local_support_groups.php) to find the most recent calendar’s and contact information for group leaders.
Referral Resources

The following is a list of providers/agencies that we have worked with in the past. Please discuss with your surgeon or Nurse Practitioner if you have any questions.

Laboratory/Blood Work

Lab Alliance of CNY at Community (4900 Broad Rd. Syracuse) 315-492-5428
Upstate Medical University Hospital Clinical Pathology (750 E. Adams St. Syracuse NY) 315-464-4462

Psychological Evaluation

Syracuse Area:
- Ghaly (Syracuse NY) 315-463-0421
- Psychological Healthcare: Dr. Spearman (600 E. Genesee St. Syracuse NY) or (3300 James St. Syracuse NY) 315-422-0300
- Thomas Griffiths PhD (600 E. Genesee St. Syracuse NY) 315-234-0212
- Timothy Hayes PhD (315 S. Crouse Ave. Syracuse NY) 315-422-1722
- Jay Hartman LCSW (600 Oswego St. Suite A, Liverpool NY) 315-453-4084
- Randall Stetson LCSW (Bienestar Bilingual Counseling Center 2717 Belleview Ave. Syracuse NY) 315-437-1304
- Nicole Christina LCSW (1315 Westmoreland Ave. Syracuse) 315-426-8330
- Jessica Charboneau MSW (Syracuse NY) 315-708-9525
- Judith Falk LCSW (1101 Burnet Ave. Syracuse, NY) 315-440-6558
- Paul Honess LCSW (2507 James St. Syracuse, NY) 315-437-8780

Outside of Syracuse:
- William Connor PhD (75 Oak St. Binghamton NY) 607-797-7766
- Rubenzahl, Knudsen & Associates Psychological Services (22670 Summit Dr. Suite 2. Watertown, NY) 315-788-3332
- Rubenzahl, Knudsen & Associates Psychological Services (7785 N. State St. Suite 150. Lowville, NY) 315-376-5255

Cardiac Clearance

Upstate Heart and Vascular Center (750 E. Adams St. Syracuse NY) 315-464-5735
Upstate Cardiology (UHCC, 90 Presidential Plaza, Syracuse, NY) 315-464-9335
EXAMPLE of Letter of Medical Necessity

Today’s Date:

**From:** Primary Care Provider Name  
Primary Care office/Practice Name  
Primary Care Address  
Primary Care Phone/fax number

To: Upstate Bariatric Surgery Program:

Mrs. Jones has been a patient of mine for the last xx (number of) years.  
She currently has a BMI of 45. She also suffers from the co-morbid conditions of Obstructive Sleep Apnea, Type 2 Diabetes, and high blood pressure related to her disease of obesity.  
Mrs. Jones has attempted and failed at multiple diets over the years. I am in full support of her pursuit of bariatric surgery as a treatment option for her disease of morbid obesity.  
I look forward to working with your team.

Sincerely,

John Doe, MD, PCP