

CLIENT INSURANCE SCREEN

GENERAL PROCEDURES

The Client Insurance Form is completed for each client admitted or readmitted into a treatment program with the intention of documenting insurance coverage if applicable.

It must be updated at least annually or more often if the client's insurance coverage changes.

CLIENT INSURANCE DATA

Account Related Information

Account Opened Date: 01/01/2016
(Date patient became a client of this provider):

Insurance Coverage Information

Insurance ID:
Insurance Type:
Company:
Deductible Amount:
Group Name: Group Number:
Member Number:
Begin Date: End Date:
Comments:
Created By: Created Date:
Modified By: Modified Date:

Valid Insurance Types

Ins_Type_Code	Ins_Type_Desc
MEDICAID	MEDICAID (Standard)
HELP	HELP (Medicaid TPA)
MEDICARE	MEDICARE Parts A and B
BCBS	BLUE CROSS / BLUE SHIELD
PRIVATE	PRIVATE HEALTH INSURANCE (NOT Blue Cross/Bl
VA	V.A. (Veterans Health Plans)
HMK_CHIP	HEALTHY MONTANA KIDS (HMK) and CHIP
IHS	INDIAN HEALTH SERVICES

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ACCOUNT OPENED DATE: This is the start date for the current admission. Type the date in *MMDDYYYY* format. This is a required field.

INSURANCE ID: This is the Insurance identification number easily found on the client's identification card.

INSURANCE TYPE: The insurance type can be found by pulling down the drop down list. The types are shown above for your convenience. This is a required field.

COMPANY: Enter the name of the insurance company. This is a required field.

GROUP NAME: Enter the group name of the insurance company.

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GROUP NUMBER: Enter the group number for this client and insurance company.

MEMBER NUMBER: Enter the member number for the client's insurance.

BEGIN DATE: Enter the date the insurance account became active. This may be the same as the Account Opened Date. Type the date in *MMDDYYYY* format. This is a required field.

END DATE: Enter the date the coverage will end, if available. Type the date in *MMDDYYYY* format.

STATUS: Mark either "*Active*" if the insurance is currently active or "*Cancelled*" if the insurance has been cancelled.

COMMENTS: Use this area for recording any needed comments about this particular record.