

Today's Date \_\_\_\_\_

Referring Party / Contact \_\_\_\_\_

Phone / Fax \_\_\_\_\_ E-mail: \_\_\_\_\_

Company \_\_\_\_\_

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### **PATIENT INFORMATION**

Last Name \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_

SSN \_\_\_\_\_ DOB \_\_\_\_\_ ESRD Date \_\_\_\_\_

City \_\_\_\_\_ ST \_\_\_\_\_ Zip \_\_\_\_\_

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**Specialty Pharmacy Only**    Diagnosis \_\_\_\_\_

Drugs/Meds (J-Codes) \_\_\_\_\_

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### **INSURANCE INFORMATION**

Patient Plan Year: \_\_\_\_\_

Employer Group Name \_\_\_\_\_ Group # \_\_\_\_\_

In/Out of Network \_\_\_\_\_ Network/PPO & Discount \_\_\_\_\_

Policy Type \_\_\_\_\_ COBRA POLICY? \_\_\_\_\_ Effective Date \_\_\_\_\_

Benefits & Amount Met: CoPay: \_\_\_\_\_ Deductible: \_\_\_\_\_ OOP: \_\_\_\_\_

MGU \_\_\_\_\_ Plan Year \_\_\_\_\_

Stop Loss \_\_\_\_\_ Plan Year \_\_\_\_\_

Payer \_\_\_\_\_ Plan Year \_\_\_\_\_

TPA/Contact \_\_\_\_\_ Phone/E-mail \_\_\_\_\_

Case Manager \_\_\_\_\_ Phone/E-mail \_\_\_\_\_

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### **PROVIDER & CLAIMS INFORMATION**

TAX ID # \_\_\_\_\_

Provider \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Contact \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

**Charges Outstanding** \_\_\_\_\_ Age of claims? \_\_\_\_\_

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Send Worksheets/Invoice to (name, address, fax & email): \_\_\_\_\_

Include unpaid claims and current discount.

Did you check plan benefits and PPO/PBM restrictions?