

**CLIENT INFORMATION**

Person Receiving Services: \_\_\_\_\_ DOB: \_\_\_\_\_ Sex: \_\_\_\_\_

Person Responsible for Payment: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Employer: \_\_\_\_\_

**PHYSICIAN INFORMATION**

Primary Referring Physician: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Address: \_\_\_\_\_

**PRIMARY BILLING INFORMATION**

Insurance Company: \_\_\_\_\_ Address: \_\_\_\_\_

Insured's Name: \_\_\_\_\_ DOB: \_\_\_\_\_ ID #: \_\_\_\_\_ Group #: \_\_\_\_\_

Insurance Company Phone: \_\_\_\_\_

**DO YOU HAVE SECONDARY INSURANCE?** Yes No

Insurance Company: \_\_\_\_\_ Address: \_\_\_\_\_

Insured's Name: \_\_\_\_\_ DOB: \_\_\_\_\_ ID #: \_\_\_\_\_ Group #: \_\_\_\_\_

Insurance Company Phone: \_\_\_\_\_

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**TO BE COMPLETED BY OFFICE** DATE: \_\_\_\_\_ CONTACT: \_\_\_\_\_

Benefit Summary: \_\_\_\_\_

Exclusions: \_\_\_\_\_

Prior Authorization Required: \_\_\_\_\_

Physician Referral Required: \_\_\_\_\_

Individual Deductible: \_\_\_\_\_ YTD: \_\_\_\_\_ Family Deductible: \_\_\_\_\_ YTD: \_\_\_\_\_

Individual Annual Out of Pocket: \_\_\_\_\_ Family Annual Out of Pocket: \_\_\_\_\_