

# Claims Process at a Glance ...

**ALWAYS ADVISE YOUR CLIENTS TO MAKE YOU THEIR FIRST  
PHONE CALL IF THEY EVER NEED TO CLAIM SO THAT YOU CAN  
HELP FACILITATE THE PROCESS**

**– ALWAYS INCLUDE YOUR SL IN THIS PROCESS –**

- ▶ Meet with clients to deliver claim forms (can be sent in an email but better to meet with them whenever possible)
  
- ▶ Explain they should get the Physician portion completed first
  - ▶ Indicate the important areas that need to be filled out based on coverage
  - ▶ If they received stitches or surgery they'll need a surgical report
  - ▶ Whenever there is a break a radiology form will be required

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- ▶ Once the client has gathered the appropriate doc's from their Physician they can fill out the Claimants Statement
  - ▶ You can assist but you can not write on the form
  - ▶ The information on this form must match the Physician's form
- ▶ After everything has been filled out properly and checked by you and your SL it can be faxed to the Claims Department
- ▶ Follow up after 2 days to confirm it was received and set a reminder to follow up after 15 days to confirm everything was processed or to see if anything else is needed