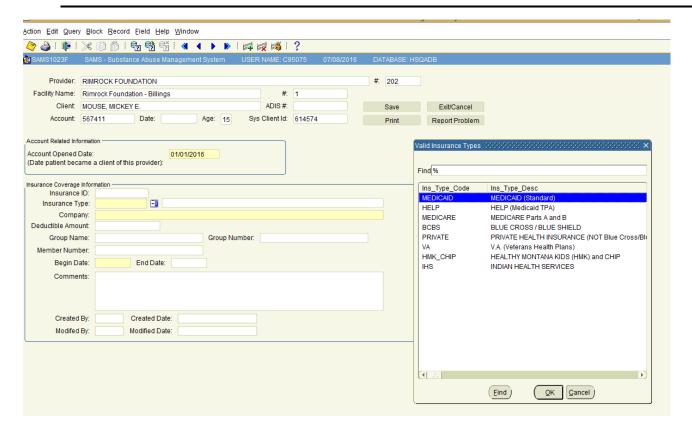# CLIENT INSURANCE SCREEN

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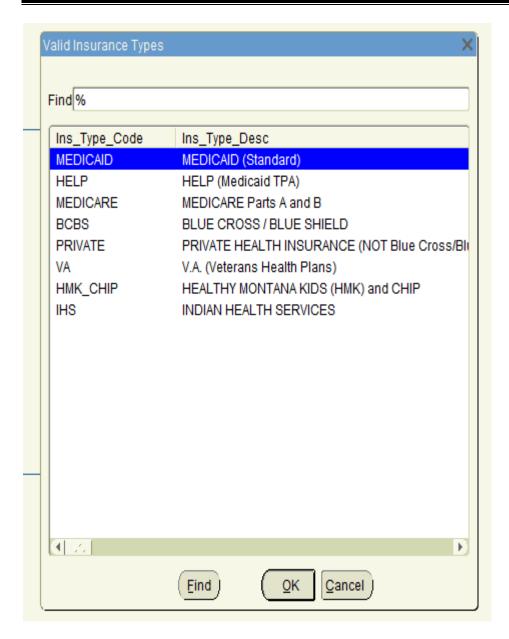
It must be updated at least annually or more often if the client's insurance coverage changes.

CLIENT INSURANCE DATA

CLIENT INSURANCE SCREEN

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.

CLIENT INSURANCE SCREEN

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.