



Client Insurance Checklist

B'WELL COUNSELING 2022-2023

Have on hand:

- This worksheet & something to write with
- Insurance ID:
 - Locate member ID on front of card
 - Locate customer service number of back of card
- Client's date of birth

Questions for customer service:

- Do I have active mental health care coverage with this policy?
- Is this policy my primary insurance?
- When does my policy renew or start over?
- Does my insurance cover the following CPT (current procedural terminology) codes: 90791, 90837, 90834?
- Does my insurance cover both in-person and telehealth appointments?
- Do I need authorization before starting sessions?
- Do I have a maximum number of sessions per year?
- Do I have a deductible that has to be met before my insurance covers all or a portion of the cost for sessions? If so...
 - What is my total deductible amount?
 - What amount (to-date) is left to be met?
 - What percentage am I responsible for once that deductible is met? (ie: What coinsurance will I owe?)
- If I do not have a deductible, do I have a copay owed for every session?
- What is your (representative's) name and the reference number for this call?

****Remember to call back when your policy resets or changes to verify any new information****