

Telephone Screening Form



PROVIDER:

Caller's Name		Relationship to Potential Client	
Home Phone	()	Work Phone	()
Cell Phone	()	Pager	()

Client's Name (if different)		Date of Birth	
Client's Address	Street	City	
	State	Zip	Home Phone ()
Reason(s) for calling today			
Risk of harm to self or others?			
Current Medications			
Date of First Call		First Appt. Offered	
Appointment Date		Appointment Time	

Insurance Company			
Member Services Phone Number	()	Mental Health Phone Number	()
Policy or ID Number		Group Number	
Policy Holder's Employer			
Policy Holder's Name		Relationship to Client	
Policy Holder's Date of Birth		Policy Holder's SSN	
Policy Holder's Home Phone	()	Policy Holder's Zip Code	

BEFORE you hang up the phone:

- Explain your fee structure, whether you will submit claims, and your payment policies.
- Tell the client to call their insurance company ***before the appointment*** to find out what preauthorization procedure must be followed. Call the separate mental health telephone number typically found on the back of the insurance card. Just getting your name from the insurance company is not sufficient. ***Specifically advise the client that you cannot see her/him until they have followed the preauthorization procedure.***
- Tell the client to call you or your billing office with their authorization number.
- Remind the client to bring their insurance card(s) to the first appointment.
- Ask the client to arrive 10 minutes early to fill out paperwork.