



Providing Service You Can Trust

Claims Checklist

We at Worksite Innovations understand that filing claims can be difficult. Here are some tips to make the process easier so you can get your claims filed with ease.

Need your Policy Number? Need Claim Forms? Have questions on your claim? Call our office at: 888-339-3593

Or visit our website at

www.worksiteinnovations.com



For Hospital/ CI /Cancer Claims you may need:

- **The UB04** – This is a universal bill that provides your personal information with diagnostic codes needed for the claim. Must include Admission and discharge date and times. This can be requested from medical billing.
- **Operative Reports** are for surgeries. This is a type of report that highlights the processes of the operation.
- **Anesthesia bills** can be requested from medical billing.
- **Chart notes** give details of the Hospital Visits and can be requested from medical records or found on your **patient portal***.
- **Pathology Report**- To show diagnosis of critical illness.

For Accident/ Short term Disability claims you may need:

- **Chart Notes** from initial Visit to hospital or clinic.
- **Police Report** this will be needed in the case of car accident or any accident that had to be reported to the authorities.
- **Major Diagnostic exams** (e.g., x-ray, MRI etc.) information can be requested from medical records or found on your **patient portal***.
- **Operative report and anesthesia bill** (check hospital claim tips).
- **Map quest image** showing out of town travel for medical treatment as well as lodging **invoice** for hotel stays – must be in the name of the insured.
- **Physician Statement**- Statement should show reason for and length of time off work.

Honorable Mentions.

- Fill out claim forms thoroughly and make sure dates and symptoms line up the information provided by the doctor.
- There are so many ways to send in your claims. Claims can be filled out online, emailed in, faxed and even mailed. Reach out to your agent to see what options are available to you.
- The online **patient portals** are your friends. These are online accounts provided by the hospitals that you are treated at. They give you access to information on your care and treatments from your visits. Not all hospitals have these but if you do have access to one, you can avoid the long holds and wait times when requesting information from the hospitals directly.