



**IDALIA LASTRA, D.M.D.**

## INSURANCE INFORMATION REQUEST FORM

Welcome to our office! In order to best serve you, we need some information for our records. Please try to answer all the questions. We request your insurance information when you call the office to set up the first appointment. The reason we do this is to have all your insurance benefits information checked so we can help in setting up payment arrangements. The benefit information we receive is not a guarantee of payment.

Date \_\_\_\_\_

Patient's Name \_\_\_\_\_ Birthdate (month) \_\_\_\_\_ (day) \_\_\_\_\_ (year) \_\_\_\_\_  
*First Middle Initial Last*

Insured's Name \_\_\_\_\_ Insured Birthdate (month) \_\_\_\_\_ (day) \_\_\_\_\_ (year) \_\_\_\_\_  
*First Middle Initial Last*

Home phone \_\_\_\_\_ Relationship to Patient \_\_\_\_\_

Home Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Insured's Employer \_\_\_\_\_ Work Phone \_\_\_\_\_ SSN \_\_\_\_\_

Group Number \_\_\_\_\_ ID # \_\_\_\_\_

Insurance Company Name \_\_\_\_\_

Insurance Company Phone \_\_\_\_\_

Does anyone else have this patient covered for orthodontics? \_\_\_\_\_

### **Quote of benefits**

When we call the insurance company we request:

Life time maximum on your plan	(each plan differs)
Percentage of fee paid	(can be from 20% to 80% of charges)
Age limit	(may be children to 19 or 25 only)
Date of eligibility	(there may be a waiting period before you are eligible for orthodontic benefits)
Any limitations	(Phase I, TMJ, Treatment in progress)

### **Filing claim forms**

The signature of the insured is required on the original claim form which will be submitted by our bookkeeper along with any subsequent treatment forms needed. Each insurance company has its own policy on ways of paying benefits. Some will pay as billed; some will divide the charges over the treatment time and pay quarterly installments and others will only make payments to the insured and not to the provider.

### **Setting up payment arrangements**

Our Treatment Coordinator subtracts the amount of estimated benefits your plan allows from the total cost of your orthodontic treatment and makes arrangements so the balance can be paid. We are happy to accept benefits from your insurance company to make it easier for you, but any insurance benefits not paid are your responsibility and will be transferred to your contract.

### **Important additional information**

Insurance will not necessarily pay for the entire treatment since there may be a deductible, a lifetime dollar limit and, or excluded services. Lost and broken appliances or loose braces are rarely covered. There are times that your insurance may not pay the estimated amount due to the following possible reasons: deductibles not met, change in the way the insurance company figures and pays benefits, change in insurance companies, or termination of plan or employment. In addition, the estimated allowable cost incurred by necessary extractions needed for orthodontic treatment may be applied towards your orthodontic benefits. If this happens the balance of the fee is transferred to the guarantor to pay.

If you do not receive the benefits you believe you are entitled to from your insurance carrier, you need to contact them or your insurance representative in order to dispute any matters.