

Calling Your Insurance Company

Before you call:

1. Have your insurance ID card in front of you. You will need:
 - a. ID number of insured person (often the Social Security number of the insured)
 - b. Plan number
 - c. Group number
 - d. Employer's name and ID#
2. Be ready to take notes:
 - a. Write on this form
 - b. Put down the date you called
 - c. Summarize what you were told and who gave you the information.

When you call:

1. Call the **Customer Service Number**.
2. Ask for Coverage Information
 - a. Indicate that you are interested in Orthodontic Coverage.
3. Identify the patient:
 - a. Insured?
 - b. Spouse?
 - c. Child? Give child's date of birth
4. Are there any age restrictions?
 - a. What ages are covered?
5. What is the coverage?
 - a. Lifetime?
 - b. Yearly?
6. Are there any deductibles?
 - a. Lifetime?
 - b. Yearly?
7. Does the coverage have a lifetime limit?
 - a. How much is it?
 - b. Has any been used up yet?
 - c. How much is left?
8. Where should the claim be sent?
 - a. Is the address on the card the correct address?
 - b. Is there a special address for this specific plan?

After the call:

Write down a summary of your coverage as it was explained to you.