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## Financial Information Form

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I truly appreciate your choosing to come to me for treatment. As part of providing high-quality services, I need to be clear with you about our financial arrangements.

If you have health insurance, it may pay for a part of the cost of your treatment here. To find out if this is so, I need the information requested below in sections D, E, F and G. I will explain any part of this form that is not clear to you.

A. Please select one or more of the following options:

1.  I intend to use any insurance benefits available to pay for part of the services I receive here. (Please complete sections E, F, and G of this form.)
2.  I decline to use the health insurance I have with \_\_\_\_\_ (company). (Please select options 4 or 5 below.)
3.  I have no health insurance coverage.
4.  I will authorize you to bill my credit/debit card for each session.
5.  I will pay by cash or check at the beginning of each visit.

B. If you ask me to, I can submit claims to your health insurance plan or managed care organization (MCO) for you, but you must authorize me to receive any payments the insurer makes. If I have a contract with your plan, I am "in network" and must charge you only the fee that the insurer and I have agreed to. You will pay me the full fee until your payments reach the yearly deductible of your health insurance. After that, you will pay me only the copayment or "copay" for each time we meet.

C. The use of health insurance to pay for all or part of therapy involves many considerations. You can learn more about these in my handout entitled "What You Should Know about Managed Care and Your Treatment." The major concerns include these:

- When an insurance company pays for part of your treatment, the company has a right to review your records, limit treatment, and deny claims for payment.
- Not all services may be covered, including phone meetings, videoconferencing, and any services the company decides are not "medically necessary." If you request and agree to services that are not covered, you will be expected to pay for them, and we will sign an additional contract.
- If your insurance changes, you agree to provide me with an update as soon as possible. If you become eligible for additional or different insurance such as Medicare, you must inform me.
- This office will submit claims in a timely manner and will provide an update to you if the insurance company or MCO denies the claim.

D. Please give us this information as it appears on your insurance policies or cards.

Your name: \_\_\_\_\_ Date of birth: \_\_\_/\_\_\_/\_\_\_ Age: \_\_\_\_\_

Home phone #: \_\_\_\_\_ Cell #: \_\_\_\_\_

Home street address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Name of the insurance company: \_\_\_\_\_ Health plan: \_\_\_\_\_

Policy #: \_\_\_\_\_ Group #: \_\_\_\_\_ Effective date: \_\_\_/\_\_\_/\_\_\_

Phone number of plan: \_\_\_\_\_

Address to send claims: \_\_\_\_\_

