

Use this fillable worksheet before contacting your health insurance plan about where Explanation of Benefits notices, claims letters, portal alerts, and other insurance communications are sent.

Student information

| | |
|----------------------|----------------------|
| Student name | Date of birth |
| <input type="text"/> | <input type="text"/> |
| Phone number | Email address |
| <input type="text"/> | <input type="text"/> |

Insurance information

| | |
|----------------------|-----------------------------|
| Insurance company | Insurance phone number |
| <input type="text"/> | <input type="text"/> |
| Member ID | Group number |
| <input type="text"/> | <input type="text"/> |
| Policyholder name | Insurance website or portal |
| <input type="text"/> | <input type="text"/> |

Private contact preference

| | |
|--------------------------|----------------------|
| Private mailing address | |
| <input type="text"/> | |
| Private email address | Private phone number |
| <input type="text"/> | <input type="text"/> |
| Preferred contact method | |
| <input type="text"/> | |

Questions to ask the insurer

- Does this plan allow a confidential communications request?
- What official form should I use?
- Can Explanation of Benefits notices be sent only to me?
- Can claim alerts, portal messages, letters, and billing communications be sent only to me?
- Does the request cover all services or only sensitive services?
- How long does processing usually take?
- Will any communications already in process still be sent to the policyholder?
- Do I need to renew the request each year or after changing plans?

Request tracking

| | |
|-----------------------------|---------------------------|
| Date insurer contacted | Representative name or ID |
| <input type="text"/> | <input type="text"/> |
| Case or confirmation number | Submission method |
| <input type="text"/> | <input type="text"/> |
| Expected processing date | Follow-up date |
| <input type="text"/> | <input type="text"/> |

Use this fillable worksheet before contacting your health insurance plan about where Explanation of Benefits notices, claims letters, portal alerts, and other insurance communications are sent.

Notes