Headway

Insurance verification checklist for therapists

BASIC INFORMATION NEEDED

Before you get on the phone with an insurance company, you'll need to have specific information about your client and their insurance plan, including:

CHECKLIST 1

- ☐ Client's full name
- ☐ Client's date of birth
- ☐ Copy of the client and the policyholder's ID
- ☐ Copy of the client's insurance card

If you need to verify that a certain service or procedure is covered by your client's insurance plan, then you may need the following additional information:

CHECKLIST 2

- ☐ Relevant CPT codes
- ☐ Relevant ICD-10 codes
- ☐ Session length and frequency

Headway handles insurance verification for its providers, along with credentialing and billing. Without the burden of administrative tasks like these, you can focus on the important work of supporting your clients in therapy.