



Insurance Claims Policy

Document Details		
Title	Insurance Claims Policy	
Main points	How to deal with insurance claims	
Who is the document aimed at?	All staff	
Author		
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Approved by (Clinician/Manager)	EMT	
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Document Links		
Required by CQC		
Other		
Amendments History		
No	Date	Amendment
1		
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Insurance reports

- Once the insurance letter has arrived in post, check there is a consent form from signed by patient
- Get patients notes out of record room, tie insurance form around notes and place in the doctor's box (if no box please create one for each GP)
- Add details to practice spreadsheet
- Add slot to appointment book for the GP to action
- Once form is returned, put notes back in record room and send form/notes to solicitor
- Scan on to the patient's records (in case it goes missing in the post)
- Complete Insurance folder
- Add quick note to state that form is complete and posted to solicitor
- If Solicitor is requesting full set of notes, ask the patient to gain full online access for their medical records, for them to share with the solicitor themselves.