

Hagen Consultants

P.O. Box 710, DeForest, WI 53532-0710

HOW TO GET STARTED WITH HAGEN CONSULTANTS MEDICAL CLAIMS PROCESSING

- If you have a specific medical file, it might be easiest to pass the entire file over to Hagen. If not, please provide as much information as you can. (A copy of the insurance policy if available and up to a year's worth of your client's paperwork.)
- Complete the Client Set Up Sheet.
- Include copies of the front and back of all insurance cards.
- Items that should be sent to Hagen on a weekly basis:
 1. Medicare Summary Notices
 2. All other Insurance Explanation of Benefits (Except premium notices, pay these as received)
 3. Physician/Clinic bills
 4. Hospital bills
 5. Prescription drug statements
 6. Copies of paid pharmacy bills
 7. Copies of paid nursing home/assisted living bills
- If you receive any checks from the insurance companies, please deposit those checks into the client's account, but forward the attached paperwork for our review. When in doubt on paperwork, please send it.
- Pay only pharmacy bills, nursing home bills, wheelchair transports and premium notices when they come to you. We should be sent copies of any payments you do make. The rest of the bills can wait for Hagen Consultants to instruct payment.
- The addresses to send your paperwork to Hagen Consultants is: PO Box 710, DeForest, WI 53532-0710

Our physical address for courier delivery only is: 113 S. Main St. Ste 302, Lodi WI 53555. All other mail please send to the PO Box, thank you.

- You will be given the name of your Medical Reimbursement Specialist, and they will be available to answer any questions that you may have on your clients.
- The monthly reports, called Account Activities, are prepared on the same date each month. Any invoices needing payment will be attached to the Account Activity. For all new accounts opening, once we have a feel for the volume of accounts you have, we will set that date for you and let you know.

**Please note that any bills or correspondence we receive, unless they are collection notices, will be addressed when working the clients file on the due date of the account, not as received in our office (mail packet, by fax or email). We review the file on a monthly basis, nothing will sit longer than 30 days before you hear back from us. If you have a specific concern you can email/fax the information and we will research this and get back to you at that time, otherwise we will wait to process the paperwork until the file is worked for the month.

- Why do we need the nursing home, assisted living or pharmacy bills?

We monitor for duplicate charges, insurance postings, co-pays billed to the client before insurance processes, errors in billing, items that are covered by insurance and not billed to insurance. This is only a small list of reasons we require the copies of paid nursing home or pharmacy bills.

Example: On a pharmacy bill, one client was billed \$369.00 for one purchase. After reviewing the bill, the charge should have been \$3.69 for one bottle of aspirin and they were billed for a quantity of 100! The Trust paid the bill and we were able to obtain a refund of \$365.31 for the client.

- All other medical provider bills should wait for payment until instructed by Hagen Consultants.

ITEMS THAT WE NEED TO BE NOTIFIED OF AS SOON AS POSSIBLE

- When a client passes away, we need the date of death and if the account is transferring to another area. Estates are worked more aggressively, so we can close as quickly as possible for the family members, and estates can be dispersed. If there is another person, outside of the client, that is no longer responsible for this client and the account should be closed, we need this in writing (fax or email is fine) from you as soon as possible, so we do not continue to work the account. You would be liable for any Hagen Consultant fees incurred before being notified.
- Change in pharmacy.
- Change in health insurance coverage. This avoids extended delays in processing claims for the client. This includes open enrollment packets or yearly changes which often occur in October.
- Should the client move from their home to a nursing facility or assisted living, please let us know as soon as possible along with any changes in pharmacy or health insurance coverage. This avoids extended delays in processing claims for the client. When calling for information to insurance providers, often we have to supply a home address and this needs to be current.
- If you should need to close an account for any reason, we request that we be notified in writing (a fax or e-mail is fine). You would be responsible for reimbursing Hagen Consultants for any time spent on the account prior to Hagen Consultants being notified of the account closing.