## Purpose

# To assure documentation of insurance companies (HMO, PFFS, etc.) precertifications/certifications, authorization numbers, etc. are communicated and documented throughout the Clinical/Financial Operations to assure that skilled days are accounted for.

# **Policy**

1. The facility will document in Matrix under **Resident Notes** tab, which includes:

* Name of Insurance company
* Case Manager’s name, phone number and fax number
* Authorization number including pre-certifications/certifications
* Covered days
* When next update is due
* Anything that pertains to the insurance follow-up with the case manager, last covered days, appeals through KeyPro, etc.

1. The facility will update **Resident Notes** whenever calling/responding to an insurance company whether through, phone, email, fax, etc.
2. Documentation received from the insurance company will be scanned into the EMR and attached in **Documents** and saved in the **Insurance cards/Verification** folder.