



Healthcare Reimbursement Checklist

Get Ready

- Set up your paper and digital folders. *
 - Create a digital folder with screenshots of maps to your doctors' offices, etc.
 - Create a digital folder for doctors' letters of medical necessity.
- [Download](#) the free reimbursement spreadsheet from eQuipping for eMinistry. **
 - Make your adjustments to the spreadsheet depending on your family's needs.
 - Add addresses under the addresses tab.

Take Care of These Steps as They Happen

- Record appointments, claims, email notifications, bank deposits, bills paid, ... in the spreadsheet.
- Keep papers in the correct folders.
- Scan and name your PDF files for uploading a manual claim.
- Ask doctors for letters of medical necessity.

Approve an EOB **

- Log in to Blue Cross (BCBS) and into P&A to identify the correct expense.
- Record claim numbers and other information from BCBS in the spreadsheet.
- Click on "approve" in P&A.
- Record the date in the spreadsheet when the EOB amount is in your bank.

Submit a manual claim ***

- Make sure you have all documentation you'll need before uploading your claim.
- To expedite your claim, consider grouping similar items into a claim.
- Note the starting and ending dates of your claim.
- Check and double-check the total amount you will be claiming.
- After submitting, record the UPV number in the spreadsheet.
- After your claim is processed, record the amount paid, and other information, in the spreadsheet.

Miscellaneous

- Track bills due, claim denials, et cetera, in your spreadsheet.
 - Use the filter in the "done" column to help focus on specific tasks.
- Every January, start new with folders and spreadsheets for the new year.

Brought to you by Sus Schmitt of eQuipping for eMinistry

- Learn more in the three-part blog series:
 - [Organize and name](#) your files. *
 - Use [a spreadsheet to track](#) your expenses. **
 - [Learn a workflow](#) to stay on track for submissions. ***

Visit [eQuipping for eMinistry](#) to download this free checklist.