

Collecting Patient Information		
Information needed	Right way	Wrong way
Current phone	Please confirm your home and work phone number for me.	Are your phone numbers the same?
Current address	Mrs. Smith are you still living at 312 Windy Drive?	Mrs. Smith, are you at the same address?
Employer	Are you still employed by the City of New York?	Have you changed jobs?
Primary Insurance	Is Aetna Preferred still your primary insurance?	Do you have the same primary and secondary insurance?
Secondary Insurance	Do you have a secondary insurance coverage with UnitedHealthcare?	Do you have the same primary and secondary insurance?
Workers Compensation	Is this visit related to a work or auto injury?	No question asked about the possibility of injury.

Source: Judy Capko, consultant and founder, Capko & Company, www.capko.com.