

Post-Trial Client Information Sheet

This required form provides crucial information needed to submit to your funding source.
Please fill out electronically if possible, and complete each section thoroughly.

1. CLIENT: *The client is the person who will be receiving the equipment or services.*

Client Last Name: _____ First Name: _____
Client Date of Birth: _____ Sex: Male Female Not Specified

2. DIAGNOSIS: *Client's condition deeming the requested equipment or services medically necessary.*

Medical Diagnosis: _____
Diagnosis Code (ICD-10): _____ Date of Onset: _____
Speech Diagnosis: _____
Diagnosis Code (ICD-10): _____ Date of Onset: _____
Is diagnosis a result of an accident? Yes No If yes: Date of accident? _____ Accident Type? Work Auto Other

3. TREATING PHYSICIAN: *The treating physician is the medical doctor who has prescribed the requested equipment.*

First Name: _____ Last Name: _____ Credential (i.e. MD): _____
Name of Facility: _____
Address: _____ City: _____ State: _____
Zip: _____ Daytime Phone: _____ Fax: _____ NPI # can be found at:
NPI Number: _____ Medicaid Provider Number: _____ <https://npiregistry.cms.hhs.gov>

4. SPEECH LANGUAGE PATHOLOGIST:

First Name: _____ Last Name: _____
ASHA Number: _____ State License Number: _____
Name of Facility: _____
Address: _____ City: _____
State: _____ Zip: _____ Email: _____ Daytime Phone: _____

5. INSURANCE INFO: *Please attach a legible copy of the front and back of all insurance cards.*

Complete all that apply:

Name of Medicaid/Managed Care Organization _____ ID # _____
Name of Medicare/Health Care Organization _____ ID # _____
Name of Private Insurance _____ ID # _____ Group # _____