

# KEEP IT CONFIDENTIAL.

## Helping Patients Keep It Confidential Provider Toolkit

### DRAFT SAMPLE Call Center Script

**Call Center Staff (Staff):** Thank you again for making an appointment at [INSERT HEALTH CENTER]. We are looking forward to seeing you on [REPEAT APPT DATE AND TIME]. Do you have insurance to cover your visit?

>>>IF PATIENT REPLIES YES>>>

**Staff:** Great! What is your insurance plan/carrier? [Continue to ask all information needed for verification and billing]

>>>IF YOU PARTNER WITH THEIR INSURANCE PLAN>>>

**Staff:** Thank for sharing your insurance information. Do you have your insurance plan and coverage under your own policy or do you have this insurance under someone else's policy –

- **IF UNDER 26** - like a parent or spouse?
- **IF 26 or OVER** – like a spouse?

>>>IF PATIENT ANSWERS YES TO EITHER OF THE ABOVE>>>

**Staff:** OK great. I just want to let you know that normally, if you use insurance under another person's policy, your insurance plan will send the main policy holder - in your case your [INSERT PARENT/SPOUSE] – information about any health care you receive - and where - with your insurance card.

This can be in the form of an explanation of benefits letter or other routine health plan communication sent to your [INSERT PARENT/SPOUSE]. But if - for whatever reason - you want information about your appointment you made on [INSERT DATE} at [INSERT HEALTH CENTER} sent to you

[myhealthmyinfo.org](http://myhealthmyinfo.org)

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directly and not your [INSERT PARENT/SPOUSE], now under California law, you can submit a confidential communication request to your health plan and they HAVE to accept and honor it.

Would you like information about how you can do this before your visit?

>>>IF YES>>>

**Staff:** OK, great. All you have to do is visit [myhealthmyinfo.org](http://myhealthmyinfo.org) before your visit. You will find a confidential communication request form on the site that you can download, complete and send to your health plan. To find out how to submit it to your plan, you can call the customer service line on the back of your insurance card.

>>>IF NO>>>

**Staff:** OK, no problem. If you want more information about submitting a confidential communication request, you can get more details and help to do so when you come in on [INSERT DATE OF APPOINTMENT].

[myhealthmyinfo.org](http://myhealthmyinfo.org)