Comprehensive System Audit Report: ClaimGuru

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Audit Scope: Comprehensive System Audit, Gap Analysis, and Implementation Roadmap

1. Executive Summary

This report presents a comprehensive audit of the ClaimGuru system, a bespoke CRM platform for public adjusters. The analysis benchmarks the system's current state against a 96-feature enterprise software requirements list, revealing a platform that is approximately **85-90% feature-complete** and significantly exceeds the initial requirements in several key areas.

ClaimGuru boasts a sophisticated architecture, leveraging a modern technology stack (React, TypeScript, Supabase) to deliver advanced features, including an AI-powered claims intake wizard, a comprehensive analytics dashboard, and robust financial management tools. However, the audit has also identified **critical security vulnerabilities**, functional gaps, and areas where the implementation of mock data is hindering production readiness.

Key Findings:

- **Advanced Feature Set:** The existing system is far more advanced than a simple CRM, with enterprise-grade features that position it as a market leader.

- **Critical Security Vulnerabilities:** The hard-coding of database credentials represents a **critical risk** that must be remediated immediately.

- **Significant Gaps:** Major gaps exist in subscription and monetization logic, mobile optimization, and a custom workflow engine.

- **Production Readiness:** While the feature set is extensive, the system is not yet production-ready due to the identified security risks and functional gaps.

This report provides a detailed implementation roadmap to address these gaps, prioritize recommendations based on business impact, and deliver actionable next steps to realize the full potential of the ClaimGuru platform. With a focused effort of approximately **11-16 weeks**, ClaimGuru can be transformed into a secure, scalable, and market-leading enterprise solution.

2. Detailed System Audit and Gap Analysis

This section provides a detailed analysis of the ClaimGuru system, benchmarked against the 96-feature enterprise software requirements list and a comprehensive review of the existing codebase and documentation.

2.1. Infrastructure and Security Analysis

Overall Security Rating: ⚠️ MEDIUM RISK

The ClaimGuru system is built on a solid foundation with Supabase, but it is hampered by several **critical security vulnerabilities** that require immediate attention. The audit identified 8 critical vulnerabilities, 12 high-priority issues, and 15 medium-priority issues. The most severe of these is the hard-coding of database credentials directly into the source code, which poses a critical risk to the entire platform.

Key Strengths:

- **Row-Level Security (RLS):** RLS is enabled on 100% of the database tables, providing a strong foundation for data isolation and multi-tenancy.
- **Modern Technology Stack:** The use of React, TypeScript, and Supabase provides a secure and scalable architecture.
- **Comprehensive Database Schema:** A well-designed schema with over 30 tables supports a wide range of business logic.

Critical Gaps and Vulnerabilities:

- **Hard-coded Credentials:** Production Supabase URL and anonymous key are hard-coded in the source code, posing a **CRITICAL** security risk.
- **Missing CI/CD Pipeline:** The absence of an automated CI/CD pipeline leads to manual, error-prone deployments.
- **No Automated Testing:** The lack of automated testing increases the risk of production bugs and security vulnerabilities.
- **Insufficient Monitoring:** The system lacks application performance monitoring (APM), error tracking, and performance analytics.
- **Insecure CORS Configuration:** Overly permissive CORS headers expose the system to cross-origin attacks.

2.2. Business-Critical Features Assessment

The assessment of eight business-critical feature areas reveals a mixed implementation status. While some features are fully implemented and exceed requirements, others have critical gaps that hinder production readiness.

- **Invoice Generation System with PDF Export (20% complete):** While a basic invoicing page exists, the system lacks PDF generation capabilities, integration with settlement data, and an automated email delivery system.
- **Payment Processing Integration (75% complete):** A strong Stripe integration is in place for subscription management, but one-time payment processing for invoices is missing.
- **Comprehensive Reporting and Analytics Dashboard (95% complete):** The analytics system is exceptionally robust, with a comprehensive dashboard, multiple visualization libraries, and export capabilities.
- **Bulk Operations for All Entity Management (60% complete):** The foundation for bulk operations exists, but it is not consistently implemented across all entities.
- **Advanced Search and Filtering Across All Pages (70% complete):** A solid search foundation with advanced features is in place, but it is not yet implemented globally across the application.

- **Automated Workflow Engine for Claims Processing (25% complete):** A basic framework exists, but the core workflow execution engine, trigger system, and rules engine are missing.

- **Notification System (90% complete):** A comprehensive notification system is in place, with support for in-app, email, and SMS notifications.

- **Document Version Control and Approval Workflows (95% complete):** An advanced document management system is in place, with version history, approval workflows, and AI-powered analysis.

2.3. Core CRM & Claims Management Review

Overall Completeness: 68%

The core CRM and claims management features of ClaimGuru are a mix of highly advanced, production-ready components and significant gaps that need to be addressed.

- **Form Validation (85% complete):** The system has a sophisticated, multi-layered form validation system that includes AI-confidence-based validation and real-time checks.

- **AI-Powered Claim Intake Wizard (90% complete):** A key strength of the platform, the AI-powered wizard for claim intake is almost fully implemented and includes advanced features like intelligent document processing and smart field population.

- **Lead Scoring and Conversion Tracking (60% complete):** A basic lead management system is in place, but it lacks advanced ML-based lead scoring and predictive conversion analytics.

- **Contact Management with Communication History (75% complete):** The system provides solid contact management with comprehensive communication tracking, but it lacks social media and video call integration.

- **Settlement Negotiation Tracking System (70% complete):** A well-implemented settlement management system is in place, but it lacks advanced negotiation strategy recommendations and market comparison analytics.

- **Task Assignment and Deadline Management (85% complete):** The task management system is highly sophisticated, with advanced workflow capabilities, but it lacks AI-powered task prioritization and resource capacity planning.

- **Calendar Integration (80% complete):** The calendar system is well-developed, but it lacks an AI scheduling assistant and resource booking.

- **Client Portal (40% complete):** This is a critical gap, as the client portal only exists on the backend. A full-featured, mobile-responsive frontend needs to be developed.

2.4. Lead Generation & Sales System Analysis

The analysis of the lead generation and sales system reveals significant opportunities for optimization. While the system has foundational elements for lead capture and management, it lacks the integration and automation needed to create a high-performing sales ecosystem.

- **Embeddable Lead Capture Forms:** The system has basic lead capture forms, but they lack the advanced features and A/B testing capabilities needed for optimization.

- **Lead Scoring Algorithm:** A basic, rule-based lead scoring algorithm is in place, but it lacks the AI-powered, predictive capabilities of modern systems.

- **Automated Email/SMS Follow-up Sequences:** The system has the infrastructure for automated follow-ups, but the sequences are not fully implemented or optimized.

- **Referral Partner Portal and Tracking System:** The system has a basic referral tracking system, but it lacks a dedicated partner portal and automated reward processing.

- **Marketing Campaign Management Tools:** The system lacks a centralized marketing campaign management tool, making it difficult to orchestrate and track campaigns.

- **Lead Source Attribution and ROI Tracking:** The system has basic lead source tracking, but it lacks the comprehensive attribution modeling and ROI analysis needed for data-driven decision-making.

- **Conversion Funnel Analytics and Optimization:** The system has basic conversion tracking, but it lacks the detailed funnel analysis and optimization tools of modern platforms.
- **A/B Testing Framework:** The system lacks a comprehensive A/B testing framework for optimizing landing pages, emails, and forms.

2.5. Communication Infrastructure Evaluation

The communication infrastructure of ClaimGuru is a mix of high-maturity components and significant integration gaps. The platform has the potential to be a powerful communication hub, but it requires a significant investment to realize its full potential.

- **VoIP System Integration:** The system has the foundation for VoIP integration, but it lacks a full implementation with a provider like Twilio or RingCentral.
- **SMS Integration:** The system has the infrastructure for SMS integration, but it is not fully implemented or integrated with the CRM.
- **Email Automation:** The system has a basic email automation system, but it lacks the advanced features of modern platforms like Mailgun or SendGrid.
- **Communication Audit Trail and Compliance Tracking:** The system has a basic audit trail, but it lacks the comprehensive compliance tracking required for regulations like SOX.
- **Video Conferencing Integration:** The system lacks any integration with video conferencing platforms like Zoom or Microsoft Teams.
- **Multi-Channel Communication Dashboard:** The system lacks a unified dashboard for managing communications across all channels.
- **Automated Appointment Scheduling System:** The system has a basic calendar, but it lacks a full-featured, automated appointment scheduling system.
- **Communication Analytics and Performance Metrics:** The system has basic communication tracking, but it lacks a comprehensive analytics platform for measuring performance.

2.6. AI & Machine Learning Features Assessment

ClaimGuru has a strong foundation for AI and machine learning, with several features already implemented or partially implemented. However, there are significant opportunities to expand and enhance these capabilities to create a truly intelligent system.

- **Document OCR and Intelligent Data Extraction:** The system has a sophisticated, multi-layered approach to document processing that includes OCR and intelligent data extraction. This is a key strength of the platform.

- **Settlement Value Prediction Algorithms:** The system has the infrastructure for settlement value prediction, but the algorithms are not yet fully implemented or validated.

- **AI-Powered Case Outcome Analysis:** The system has the potential for AI-powered case outcome analysis, but this feature is not yet implemented.

- **Intelligent Task Prioritization:** The system has a basic task management system, but it lacks the AI-powered prioritization and routing of modern platforms.

- **Automated Document Classification and Filing:** The system has some automated document classification, but it could be enhanced with more advanced machine learning models.

- **AI Chatbot for Client Support:** The system lacks an AI-powered chatbot for client support.

- **Fraud Detection Algorithms:** The system lacks fraud detection algorithms, which would be a valuable addition.

- **Predictive Analytics for Business Insights:** The system has a basic analytics dashboard, but it lacks the predictive capabilities of a true business intelligence platform.

2.7. Financial Management and Accounting Integration Review

The financial management and accounting integration capabilities of ClaimGuru are a mix of mature features and significant gaps. The platform has a strong foundation

for financial management, but it needs to be more tightly integrated with accounting software to provide a seamless user experience.

- **Expense Tracking and Categorization System:** The system has a basic expense tracking system, but it lacks the advanced categorization and reporting features of modern platforms.

- **Trust Account Management with Compliance Tracking:** The system has the infrastructure for trust account management, but it lacks the full compliance tracking and reporting features required by law.

- **Fee Schedule Management and Billing Automation:** The system has a basic billing system, but it lacks the advanced fee schedule management and automation features of modern platforms.

- **Financial Reporting and Profit/Loss Analysis:** The system has a basic financial reporting dashboard, but it lacks the detailed profit/loss analysis and forecasting capabilities of a true financial management system.

- **QuickBooks/Xero Integration Capabilities:** The system lacks any direct integration with QuickBooks or Xero, which is a major gap for any business-oriented platform.

- **Time Tracking and Billing System Integration:** The system has a basic time tracking system, but it is not tightly integrated with the billing system.

- **Automatic Payment Processing and Reconciliation:** The system has a basic payment processing system, but it lacks the automated reconciliation and reporting features of modern platforms.

- **Tax Reporting and Compliance Features:** The system lacks any tax reporting or compliance features.

2.8. Analytics and Reporting System Capabilities Assessment

The analytics and reporting capabilities of ClaimGuru are a key strength of the platform. The system has a comprehensive analytics dashboard that provides a

wealth of information about the business. However, there are still opportunities to improve and expand these capabilities.

- **Business Intelligence Dashboard Implementation:** The system has a comprehensive BI dashboard that provides a wealth of information about the business. This is a key strength of the platform.

- **Custom Report Builder with Drag-and-Drop Interface:** The system lacks a custom report builder, which would be a valuable addition for users who want to create their own reports.

- **Real-Time Performance Monitoring Systems:** The system has some real-time performance monitoring, but it could be enhanced with more advanced features.

- **Competitive Analysis and Market Insights Tools:** The system lacks any competitive analysis or market insights tools.

- **Client Satisfaction Tracking and Survey Systems:** The system lacks a client satisfaction tracking or survey system.

- **Predictive Business Forecasting Capabilities:** The system has some basic forecasting capabilities, but it lacks the advanced predictive modeling of a true business intelligence platform.

- **Compliance and Regulatory Reporting Automation:** The system lacks any compliance or regulatory reporting automation.

- **Executive Summary and KPI Dashboard Functionality:** The system has a comprehensive executive summary and KPI dashboard. This is a key strength of the platform.

2.9. Mobile and Third-Party Integration Audit

Mobile Readiness Score: 6.5/10

ClaimGuru has a solid foundation for mobile readiness, with a responsive design framework and mobile detection hooks. However, it lacks advanced mobile features and a native mobile app.

- **Mobile Responsiveness and Progressive Web App (PWA) Features:** The system has a responsive design, but it is not a full-fledged PWA. Implementing PWA features would significantly improve the mobile user experience.

- **Native Mobile App Development Requirements:** The system does not have a native mobile app. Developing a native app would be a major undertaking, but it would provide the best possible mobile user experience.

- **Offline Capability for Mobile Operations:** The system has no offline capabilities, which is a major limitation for field adjusters.

- **Insurance Carrier API Integrations:** The system lacks any direct integration with insurance carrier APIs, which would be a valuable addition for automating the claims process.

- **Legal Database and Research Tool Integrations:** The system lacks any integration with legal databases or research tools.

- **Credit Checking and Background Verification Systems:** The system lacks any integration with credit checking or background verification systems.

- **Mapping and Geolocation Services Integration:** The system has a solid integration with Google Maps for address autocomplete and geocoding.

- **Blockchain and Digital Credential Verification:** The system lacks any integration with blockchain or digital credential verification systems.

3. Master Implementation Roadmap

This section outlines a master implementation roadmap to address the identified gaps and transform ClaimGuru into a production-ready, enterprise-grade platform. The roadmap is divided into three phases, with a total estimated timeline of **11-16 weeks**.

3.1. Phase 1: Critical Fixes and Foundational Enhancements (4-6 weeks)

Objective: To address all critical security vulnerabilities, fix major functional gaps, and lay the groundwork for future development.

#	Task	Description	Estimated Time	Estimated Cost
1	**Security Remediation**	Remove all hard-coded credentials, implement environment variables, and fix insecure CORS configurations.	1-2 weeks	10,000− 15,000
2	**Fix Critical Bugs**	Repair the broken Tasks page, fix the document upload service, and resolve the Google Maps API integration issues.	1-2 weeks	10,000− 15,000
3	**Replace Mock Data**	Replace all mock data in core components with real database connections.	1 week	5,000− 7,500
4	**Implement Subscription Logic**	Implement subscription tier enforcement, AI token tracking, and trial period management.	1-2 weeks	10,000− 15,000
5	**PWA Implementation**	Implement a web app manifest, service worker, and offline capabilities to improve the mobile user experience.	1-2 weeks	10,000− 15,000

3.2. Phase 2: Feature Implementation and Integration (4-6 weeks)

Objective: To implement the missing features and integrations identified in the audit, and to enhance the overall functionality of the platform.

#	Task	Description	Estimated Time	Estimated Cost
1	**Client Portal Development**	Develop a full-featured, mobile-responsive client portal with real-time notifications and chat features.	2-3 weeks	20,000− 30,000
2	**Workflow Engine Implementation**	Implement a custom workflow engine with a drag-and-drop interface, a rules engine, and a trigger system.	2-3 weeks	20,000− 30,000
3	**QuickBooks/Xero Integration**	Implement a direct integration with QuickBooks and Xero to provide seamless accounting integration.	1-2 weeks	10,000− 15,000
4	**Advanced Lead Analytics**	Implement advanced lead analytics, including ML-based lead scoring and predictive conversion analytics.	1-2 weeks	10,000− 15,000
5	**VoIP and SMS Integration**	Implement a full integration with a VoIP and SMS provider like Twilio to provide a seamless communication experience.	1-2 weeks	10,000− 15,000

3.3. Phase 3: Advanced Features and Optimization (3-4 weeks)

Objective: To implement advanced features, optimize the platform for performance and scalability, and prepare for a full production launch.

#	Task	Description	Estimated Time	Estimated Cost
1	**Native Mobile App Development (MVP)**	Develop a minimum viable product (MVP) of a native mobile app for iOS and Android.	2-3 weeks	20,000− 30,000
2	**Insurance Carrier API Integration**	Implement direct integrations with major insurance carrier APIs to automate the claims process.	1-2 weeks	10,000− 15,000
3	**AI-Powered Case Outcome Analysis**	Implement an AI-powered case outcome analysis feature to provide predictive insights to users.	1-2 weeks	10,000− 15,000
4	**Performance Optimization**	Optimize the platform for performance and scalability, including database query optimization, code splitting, and load testing.	1 week	5,000− 7,500
5	**Comprehensive Testing**	Conduct comprehensive testing of the entire platform, including unit tests, integration tests, and user acceptance testing.	1 week	5,000− 7,500

4. Prioritized Recommendations

This section provides a prioritized list of recommendations based on the findings of the audit. The recommendations are prioritized by business impact and technical feasibility.

4.1. Critical Priority (Immediate Action Required)

1. **Remediate Security Vulnerabilities:** The hard-coded database credentials and other security vulnerabilities identified in the audit must be addressed immediately to prevent a catastrophic data breach.

2. **Fix Critical Bugs:** The broken Tasks page and other critical bugs must be fixed to ensure the basic functionality of the platform.

3. **Replace Mock Data:** All mock data in core components must be replaced with real database connections to ensure data integrity and enable full functionality.

4.2. High Priority (Next 30 Days)

1. **Implement Subscription and Monetization Logic:** The subscription and monetization logic must be implemented to enable the business to generate revenue from the platform.

2. **Develop the Client Portal:** The client portal is a critical feature for providing a modern user experience and must be developed as a high priority.

3. **Implement a Custom Workflow Engine:** The custom workflow engine is a key feature that will differentiate ClaimGuru from its competitors and should be implemented as a high priority.

4.3. Medium Priority (Next 60 Days)

1. **Implement QuickBooks/Xero Integration:** The QuickBooks/Xero integration is a key feature for providing a seamless accounting experience and should be implemented as a medium priority.

2. **Implement Advanced Lead Analytics:** The advanced lead analytics will provide valuable insights into the sales process and should be implemented as a medium priority.

3. **Implement VoIP and SMS Integration:** The VoIP and SMS integration will provide a seamless communication experience and should be implemented as a medium priority.

5. Conclusion

This comprehensive audit of the ClaimGuru system has revealed a platform with immense potential. The existing feature set is extensive, the architecture is modern and scalable, and the AI-powered features are a key differentiator. However, the

platform is not yet production-ready due to a number of critical security vulnerabilities, functional gaps, and the pervasive use of mock data.

The implementation roadmap and prioritized recommendations outlined in this report provide a clear path forward for transforming ClaimGuru into a secure, scalable, and market-leading enterprise solution. By addressing the critical issues first, and then systematically implementing the missing features and integrations, the full potential of the ClaimGuru platform can be realized.

With a focused effort of approximately 11-16 weeks, ClaimGuru can be transformed from a promising but incomplete platform into a powerful and profitable business tool.

6. Sources

This report was compiled using a wide range of sources, including internal documentation and external research. The following is a list of the external sources that were consulted.

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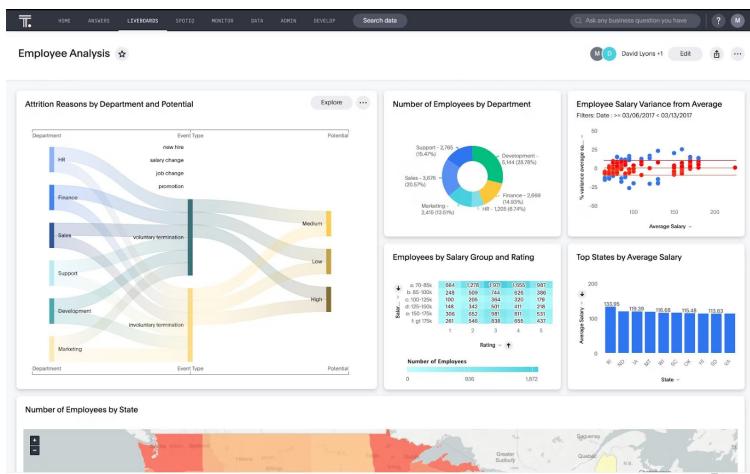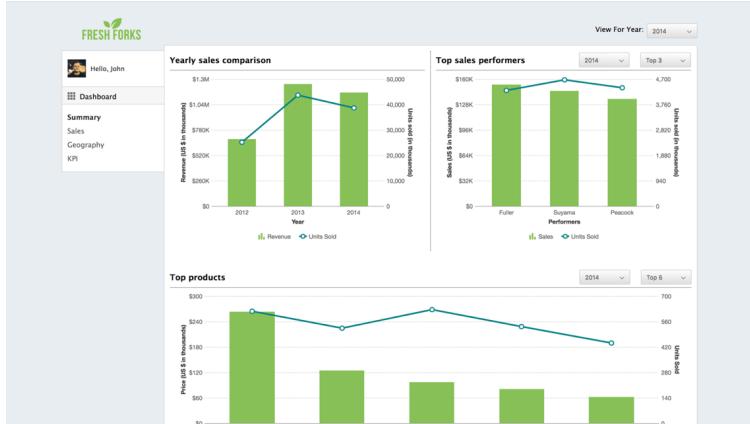
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7. Appendices

This section contains supplementary materials referenced in the audit report.

Appendix A: Figures

FRESH FORKS

Hello, John

Dashboard

Summary
Sales
Geography
KPI

View For Year: 2014

Yearly sales comparison — 2012, 2013, 2014
Revenue (US $ in thousands) / Units Sold
Revenue · Units Sold

Top sales performers — 2014 / Top 3
Fuller, Suyama, Peacock
Sales · Units Sold

Top products — 2014 / Top 6
Price (US $ in thousands) / Units Sold

HOME   ANSWERS   LIVEBOARDS   SPOTIQ   MONITOR   DATA   ADMIN   DEVELOP   Search data   Ask any business question you have

Employee Analysis ☆   David Lyons +1   Edit

Attrition Reasons by Department and Potential   Explore
Department / Event Type / Potential
new hire, salary change, job change, promotion
voluntary termination, involuntary termination
HR, Finance, Sales, Support, Development, Marketing
Medium, Low, High

Number of Employees by Department
Support – 2,765 (15.47%)
Development – 5,114 (28.76%)
Finance – 2,669 (14.93%)
HR – 1,205 (6.74%)
Marketing – 2,476 (13.61%)
Sales – 2,676 (30.61%)

Employee Salary Variance from Average
Filters: Date | >= 03/06/2017 < 03/13/2017
% variance average sa...
Average Salary

Employees by Salary Group and Rating
a: 70-85k, b: 85-100k, c: 100-125k, d: 125-150k, e: 150-175k, f: gt 175k
Rating
Number of Employees

Top States by Average Salary
Average Salary
State

Number of Employees by State

HEALTH INSURANCE CLAIM FORM
APPROVED BY NATIONAL UNIFORM CLAIM COMMITTEE (NUCC) 02/12

United Healthcare (87726)
10 Main Street
Madison AL 123456

PICA

1. MEDICARE   MEDICAID   TRICARE   CHAMPVA   GROUP HEALTH PLAN   FECA BLK LUNG   OTHER   [X] (Member ID#)
1a. INSURED'S I.D. NUMBER (For Program in Item 1): 1235678910

2. PATIENT'S NAME (Last Name, First Name, Middle Initial): Jones, Mariska
3. PATIENT'S BIRTH DATE: 01 01 00   SEX: M F [X]
4. INSURED'S NAME (Last Name, First Name, Middle Initial): Jones, Mariska

5. PATIENT'S ADDRESS (No., Street): 967 Elm Street
6. PATIENT RELATIONSHIP TO INSURED: Self [X] Spouse Child Other
7. INSURED'S ADDRESS (No., Street): 10 Main Street

CITY: Austin   STATE: TX
8. RESERVED FOR NUCC USE
CITY: Madison   STATE: AL

ZIP CODE: 73301   TELEPHONE (Include Area Code): (845) 3130545
ZIP CODE: 123456   TELEPHONE (Include Area Code): (212) 6461234

9. OTHER INSURED'S NAME (Last Name, First Name, Middle Initial): Jones, Jonathan
10. IS PATIENT'S CONDITION RELATED TO:
11. INSURED'S POLICY GROUP OR FECA NUMBER: 123456

a. OTHER INSURED'S POLICY OR GROUP NUMBER: 12345678910
a. EMPLOYMENT? (Current or Previous) YES [X] NO
a. INSURED'S DATE OF BIRTH: 01 01 00   SEX: M F [X]

b. RESERVED FOR NUCC USE
b. AUTO ACCIDENT? YES [X] NO   PLACE (State)
b. OTHER CLAIM ID (Designated by NUCC)

c. RESERVED FOR NUCC USE
c. OTHER ACCIDENT? YES [X] NO
c. INSURANCE PLAN NAME OR PROGRAM NAME: United Healthcare

d. INSURANCE PLAN NAME OR PROGRAM NAME: Aetna Advantage
10d. CLAIM CODES (Designated by NUCC):
d. IS THERE ANOTHER HEALTH BENEFIT PLAN? [X] YES   NO   If yes, complete items 9, 9a, and 9d.

READ BACK OF FORM BEFORE COMPLETING & SIGNING THIS FORM.
12. PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE I authorize the release of any medical or other information necessary to process this claim. I also request payment of government benefits either to myself or to the party who accepts assignment below.
SIGNED SIGNATURE ON FILE   DATE

13. INSURED'S OR AUTHORIZED PERSON'S SIGNATURE I authorize payment of medical benefits to the undersigned physician or supplier for services described below.
SIGNED SIGNATURE ON FILE

CARRIER

PATIENT AND INSURED INFORMATION

Oxford Health Plans
P.O. Box 7082
Bridgeport, CT 06601-7082

PLEASE DO NOT STAPLE IN THIS AREA

OXFORD
HEALTH PLANS
A UnitedHealthcare Company

HEALTH INSURANCE CLAIM FORM

Blue Cross Blue Shield of Pennsylvania (Highmark)

HEALTH INSURANCE CLAIM FORM
APPROVED BY NATIONAL UNIFORM CLAIM COMMITTEE (NUCC) 02/12

1a. INSURED'S I.D. NUMBER: XYZ12345678910

2. PATIENT'S NAME (Last Name, First Name, Middle Initial): Swift, Taylor
3. PATIENT'S BIRTH DATE: 06 / 03 / 95 SEX: F
4. INSURED'S NAME (Last Name, First Name, Middle Initial): Swift, Notus
5. PATIENT'S ADDRESS (No., Street): 123 Smith St.
6. PATIENT RELATIONSHIP TO INSURED: Other
7. INSURED'S ADDRESS (No., Street): 123 Smith St.
CITY: Lancaster   STATE: PA
ZIP CODE: 17601   TELEPHONE: (717) 5691234
CITY: Lancaster   STATE: PA
ZIP CODE: 17601   TELEPHONE: (717) 5691234
11. INSURED'S POLICY GROUP OR FECA NUMBER: 12345
11a. INSURED'S DATE OF BIRTH: 08 / 10 / 74 SEX: M

SIGNED: SIGNATURE ON FILE   DATE: 09/16/16
SIGNED: SIGNATURE ON FILE

21. DIAGNOSIS OR NATURE OF ILLNESS OR INJURY: A. F32.1

24. DATES OF SERVICE: 08 13 16 08 13 16 PLACE OF SERVICE: 13 CPT/HCPCS: 90834 DIAGNOSIS POINTER: A $ CHARGES: 100 00 DAYS: 1 RENDERING PROVIDER ID #: 1942534029

25. FEDERAL TAX I.D. NUMBER: 473089247
26. PATIENT'S ACCOUNT NO.: TC00001
27. ACCEPT ASSIGNMENT: YES
28. TOTAL CHARGE: 100 00
29. AMOUNT PAID: 10 00

31. SIGNATURE OF PHYSICIAN OR SUPPLIER: Allison Pidgeon, MA, LPC   DATE 09/16/16
32. SERVICE FACILITY LOCATION INFORMATION: Move Forward Counseling, LLC
101 West Main Street Unit F4
Salunga PA 17538-1109
1326414186
33. BILLING PROVIDER INFO & PH #: (717) 3369734
Move Forward Counseling, LLC
101 West Main Street Unit F4
Salunga PA 17538-1109
1326414186

PLEASE PRINT OR TYPE

HEALTH INSURANCE CLAIM FORM
APPROVED BY NATIONAL UNIFORM CLAIM COMMITTEE (NUCC) 02/12

PLEASE PRINT OR TYPE
NUCC Instruction Manual available at www.nucc.org

3 **HEALTH INSURANCE CLAIM FORM**

Send Completed Claim Form To:
Blue Cross and Blue Shield of Illinois
P.O. Box 805107
CHICAGO, IL 60680-4112

NOTICE TO ALL PARTIES COMPLETING THIS FORM: It is fraudulent to fill out this form with information you know to be false or to omit important facts. Criminal and/or civil penalties can result from such acts.

PLEASE PRINT OR TYPE CLEARLY

ID NUMBER — Copy this from your Blue Cross and Blue Shield Identification Card.

GROUP NUMBER: | IDENTIFICATION NUMBER:

PATIENT INFORMATION — A separate claim form must be completed for each family member.

PATIENT'S FULL, LEGAL NAME (Last, First, Middle Initial) | SEX: ☐ Male ☐ Female | SOCIAL SECURITY NUMBER (optional): | DATE OF BIRTH Month Day Year

PATIENT IS: ☐ Member ☐ Spouse ☐ Child OTHER, please explain relationship:

IF CLAIM IS FOR CHILD 19 OR OLDER—IS CHILD: A full-time student? ☐ Yes ☐ No Handicapped? ☐ Yes ☐ No

PAYEE:

☐ MAKE PAYMENT TO THE **PROVIDER** (hospital, doctor etc.), **OR**

☐ MAKE PAYMENT TO **MEMBER**, the provider has been paid

MEMBER INFORMATION

MEMBER (POLICY HOLDER) NAME: (As shown on your Blue Cross and Blue Shield ID Card) | SOCIAL SECURITY NUMBER (optional): | DATE OF BIRTH Month Day Year

CURRENT ADDRESS: | HOME PHONE:

IF COVERAGE IS THRU YOUR EMPLOYER, PROVIDE | GROUP (EMPLOYER) NAME: | WORK PHONE:

CLAIM INFORMATION

IS CLAIM FOR AN ACCIDENTAL INJURY? ☐ Yes ☐ No | IS THIS A WORKERS COMPENSATION CLAIM? ☐ Yes ☐ No | DATE OF ACCIDENT:

BRIEFLY DESCRIBE INJURY:

COMPLETE BELOW IF **NON-ACCIDENTAL** INJURY OR ILLNESS

DATE FIRST TREATED: | BRIEFLY DESCRIBE THE CONDITION(S) FOR WHICH THE PATIENT RECEIVED THESE SERVICES: (You can usually copy the diagnosis or description of service from the provider bill.)

OTHER INSURANCE INFORMATION

Are there any OTHER medical benefits available to you, your spouse, or your dependents from OTHER Group Insurance, including OTHER Blue Cross and Blue Shield policies, OTHER Employer, Labor or Professional Organizations, School, etc.? ☐ Yes (provide below) ☐ No

POLICY HOLDER NAME: | SOCIAL SECURITY NUMBER (optional):

POLICY HOLDER IS: ☐ Member ☐ Spouse ☐ Child ☐ OTHER, please explain relationship:

INSURANCE CARRIER NAME: | POLICY NUMBER: | EFFECTIVE DATE:

ADDRESS: | PHONE NUMBER:

RELEASE OF INFORMATION: I certify that the above information is correct and that the bills attached were incurred by the patient listed above. I understand that Blue Cross and Blue Shield's use or disclosure of individually identifiable health information, whether furnished by me or obtained from other sources such as medical providers, shall be in accordance with the federal privacy regulations under HIPAA (Health Insurance Portability and Accountability Act of 1996).

Sign Here _____ **Signature of Member** **Date** _____

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