

Comprehensive Benefit Investigation Report (BIR)

True USA Senior Concierge LLC | Administrative Support Division

I. Practice & Patient Profile

Ordering Practice / Client	[Insert Medical Practice Name]		
Practitioner NPI / Tax ID	[Insert NPI]	Contact / Fax	[Phone / Fax]
Patient Full Name	[Patient Legal Name]	Date of Birth	[MM/DD/YYYY]
Patient Address & Phone	[Street, City, State, Zip] [Phone Number]		

II. Primary Insurance & Financial Breakdown (Availity / Medical)

Insurance Payer Name	[Payer Name / Commercial / Medicare / Medicaid]	Policy / Group ID	[Policy # / Group #]
Subscriber Name / DOB	[Name & DOB if different]	Relationship to Patient	[Self / Spouse / Dependent]
Deductible (In/Out Network)	Met: \$[X] / Total: \$[Y]	Out-of-Pocket Max	Met: \$[X] / Total: \$[Y]
Copay / Co-insurance	[Office Visit / Procedural Details]	Effective Dates	[Start Date - End Date]

III. Medical Service & J-Code Authorization Tracking

Service / Procedure Name	[Description of Treatment or Infusion]		
CPT / HCPCS / J-Code	[e.g., J3490 / CPT 99214]	Coverage Status	[Covered / Excluded / Rider]
Prior Authorization (PA)	[Required / Not Required / Exempt]	PA Status & Ref #	[Approved / Pending - Ref: #]
Site of Care Restriction	[In-Office Only / Outpatient Hospital / Home Infusion]		

IV. Pharmacy Benefit & CoverMyMeds Integration

Pharmacy Benefit Manager (PBM)	[e.g., CVS Caremark, Express Scripts]	Rx Bin / PCN / Group	[Bin # / PCN / Group #]
Drug Name & NDC	[Brand/Generic Name]	Formulary Tier Status	[Tier 1 / Tier 2 / Non-Formulary]
Pharmacy PA / Step Therapy	[PA Required / Step Therapy Required]	Specialty Pharmacy Mandate	[Yes / No - Name of Specialty Rx]

Competitive Comparison & Strategic Enhancement Notes

Standard Market BIR Forms: Usually fragmented—either medical-only (ignoring retail/specialty pharmacy rules) or pharmacy-only (missing clinical J-codes and facility billing guidelines). They often lack financial deductible progression tracking (Met vs. Remaining).

True USA Senior Concierge LLC Enhanced Standard: Integrates dual-channel tracking (Avality & CoverMyMeds) into a single master layout. Explicitly logs **deductible accumulation progress, site-of-care limitations**, and exact **Fair Market Value fee structuring (\$35.00 USD per verified report)** under strict BAA/HIPAA governance.

CONFIDENTIALITY NOTICE: This transmission contains Protected Health Information (PHI) governed by HIPAA and HITECH standards. True USA Senior Concierge LLC provides non-clinical administrative support only (\$35.00/BI unit). Gooooo Joe!!