Fax Clerk Travel Request Checklist

Before forwarding to the Benefit Analyst

Client Information

- ☐ Client name
- ☐ Client DOB / identification information
- ☐ Home community
- ☐ Status number

Appointment / Travel Request

- ☐ Notice of Appointment / Travel Request received
- ☐ Appointment date
- ☐ Appointment time
- ☐ Appointment location / destination
- ☐ Provider / clinic name
- ☐ Healthcare service / reason for appointment identified
- ☐ Referral or other supporting documentation attached, if required for the service

Travel Requirements

- ☐ Travel dates, if provided
- ☐ Transportation/travel requirements identified, if provided
- ☐ Accommodation required, if indicated
- ☐ Escort required: Yes / No
- ☐ Escort information/supporting documentation attached, if applicable
- ☐ Special travel, mobility, or accessibility needs noted

Fax / Documentation Check

- ☐ All fax pages received and readable
- ☐ Supporting documentation received, where applicable
- ☐ Missing or unclear information obtained before forwarding the request to the Benefit Analyst

Final Check

- ☐ Request is complete and ready to be forwarded to the Benefit Analyst for review

Important: The Fax Clerk confirms that the required information and documentation have been received and obtains any missing or unclear information before forwarding the request. Requests are not saved in GCdocs. The Benefit Analyst determines eligibility, required approvals, and the transportation, accommodation, meals, escorts, or other travel benefits that may be approved/booked.