

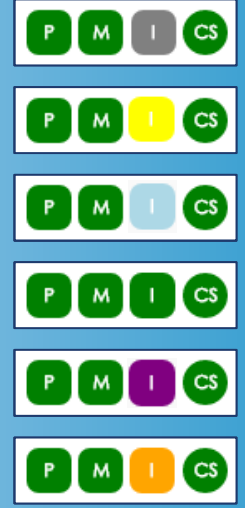
Insurance Eligibility Management



- To confirm patient insurance benefits have been verified and recorded.
- To manage and troubleshoot patient insurance eligibility and benefits.

1 Insurance Verification Icon Colors

- Gray** – Primary Contact indicated they do not have dental insurance or that they have insurance but could not enter it while completing the patient forms
- Yellow** – Insurance awaiting OrthoFi Insurance Team verification
- Blue** – Insurance verification in process:
 - Hover over the icon to view status of **In Progress** or **Paused**
- Green** – Insurance verification is complete and the results are recorded:
 - Click the icon to view benefit details in the Eligibility Claim Summary
- Purple** – Pre-Authorization is required:
 - Follow your existing Pre-Authorization process
- Orange** – OrthoFi is unable to verify insurance policy with the information provided:
 - Click the icon to change, correct, or add new insurance information



2 Resolve Unable to Verify Insurance Eligibility Verification

When an insurance policy is marked as Unable to Verify, you must **update** or **remove** the orange unable to verify policy before you can add a different insurance policy.

- Click the **orange insurance icon** to open the **Eligibility Check Summary** page
- Read the pop-up message regarding updating or removing the unable to verify policy and click the **Okay, got it** button
- Click the **orange insurance policy** tab
- Review **Eligibility Timeline** notes regarding the failed attempt to verify eligibility benefits
- Speak with the Primary Contact or insurance card holder to gather correct or new information
- Click the **Action** button and select the appropriate option:
 - Select **View Insurance** to see insurance policy details
 - Select **Update Insurance** to change or correct the policy with the information you gathered
 - Select **Remove Insurance** to remove this Insurance policy

Eligibility Check Summary

Patient: Mark Trainings

DOB: 10/12/1968
AGE: 46
Exam Date: 09/16/2015 | 02:00:00 PM

MetLife 3P Administrators (Onalaska, WI)
Unable To Verify Priority: Secondary

Carrier Network Type Priority CoB AoB Amount Coinsurance Age Status Last Updated Action

MetLife	Not Set	Primary	Practice				Unable to Verify	by Mark Van Hare	Action -
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Eligibility Timeline

Type	Date	Created By	Note
o	9/16/15	Mark Van Hare	Unable to Verify Note - Reason - Carrier unable to locate subscriber with info provided Additional Information - The patient is not listed as a subscriber with the carrier. Please confirm that the patient has insurance with this carrier and up date information as needed.

Action

Action -

- View Insurance
- Update Insurance
- Remove Insurance
- Remove & Replace Insurance

3 View Insurance to See Insurance Policy Details

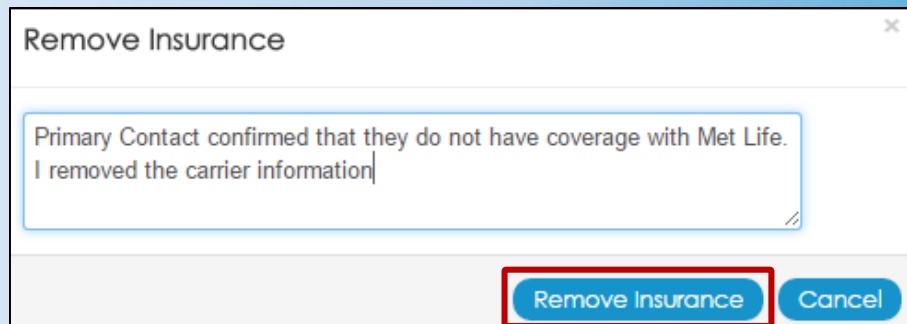
- Click the **Action** button and select the **View Insurance** option

4 Update Insurance with New or Additional Information

- Click the **Action** button and select the **Update Insurance** option
- Update information as needed in the insurance form
- Enter a **Note** to explain the updates you made
- Click the **Save** button

5 Remove Insurance Policy

- Click the **Action** button and select the **Remove Insurance** option
- Enter a **Note** to help us understand why the insurance is being removed
- Click the **Remove Insurance** button



Remove Insurance

Primary Contact confirmed that they do not have coverage with Met Life.
I removed the carrier information

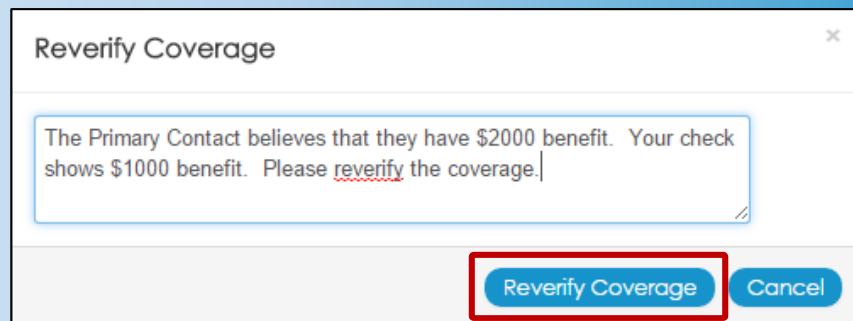
Remove Insurance Cancel

6 Request a Reverification of Coverage

- Click the **Action** button and select the **Reverify Coverage** option
- Enter a **reason for the reverification request** to help OrthoFi's Insurance Specialist conduct the reverification
- Click the **Reverify Coverage** button



You must use the Action button to initiate action please do not just enter notes at the bottom of the page



Reverify Coverage

The Primary Contact believes that they have \$2000 benefit. Your check shows \$1000 benefit. Please reverify the coverage.

Reverify Coverage Cancel

7 Add a New Insurance Policy

- Click the **Action** button and select the **+ Add Insurance** option
- Enter in the new insurance carrier Information
- Click the **Save** button