

Eligibility Busy Season Practice Checklist

Collect Insurance Early: Collect full insurance details on the first patient call

- ☐ Ask patients to submit forms at least **2 days** before the exam
- ☐ Confirm subscriber relationship (self/spouse/parent)
- ☐ Verify who is receiving treatment, details are accurate, and tied to the correct exam
- ☐ Flag possible insurance changes (new plan, employer, etc.)

Prevent Urgent Checks (Insurance Submitted < 2 Hours Before Exam)

- ☐ Submit insurance to OrthoFi **before** exam day
- ☐ Verify DOB, ID numbers, and plan details
- ☐ Ensure exam time matches actual chair time
- ☐ Submit eligibility **early** whenever possible (view check turnaround times)

Request a recheck if:

- ☐ 6+ months have passed since last verification
- ☐ Any mismatch between ISP and eligibility summary
- ☐ Insurance may have changed (new year/employer/plan update)

Keep Timing Accurate: Checks are triggered by exam time, not patient arrival.

- ☐ Update exam times for early or late arrivals
- ☐ Review the ISP before seating the patient
- ☐ Prioritize uploading insurance if forms are incomplete
- ☐ Present fees even if eligibility is pending, benefits can be overridden anytime

Address UTVs (Unable to Verify) Immediately

- ☐ Identify UTVs by the orange icon and the “CLICK HERE” prompt in the ISP
- ☐ Resolve missing or incorrect info as soon as flagged
- ☐ Confirm subscriber relationship accuracy
- ☐ Resubmit after corrections to return the check to the queue