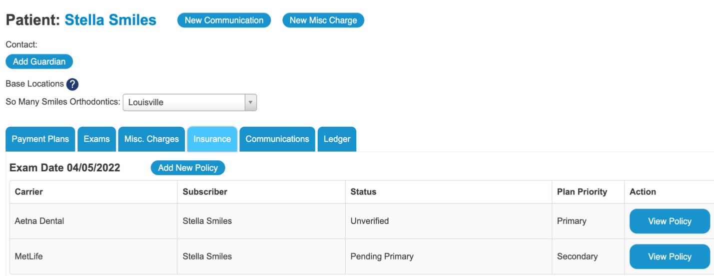
Insurance Summary

The days of separating eligibility and claims are over. Introducing the new Insurance Summary! This new application has been designed to show you all the information about a policy in one place, as it moves through the lifecycle in OrthoFi.

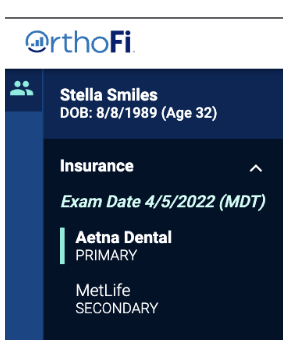
Legacy Patient Details

The first change you will notice is how the insurance tab on the patient record looks different. We are now showing insurance policies at an exam level instead of differentiating them by eligibility and claims. This should simplify the view of information when a patient has multiple exams with insurance on file. The status will display eligibility status until there is a claim. At that point, the status will reflect where the claim is in the life cycle.



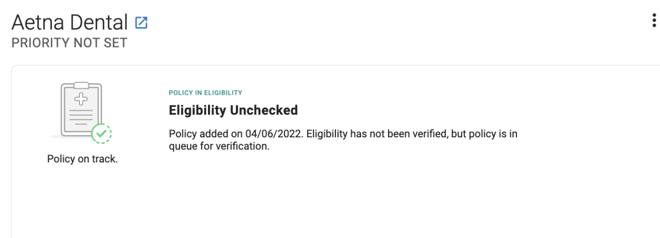
Navigation

The left hand navigation will show you any and all exams for a patient, as well as any insurance policies on file for those exams. To view a different policy for a patient, simply click on the carrier name. If a patient has many policies and exams, you will have the option to “show less exams” which minimizes that navigation or “show more exams” which will display all exams and policies for the patient. If you click the OrthoFi logo in the top left corner, you will be navigated back to the main dashboard. If you click the patient name in the top left corner, you will be navigated to the patient record - specifically the insurance tab.

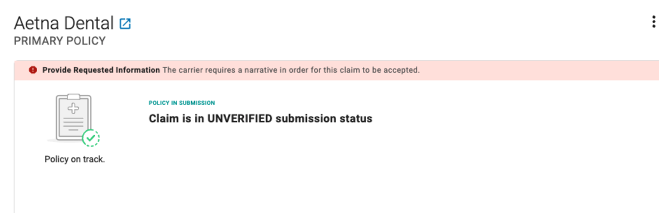


Policy Status

The policy status section of the policy should be one of the first areas you look at to determine where the policy is in its lifecycle at OrthoFi. Often the status will be accompanied by supporting text that describes in more detail where the policy is in the life cycle.

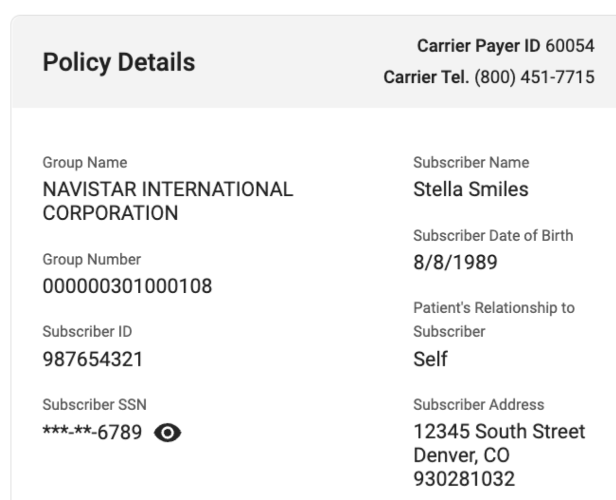


The status will also display any active follow-ups or actions that OrthoFi is taking to keep the policy on track and paying as expected.



Policy Details

The policy details will show insurance policy information about the carrier, subscriber, and group.



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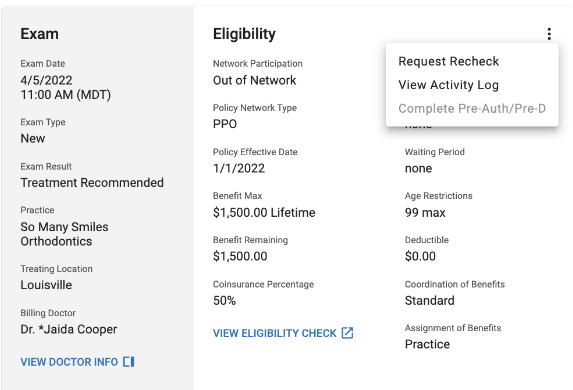
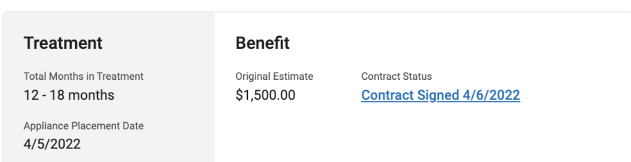
Eligibility

This section will update with important verification details once the check is complete. You can click on the three-dot menu in the upper right corner of this section to access the activity log, request a recheck, or complete a pre-auth/determination.



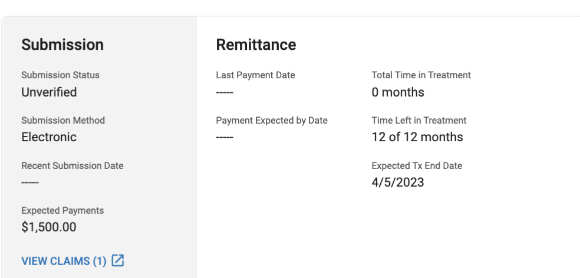
Treatment / Benefit

This section reflects the information from the Treatment Details page. It will show the months in treatment and the calculated benefits. Once the contract is signed, this section will show the contract signed date with a link to the document, and the estimated appliance placement date.



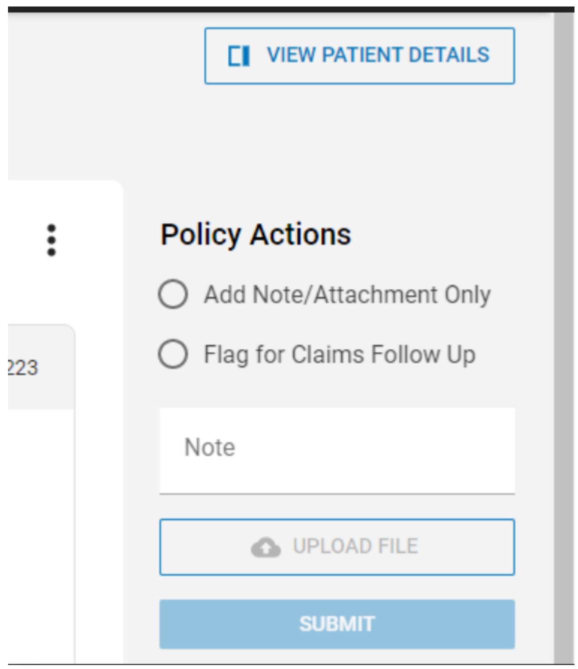
Submission / Remittance

This section shows information from the submitted claims, when we expect payments, and how many months remain in treatment. Click "View Claims" to see any submission forms generated or submitted for the policy on file.

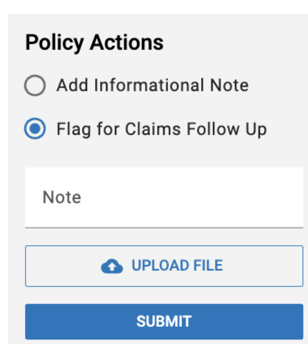


Policy Actions

This is where you can leave a timeline Note on a policy, or flag a claim for OrthoFi follow up. When a policy is pre-contract and claim, you will only be able to leave a timeline Note. You can also title your Note or upload a file. When leaving a Note, this will *only* appear as a Note on the "Policy Timeline." Notes are not routed to a specific team in OrthoFi for review.



When a policy is post-contract and a claim has been generated or submitted, you can choose to flag the policy for the OrthoFi Claims team to follow up on. In the "Note" section, this where the practice should enter a clear and concise request/ask for the OrthoFi Claims team.



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Policy Timeline

The timeline will show notes that were previously spread across eligibility and claim summary timelines. You will now see a note title for easier scannability and the user that created that note - system, practice or admin.

Patient Details Side Panel

This side panel gives you quick access to key patient information. You can open the side panel by clicking the “View Patient Details” button in the top-right of the page. Your doctor and practice information can also be viewed here.

FAQs

How do I navigate back to the legacy insurance pages?

If you need to navigate back to any legacy pages, you can click any of the legacy buttons below the policy actions. This will launch the clicked page in a new browser tab.

How do I edit a policy?

Click the ⋮ to the right of the carrier name at the top of the page and then select “Edit Policy”. You will be navigated to the page where you can edit the policy information added. This can only be done before the eligibility check is completed.

How do I terminate a policy?

Click the ⋮ to the right of the carrier name at the top of the page and then select “Terminate Policy”. You will be required to add a date.

How do I request a recheck on a policy?

Click the ⋮ in the top right corner of the eligibility section and then select “Request Recheck”. Please add a reason, and then submit. This will queue the policy to be reverified.