



## **Corrected Claim Narrative FAQs, Tips & Tricks**

- **Why is a narrative required?**
  - Carriers require a narrative, or clinical narrative, when treatment changes after the initial submission to understand *why* treatment has changed.
- **When is a narrative needed for a corrected claim?**
  - The months of treatment has been extended
  - The treatment fee has changed
  - The procedure code needs to be updated
    - Note: A narrative is **not** needed for starting a new phase of treatment. If the patient is starting a new phase of treatment, you will need to schedule a current exam in the OrthoFi system or your PMSW, if your practice is integrated, and recommend treatment, and sign a new contract.
- **When should the narrative be uploaded?**
  - As soon as you are aware that treatment has changed
  - *If the patient obtained new insurance, but the Insurance Summary Page indicates the patient has 0 months of “Time Left in Treatment” upload a narrative to the Policy Timeline after adding the new insurance policy to support timely eligibility verification and claims processing*
- **Narrative best practices:**
  - Use the template on page 3 of this document as a guideline
  - Digitally complete the template to help mitigate any uncertainties with handwriting
  - If there is information you think may be helpful for processing the corrected claim, include it!
  - Upload the narrative as a **PDF file**

- **How do I upload a narrative?**

- Upload the narrative to the patient's Insurance Summary Page (ISP), and Flag for Claims Follow Up. You can navigate to the ISP by clicking the "I" icon from the Exam Tab on the landing page for the patient account.

Exam Date	Exam Type	Location	Treatment Coordinator	Patient Forms (next steps)	Status
02/07/2022 12:00 AM	Start / Records	Baltimore	[REDACTED]	<div style="display: flex; gap: 5px;"> <span>P</span> <span>M</span> <span style="background-color: yellow;">I</span> <span>CS</span> <span>PP</span> <span>FD</span> <span>DP</span> </div>	Patient Started <span>Action ▾</span>

Ledger

Insurance

Exam Date 11/4/2021

United Concordia - Dental PRIMARY

INSURANCE POLICY
POLICY TIMELINE
PAYMENT HISTORY

### United Concordia - Dental

PRIMARY POLICY

CLOSED **Remittance Complete**

Final Payment

Policy is Closed. Final payment received on 7/13/2023. Insurance AR is complete.

**BENEFIT PAYMENTS**

Current Estimate	\$ 1,500.00
Received	\$ 1,500.00
<b>Remaining</b>	<b>\$ 0.00</b>

**Policy Details**

Carrier Tel. (800) 332-0366

Group Name	Group Number
Subscriber ID	Subscriber SSN

**Policy Actions**

Add Note/Attachment Only

**Flag for Claims Follow Up**

Note

UPLOAD FILE

SUBMIT

*If a narrative has been requested via a Practice Task, please follow the guidelines in the ["Claims Communication Process Job Aid"](#) to resolve*

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### Narrative for Corrected Orthodontic Claim

<b>Patient Name:</b>	
<b>Patient Date of Birth:</b>	
<b>Subscriber Name:</b>	
<b>Subscriber Date of Birth:</b>	
<b>Subscriber ID:</b>	
<b>Appliance Placement Date:</b>	
<b>Procedure Code:</b>	
<b>Claim Number:</b>	

Original information on the current claim form (be specific with the claim box number):	
Corrected information to be updated on the claim form (be specific with the claim box number):	
Reason for change:  <i>Note: If treatment is being extended, please include the following information:</i> <ul style="list-style-type: none"><li>- Banding date</li><li>- <b>New</b> expected total months of tx<ul style="list-style-type: none"><li>- Note: this should not be a range of months</li></ul></li><li>- Reason tx length was extended</li><li>- Expected debond date</li></ul>	