



QUESTIONNAIRE

How **Efficient** is Your Insurance Verification Process?

As a dental office manager, you've had to set up a lot of processes to keep your practice running efficiently. And periodically, it's worth evaluating your processes to make sure they're still working for your team and to see if they can be improved in any way. One of these processes is how you verify patients' insurance. It's an essential part of your role, and one that impacts patient retention and the practice experience. Fill out this questionnaire to find out if your process needs to be improved in any way.

Internal Training

Select one answer for each question

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|--|------------|-----------|---------------|
| 1. Does your onboarding include how to verify patients' insurance? | Yes | No | Unsure |
| 2. Is your documentation up to date? | Yes | No | Unsure |
| 3. Do you offer regular training when your verification process changes? | Yes | No | Unsure |
| 4. If your practice has an insurance verification tool, have you taken advantage of the vendor's training materials? | Yes | No | Unsure |

Insurance Verification Process

Select one answer for each question

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|---|------------|-----------|---------------|
| 1. Do you have a clear step-by-step process on how to verify insurance (whether it's manual, automated, or a combination of the two)? | Yes | No | Unsure |
| 2. Do you verify insurance up to 3-4 days ahead of a patient's appointment? | Yes | No | Unsure |

Secondary Insurance

Select one answer for each question

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|--|------------|-----------|---------------|
| 1. Is everyone at your front desk trained to ask patients if they have secondary insurance? | Yes | No | Unsure |
| 2. Do you have a field in your intake forms about secondary insurance so you can capture that information? | Yes | No | Unsure |

Patient Information and PMS Data

Select one answer for each question

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|--|------------|-----------|---------------|
| 1. Do you collect insurance information during the intake process? | Yes | No | Unsure |
| 2. Do you have a process for collecting incomplete insurance information? | Yes | No | Unsure |
| 3. If your practice uses an insurance verification tool, are you able to sync your insurance forms to the PMS? | Yes | No | Unsure |
| 4. Do you have a method for asking patients to let your office know of any changes to their insurance plans? | Yes | No | Unsure |

Technology

Select one answer for each question

- | | | | |
|---|------------|-----------|---------------|
| 1. Does your practice verify insurance manually, with an automated tool, or a combination of the two? | Yes | No | Unsure |
| 2. If you have an insurance verification tool, can you integrate it with your PMS? | Yes | No | Unsure |
| 3. If you have a tool, does your team have easy access to the vendor's knowledge base and other training materials? | Yes | No | Unsure |

Results

If you answered Yes to at least 10 of these questions, then you're in good shape when it comes to verifying patients' insurance. You have a good process in place that allows you to verify insurance fast and accurately. Just remember to set a reminder to periodically assess your process because there's always room to make it better!

If you answered No or Unsure to 10 of these questions, then it's time to consider revamping your insurance verification process. Take a look at the questions you said No or Not Yet to see if there's a way to incorporate a few of these items into your existing process.

You don't need to implement everything at once, but start with 1-2 improvements, see how it goes, and then continue to iterate. A tool like RevenueWell's Insurance Verification can save your team time and verify insurance within seconds, in a more accurate way.