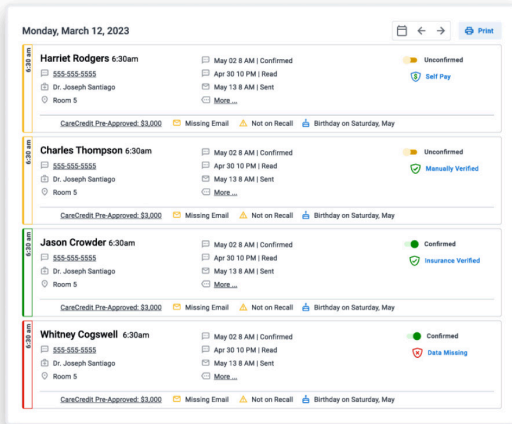




Insurance Verification Best Practices

By following these **best practices**, you can streamline your workflow, reduce errors, and ensure a smooth verification process for all your patients.



Weekly Schedule Review

- Plan Ahead:** Regularly review your upcoming weekly schedule.
- Update Verification Statuses:** Check each patient's insurance verification status. Update any necessary patient information to ensure all verifications are up-to-date. Learn more about our Insurance Verification Statuses [here](#).
- Manual Verifications:** For patients who are not yet verified, [run manual verifications](#). This proactive step helps to avoid last-minute issues and ensures all patients are covered.

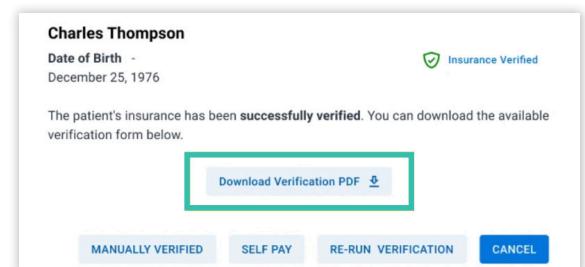
Review Payer Set Up

- Link Payers:** Follow our [configuration guide](#) Payer Setup steps to link connected payers to the same login. This will streamline your verification process by centralizing access and reducing login redundancies.
- Consistent Updates:** Regularly check for any updates to payer connections or statuses in the Payer Setup tab to ensure continued efficiency and accuracy.

Insurance Identifier	% Patients	Relationship	Payer	Status
DELTA DENTAL	25%			Not Setup
BLUE CROSS	13%			Not Setup
METLIFE	11%			Not Setup
AETNA	10%			Not Setup
MASSEALTH	6%			Not Setup
CIGNA	4%			Not Setup
GUARDIAN	4%			Not Setup
NORTHEAST DELTA	4%			Not Setup
PRINCIPAL	1%			Not Setup
ALTUS	1%			Not Setup
HARVARD PILGRIM	1%			Not Setup
METROPOLITAN	0.8%			Not Setup

Download and Print

- Download Verifications:** Make it a habit to [download insurance verifications](#) as they are completed. This ensures you have a record readily available for reference and avoids the need to re-run verifications.
- Print as Needed:** Keep [printed copies](#) of verifications for your records as you see fit.



Carrier-Specific Considerations

- Understanding Variations:** Be aware that PDFs generated from verifications will vary depending on carrier-specific data. Each insurance carrier may have unique requirements and formats. Learn more about our carrier-specific information [here](#).
- Detailed Review:** Review each PDF carefully to ensure all required information is present and accurate according to the specific carrier's guidelines.

By incorporating these best practices into your daily routine, you will enhance your insurance verification process, ensuring efficiency and accuracy. Remember, staying proactive and organized is key to becoming an Insurance Verification pro!

