Insurance Validation

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Version 14.19

*This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.*

About Insurance Validation

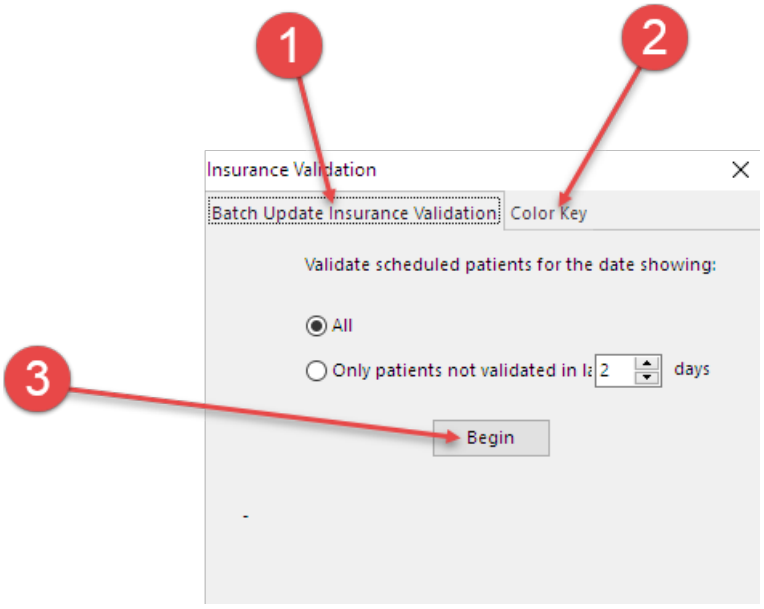
> **Path: Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button > Validate button**

The Insurance Validation window performs a batch update insurance validation for scheduled patients. This will verify a patient's insurance coverage.

To use the validation feature in the OP software, offices need to:

- Enroll for Full HIPAA transactions with Office Practicum
- Enroll with an integrated clearinghouse
- Set Up the Insurance Payer Table to use the Validation Feature

Note: This feature will work contingent on the proper set up of the Insurance Record, accurate Patient Information entered into the patient record, and whether the payer is supported by the clearinghouse for Real-Time Eligibility.



Insurance Validation Map

Number	Section	Description

1	Batch Update Insurance Validation tab	The Batch Update Insurance Validation tab sets the criteria for the insurance validation.
2	Color Key tab	The Color Key tab explains the color codes that will populate in the Ins. Valid column on the Tracking tab after validation is performed. • If nothing comes back into the system or the field is White in color, ask the patient for updated insurance information or call the payer for further information. • If a Dark Green color comes back into the system, the validation check has returned a valid insurance status. • If a Yellow color comes back into the system, retry your validation attempt. There could have been connectivity issues at the time of the validation attempt. • If a Light Green color comes back into the system, then there is no insurance policy to validate on file. The patient is either listed as Self Pay or the insurance was not ranked. • If a Pink color comes back into the system, then the insurance on file is invalid.
3	Begin button	The Begin button performs the validation.

Version 14.10

About Insurance Validation

Path: Smart Toolbar > Schedule button > Tracking tab > Insurance Validation

The Insurance Validation window performs a batch update insurance validation for scheduled patients. This will verify a patient's insurance coverage.

To use the validation feature in the OP software, offices need to:

- Enroll for Full HIPAA transactions with Office Practicum
- Enroll with an integrated clearinghouse
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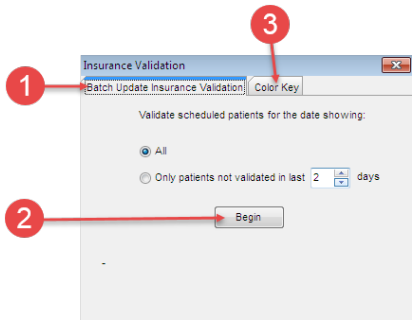

Insurance Validation Map

Number	Section	Description

1	Batch Update Insurance Validation tab	The Batch Update Insurance Validation tab sets the criteria for the insurance validation.
2	Begin button	The **Begin** button performs the validation.
3	Color Key tab	The Color Key tab explains the color codes that will populate in the Ins. Valid column on the Tracking tab after a validation is performed. • If nothing comes back into the system or the field is White in color, ask the patient for updated insurance information or call the payer for further information. • If a **Dark Green** color comes back into the system, the validation check has returned a valid insurance status. • If a **Yellow** color comes back into the system, retry your validation attempt. There could have been connectivity issues at the time of validation attempt. • If a **Light Green** color comes back into the system, then there is no insurance policy to validate on file. The patient is either listed as Self Pay or the insurance was not ranked. • If a **Pink** color comes back into the system, then the insurance on file is invalid.