Validation Feature

Last Modified on 07/20/2022 8:18 am EDT

Version 14.19

> **Path: Clinical, Practice Management, or Billing tab > Patient Chart > Insurance**

About

Below you'll learn how to validate Insurance from the Patient Chart. If your office is contracted for Full HIPAA Services and has also contracted with your clearinghouse to check patient eligibility, you will have access to the **Validate** button. Once Insurance is validated using the Validate button, the **Medical Benefits** tab may be reviewed to see additional policy details as provided by the Payer. The extent of the information provided varies by Payer.
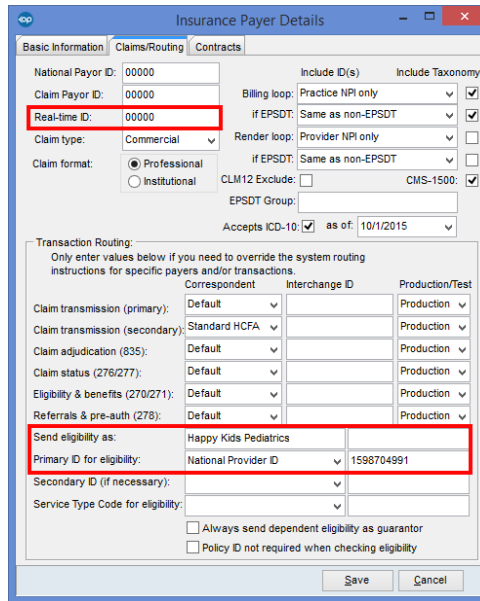
Validate Insurance from the Patient Chart

1. Navigate to the Insurance section of the patient's chart by following the path above.
2. Select the insurance payer that needs to be validated.
3. Click on the **Validate** button in the upper right corner of the window. If validation is successful, the **Validated Date** will populate.

Unsuccessful Validation

On occasion, a clearinghouse will have an 'outage' for particular payers during which time validation will not be working. You may receive notification from your clearinghouse about the outage and subsequent restoration of the ability to validate specific payers.

If validation is unsuccessful, and it is not related to an outage, review the following fields in the Insurance Payer Details window for the specific payer. If edits are necessary, be sure to save your changes and retry validation.

- **Real-time ID**: Ensure the correct Real-Time Payer Eligibility number is entered. This can be supplied by the clearinghouse.
- **Send Eligibility as**: Ensure the entry here is what has been contracted with your clearinghouse.
- **Primary ID for eligibility:** Ensure either a Provider's Individual NPI or Practice Group NPI is entered depending on your contract with the clearinghouse.

> 📌 **Note**: If you are still having validation problems with this payer after you have reviewed the above fields, contact your clearinghouse to determine how they want transactions identified when validating for this specific payer. If your clearinghouse directs you to enter a secondary ID for this payer, you can enter the **Secondary ID** by clicking on the drop-down arrow to select the Service Provider ID, National Provider ID, Federal Tax ID, or Provider SSN. Then, enter the corresponding ID in the field to the right of this dropdown box.
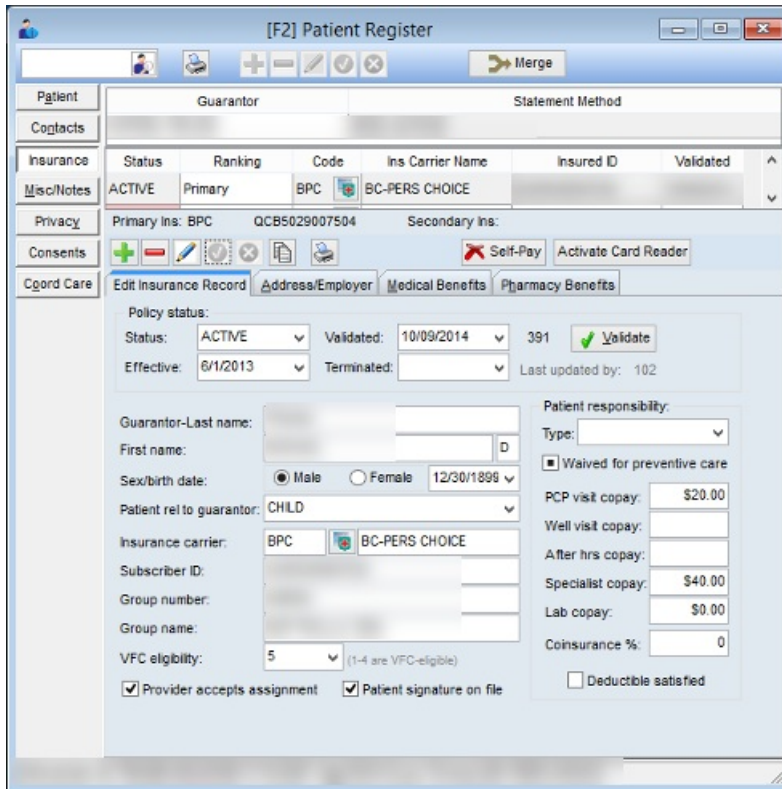
Version 14.8

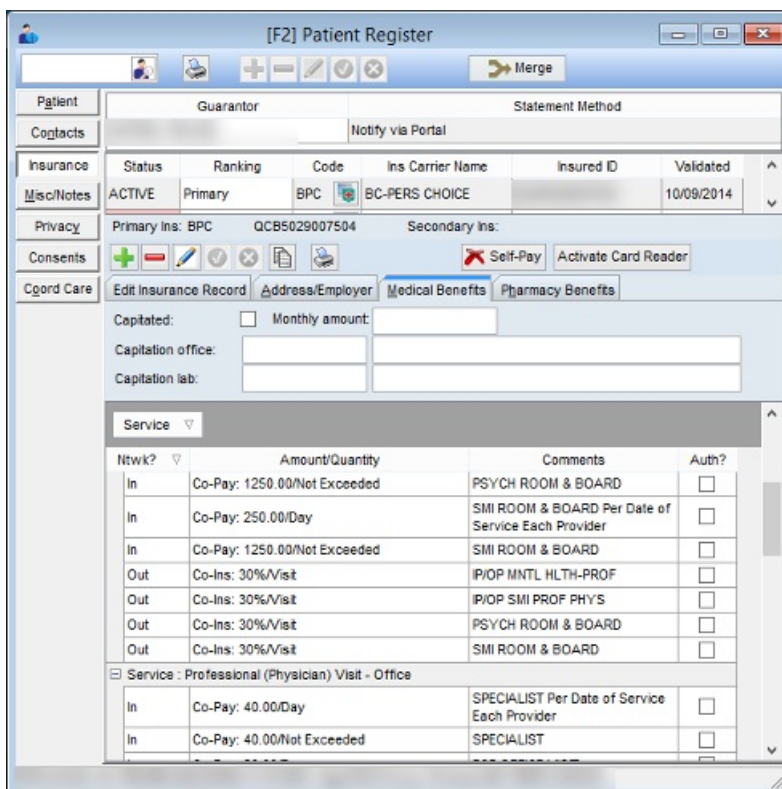## Path: Smart Toolbar > Insurance button > Validation button

Overview

This page will instruct you on how to validate insurance and troubleshoot validation errors. If your office is contracted for Full HIPAA Services, and have also contracted with your clearinghouse to check patient eligibility, you will have access to the **Validate** button.

Validating

1. Click on the **Validate** button ✔ Validate in the upper right corner of the form.
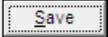2. If validation is successful, the validated date will populate.

3. Click on the **Medical Benefits** tab [Edit Insurance Record | Address/Employer | **Medical Benefits** | Pharmacy Benefits] to see additional policy details as provided by the payer. The information provided will vary by payer.
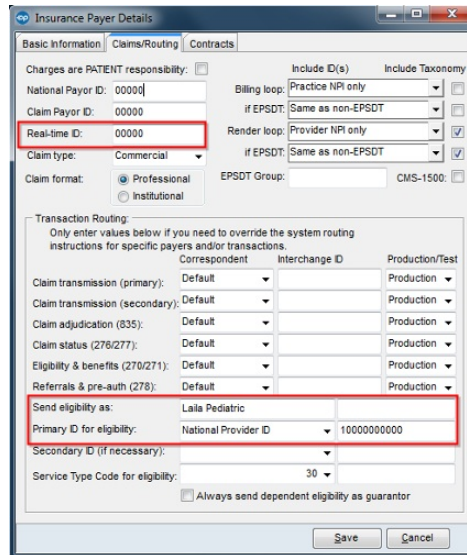

Troubleshooting

ℹ️ If validating is unsuccessful make sure the clearinghouse supports validation for this payer by referencing their payer list.

1. Click on the Insurance button [icon] next to the insurance Code.
2. The **Claims/Routing** tab will open.
3. Check to see that a Real-time ID is listed, if not enter here. *This code is found on the clearinghouse payer list.*
4. Check the **Send Eligibility as** and **Primary ID for eligibility** fields are complete.
5. Click the S**ave** button [Save].

6. Try validating again.

⚠️ **Note**: If you are still having validation problems with this payer after you have attempted all combinations of the **Send eligibility as** field and the **Primary ID for eligibility** fields, contact your clearinghouse to determine how they want you to identify yourself when validating for this specific payer. If your clearinghouse directs you to enter a secondary ID for this payer, you can enter the **Secondary ID** by clicking on the dropdown arrow to select the Service Provider ID, National Provider ID, Federal Tax ID, or Provider SSN. Then, enter the corresponding ID in the field to the right of this dropdown box.

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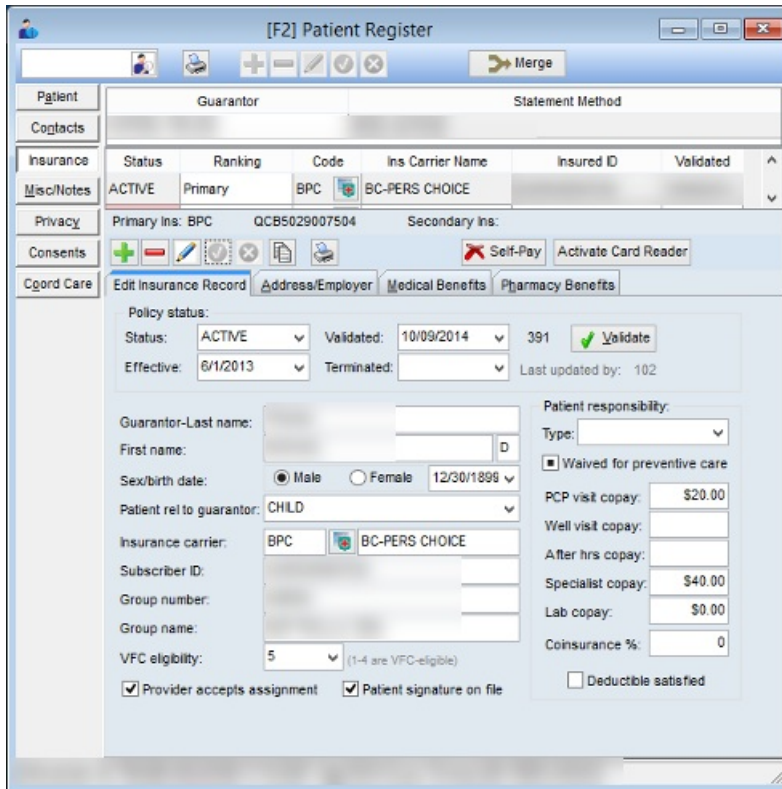
Version 14.10

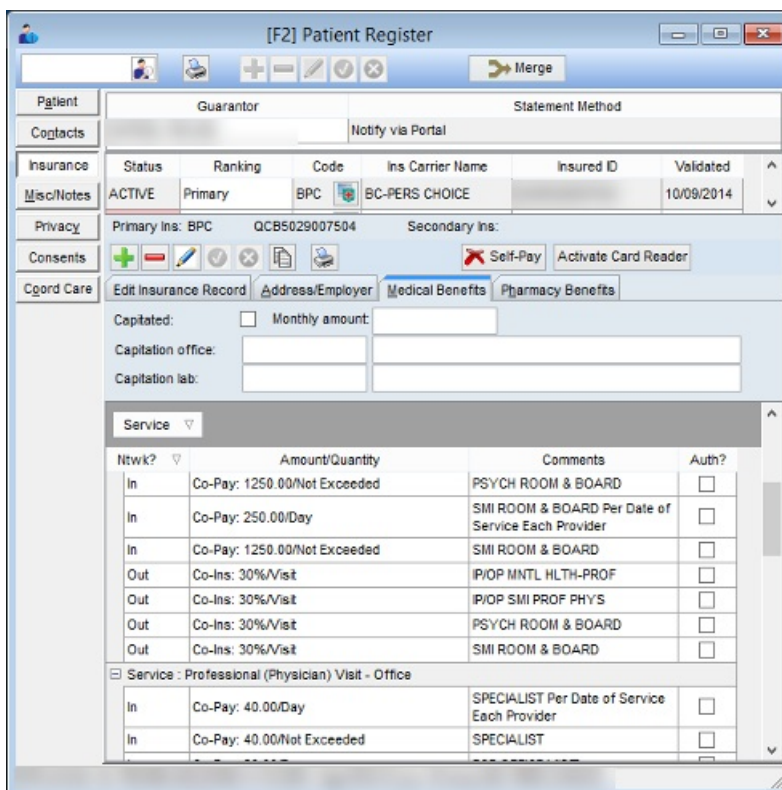**Path: Smart Toolbar > Insurance button > Validation button**

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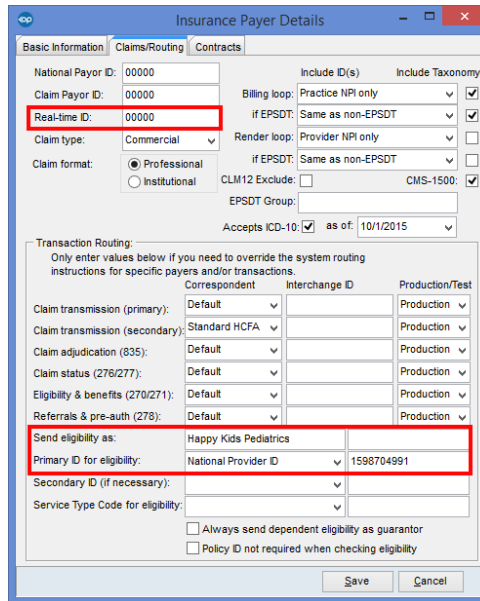
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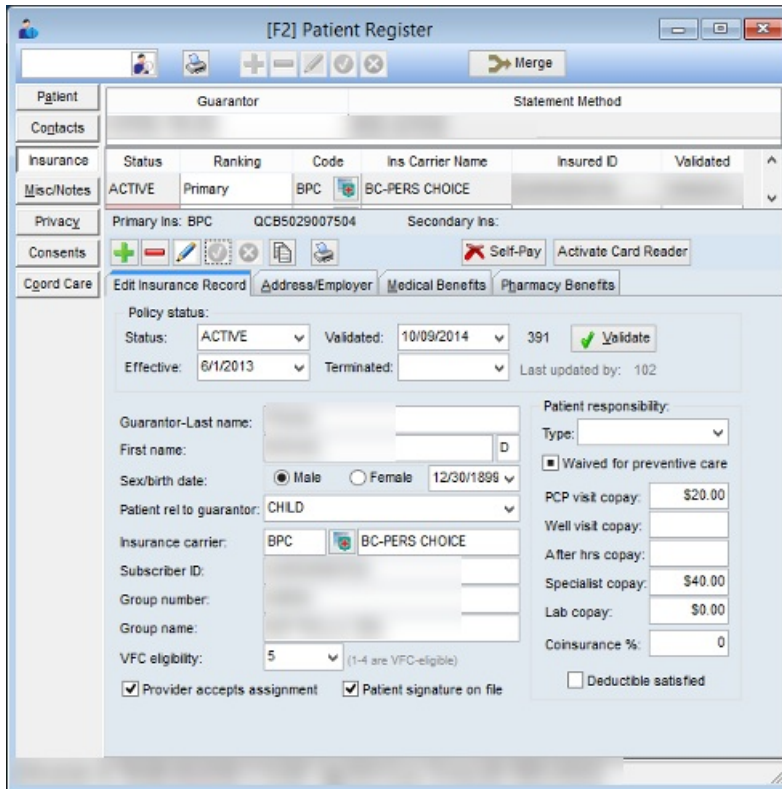
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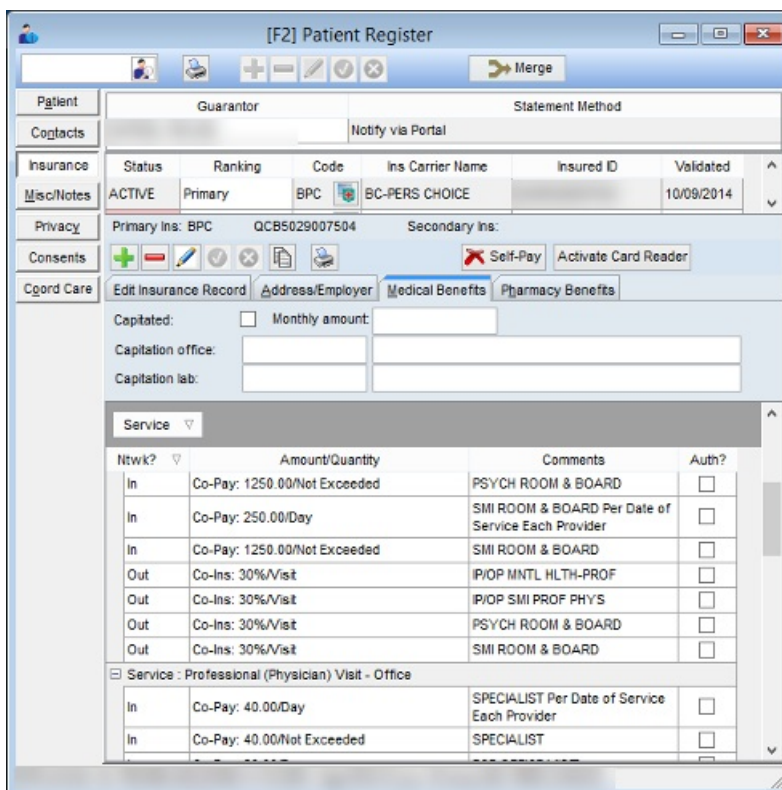| **Path: Smart Toolbar > Insurance button > Validation button**

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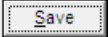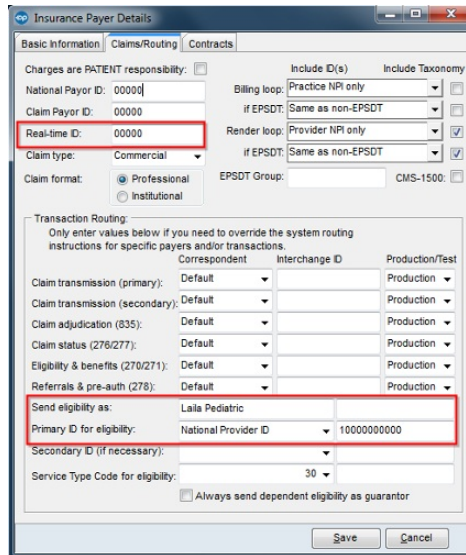2. If validation is successful, the validated date will populate.

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