Validate Insurance

Last Modified on 01/02/2020 2:05 pm EST

Version 14.19

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

Overview

To use the validation feature in Office Practicum, offices will need to:

1. Enroll for Full HIPAA transactions with Office Practicum.
2. Enroll with an integrated clearinghouse.
3. 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.

You can use the validation feature to:

- Verify an individual patient's insurance in the Add/Edit Appointment window.
- Verify an individual patient's insurance in the Tracking tab of the Schedule.
- Verify insurance coverage for every patient (based on parameters set) on the schedule for a particular day.

Verify Insurance for an Individual Patient from the Appointment

1. Select the **Calendar view** from the Schedule.
2. Navigate to the patient whose insurance you would like to validate.
3. Double-click on the patient's appointment. This will open the Add/Edit Appointment window.
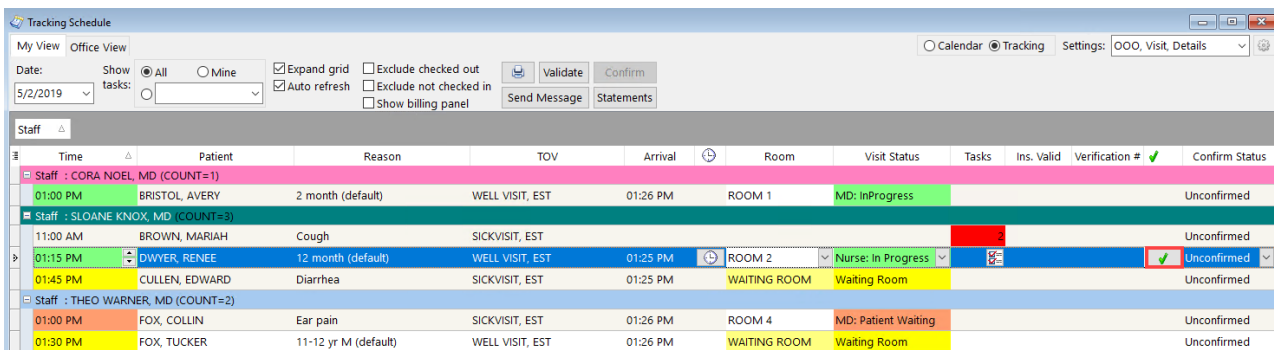4. Click the **Validate** button located in the Primary Insurance section of the window.

Validation will process for the patient.

Verify Insurance for an Individual Patient from the Tracking Tab

1. From the **Schedule**, select the **Tracking** radio button

There are two columns that you will use to perform insurance validation.

- **Insurance Validation** column ⬚Ins. Valid⬚ : this column populates with the color key result after validation has been performed.
- **Verify Insurance** column ✅ : this column populates with a**Verify Insurance** button on each individual patient's line in the **Tracking** window and is used to validate insurance for that patient.
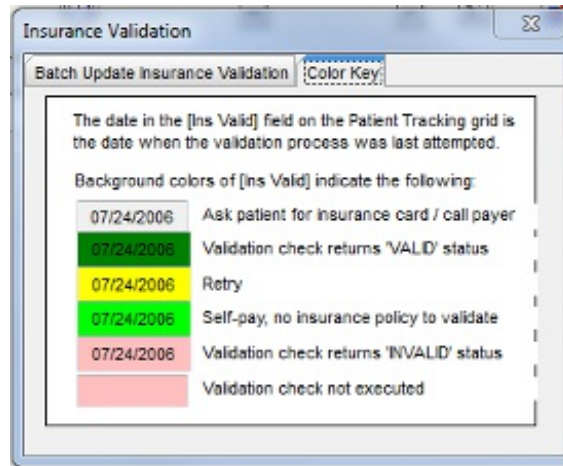

> 📌 **Note**: If you do not see the Ins. Valid or Verify Insurance columns in your window, it is likely the columns have been removed from view. To learn how to add columns to your view, click here.

2. Click the **Line** for the patient whose insurance you would like to verify. The**Verify Insurance** button is displayed.
3. Click the **Verify Insurance** button. Validation will process and return a result in the**Ins. Valid** column based on the color key.
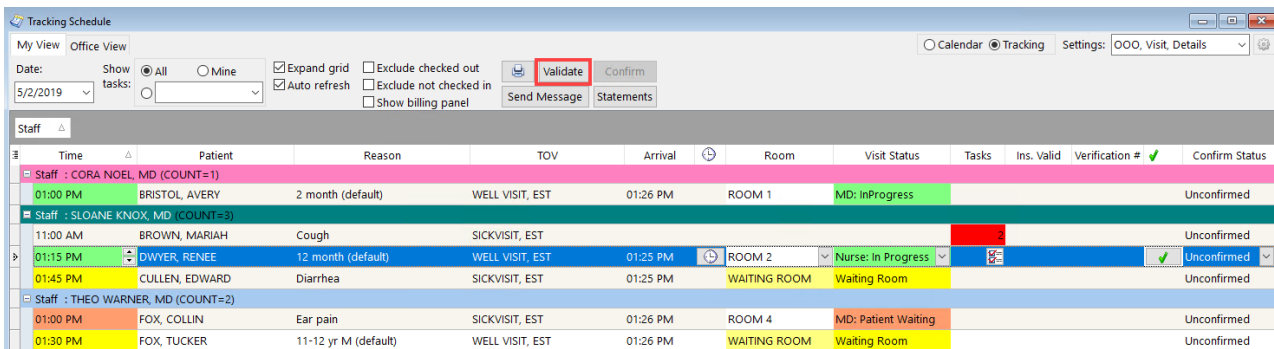
- If the result is nothing or the field is White, ask the patient for updated insurance information or call the payer for further information.
- If the result is **Dark Green**, the validation check has returned a valid insurance status.
- If the result is **Yellow**, retry your validation attempt. There could have been connectivity issues at the time of validation attempt.
- If the result is **Light Green**, 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 the result is **Pink,** then the insurance on file is invalid.
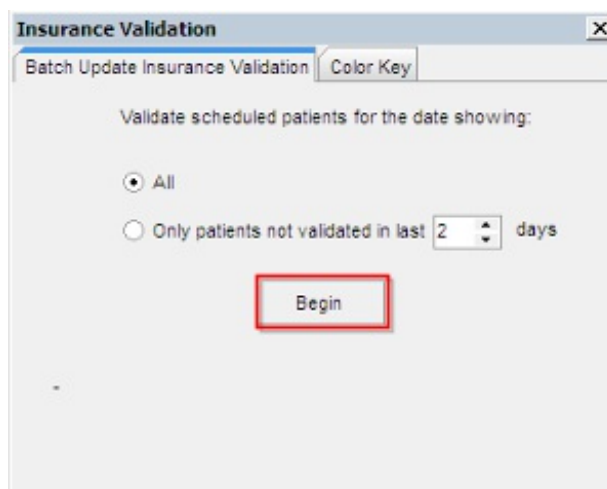
Insurance Validation

Batch Update Insurance Validation | Color Key

The date in the [Ins Valid] field on the Patient Tracking grid is the date when the validation process was last attempted.

Background colors of [Ins Valid] indicate the following:

07/24/2006	Ask patient for insurance card / call payer
07/24/2006	Validation check returns 'VALID' status
07/24/2006	Retry
07/24/2006	Self-pay, no insurance policy to validate
07/24/2006	Validation check returns 'INVALID' status
	Validation check not executed

Verify Insurance for All Patients on Schedule

1. Follow steps 1 and 2 above
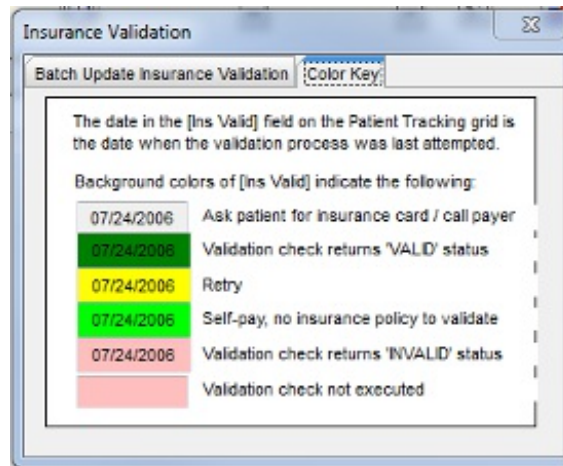2. At the top of the Tracking window, click the **Validate** button   ✔ Validate

3. In the **Insurance Validation** box, select your criteria and click the **Begin** button to start validating

Insurance Validation

Batch Update Insurance Validation | Color Key

Validate scheduled patients for the date showing:

◉ All

○ Only patients not validated in last 2 ▲▼ days

Begin

4. Validation will process and return a result in the **Ins. Valid** column based on the color key.

- If the result is nothing or the field is **White**, ask the patient for updated insurance information or call the payer for further information.
- If the result is **Dark Green**, the validation check has returned a valid insurance status.
- If the result is **Yellow**, retry your validation attempt. There could have been connectivity issues at the time of validation attempt.
- If the result is **Light Green**, 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 the result is **Pink,** then the insurance on file is invalid.

Version 14.10

Path: Smart Toolbar > Schedule button > Tracking tab

Overview

To use the validation feature in Office Practicum, offices will need to:

1. Enroll for Full HIPAA transactions with Office Practicum.
2. Enroll with an integrated clearinghouse.
3. Set up the Insurance Payer Table to use the Validation Feature.

> ℹ 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.

You can use the validation feature to:

- Verify an individual patient's insurance in the Add/Edit Appointment window.
- Verify an individual patient's insurance in the Tracking tab of the Schedule and Practice Workflow window .
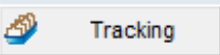
- Verify insurance coverage for every patient (based on parameters set) on the schedule for a particular day.

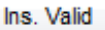## Verify Insurance for an Individual Patient from the Appointment

1. Click the **Sched** button
2. Navigate to the patient whose insurance you would like to validate
3. Within the **Add/Edit Appointment** window, double-click the patient's appointment
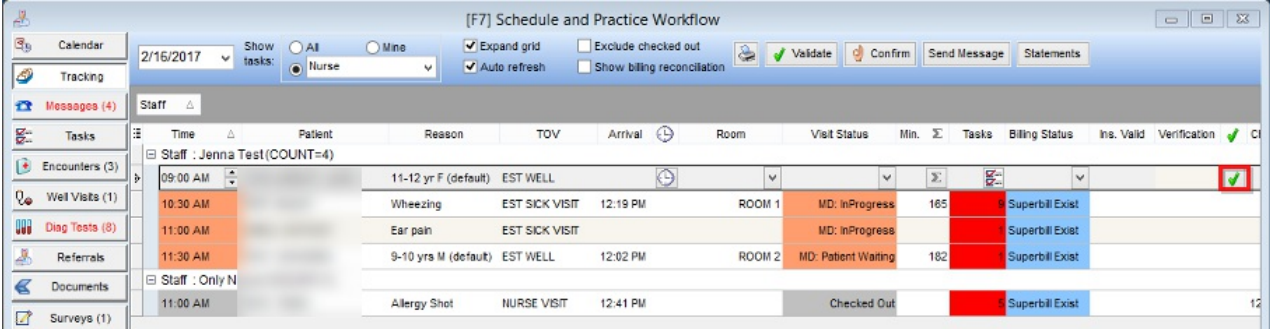4. In the **Primary Insurance** section, click the **Validate** button

Validation will process for the patient.

Verify Insurance for an Individual Patient from the Tracking Tab

1. Click the **Schedule** button ![Sched]
2. Click the **Tracking** tab ![Tracking]

There are two columns that you will use to perform insurance validation.

- **Insurance Validation** column ![Ins. Valid] : this column will populate with the color key result after validation has been performed.
- **Verify Insurance** column ![checkmark] : this column will populate with a **Verify Insurance** button on each individual patient's line in the Tracking window and will be used to validate insurance for that patient.
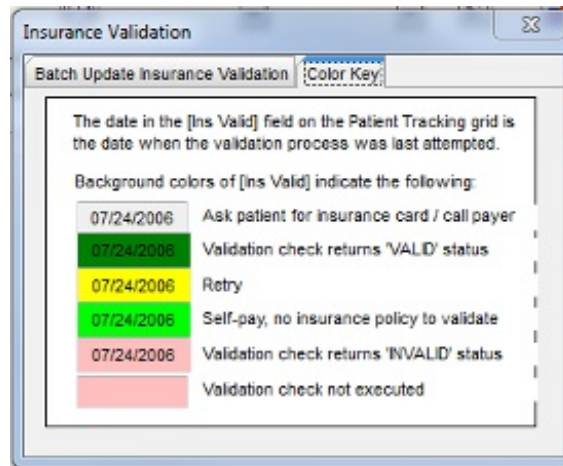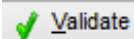

> **Note**: If you do not see the **Ins. Valid** or **Verify Insurance** columns in your window, it is likely the columns have been removed from view. To learn how to add columns to your view, click **here**.
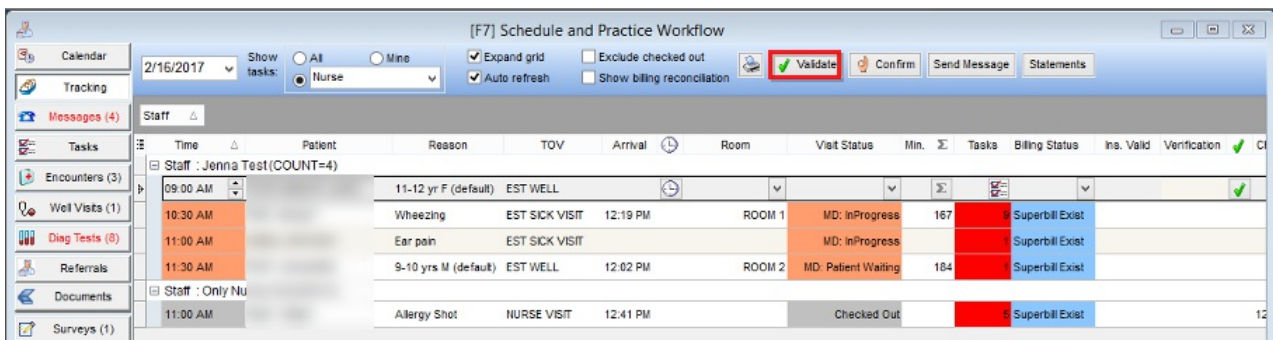
3. Click the **Line** for the patient whose insurance you would like to verify. The **Verify Insurance** button is displayed.
4. Click the **Verify Insurance** button. Validation will process and return a result in the **Ins. Valid** column based on the color key.

- If the result is nothing or the field is **White**, ask the patient for updated insurance information or call the payer for further information.
- If the result is **Dark Green**, the validation check has returned a valid insurance status.
- If the result is **Yellow**, retry your validation attempt. There could have been connectivity issues at the time of validation attempt.
- If the result is **Light Green**, 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 the result is **Pink,** then the insurance on file is invalid.
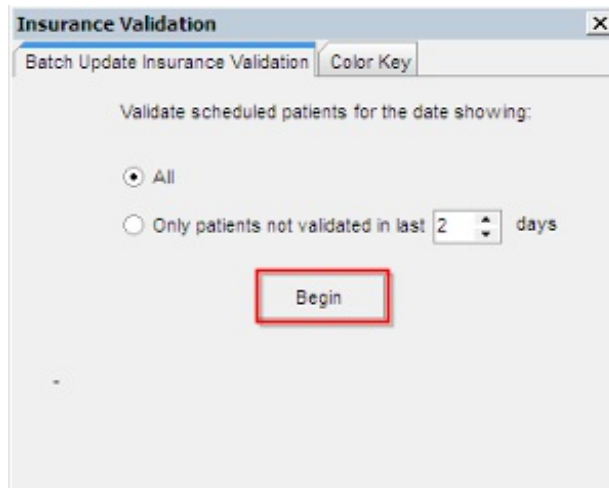

Verify Insurance for All Patients on Schedule

1. Follow steps 1-3 above
2. At the top of the **Tracking** window, click on the **Validate** button

5. In the **Insurance Validation** box, select your criteria and click the **Begin** button to start validating

6. Validation will process and return a result in the **Ins. Valid** column based on the color key.

- 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.