



RELEASE NOTES

Insurance Verification

What is it?

The eVisit Verification Tool collects patients' insurance information and determines whether or not their insurance is valid.

Why is it useful?


This will allow the patient, provider, and clinic to be informed within seconds whether or not the patient insurance information is valid or supported for a visit.

When should I use it?

Insurance Verification should be used when serving patients in which the organization would like to incorporate insurance plan billing as part of the revenue cycle and care plan. In lieu of, or in addition to, cash-pay encounters, insurance verification should be used when real-time verification is needed in order to determine how the patient encounter should be billed.

How does it work?


Insurance verification will let a user who has added insurance know if their insurance is verified or not. A new user whose information is not transferred over from another source will be asked if they would like to add insurance.

[Back](#)Insurance

We could not electronically verify your insurance. Please make sure all the information below is correct. (5 attempts remaining).

✕

In order to verify Jane Doe's insurance, please confirm that the information below is correct.

Personal Information

First Name

Jane

Last Name

Doe

Address

1726 N. 1200 E.

City

Logan

State

Utah

ZIP Code


87654

Mobile Phone

876-987-3837

DOB

12/23/1980

Insurance Information

Insurance Company

Aetna

Relation To Policy Holder

Self

Policy Holder Name (First)

Jane

Policy Holder Name (Last)

Doe

Policy Holder DOB

12/23/2010

ID number

65443

Group number

775543

Policy Type

No response given

Policy Type

No response given

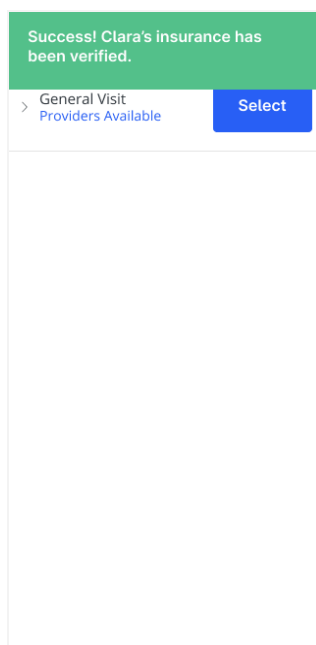
Submit

Continue without verification

*You will still be able to see a provider if you continue without verification

If the user clicks “yes” they will be given the opportunity to add their insurance information. They will be then taken to a page where they can review their personal and insurance information. On this page they can submit their insurance for verification. If a user’s insurance is not verified, a yellow banner will appear informing the user that their insurance was not verified, prompting them to check their information, and informing them of how many attempts they have left to verify their insurance. Each user gets five attempts to verify their insurance. A user may also, at any point, click “continue without verification.” If they click “continue without verification” they would be able to schedule a visit with unverified insurance.


If a user’s insurance is verified they will proceed to the next page and see a green success banner.




After a user has attempted to verify their insurance unsuccessfully five times, they will be taken to a page where they can choose to continue without insurance, or continue without verification. If the user chooses to continue without insurance, the visit will proceed as if the user had chosen not to add insurance. If the user chooses to continue without verification they will be able to continue to schedule their visit and their insurance will be marked as unverified.


A provider will be able to see if a patient’s insurance is verified by navigating to the patient profile in the side menu and selecting “Insurance.”

On the review and confirm page there is a new section that has been added for insurance. An icon next to the insurance information will indicate if the insurance is verified or unverified. If a user has not added insurance, this section will still appear, but it will say NONE under insurance. If the user chooses to edit this section they can add or change their insurance information.


[Back](#) Review Details 


Patient

 Jane Doe
Female, 12 yrs

 Edit


Provider

 Dr. Katrina Anerich
Regional Hospital

 Edit


Visit Type

General Visit
15 minutes

 Edit


Visit Details

Short reason for request
Sick child
Description of illness
Fever and chills
Attachments
No attachments have been uploaded.

 Edit


Visit Date and Time

Thursday, July 8th at 5:15 PM


 Edit


Pharmacy

Walmart Pharmacy (3799)
240 West Baseline Road
AZ 85210

 Edit

Insurance

Aetna  Unverified Insurance
ID No. 54433
Group No.54433

 Edit

Acknowledgement

☒ I have read and confirm that the information is correct to the best of my knowledge

Confirm & Check In

Cancel

For a returning user their insurance will be checked for verification in the background when they go to schedule a visit. If the insurance is verified the user will not be notified and they will continue to schedule their visit.

If a returning user's insurance is not verified the user will be notified and given the opportunity to update their insurance. They will be given 4 attempts to verify their insurance, as one attempt was used in the background upon starting the visit request.

Back

Review Details

☰

We couldn't verify your insurance

You will still be able to see a provider with unverified insurance. (This modal is editable per practice)

Update Insurance

Continue

Sick child

Description of illness

Fever and chills

Attachments

No attachments have been uploaded.

Visit Date and Time

Edit

Thursday, July 8th at 5:15 PM

Pharmacy

Edit

Walmart Pharmacy (3799)

240 West Baseline Road

AZ 85210

Insurance

Edit

⚠ Aetna

ID No. 54433

Group No. 54433

Acknowledgement

☐ I have read and I confirm that the information is correct to the best of my knowledge

Confirm & Check In

Cancel

How do I get started?

This feature will be available to all customers, though it will need to be configured. Contact your Customer Success Manager or eVisit Technical Support for assistance with that configuration.

Additional Information

Please note the following additional details about the Insurance Verification feature:

- Insurance Verification is limited to the verification of validity of a member's insurance plan
- This phase of Insurance Verification will not include eligibility calculations, patient estimates, etc. *those features are coming soon in a future release!*
- Not all trading partners are supported
- A group, clinic, or provider NPI is required to be set on the Owner level of the practice for Verification to process and return findings