

# Insurance verification and eligibility checks

Automatically verifies patient insurance eligibility and benefits when appointments are scheduled, ensuring accurate coverage information before treatment and reducing claim denials.

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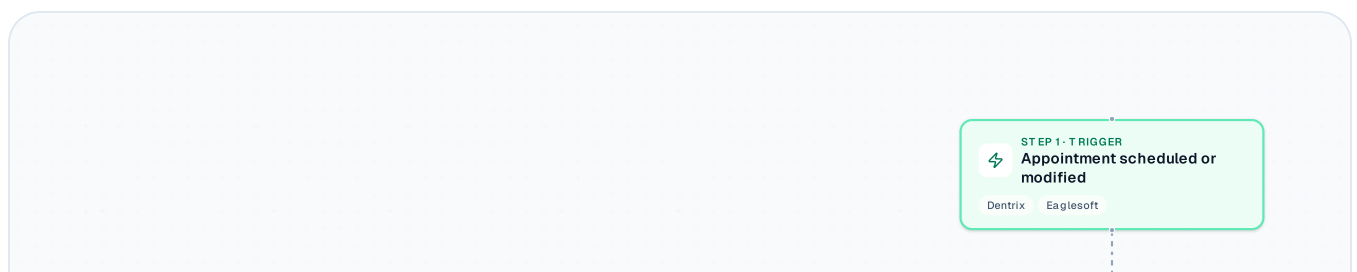


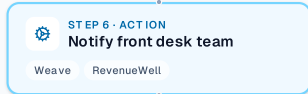
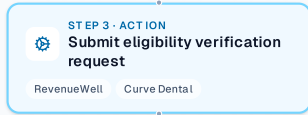
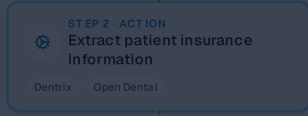
## WORKFLOW TRIGGER

Patient appointment is scheduled or updated in practice management system

## Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

### Appointment scheduled or modified

New patient appointment is created or existing appointment is updated in the practice management system. System captures patient ID, insurance details, and scheduled treatment codes.

2

 ACTION

### Extract patient insurance information

Retrieves patient's current insurance carrier, policy number, group number, and subscriber details from patient record. Validates that all required fields are present for verification.

Dentrix

Open Dental

3

 ACTION

### Submit eligibility verification request

Sends automated eligibility inquiry to insurance carrier using patient's policy information and planned treatment codes. Queries real-time benefits, deductibles, and coverage percentages.

RevenueWell

Curve Dental

4

 DECISION

### Check verification response status

Evaluates insurance carrier response to determine if eligibility was successfully verified or if additional information is needed. Routes workflow based on verification success or failure.

RevenueWell

5

 ACTION

### Update patient record with benefits

## AI Business OS

Automatically populates verified insurance benefits, co-pays, deductibles, and coverage limits into patient's treatment plan and financial record. Calculates estimated patient responsibility.

Dentrix

Eaglesoft

6

 ACTION

### Notify front desk team

Sends automated alert to front desk staff with verification results and any required patient communications. Flags accounts needing manual follow-up for failed verifications.

Weave

RevenueWell

7

 OUTPUT

### Generate verification summary report

Creates comprehensive insurance verification report showing patient benefits, coverage details, and estimated treatment costs. Report is accessible to clinical and administrative staff.

Dentrix

Open Dental



## Outputs

- Updated patient record with verified insurance benefits

- Automated notification to front desk staff

## AI Business OS



### Key Metrics

- Insurance verification success rate
- Average verification processing time
- Reduction in claim denials



### Tools & Integrations

- Dentrix
- Eaglesoft
- Open Dental
- Curve Dental
- RevenueWell
- Weave

## AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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