

# Insurance verification and claims processing

Automates insurance verification and claims processing for mental health sessions, reducing manual administrative work and accelerating reimbursement cycles while ensuring HIPAA compliance.

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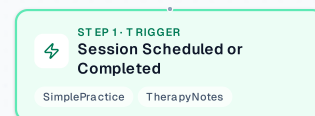


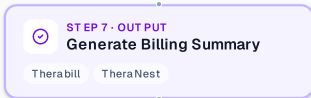
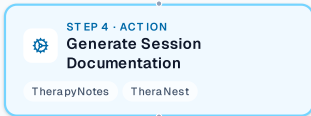
## WORKFLOW TRIGGER

Patient schedules a therapy session or existing session is marked as completed

## Visual Flow

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





# Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

## Session Scheduled or Completed

Workflow initiates when a patient books a new appointment or when a therapist marks a session as completed in the practice management system.

2

 ACTION

### Verify Insurance Coverage

Automatically checks patient's insurance eligibility, benefits, copay amounts, and deductible status through real-time insurance verification APIs.

SimplePractice

Therabill

3

 DECISION

### Check Coverage Status

Evaluates if insurance is active and covers the specific mental health services provided. Routes to different paths based on coverage verification results.

Therabill

4

 ACTION

### Generate Session Documentation

Pulls session notes, diagnosis codes, and treatment information from the practice management system to prepare claim documentation.

TherapyNotes

TheraNest

5

 ACTION

### Submit Insurance Claim

Automatically generates and submits electronic claims with proper CPT codes, diagnosis information, and session details to the insurance provider.

6

 ACTION

### Update Patient Records

Records claim submission status, updates patient billing information, and sets follow-up reminders for claim tracking in the practice management system.

SimplePractice

TherapyNotes

7

 OUT PUT

### Generate Billing Summary

Creates comprehensive billing report showing claim status, patient responsibility amounts, and next steps for the therapy practice administrative team.

Therabill

TheraNest



### Outputs

- Electronic insurance claims submitted
- Updated patient billing records
- Billing summary report with claim tracking



## Key Metrics

- Claim processing time reduction
- Insurance verification accuracy rate
- Days to payment collection



## Tools & Integrations

- SimplePractice
- TherapyNotes
- TheraNest
- Therabill

## AI Business OS

### AI Business OS

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