

Insurance verification and claims processing

This workflow automatically verifies patient insurance eligibility and processes vision care claims, reducing manual verification time and improving claim approval rates through real-time validation and automated submission.

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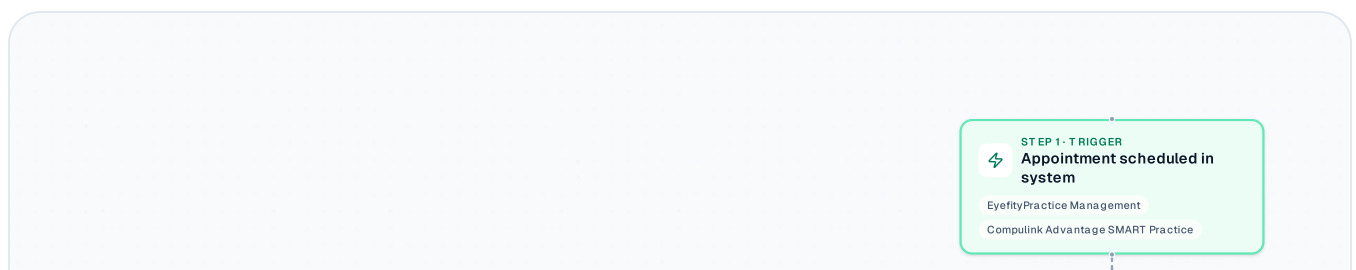


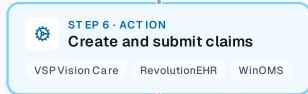
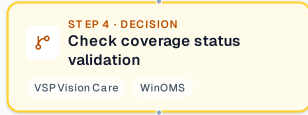
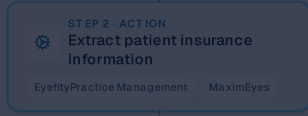
WORKFLOW TRIGGER

Patient schedules eye exam appointment 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 in system

Patient books an eye exam appointment through the practice management system. This triggers the insurance verification workflow to begin automatically.

2

 ACTION

Extract patient insurance information

System retrieves patient's insurance details including member ID, group number, and policy information from the patient record. Missing information triggers patient notification for updates.

EyefityPractice Management

MaximEyes

3

 ACTION

Verify eligibility with VSP

Automated API call to VSP Vision Care validates patient's current coverage, benefits, copay amounts, and authorization requirements. Real-time eligibility status is retrieved and recorded.

VSP Vision Care

RevolutionEHR

4

 DECISION

Check coverage status validation

System evaluates if insurance is active and covers requested services. Workflow branches based on coverage approval or denial status.

VSP Vision Care

WinOMS

5

 ACTION

Generate pre-authorization if required

For covered services requiring prior authorization, system automatically submits pre-auth requests with patient and procedure details.

Authorization status is tracked and updated.

AI Business OS

VSP Vision Care

Compulink Advantage SMART Practice

6

 ACTION

Create and submit claims

After exam completion, system automatically generates insurance claims with proper CPT codes, submits electronically to VSP, and tracks claim status. Rejected claims are flagged for review.

VSP Vision Care

RevolutionEHR

WinOMS

7

 OUTPUT

Update patient financial records

Final step updates patient account with verified coverage details, processed claims status, and outstanding balances. Staff receives notification of any required follow-up actions.

MaximEyes

EyeFityPractice Management



Outputs

- Verified insurance eligibility status
- Submitted insurance claims
- Updated patient financial records



Key Metrics

- Insurance verification completion rate
- Claim approval percentage
- Average verification processing time



Tools & Integrations

- VSP Vision Care
- EyefityPractice Management
- Compulink Advantage SMART Practice
- RevolutionEHR
- MaximEyes
- WinOMS

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