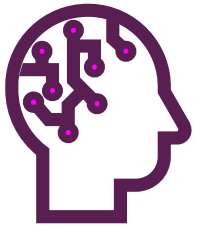
ELIGIBILITY ESSENTIALS & PRO IN DENTRIX ASCEND

Eligibility Essentials & Pro Overview

What's in it for me?



Save Staff Time: Automated eligibility requests will save hours per day from staff manually verifying via phone and web portals.

Easy-to-Read Document: Eligibility responses are standardized and automatically saved to the Document Manager.

Import Plan Details: Choose important plan benefit and coverage details to import directly back to Dentrix.

Credential Manager: One easy-to-access place to save insurance payer usernames and passwords.

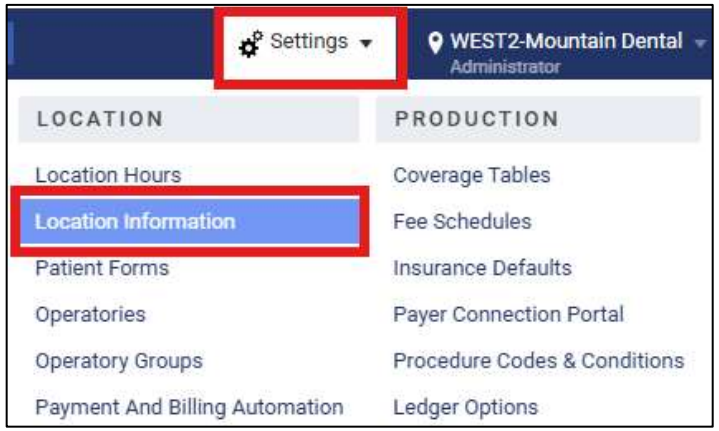
Training Topics

- Setup – Location Settings, User Roles & Rights
- Differences between Eligibility Essentials and Eligibility Pro
- Automated Eligibility Process
- Payer Connection Portal – saving payer web portal credentials
- Viewing Eligibility Status & Details
- Requesting One-Time Eligibility Response
- Importing Eligibility Details

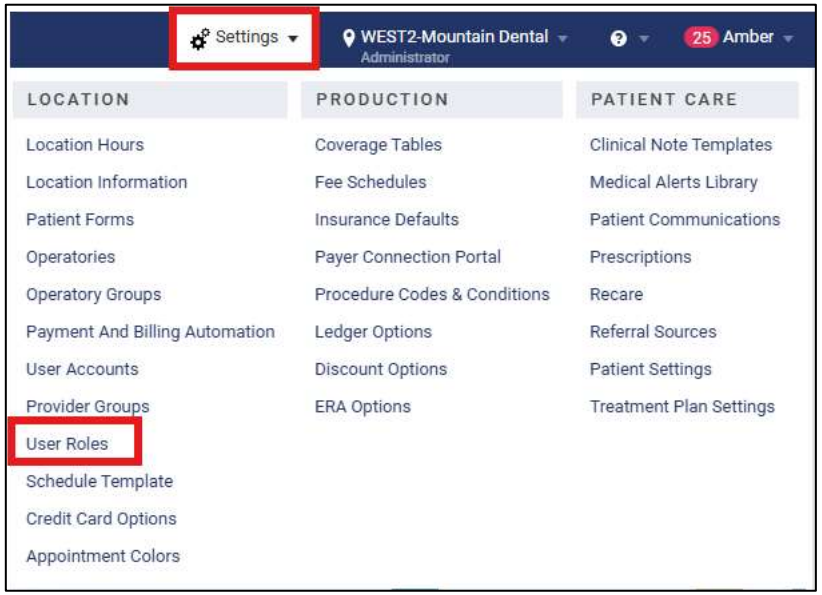
1 SETUP – LOCATION SPECIFIC

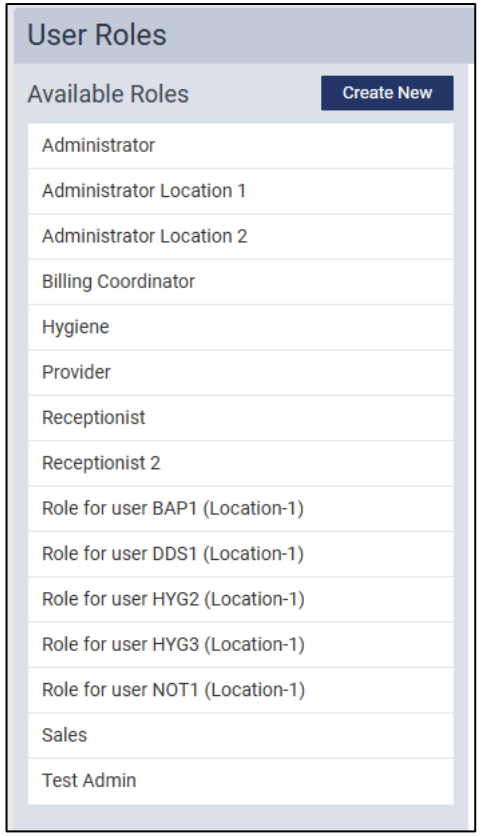
Settings – Location Information

- **Insurance Eligibility Verification must be turned on.**
- **Business Day Lead for Batch Eligibility Verification = Days in advance eligibility is verified.**

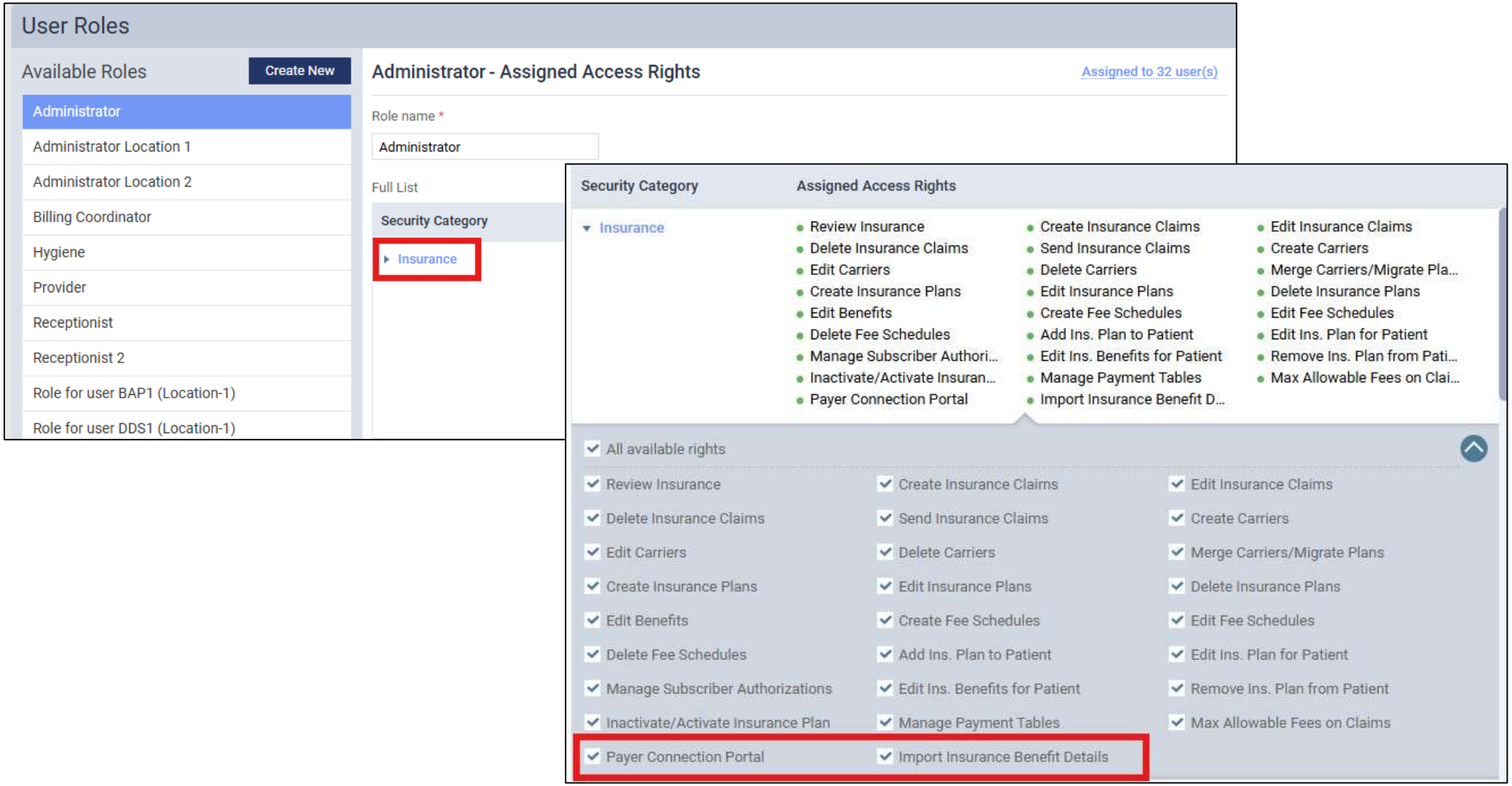


Settings – User Roles





Setup – User Access Rights

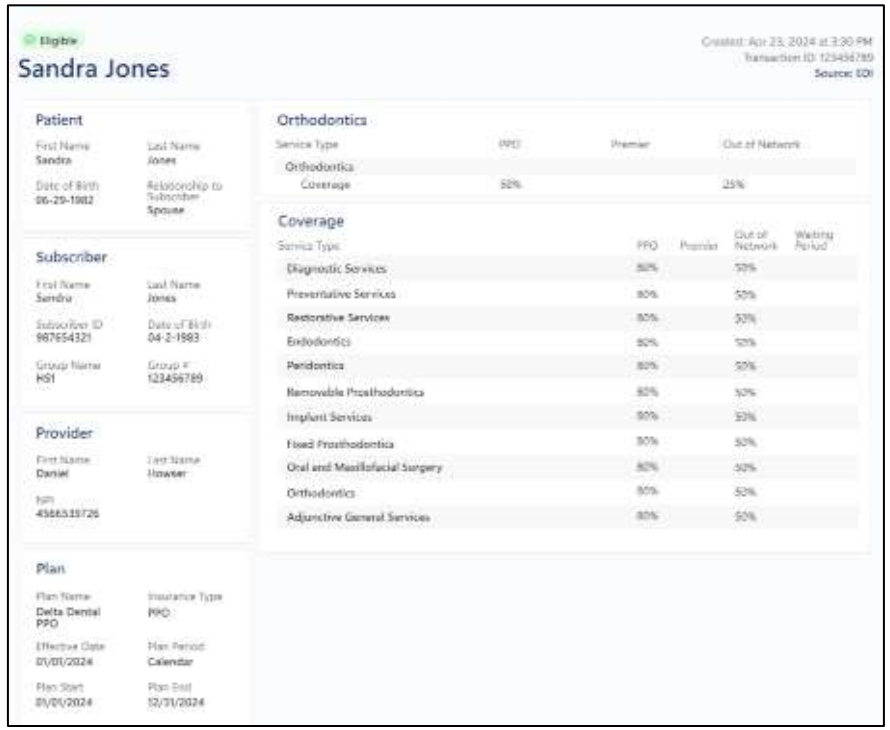


2 ELIGIBILITY ESSENTIALS VS ELIGIBILITY PRO

Eligibility Essentials vs Eligibility Pro

Pro Responses will return more detailed benefit and coverage information.

Essentials Response

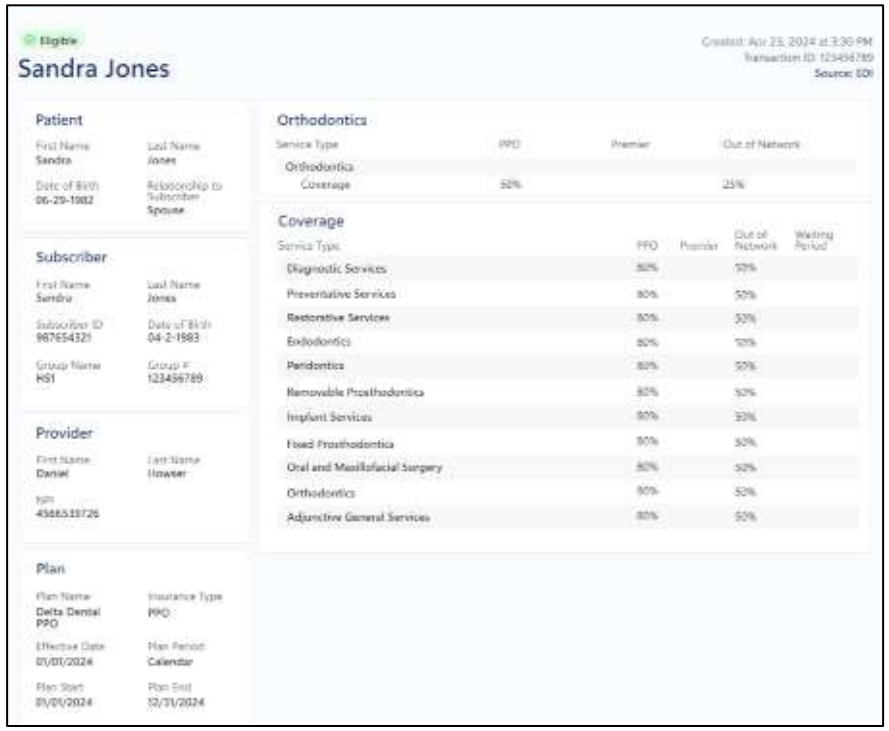


Pro Response

Eligibility Essentials vs Eligibility Pro

Essentials Responses will vary by Payer.

Essentials Response



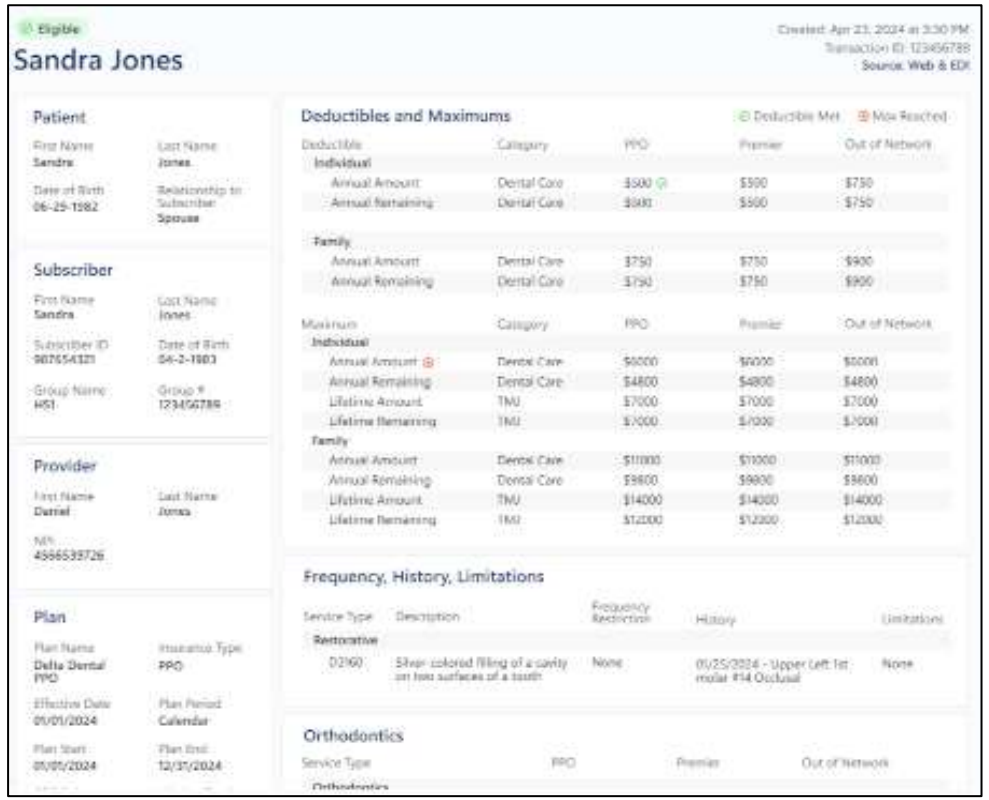
- **EDI Request**
- **EDI = Electronic Data Interchange**
- **Payers (insurance company) determine the data returned**

*Plan details will vary by payer

Eligibility Essentials vs Eligibility Pro

Pro Responses will return more detailed benefit and coverage information.

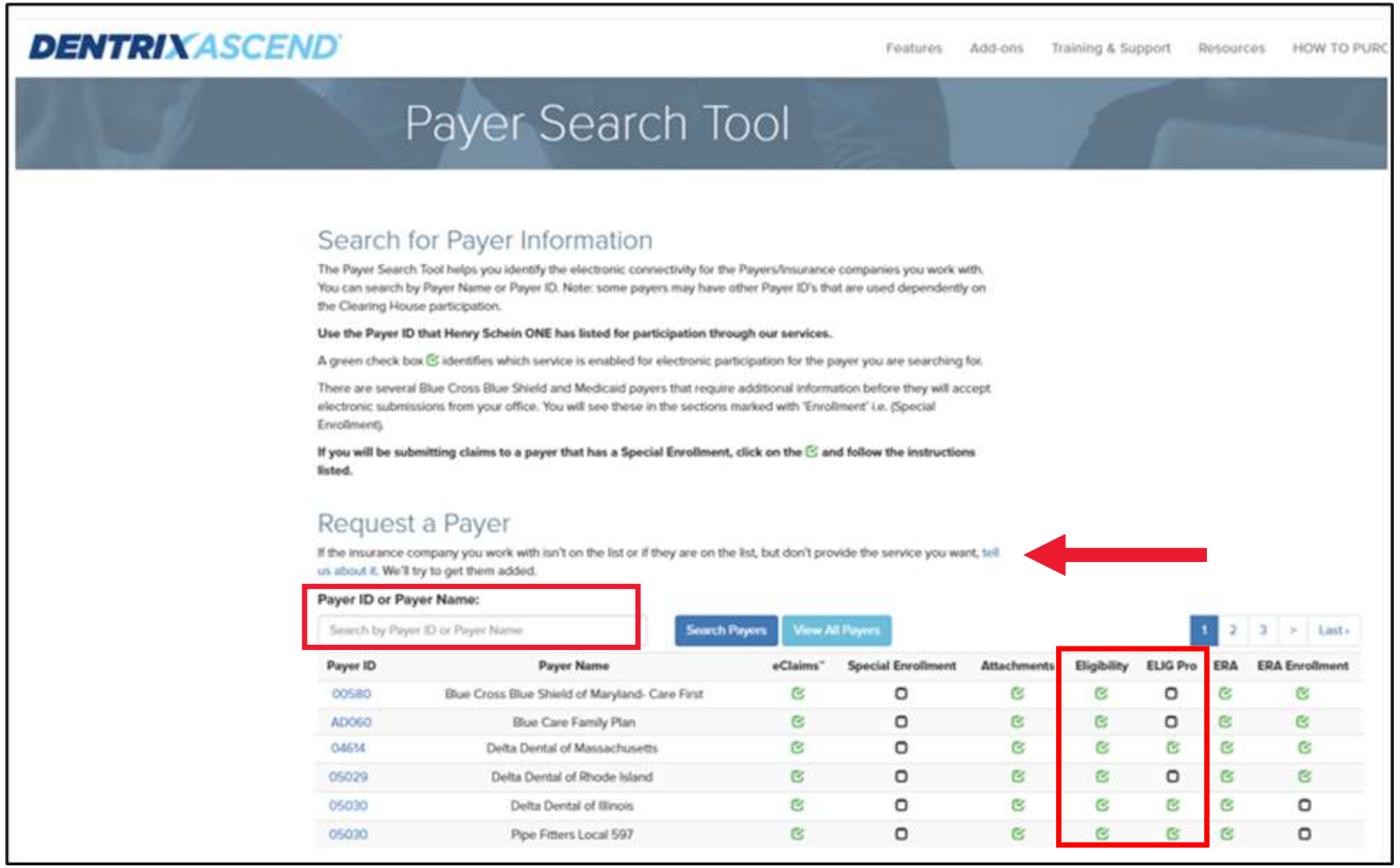
Pro Response



- **Web Request**
- **Retrieves data from payer's web portals**
- **Includes additional data:**
  - Deductibles & Maximums
  - Frequency
  - History
  - Limitations

Payer Search Tool

Link can be found on Eligibility Essentials & Pro Quick Start Guide – Additional Resources



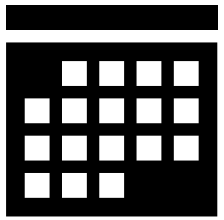
Eligibility	ELIG Pro
☑	☐
☑	☐
☑	☑
☑	☐
☑	☑
☑	☑
☑	☑

3 AUTOMATED ELIGIBILITY PROCESS

Automated Eligibility Process

- Nightly for appointments scheduled for the next specified number of business days
- Immediately after scheduling an appointment within the next specified number of business days

- Appointments will be skipped IF eligibility has already been verified in the **current** calendar month



Automated Eligibility Process

Essentials vs. Pro

Essentials - Included

- Automated EDI requests
- Details will vary by payer
- Option to manually request Pro response

Pro Subscription

- Automated web requests for all participating payers set up in the Payer Connection Portal
- Any payers not participating in Pro but **DO** participate in Essentials will request an EDI response automatically

Recap

✓Setup/Settings

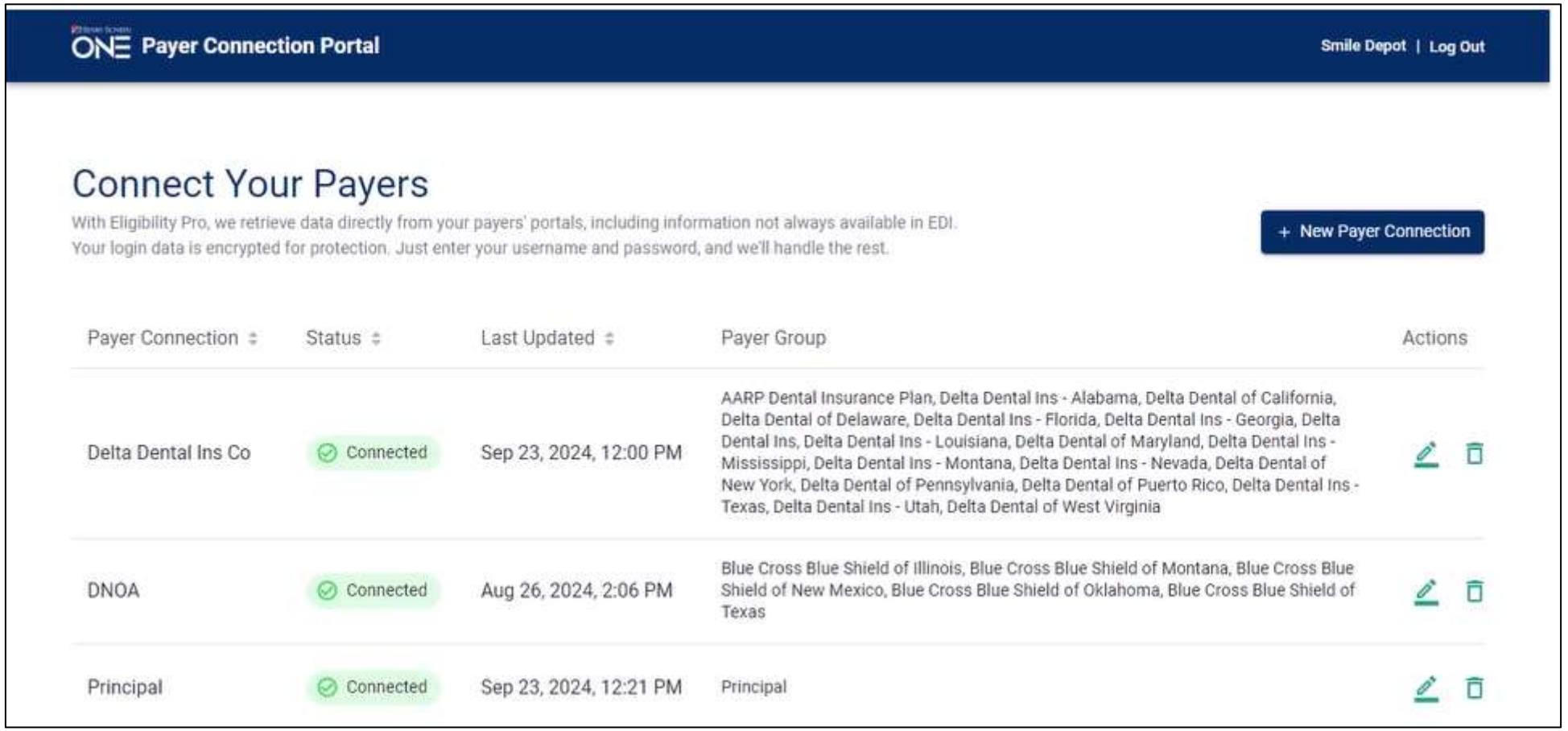
✓Differences between Essentials & Pro

✓Automated Eligibility Process

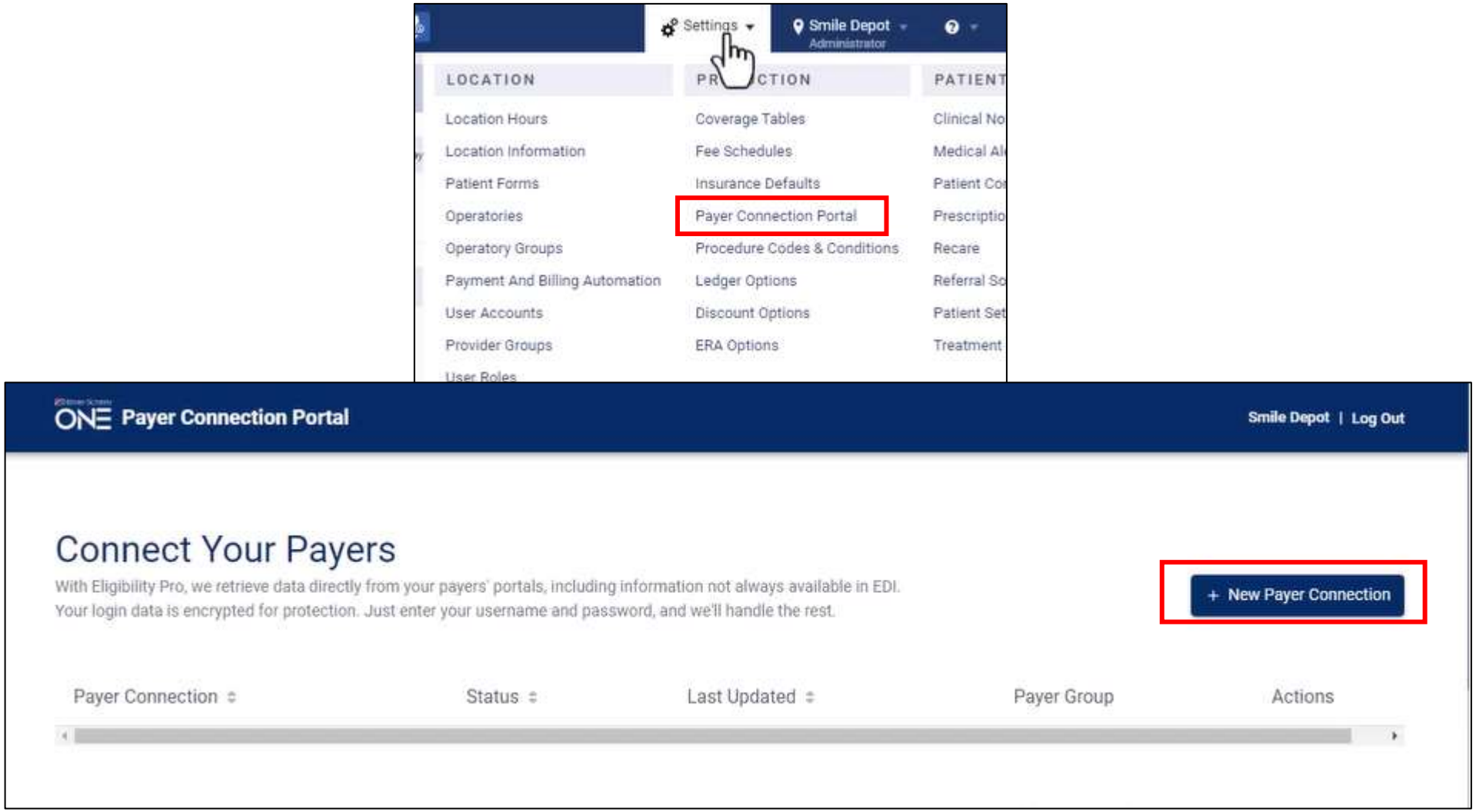
4 PAYER CONNECTION PORTAL

Payer Connection Portal

Save insurance payer usernames & passwords in one place!

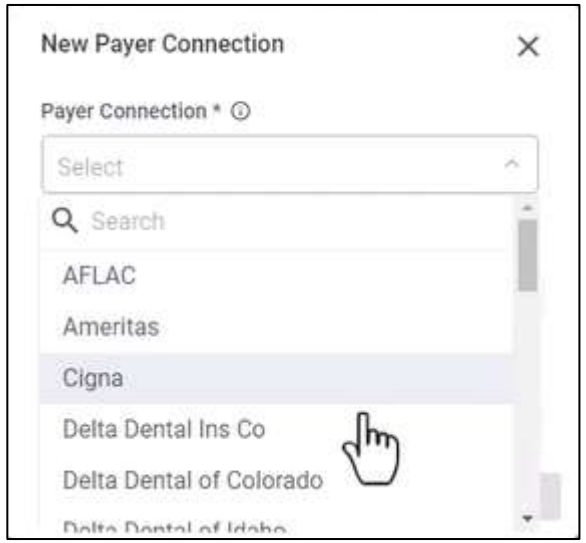


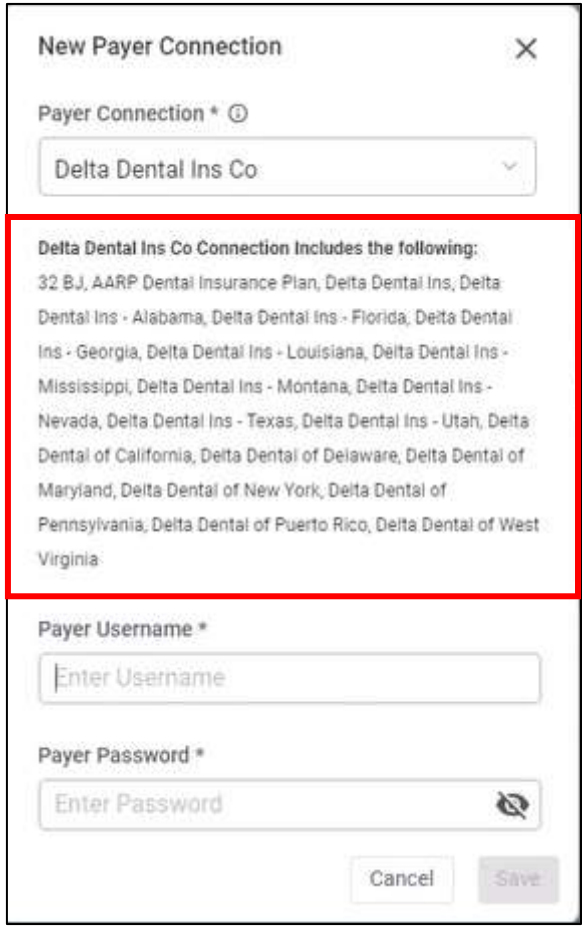
Payer Connection Portal



Payer Connection Portal

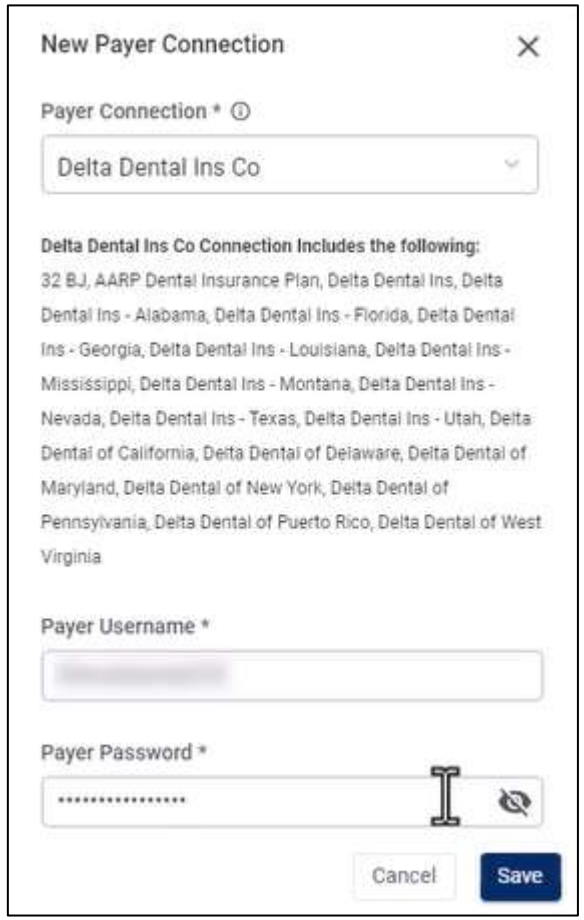
New Payer Connection

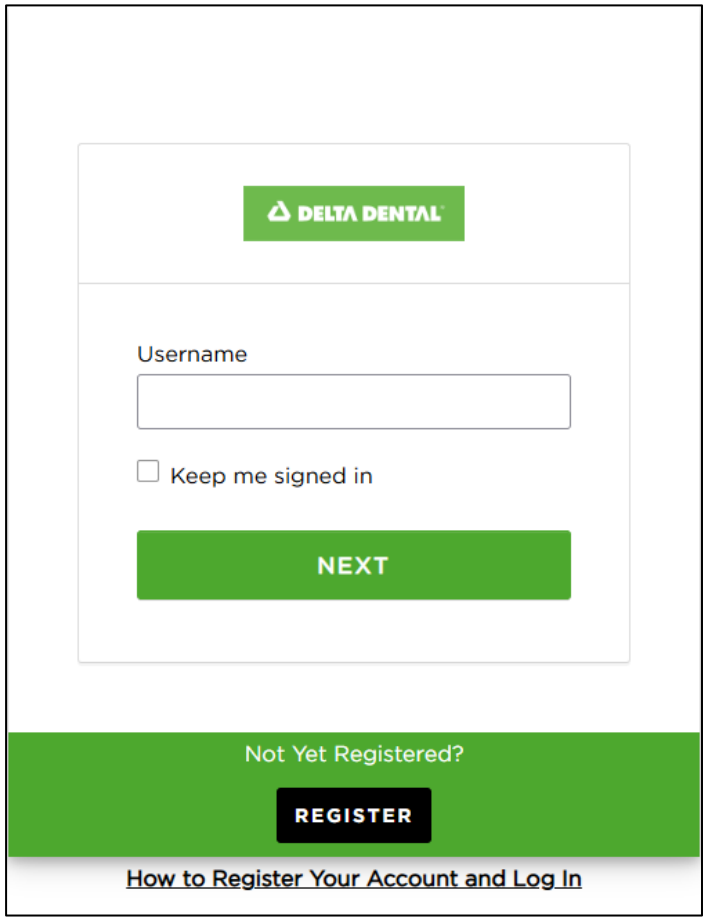




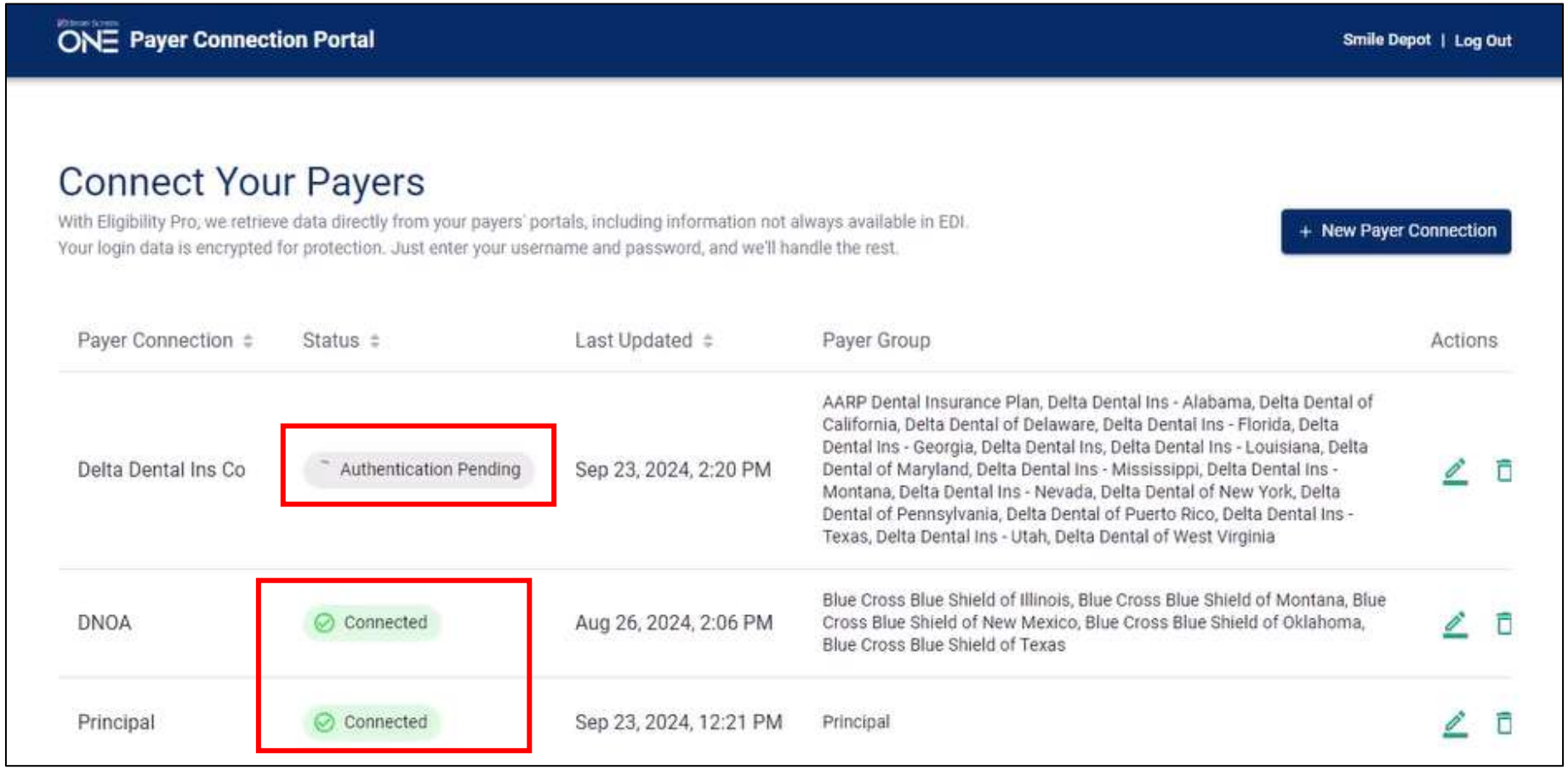
Payer Connection Portal

Enter your practice username and password for the Payer's web portal to connect!



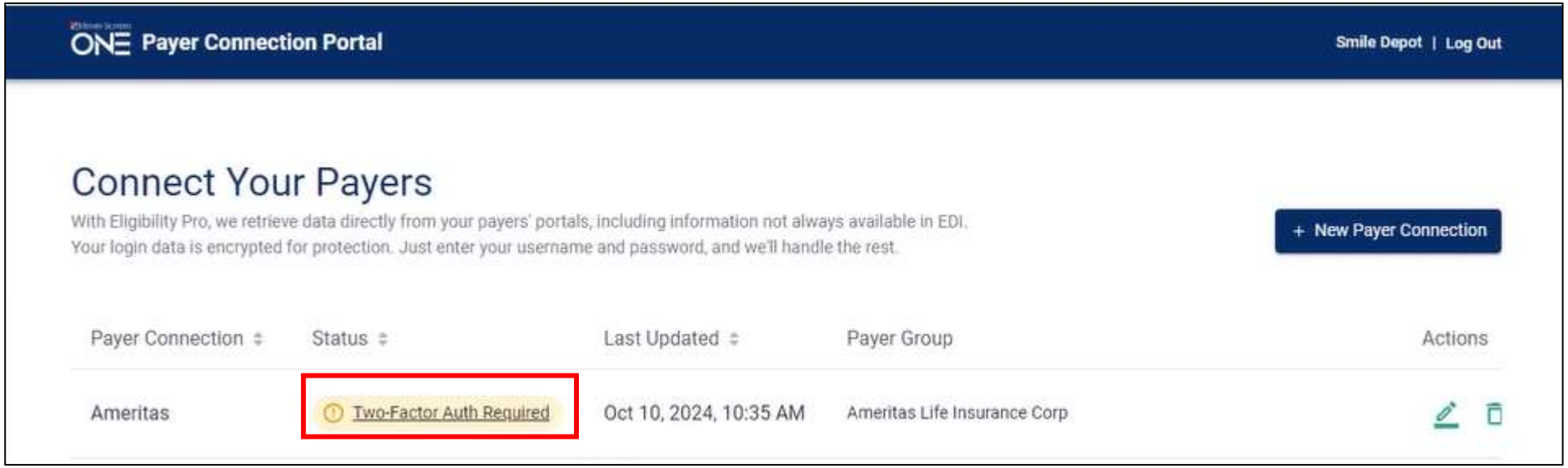


Payer Connection Portal



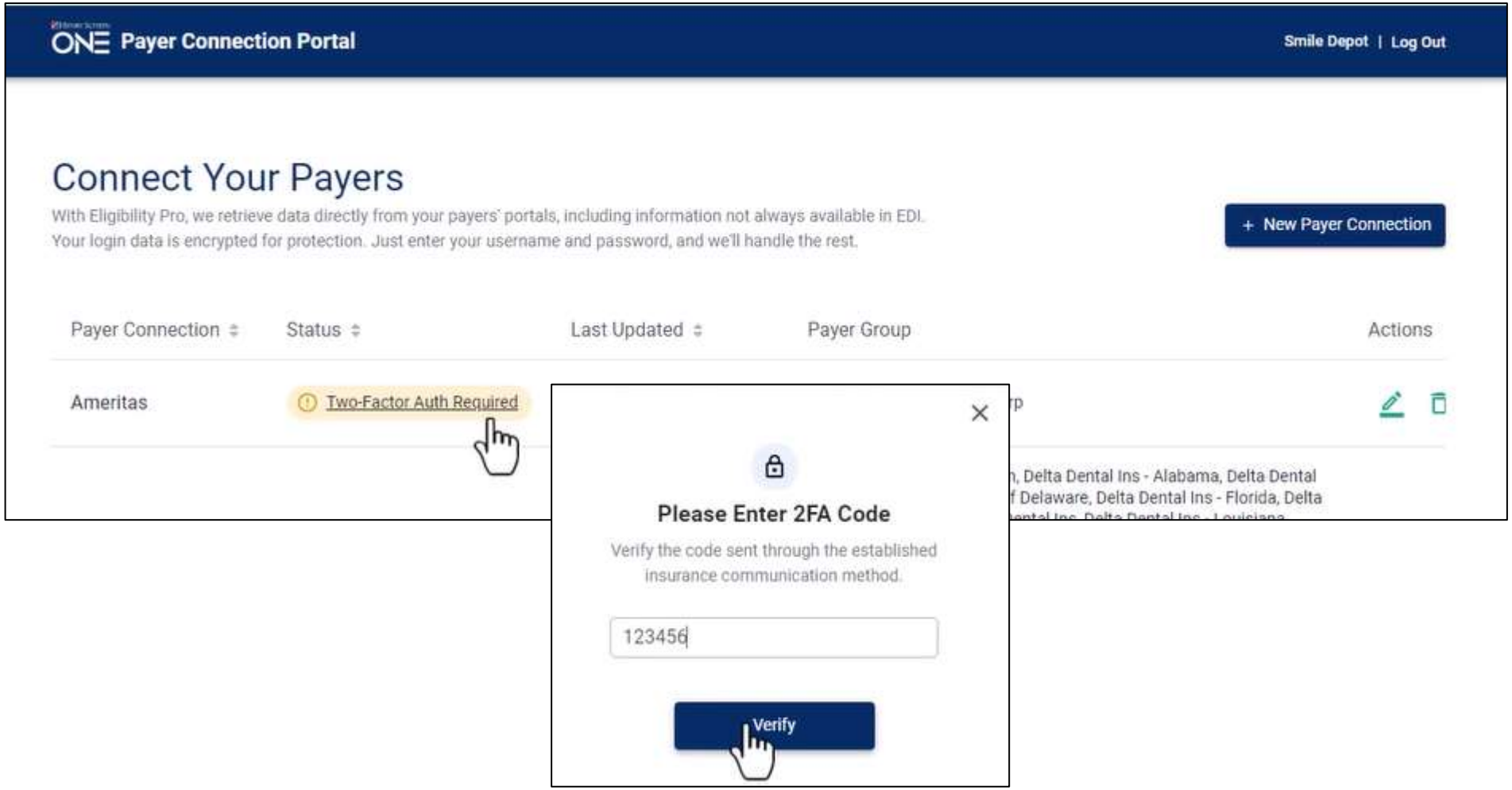
Payer Connection Portal

Two-Factor Authentication



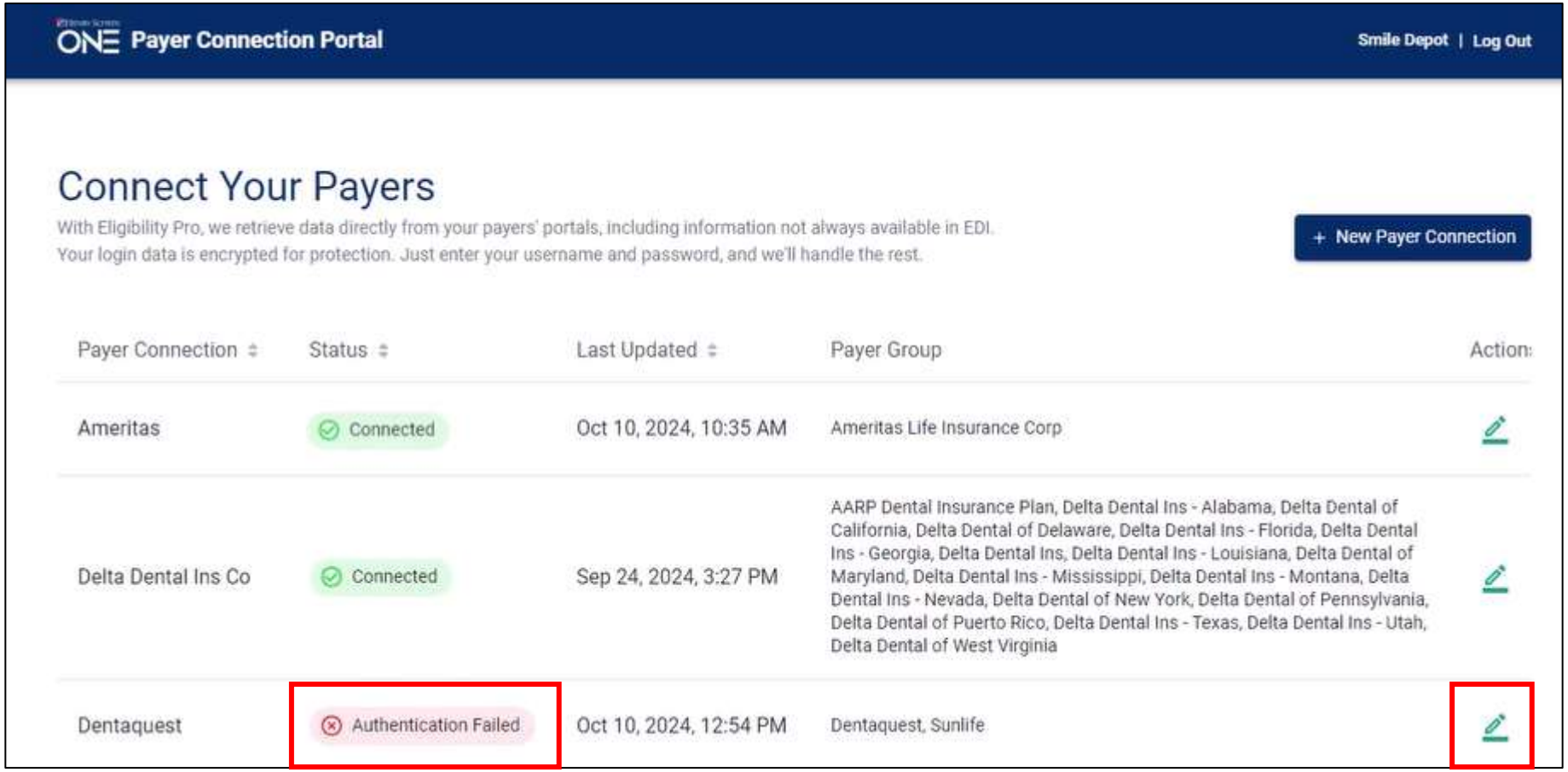
Payer Connection Portal

Two-Factor Authentication



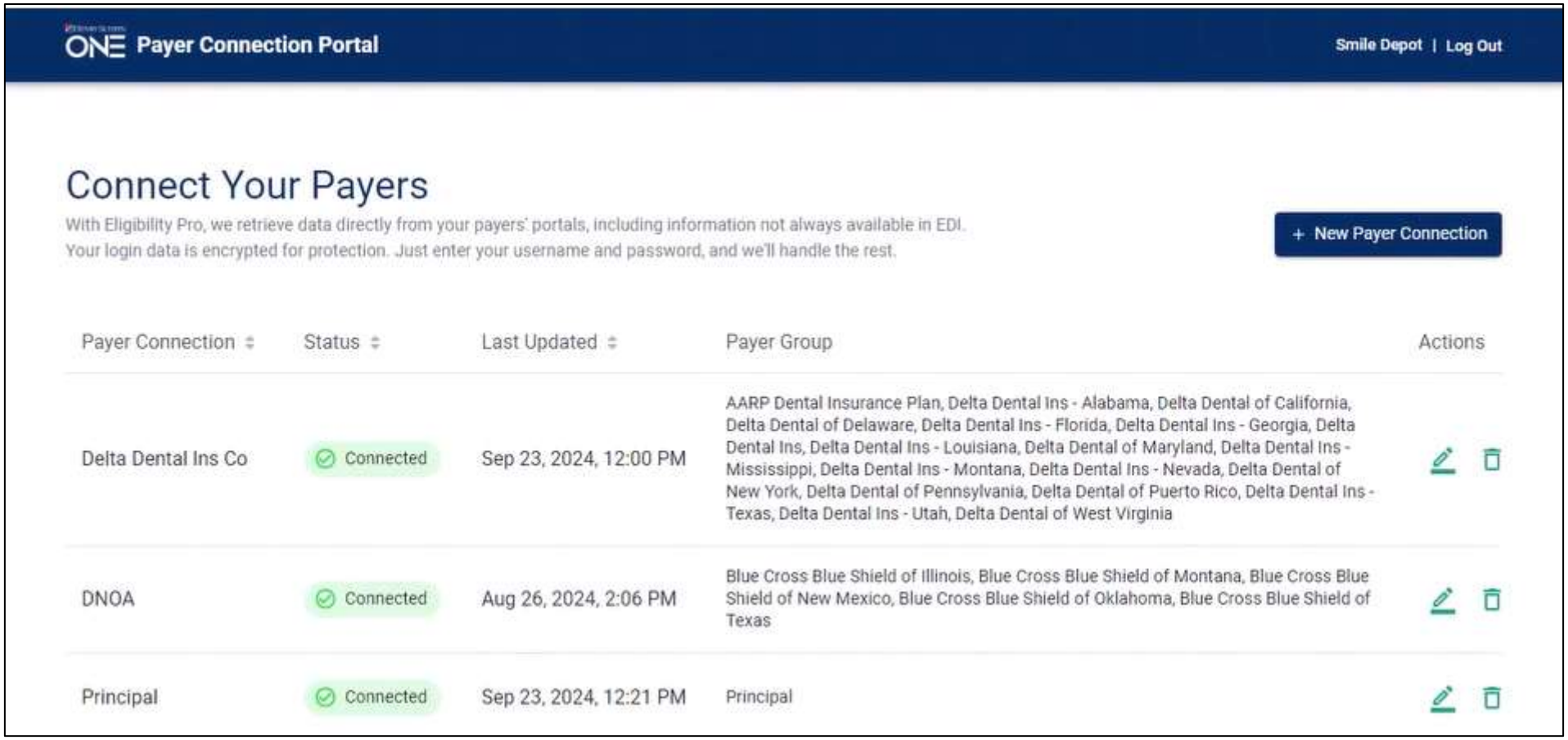
Payer Connection Portal

Failed Authentication



Payer Connection Portal

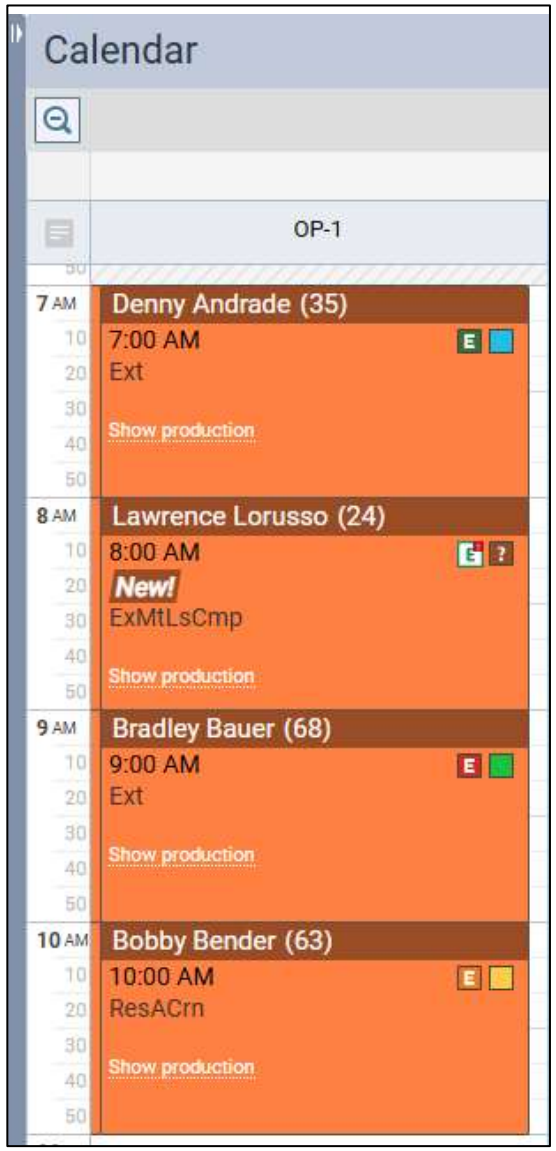
Get started adding those payers your practice works with!



5 VIEWING ELIGIBILITY STATUS & DETAILS

Viewing Eligibility Status

Schedule/Calendar View



Green = Eligible

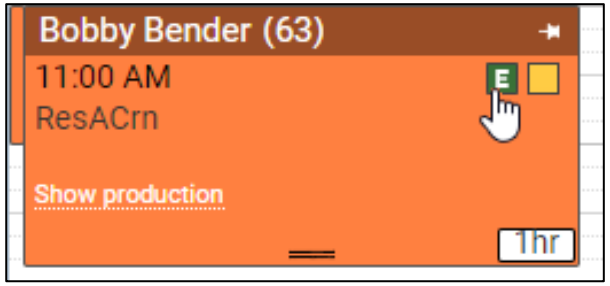
Green E/White Background = Eligible & Import Benefits Available

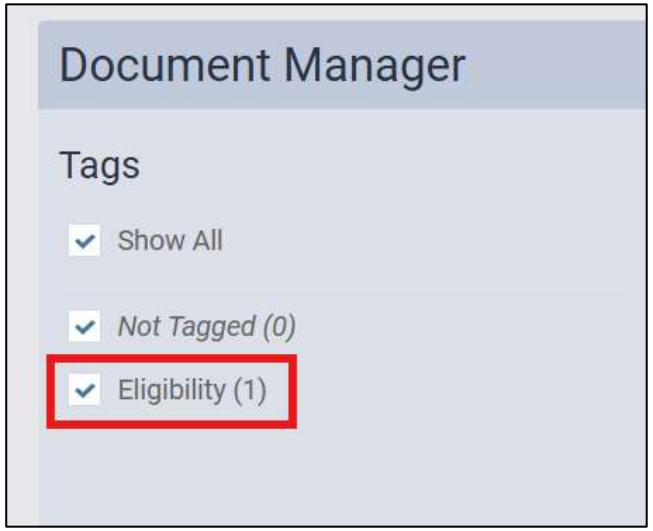
Red = Not Eligible

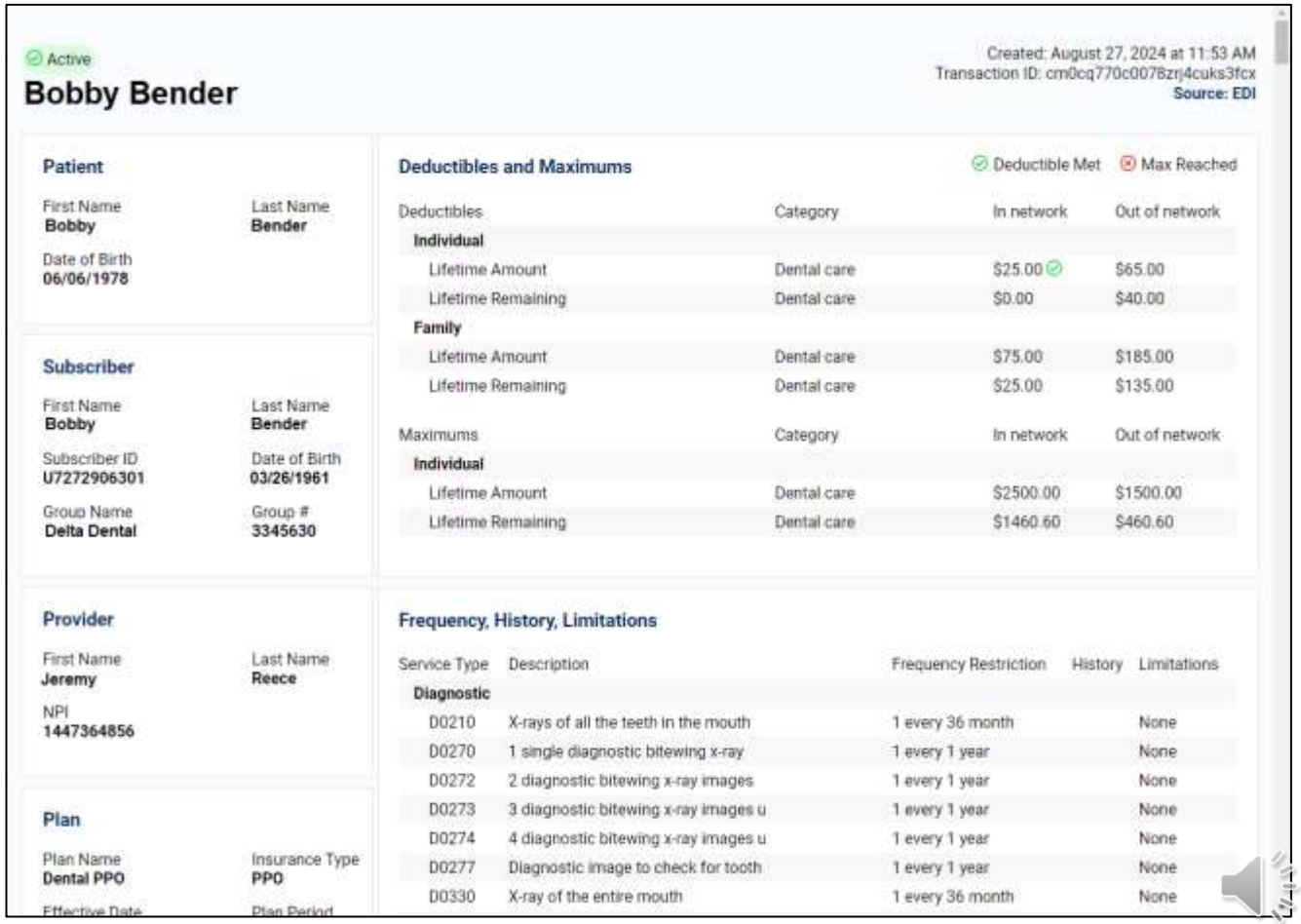
Orange = Unable to Verify

Viewing Eligibility Detail

Clicking directly on the E icon will open the most recent eligibility response.

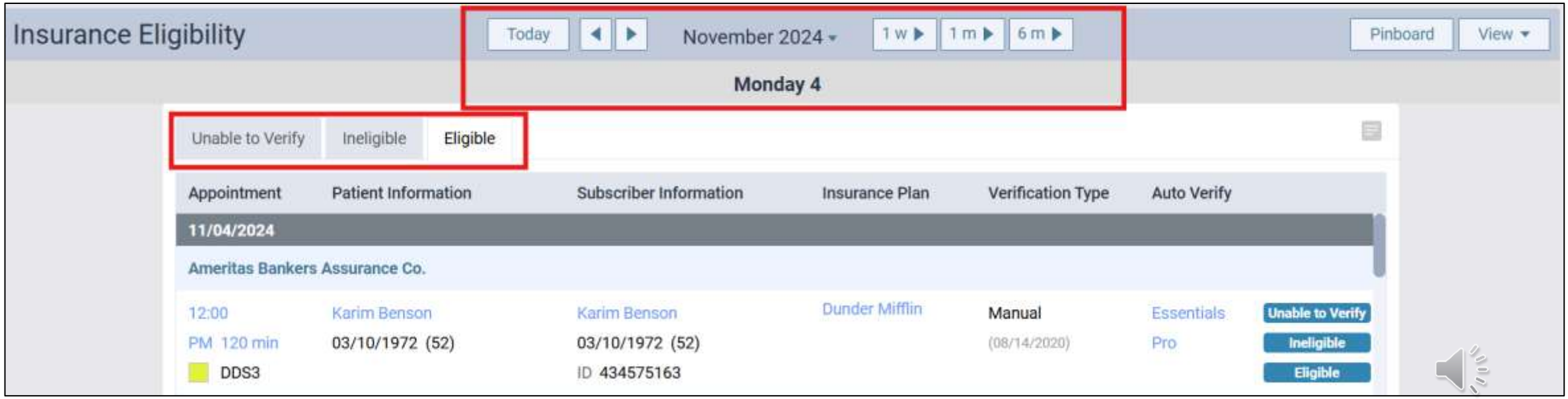






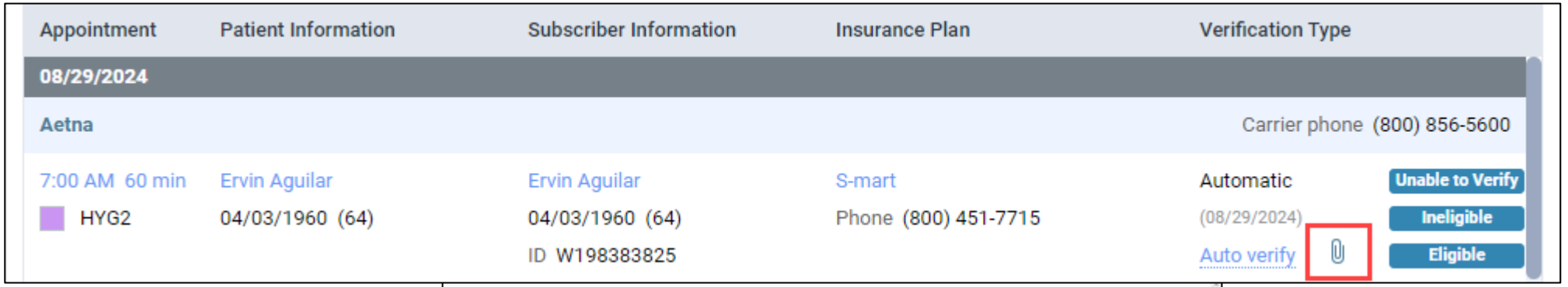
Viewing Eligibility Status

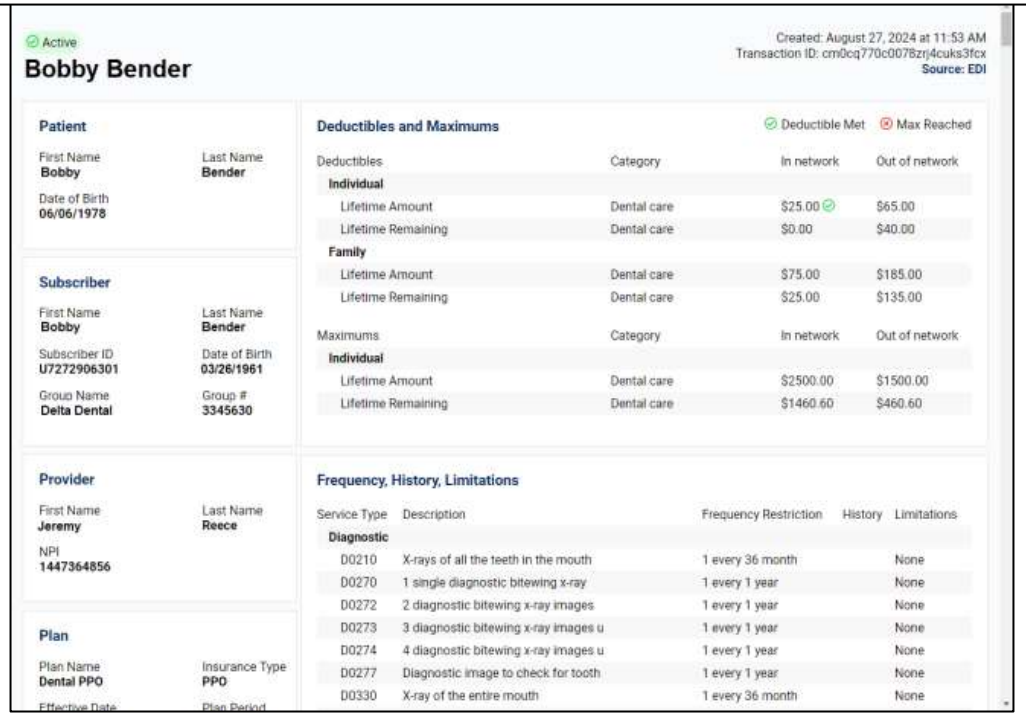
Schedule – Insurance Eligibility



Viewing Eligibility Detail

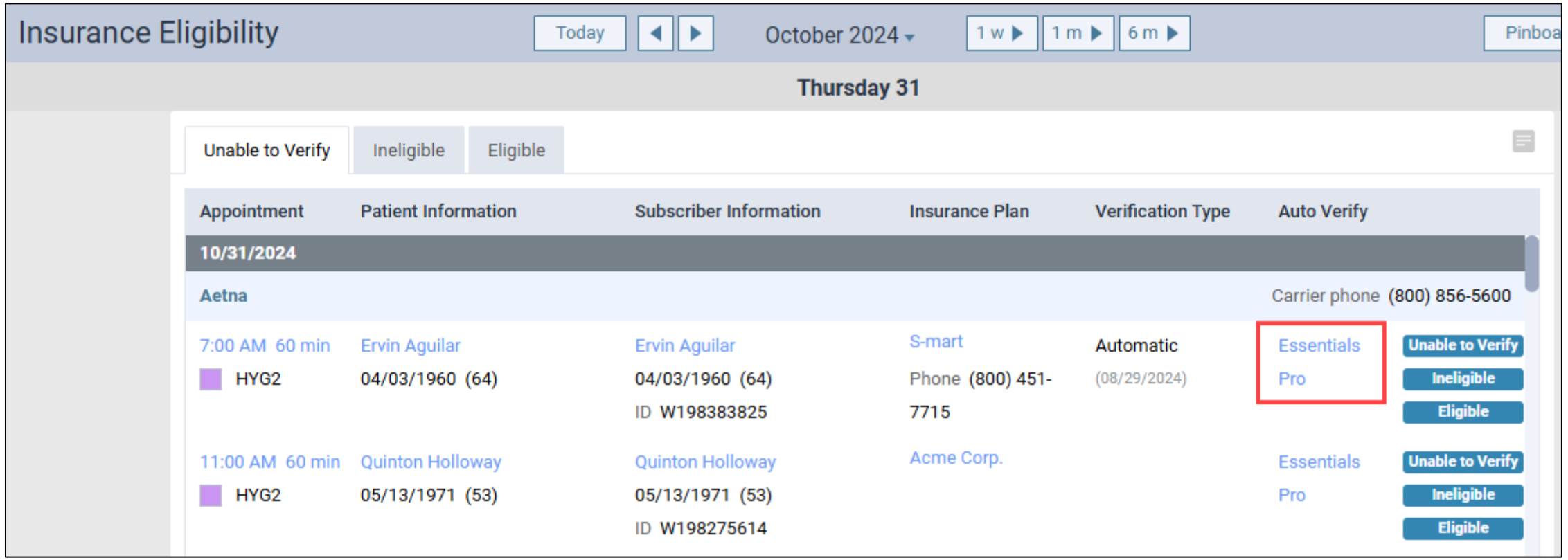
Insurance Eligibility Screen – Paperclip icon will open most recent eligibility response.





One Time Eligibility Request

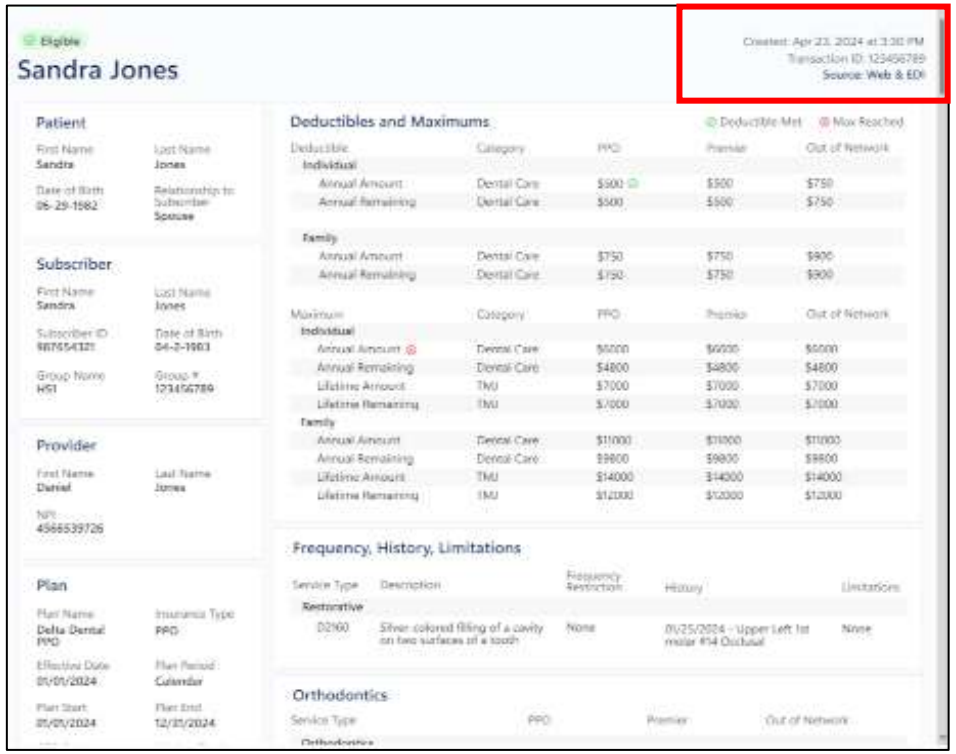
Insurance Eligibility Screen – Manually Request Eligibility Response



6 ELIGIBILITY DOCUMENT DETAILS

Viewing Eligibility Detail

Eligibility Document Details



Source: Essentials (EDI)
Created: May 1, 2024 at 10:56 AM
Transaction ID: 123456789

Source: Pro (Web+EDI)
Created: May 1, 2024 at 10:56 AM
Transaction ID: 123456789

Viewing Eligibility Detail

Eligibility Document Details

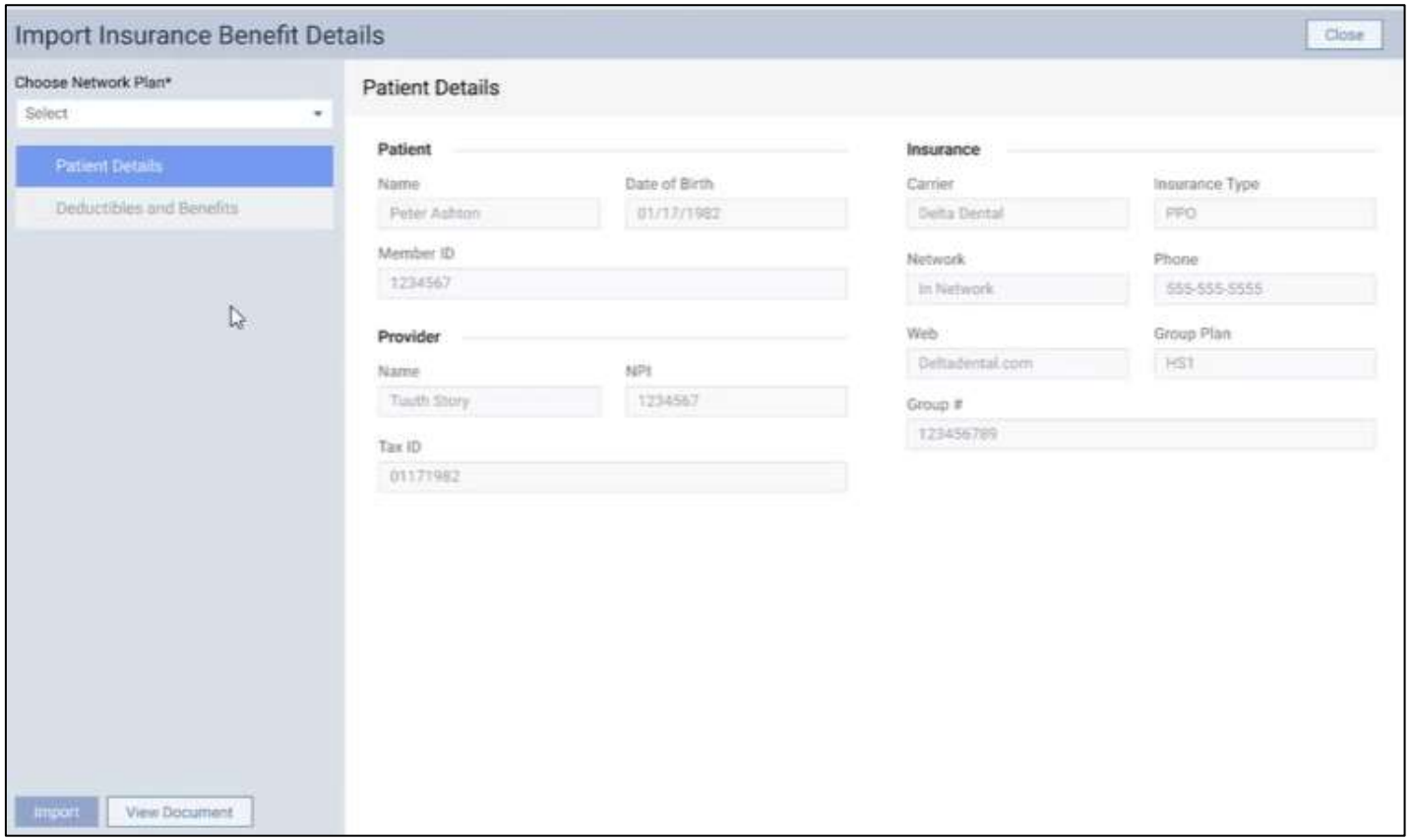
Viewing Eligibility Detail

Eligibility Document Details

6 IMPORTING ELIGIBILITY DETAILS

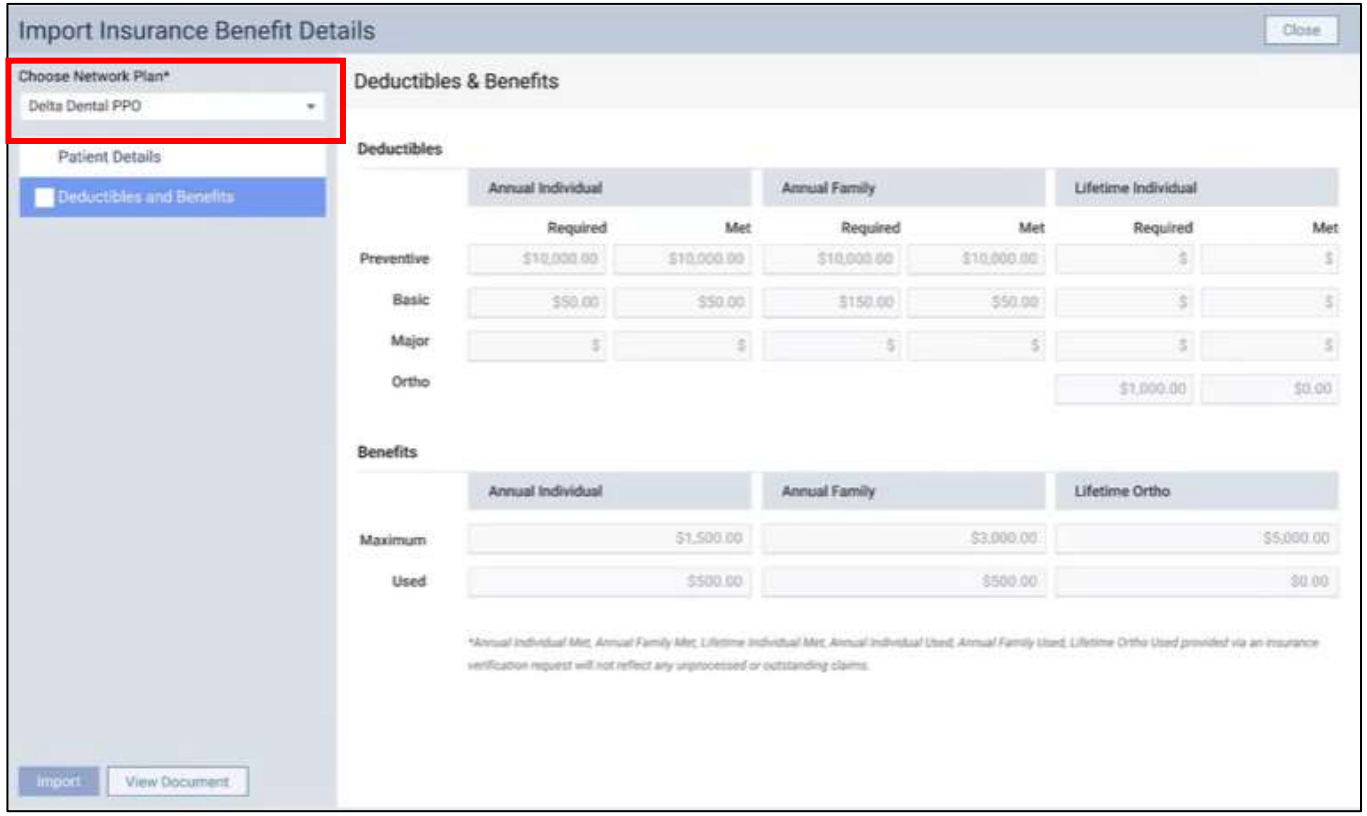
Importing Eligibility Details

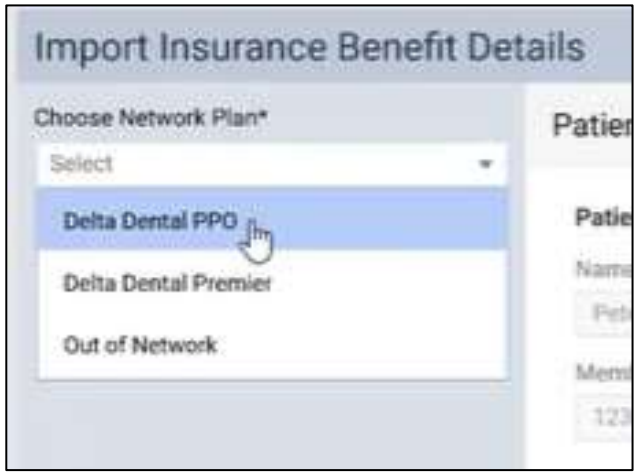
Choosing the Eligibility icon will launch the import window.



Importing Eligibility Details

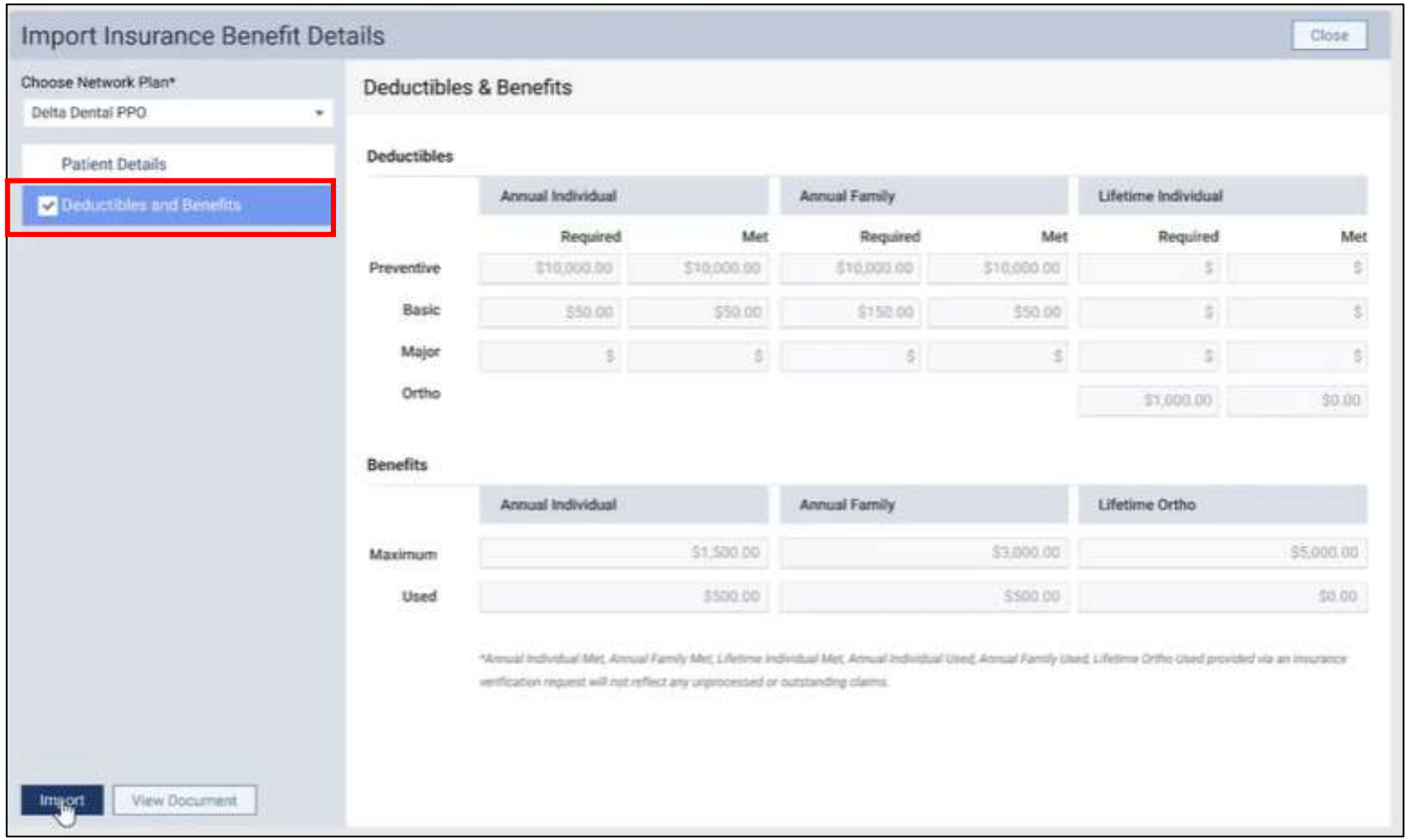
Choose Network Plan





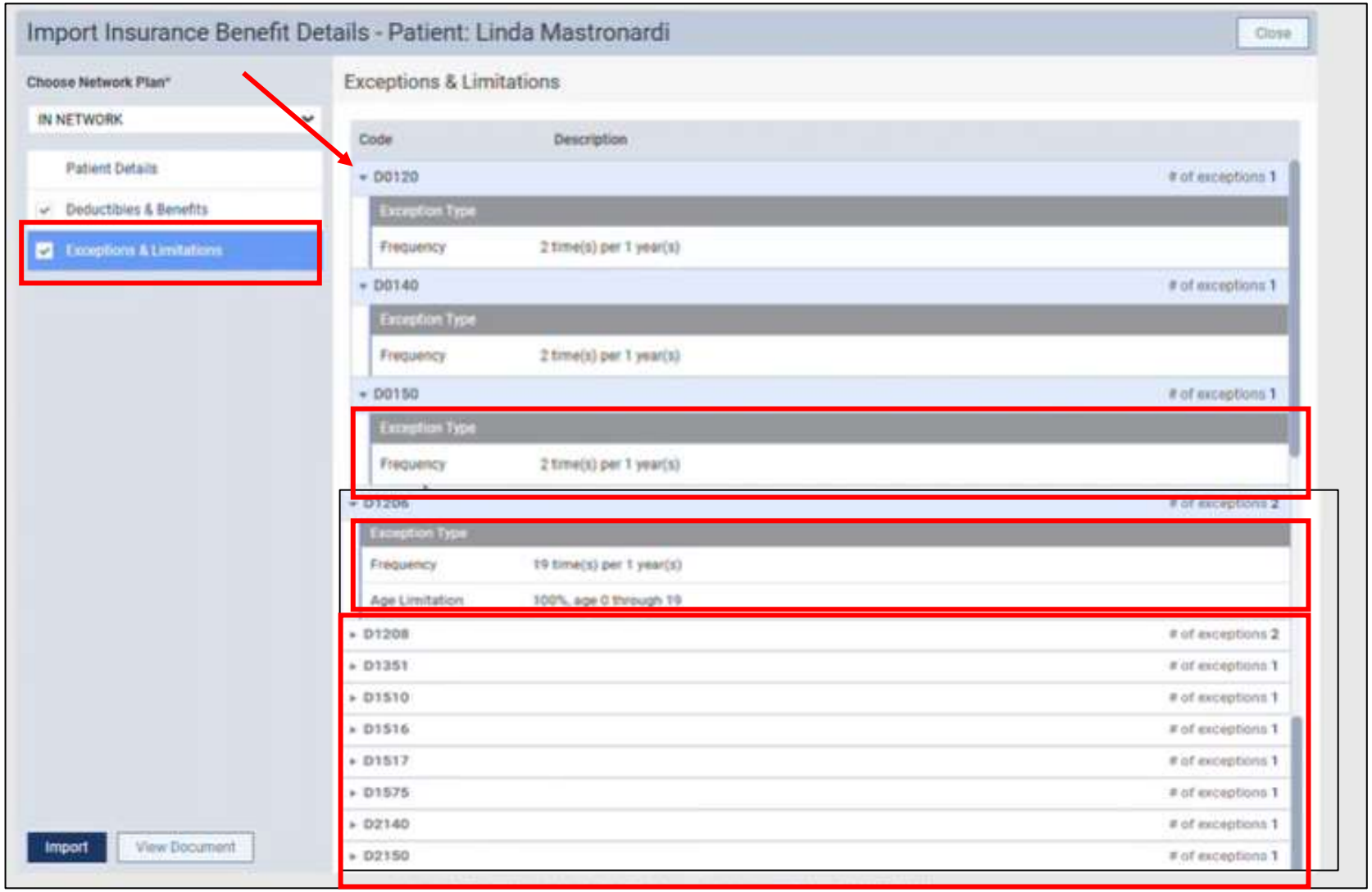
Importing Eligibility Details

Deductibles & Benefits



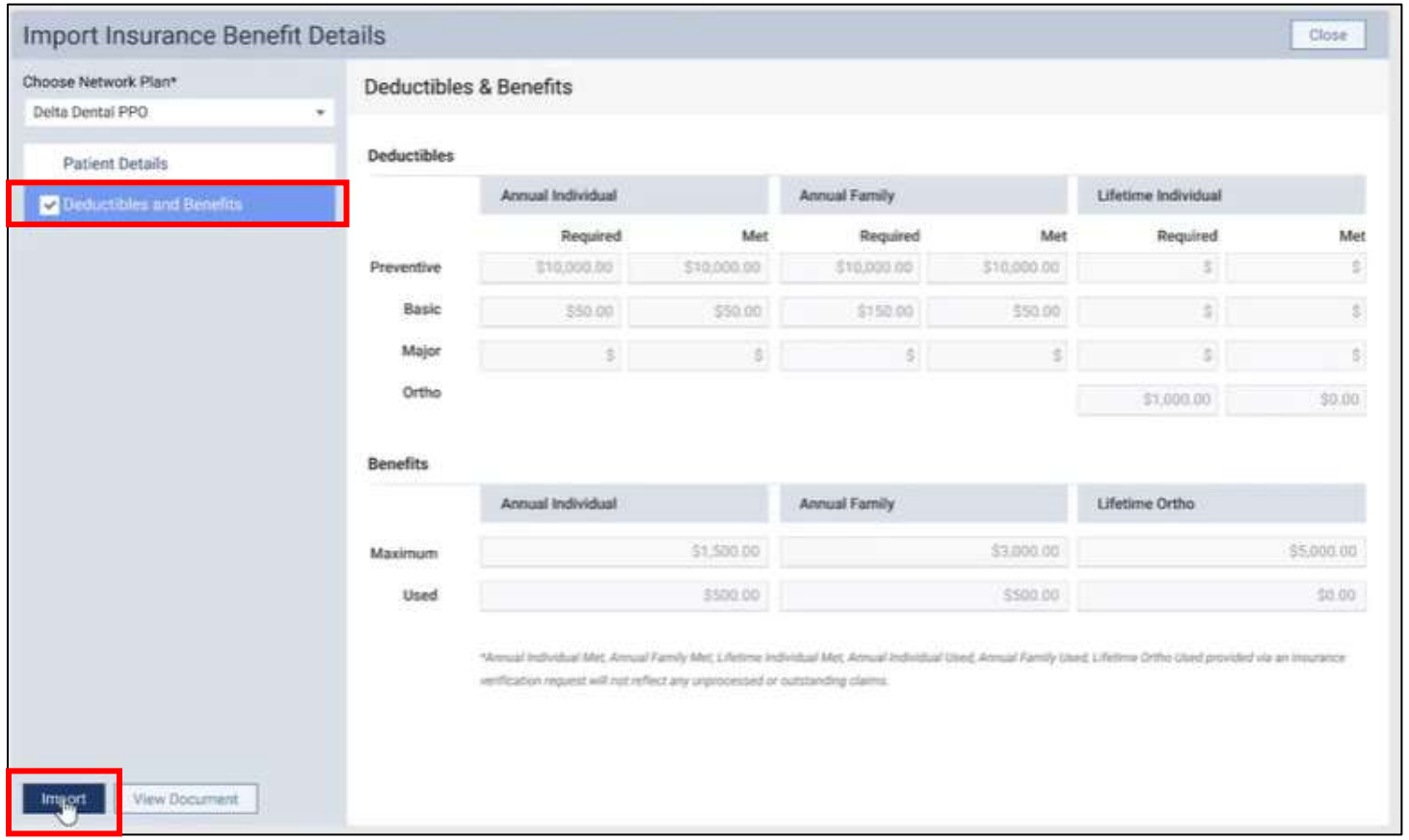
Importing Eligibility Details

Exceptions & Limitations



Importing Eligibility Details

Deductibles & Benefits



Importing Eligibility Details

Mark as Done marks the import as complete, closes the window, and turns the E icon green.

Exit without Importing closes the window and leaves the E import icon so the user can return to import later.

Cancel will exit from the import window and returns you to the import detail review.

Recap

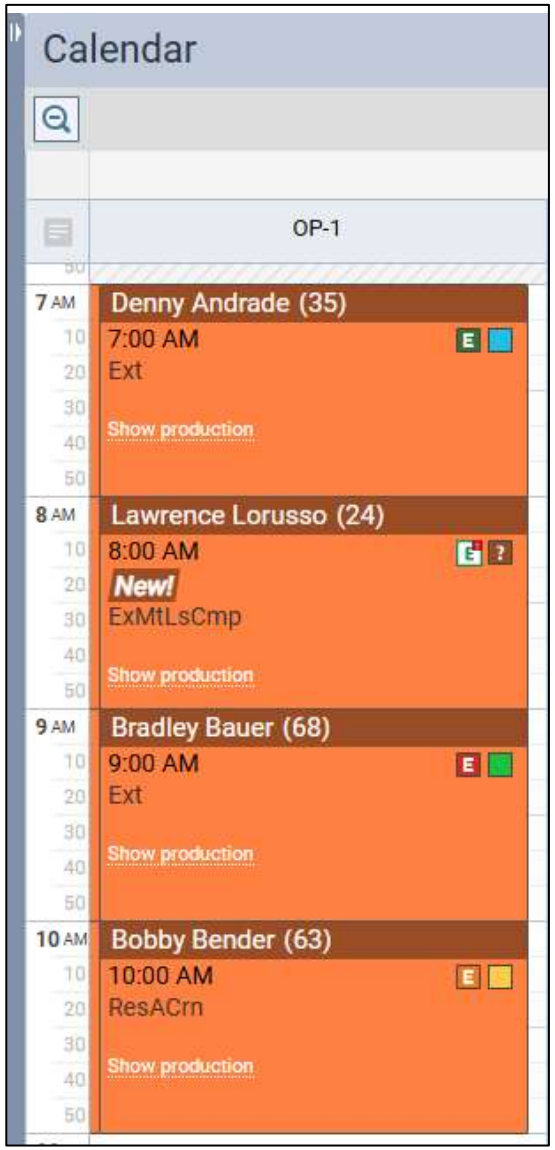
✓Payer Connection Portal

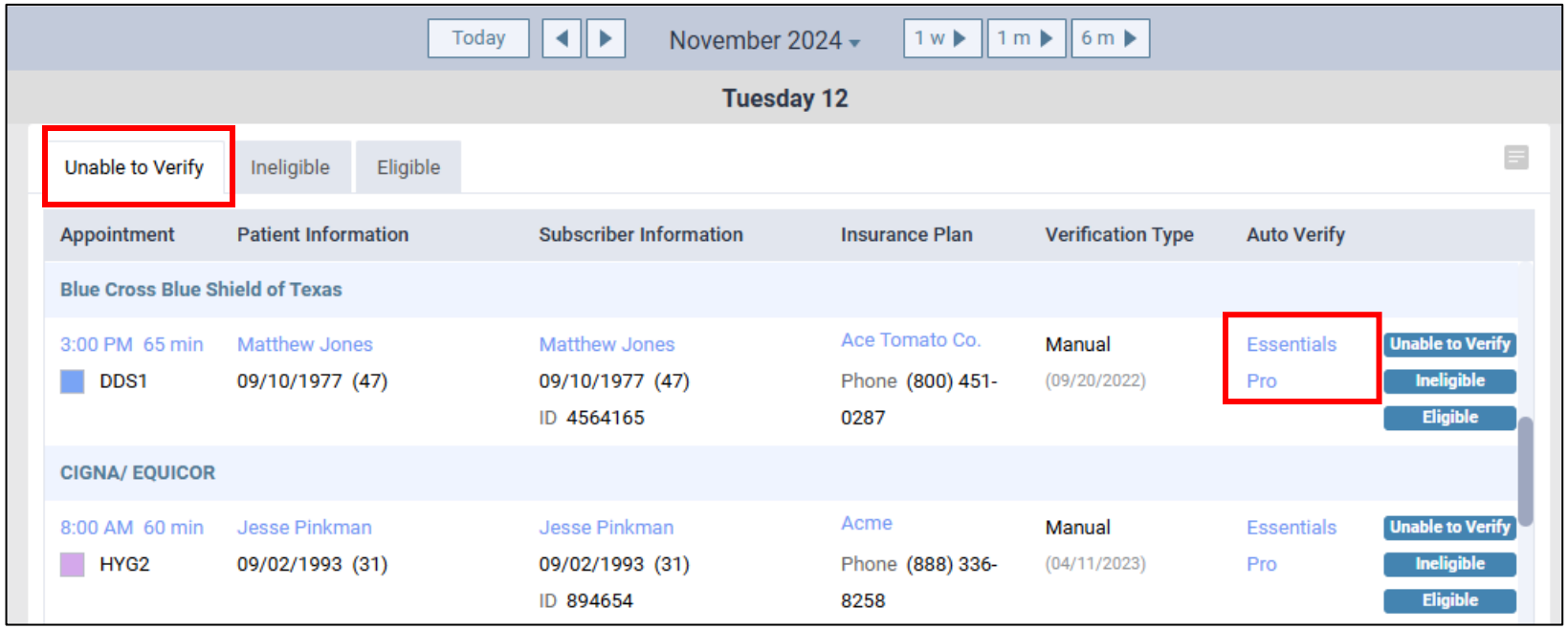
✓Viewing Eligibility Status & Details

✓Importing Eligibility Details

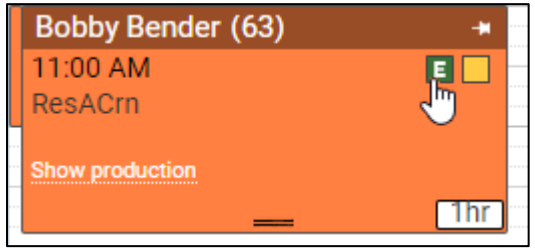
7 BRIEF WORKFLOW

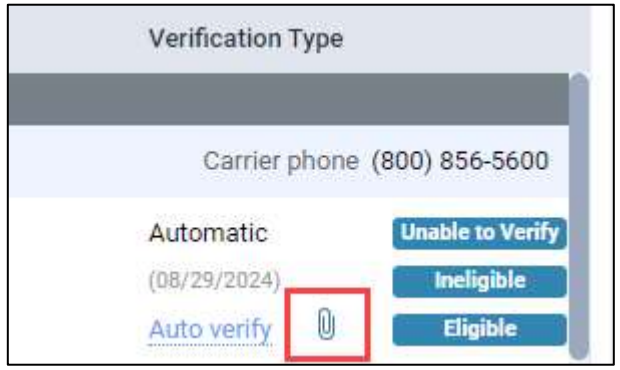
Brief Workflow

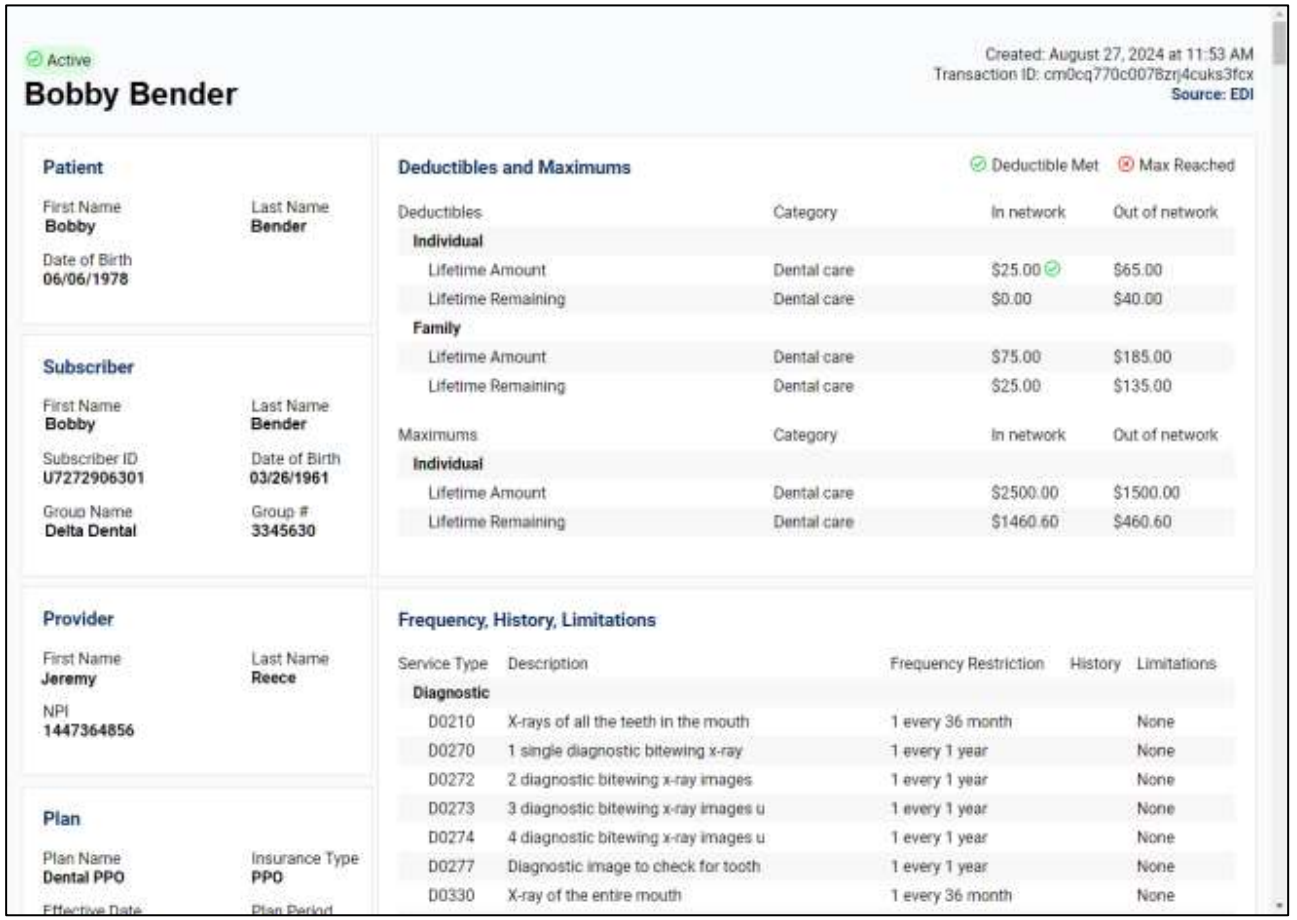




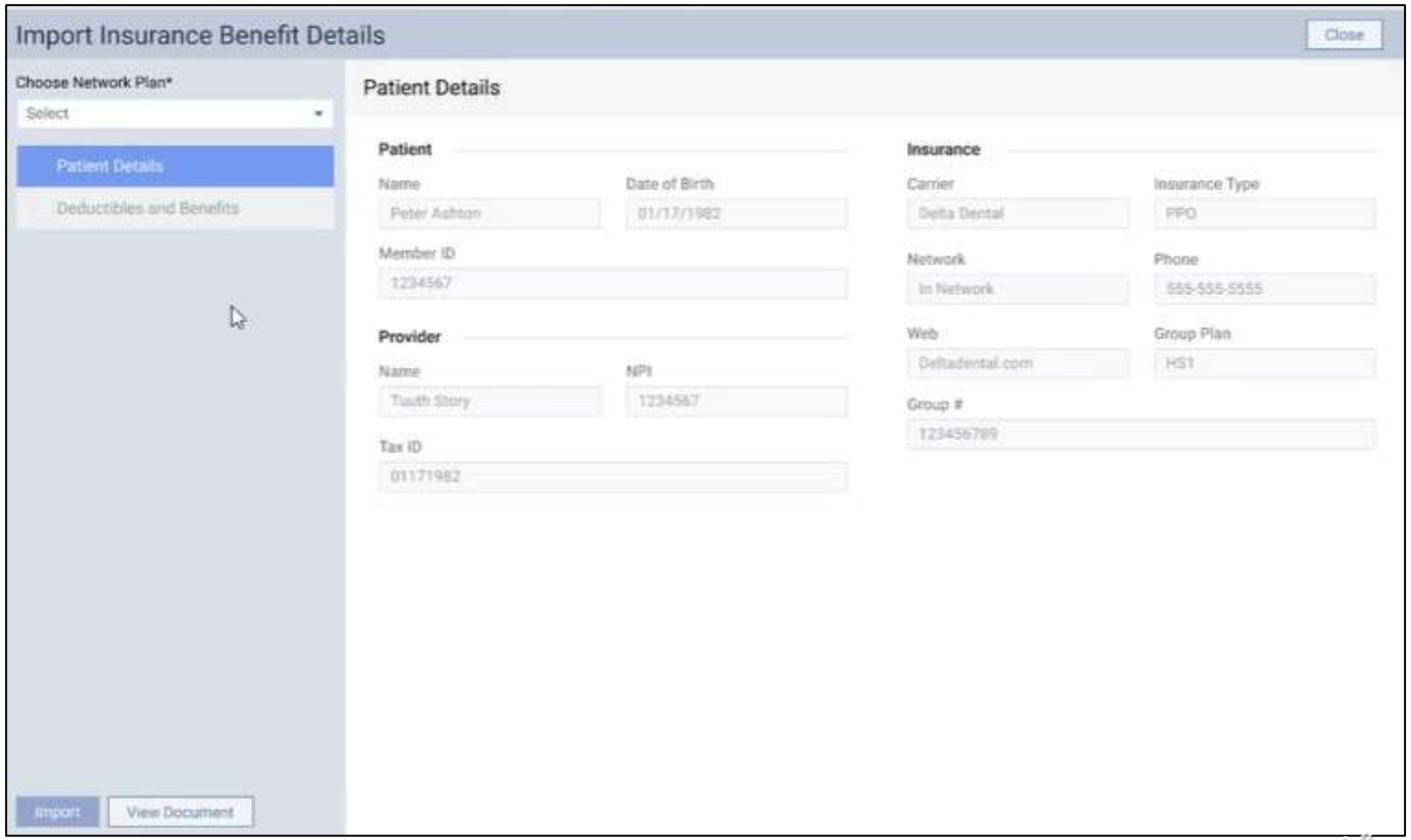
Brief Workflow



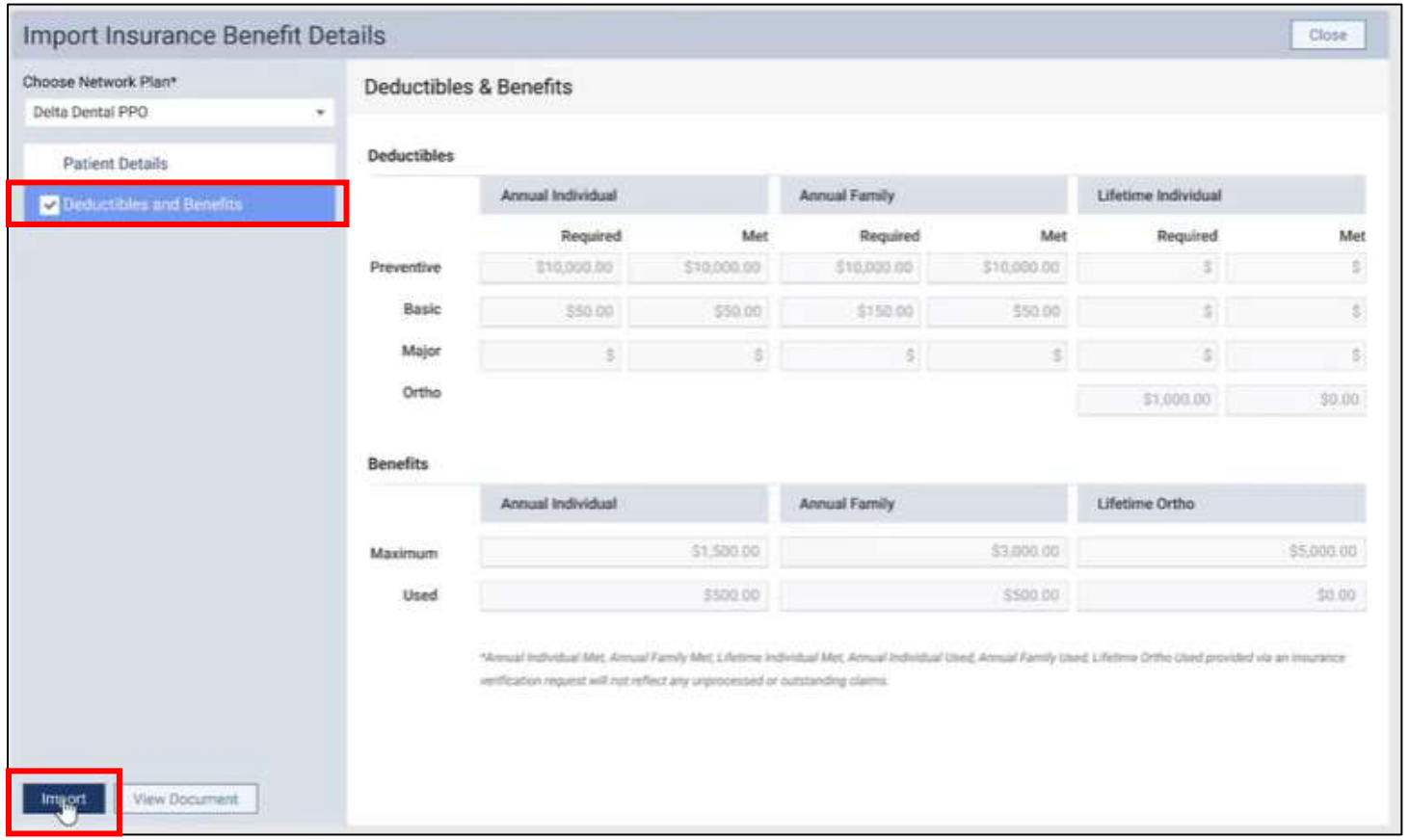




Brief Workflow



Brief Workflow

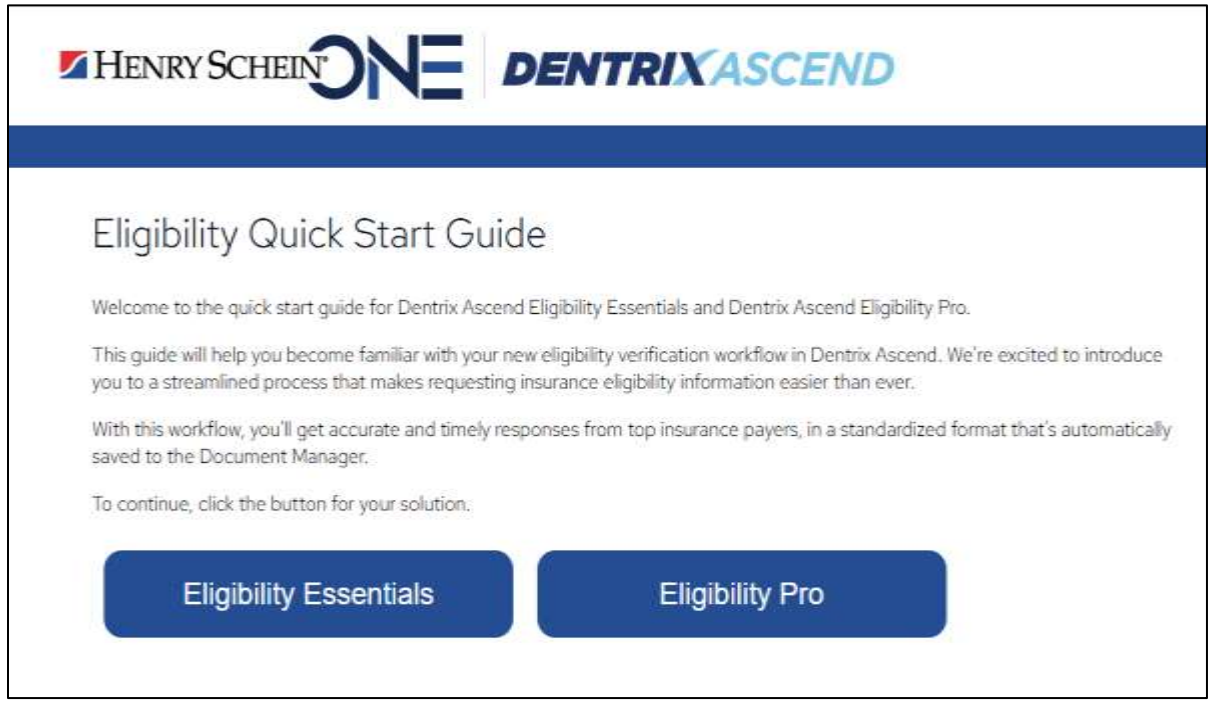


Key Points to Remember

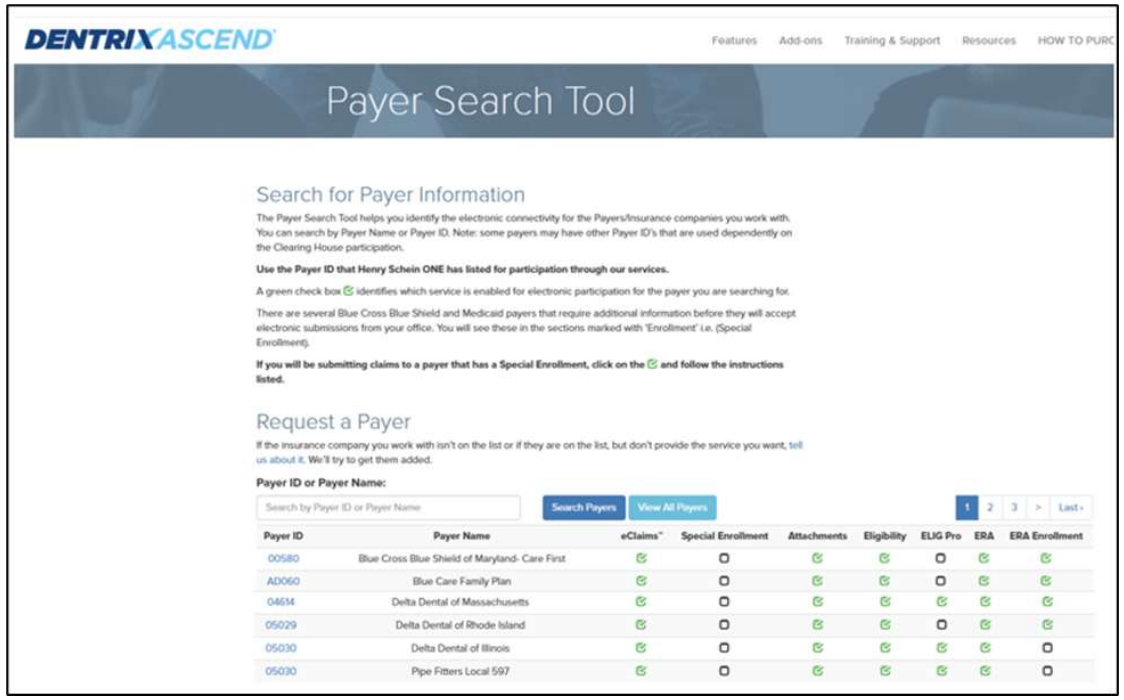
- **Setup/Settings:**
  - Location Specific
  - Automated Eligibility turned on and business day lead specified
  - Grant Access Rights to User Roles
- **Automated Eligibility Process:**
  - Nightly OR Immediately upon scheduling within specified number of business days

- **Eligibility Responses:**
  - Essentials – EDI
  - Pro – Web
- **Payer Connection Portal:**
  - Connect Payer portal usernames/passwords to receive Pro responses
- **Import Benefit Details:**
  - Important coverage details can be imported directly into Dentrix

Resources



Quick Start Guide



Payer Search Tool

On behalf of Henry Schein One

Thank You