

Verification of Benefits Tips

Calling a payer to get coverage confirmation can be tricky. Here's a handy list of tips, information you'll need, and a script for when you get a representative on the phone.

TIPS:

- Avoid calling on Monday. Wednesday is the best day to call.
- Put it on your calendar. Call early or late, not at lunchtime.
- Be prepared. Have all of the info you know that they're going to ask for. Verify coverage for multiple clients at once.
- Check multiple service codes for each new client.
- Press "0" or say representative to skip electronic prompts.
- ALWAYS collect the name of the representative, a call reference number, and a callback number/the number you're being transferred to before you let someone end the call.
- Don't hesitate to call back and speak with another rep or a supervisor.

INFO CHECKLIST:

- Billing NPI
- Practice Address
- Payer specific provider number (if applicable)
- Client's full name
- Client's date-of-birth
- Client's subscriber ID
- Client's complete address or phone number

SCRIPT:

1. On the automated prompt indicate that you need to be connected with Provider Services.
2. "I would like to verify eligibility and benefits for Outpatient Mental Health Services for a new client"
3. "Before we start, can you please confirm that I am an in-network provider for this client's plan. My billing NPI is--"
4. If the they are not in-network- verify whether they have OON coverage
5. "Please verify that you have the correct address for my practice. It is--"
6. "The subscriber ID, DOB, first and last name, and client address are..."
7. "I need to confirm the following CPT codes..."
8. "I want to confirm whether there is a number of visit limitation or authorization required for any of these services"
9. "What will the client pay for these services? Is there a copay?"
10. "Does this client have an outstanding deductible? If yes, how much have they accumulated towards it and how much is left?"
11. "What is this client's out of pocket maximum?"
12. "When did this policy begin and when will it end?"
13. "What address or electronic payer ID should I file these claims to?"
14. "Can you please provide me with your name and a call reference number?"