## **IV Process:**

1. Log into airpay and PMS - one on each screen
2. Pull up the schedule in the PMS - verify that there are no new appointment for today and tomorrow that need verified:
	1. If a plan breakdown is required
		1. Pull up the patient's appointment in airpay.
		2. If the plan breakdown was not automatically completed:
			1. Attempt to do verification via web portal
				1. If unable to verify via web portal, call the insurance carrier.
				2. Note the phone agent's name and reference number of the call.
			2. Transfer the necessary information into the airpay's IV form
		3. If the plan breakdown was automatically completed:
			1. Verify the completeness of the required information.
			2. If missing any information, go back to step 2.a.iI.1
		4. Export the pdf and upload in the patients chart
		5. Transfer all the details of the plan into the coverage table of the PMS.
		6. Sign off on the appointment screen.
	2. If a eligibility check is required:
		1. If eligibility cant be verified automatically or is missing information such as patient history:
			1. Attempt to do verification via web portal
				1. If unable to verify via web portal, call the insurance carrier.
				2. Note the phone agents name and reference number of the call.
			2. Transfer the necessary information into the airpay's IV form
		2. Update the used amounts of the deductible and maximum in the patients insurance plan coverage table.
		3. *Make a note of any history updates in the insurance plan area.*
		4. Upload the pdf into the patient's chart
		5. Sign off on the appointment screen.
3. Working two days in advance.
	1. Working through the columns one appointment at a time.
		1. If a plan breakdown is required
			1. Pull up the patient's appointment in airpay.
			2. If the plan breakdown was not automatically completed:
				1. Attempt to do verification via web portal

If unable to verify via web portal, call the insurance carrier.

Note the phone agent's name and reference number of the call.

* + - * 1. Transfer the necessary information into the airpay's IV form
			1. If the plan breakdown was automatically completed:
				1. Verify the completeness of the required information.
				2. If missing any information, go back to step 2.a.iI.1
			2. Export the pdf and upload in the patient's chart
			3. Transfer all the details of the plan into the coverage table of the PMS.
			4. Sign off on the appointment screen.
		1. If a eligibility check is required:
			1. If eligibility cant be verified automatically or is missing information such as patient history:
				1. Attempt to do verification via web portal

If unable to verify via web portal, call the insurance carrier.

Note the phone agent's name and reference number of the call.

* + - * 1. Transfer the necessary information into the airpay's IV form
			1. Update the used amounts of the deductible and maximum in the patient's insurance plan coverage table.
			2. *Make a note of any history updates in the insurance plan area.*
			3. Upload the pdf into the patient's chart
			4. Sign off on the appointment screen.

Policy:

* + When an appointment is verified, enter a note on the appointment with the following format: "Verified (Date) - (Signature)"
	+ If you find yourself on hold, make sure to continue working on other verifications that don't require a phone call while you are waiting.
	+ No Eligibility Check: Visited within the same calendar month.
	+ Eligibility Check: Visited outside the calendar month.
	+ Full Breakdown: Once a year at renewal.

Questions to answer:

* Does airpay have a way to flag new appointments that haven't been added
* Is there a plan note section in Airpay? Is there a place to indicate how it was verified (via web portal or phone call)?
* Is everything on the Airpay form required?
* Does Airpay have the ability to differentiate between eligibility check and full breakdown needs for a patient?