

Insurance Summary Page (ISP)

Navigation & Quick Reference Guide

Watch the video overview (3 min): [Insurance Summary Page - Navigation & Overview](#)

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1. Access the Insurance Summary Page (ISP)

Option A:

1. Open the **Patient Details** page for the patient you'd like to view > select the **Insurance** tab.
2. Review insurance policies listed by exam.
 - a. Patients with multiple exams or policies will have multiple entries.
3. Review the **Status** column.
 - a. Before a claim is created, the status reflects eligibility verification status.
 - b. Once a claim exists, the status reflects the claim lifecycle.
4. Select **View Policy** to open the Insurance Summary Page.

The screenshot shows the OrthoFi Patient Details page for Jack Green. The 'Insurance' tab is selected in the top navigation bar. Below the tabs, there's a table with columns: Carrier, Subscriber, Status, Plan Priority, and Action. The 'Status' column is highlighted with a green arrow and the text 'ELIGIBILITY VERIFICATION STATUS'. The 'Action' column has a 'View Policy' button highlighted with a green box.

Option B: On the Dashboard or Patient Details Page, click the **I icon** to open the Insurance Summary Page.

Exam Date	Exam Type	Location	Treatment Coordinator	Patient Forms (next steps)		Status	
01/31/2023 9:00 AM	New	Nextdoor	TC Demo Config	P M I FS PP FD DP	PC Rebecca Green F Rebecca Green	Patient Started	Action

2. Insurance Summary Page Layout

The screenshot displays the OrthoFi Insurance Summary Page for Jack Green (DOB: 4/10/2016, Age 10). The page is divided into several sections, each highlighted with a numbered callout:

- 1. Insurance Policy Navigation (Switch Between Policies):** Located in the left sidebar, it includes links for "Ledger", "Insurance", "Exam Date 1/31/2023", "3P Administrators (Onalaska, WI)", and "PRIMARY".
- 2. Insurance Policy Tab:** Located at the top of the main content area, it includes tabs for "INSURANCE POLICY" and "POLICY TIMELINE".
- 3. Policy Status Section:** Located in the top left of the main content area, it displays "3P Administrators (Onalaska, WI)" and "PRIMARY POLICY". It includes a status indicator "Claim is in UNVERIFIED submission status" and a "Policy on track." message.
- 4. Policy Details Section:** Located in the top right of the main content area, it displays "Policy Details" and includes fields for Group Name, Group Number, Subscriber ID, Subscriber SSN, Subscriber Address, Subscriber Name, Subscriber Date of Birth, Patient's Relationship to Subscriber, and Patient's Name on Policy.
- 5. Eligibility Section:** Located in the middle left of the main content area, it displays "Eligibility" and includes fields for Network Participation, Policy Network Type, Policy Effective Date, Benefit Max, Benefit Remaining, Coinsurance Percentage, Verification Status, Pre-Auth & Pre-D, Waiting Period, Age Restrictions, Deductible, Coordination of Benefits, and Assignment of Benefits.
- 6. Exam Details Section:** Located in the middle left of the main content area, it displays "Exam" and includes fields for Exam Date, Exam Type, Exam Result, Treatment recommended, Practice, Configuration Demo, Treating Location, Treating Doctor, Billing Doctor, and Dr. Configuration Doctor.
- 7. Treatment & Benefits Section:** Located in the middle right of the main content area, it displays "Treatment" and "Benefit" and includes fields for Total Months in Treatment, Original Estimate, Contract Status, and Contract Signed.
- 8. Submission & Remittance Section:** Located in the bottom right of the main content area, it displays "Submission" and "Remittance" and includes fields for Submission Status, Submission Method, Appliance Placement Date, Recent Submission Date, Billing Dentist or Entity, Treating Dentist, Treating Location, Last Payment Date, Next Submission Date, Expected Payments, Payment Expected by Date, Total Time in Treatment, Time Left in Treatment, and Expected Tx End Date.
- 9. Policy Actions Section:** Located on the right side of the page, it includes a "VIEW PATIENT DETAILS" button, a "Policy Actions" section with radio buttons for "Add Note/Attachment Only" and "Flag for Claims Follow Up", a "Note" field, an "UPLOAD FILE" button, and a "SUBMIT" button.
- 10. Policy Timeline:** Located at the top of the main content area, it is a tab that is currently not selected.

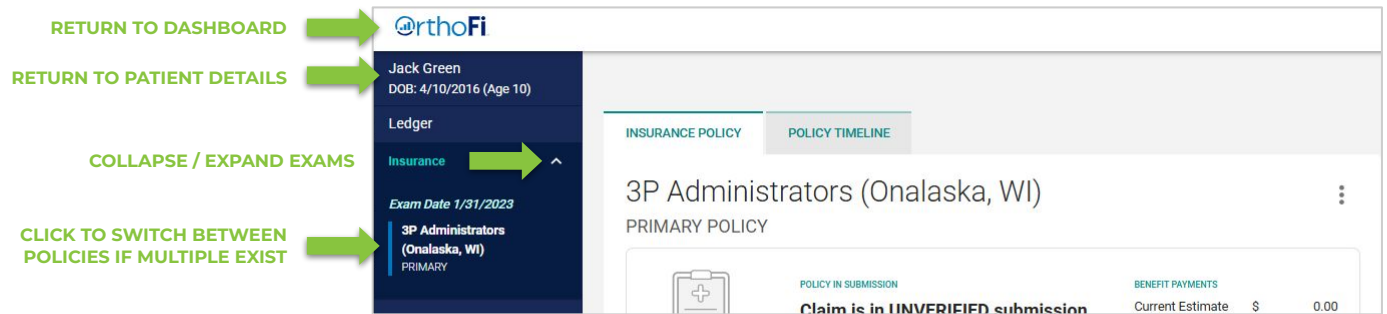
Insurance Summary Page (ISP) Sections

1. Insurance Policy Navigation (Switch Between Policies)
2. Insurance Policy Tab
3. Policy Status Section
4. Policy Details Section
5. Eligibility Section
6. Exam Details Section
7. Treatment & Benefits Section
8. Submission & Remittance Section
9. Policy Actions Section
10. Policy Timeline

3. Insurance Policy Navigation (Switch Between Policies)

Policy Navigation

- Click a **carrier name** to view a different policy.
 - Click the **^** or **v** arrows to show more or less exams and adjust the navigation view.
 - Click the **OrthoFi logo** to return to the Dashboard
- Click the **patient name** to return to the Patient Details page for the patient.

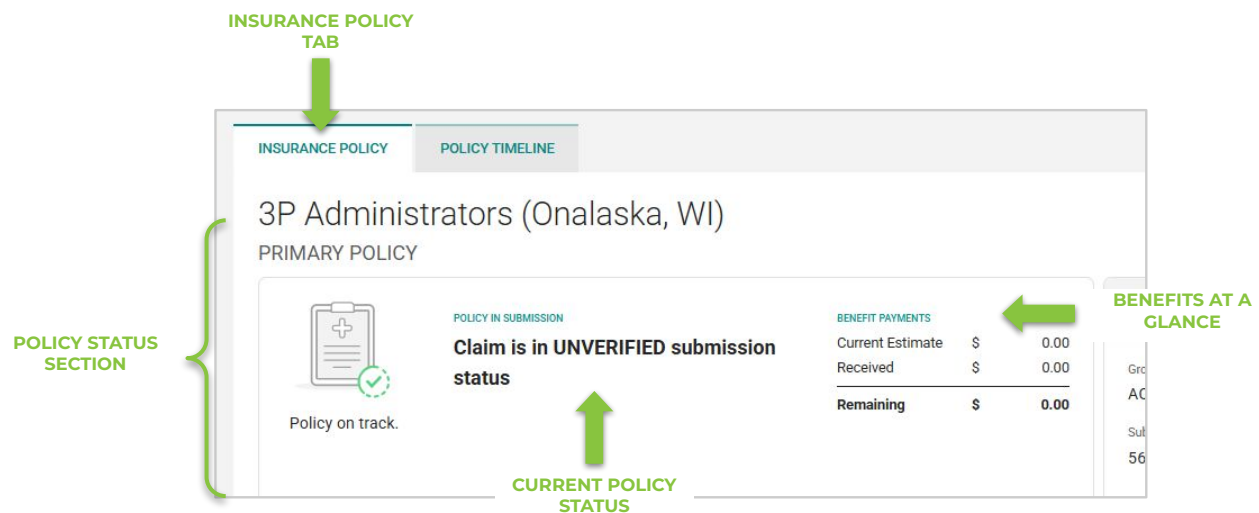


4. Insurance Policy Tab: Policy Status Section

The Policy Status section on the Insurance Policy Tab is the quickest way to check where a policy is in its lifecycle.

It displays:

- Current policy status
- Additional status details (when applicable)
- Active follow-ups or actions being completed by OrthoFi
- Benefits at a glance: Estimates, benefits received, and benefits remaining



5. Insurance Policy Tab: Policy Details Section

Displays carrier, subscriber, and group information.

INSURANCE POLICY **POLICY TIMELINE**

3P Administrators (Onalaska, WI)

PRIMARY POLICY

POLICY IN SUBMISSION
Claim is in **UNVERIFIED** submission status
Policy on track.

BENEFIT PAYMENTS
Current Estimate \$ 0.00
Received \$ 0.00
Remaining \$ 0.00

Policy Details ⓘ Carrier Tel. (555) 666-7777

Group Name	Group Number
AOB to Patient	65759292636
Subscriber ID	Subscriber SSN
5681234567	***-**-2963 ⓘ
Subscriber Address	Subscriber Name
123 My Street Next Door, TX 12345	Rebecca Green
Subscriber Date of Birth	Patient's Relationship to Subscriber
9/28/1984	Child
Patient's Name on Policy	
Jack Green	

POLICY DETAILS SECTION

6. Insurance Policy Tab: Eligibility Section

Displays insurance verification results after the eligibility check is complete.

From the ⋮ (three-dot menu) you can:

- View the Activity Log
- Request a Recheck
- Complete a Pre-Auth/Determination
- View Eligibility Check details

INSURANCE POLICY **POLICY TIMELINE**

3P Administrators (Onalaska, WI)

PRIMARY POLICY

POLICY IN SUBMISSION
Claim is in **UNVERIFIED** submission status
Policy on track.

BENEFIT PAYMENTS
Current Estimate \$ 0.00
Received \$ 0.00
Remaining \$ 0.00

Eligibility ⓘ

Network Participation	Policy Network Type
Out of Network	PPO
Policy Effective Date	Benefit Max
1/1/2022	\$2,000.00 Lifetime
Benefit Remaining	Coinurance Percentage
\$2,000.00	50%
Verification Status	Pre-Auth & Pre-D
Complete 1/22/2025	none
Waiting Period	Age Restrictions
none	99 max
Deductible	Coordination of Benefits
\$0.00	Standard
Assignment of Benefits	
Subscriber	

[VIEW ELIGIBILITY CHECK](#) ⓘ [VIEW ELIGIBILITY CHECK DETAILS](#)

- **VIEW THE ACTIVITY LOG**
- **REQUEST A RECHECK**
- **COMPLETE A PRE-AUTH/DETERMINATION**

7. Insurance Policy Tab: Exam Details Section

Provides a summary of the patient's exam.

Displays:

- Exam date
- Exam type
- Exam result
- Treating practice and location
- Treating and billing doctor

Exam

Exam Date
1/31/2023
8:00 AM (PST)

Exam Type
New

Exam Result
Treatment recommended

Practice
Configuration Demo

Treating Location
Nextdoor

Treating Doctor ⓘ
Dr. Associate Doctor

Billing Doctor ⓘ
Dr. Configuration Doctor

[VIEW DOCTOR INFO](#)

8. Insurance Policy Tab: Treatment & Benefits Section

This section reflects the information from the Treatment Details page, and it displays treatment duration and calculated benefits.

Displays:

- Months in treatment
- Benefit estimates
- Contract signed date (after signing)
- Contract link
- Estimated appliance placement date

Once a contract is signed, it:

- Shows the signed date (with link to the document)
- Displays the estimated appliance placement date

Treatment

Total Months in Treatment
18 - 20 months

Benefit

Original Estimate
\$1,690.00

Contract Status
Contract Signed
6/16/2026

[VIEW ESTIMATE HISTORY](#)

9. Insurance Policy Tab: Submission & Remittance Section

This section shows submitted claim information, expected payments, and months remaining in treatment.

Displays:

- Claim status
- Expected payments
- Remaining treatment months
- Click **“View Claims”** to see any submission forms generated or submitted for the policy on file.

Submission

Submission Status
Unverified

Submission Method
Electronic

Appliance Placement Date
6/16/2026

Recent Submission Date

Billing Dentist or Entity
Config Demo Ortho (as of 6/16/2026)

Treating Dentist
Associate Doctor (as of 6/16/2026)

Treating Location
123 Satellite Dr
Nextdoor, CO 12345
(as of 6/16/2026)

[VIEW CLAIMS \(1\)](#)

Remittance

Last Payment Date

Next Submission Date

Expected Payments

Payment Expected by Date

Total Time in Treatment
1 months

Time Left in Treatment
17 of 18 months

Expected Tx End Date
12/16/2027

CLICK TO VIEW SUBMITTED CLAIMS AND FORMS

10. Insurance Policy Tab: Policy Actions Section

Here, you can Flag a Claim for follow-up or leave a note on the Policy Timeline. Available actions are determined by whether or not the contract has been signed.

- **Pre-Signed Contract:** Leave timeline notes (with titles and file uploads).
- **Post-Signed Contract:** Policies can be flagged for OrthoFi Claims team follow-up.

Add a Note: Use Add/Note Attachment Only to add information or supporting documents to the policy timeline.

- Add a title.
- Attach a file (optional).
- Select Submit.
- **Note:** OrthoFi teams are not notified of timeline notes, and are only stored for reference in the Policy Timeline.

Flag for Claims Follow-Up: Follow the steps outlined in the job aid or video linked below:

- Job Aid: [How to Flag a Claim for Follow Up \[One-Pager\]](#)
- Video: [How to Flag a Claim for Follow Up \[Video\]](#)

Policy Actions

☐ Add Note/Attachment Only

☐ Flag for Claims Follow Up

Note

UPLOAD FILE

SUBMIT

11. Insurance Policy Tab: Additional Actions

From the **⋮ menu** next to the carrier name, you may be able to:

- Edit Policy (before eligibility is completed)
- Terminate Policy (must include a date for the policy to be terminated in the system)
- Access legacy insurance pages (opens in a new browser tab)

INSURANCE POLICY | POLICY TIMELINE

3P Administrators (Onalaska, WI)

PRIMARY POLICY

POLICY IN SUBMISSION
Claim is in **UNVERIFIED** submission status

Policy on track.

BENEFIT PAYMENTS	
Current Estimate	\$ 0.00
Received	\$ 0.00
Remaining	\$ 0.00

Policy Details

Carrier Tel. (555) 666-7777

Group Name	Group Number
AOB to Patient	65759292636

ADDITIONAL ACTIONS

12. Policy Timeline

The Policy Timeline combines activity previously found in separate eligibility and claims timelines.

- Consolidates all notes into a single timeline for easier review.
- Notes display with a title, author (system, practice, or admin), and timestamp.

Here, you can view:

- Notes
- Tasks
- Attachments
- Claims follow-up requests
- System, practice, and admin activity

POLICY TIMELINE TAB

Jack Green
DOB: 4/10/2016 (Age 10)

Ledger

Insurance

Exam Date 1/31/2023

3P Administrators (Onalaska, WI)
PRIMARY

VIEW PATIENT DETAILS

INSURANCE POLICY | POLICY TIMELINE

Policy Timeline

Date ↓	User	Description	Action
1/22/2025 1:05 PM (PST)	ORTHOF Paula McGinty	Note Benefits verified via Guardian Life Insurance Company of America website. Summary attached for reference. Patient has not used any of the \$1800.00 lifetime maximum, patient has the full benefit available.	⋮
1/22/2025 1:05 PM (PST)	ORTHOF Paula McGinty	Insurance Eligibility Check Complete Insurance Eligibility Check Complete	⋮
4/26/2025 10:37 AM (PDT)	ORTHOF Paula McGinty	Assignment of benefits changed at claim level Assignment of benefits changed at claim level from Practice to Patient	⋮
4/26/2025 10:37 AM (PDT)	ORTHOF Paula McGinty	Insurance Eligibility Check Complete Insurance Eligibility Check Complete	⋮

Policy Actions

☐ Add Note/Attachment Only

☐ Flag for Claims Follow Up

Note

UPLOAD FILE

SUBMIT

12. Quick Reference

Need to...	Located Here
View policy details	Insurance Policy tab
Check policy status	Policy Status
Review eligibility	Eligibility
Request a recheck	Eligibility : menu
View submitted claims	Submission & Remittance
Switch insurance policies	Left navigation panel
View activity	Policy Timeline
Review payments	Payment History
Leave a note	Add Note Attachment Only
Request claim assistance	Flag for Claims Follow-Up
View patient, doctor, or practice details	View Patient Details

Need Support?

Call 877-766-5220 | Mon–Fri, 8 AM – 7 PM (ET)

Email support@orthofi.com