

Pre-Authorization & Pre-Determination Overview

Guide for when insurance requires Pre-Authorization or recommends Pre-Determination

WHAT'S THE DIFFERENCE?

Pre-Determination (Recommended)

Purpose: Estimates exact benefit and patient responsibility before treatment.

- Not required for payment
- Carrier may still pay benefits without it
- Practices submit directly to carriers
- Submitting improves patient est. accuracy
- OrthoFi will note requirements in the ISP
- Est. benefits default to max allowable if not submitted

Pre-Authorization (Required)

Purpose: Approval required before treatment is performed.

- REQUIRED before treatment is rendered
- Insurance will NOT pay without approval
- Practices submit directly to carriers
- OrthoFi provides required documentation details (e.g., narratives, x-rays, scoring indices)
- Estimated benefits will NOT populate until approved

HOW YOU'LL KNOW ACTION IS NEEDED

- Look for the **purple "I" icon** on the dashboard
- This indicates Pre-Authorization or Pre-Determination is required or recommended



Submission & Workflow

Step-by-Step Process

1. Search for patient in OrthoFi
2. From Patient Detail Page, click the **Exams** tab
3. Click the **purple I icon** to navigate to the Insurance Summary Page (ISP)

Patient: Kai Crow [New Communication](#) [New Misc Charge](#)

Contact: [Add Guardian](#)

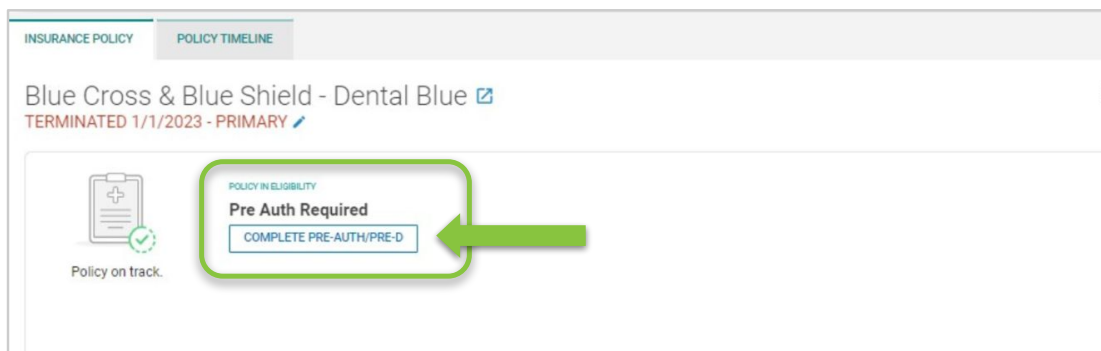
Base Locations [?](#)
Farnsworth Orthodontics: San Angelo

[Payment Plans](#) [Exams](#) [Misc](#) [Communications](#) [Ledger](#)

[+ New Exam](#)

Exam Date	Exam Type	Location	Treatment Coordinator	Patient Forms (next steps)	Status	Action
06/14/2022 12:00 PM	New	Farnsworth Orthodontics - San Angelo	Treatment Coordinator	P M I CS	Needs Attention	Action

4. Click the **Complete Pre-Auth/Pre-D** button



5. Enter the **Benefit Amount**

Note: If you choose to not file a Pre-Determination, enter **0** for the benefit amount

6. Upload the Pre-Authorization or Pre-Determination document by clicking **Click to select files**

Note: If you are not filing a Pre-Determination, upload any blank document.

7. Click **Submit**

Pre-Authorization

Patient: Kai Crow

Carrier: Blue Cross & Blue Shield - Dental Blue

Benefit Amount

\$ 1750.00

If you have the Pre-Authorization Response, upload it here and enter the confirmed benefit to continue. Otherwise, submit your estimated value to complete the process.

Click to select files

Cancel Submit

IMPORTANT NOTES:

- Always use the same procedure codes and fees as the treatment plan and insurance claim
- Always **scan and upload** approval/denial documents to the ISP for Claims reference
- Practices may submit a Pre-Determination for any patient, regardless of OrthoFi's recommendation