Verifying Claims

A step-by-step guide for reviewing and submitting claims to the OrthoFi Claims Team

Claims are pre-populated from the **Treatment Build page**, but certain fields require verification before sending to the insurance carrier.
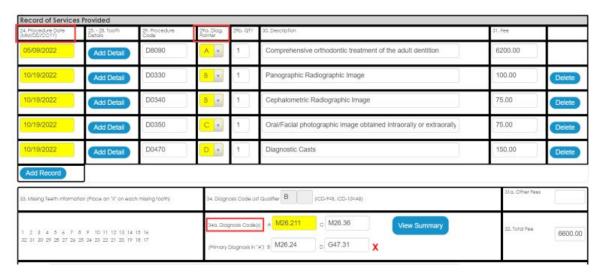
Steps to Verify a Claim

1. **Access the Claim:** Navigate to the Insurance filter of the Dashboard. When a patient's appliance placement date arrives, they will appear in this filter for claim verification.

2. **Open the Claim:** Click "Verify Claim."

3. **Check Required Fields (highlighted in yellow):**
   a. **Box 24:** Procedure Date → The date the service occurred.
   b. **Box 29a**: Diagnosis Pointer → References Box 34a, indicating which diagnosis code applies to the service.
   c. **Box 34a:** Diagnosis Code(s) → The reason for treatment. Only 1 code is required, and up to 4 codes can be included.

4. **Finalize the Claim:** Enter your PIN or password, and choose either: Submit Claim → If all dates of service are complete OR Save and Verify Later → If a future date of service is pending.