

FRONT OFFICE *Rocks*®

The Leader in Dental Front Office Solutions & Training

Calling on Outstanding Insurance Claims

Because we send so many claims daily, it becomes rather easy for a few to fall through the cracks. Most insurance companies accept electronic claims, which are typically returned to us within two weeks. However, some insurance companies only accept paper claims, which can take much longer to be returned. Whether the claim was sent by mail or electronically, it is important to track the status of claims over 30 days old.

1. To print out the Outstanding Claims list, go to the home screen of EagleSoft and click on the printer
2. Select the "Insurance" tab and scroll down to "Outstanding Claims by Aging Category", select that by clicking "Process"
3. Unclick the 0-29 Days Old box and then click "OK"
4. Print the report by selecting the "Print" button on the top
5. Staple the report together and highlight the patient names, dates of service, and ID#'s
6. The report categorizes the claims by insurance company, so you can ask about each patient on one phone call
7. Most insurance companies have automated systems that you have to work through in order to talk to a live person. Here are some tips to get you through it quickly:
 - The system will likely ask you where you are calling from, in some fashion, always select "Dental Office" or "Provider"
 - They may ask you for one, two, or all of these things:
 - o Our Tax ID is _____
 - o Our NPI is _____
 - o The State Lic. # is _____
 - You'll also need the patient's ID#, found on the Outstanding Claims Report
 - The patient and/or subscriber's DOB, also found on the report
 - The date of service in question – remember you're calling about CLAIMS
 - At some point they will ask you if you'd like to speak to a live person, if they don't just hit 0
8. When you get a live person on the phone, follow this narrative: "Hello, my name is _____ and I'm calling from _____ to check on the status of an(some) outstanding claim(s)"
9. They may ask you to repeat some of the verifying information that you entered in the automated system, and will likely ask the name of the provider/treating dentist.
10. Explain that the claim has been outstanding for some time and they will investigate it for you. Take note of what they say on the report and move on to the next patient.
11. When you're done with the report, you'll need to go into the patient notes and enter the newest updates for the status of this claim. To do this, open the patient account screen and select "View Patient Claims" from the top menu.
12. Highlight the claim you want and select "Claim Notes", then "Add Claim Notes"
13. Enter your initials, the updated info regarding the status of the claim, and then click "OK"