

## DAILY ELIGIBILITY VERIFICATION CHECKLIST

### Front Desk Reference Guide

MedSole RCM | 2026

POST THIS AT EVERY FRONT DESK WORKSTATION

#### BEFORE EVERY PATIENT VISIT – NO EXCEPTIONS

##### 1. RUN ELIGIBILITY CHECK

Use: [Your portal/clearinghouse name]  
Check: Policy status, effective dates

**⚠ DO NOT SKIP for returning patients!**

##### 2. VERIFY KEY INFORMATION

- Patient name matches exactly
- Date of birth is correct
- Policy/Member ID matches card

##### 3. CONFIRM COVERAGE IS ACTIVE

- "Active" status displayed
- Effective date is BEFORE today
- No restrictions for today

##### 4. ASK THE PATIENT DIRECTLY

*"Has your insurance changed since your last visit?"*

- If YES → Collect new card, re-verify
- If NO → Proceed but verify in system

##### 5. SCREENSHOT & SAVE

- Capture screen w/ date/time
- Save to patient's account

##### 6. COLLECT UPDATED CARD

- Copy front and back
- Verify card matches system

#### ⌚ IF VERIFICATION SHOWS INACTIVE/TERMINATED

**HARD STOP – Do not proceed until resolved!**

- 1. **Inform patient:** "Our system shows your coverage may have ended"
- 2. **Ask patient:** Do you have a new card? Has employer changed?
- 3. **Resolve:** Get new insurance OR Patient calls insurer OR Self-pay
- 4. Document in notes     5. Flag for billing team

## JANUARY 2026 SPECIAL ALERT – MEDICARE ADVANTAGE

### MANDATORY: Verify ALL Medicare Advantage patients in January 2026

- Carriers exited markets Jan 1, 2026 (600k+ patients affected)
- Old cards will NOT work – claims will be denied
- ACTION:** Run fresh verification for EVERY MA patient regardless of history

*Ask: "Did your Medicare Advantage plan change this year?"*

#### QUICK REFERENCE – PORTALS

Medicare/MA:	CMS.gov / Plan portal
BCBS:	[Your state portal]
UHC:	UHCProvider.com
Aetna:	Availity.com
Cigna:	CignaforHCP.com

#### COMMON MISTAKES (PR-27 DENIALS)

-  Skipping "regular" patients
-  Accepting old cards unchecked
-  Not asking about job changes
-  Forgetting screenshot proof

 **VERIFY EVERY PATIENT. EVERY VISIT. NO EXCEPTIONS.**

Questions? Contact: [Your billing dept] | Need help with denials? [www.medsolercm.com](http://www.medsolercm.com)