

Date-of-service verification review

Use this one-page checklist to review current information, flag gaps and make a clear handoff. Adapt it to your team's procedures.

Workflow notes only. Do not enter names, IDs, coverage details or other patient information.

Approved-system record reference*

Practice context (optional)

Review date / check time

Source / channel (no patient-specific details)

*Use only a non-identifying workflow reference permitted by your organization; otherwise leave blank.

SIX CHECKS BEFORE THE HANDOFF

- ☐ Match the record to today's visit
- In the approved system, confirm the patient, practice, provider and service date.
- ☐ Ask about changes
- Route new coverage or policyholder information through the normal intake process.
- ☐ Review current eligibility
- Review the date-of-service response. Retain the source and check time in your system.
- ☐ Review relevant benefit questions
- Check the detail needed for the estimate. Make unanswered questions visible.
- ☐ Record the review outcome
- Select a clear status below; a returned response alone does not complete the review.
- ☐ Confirm the handoff
- Tell the estimate owner what was reviewed and what is still open. Clinical decisions stay with the treating team.

FOLLOW-UP AND OUTCOME

Missing benefit questions: note category only; keep details in the approved system

Owner / role

Next step (workflow only)

Due for review

Outcome

☐ Reviewed

☐ Needs information

☐ Escalated