

pVerify Salesforce App User Guide

Version 1.1

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I. Overview of the pVerify App

The pVerify App allows Salesforce users to connect to pVerify to run Patient Eligibility and Same or Similar Inquiries directly from their organization’s Salesforce CRM solution.

Patient Eligibility, also known as benefits verification, is the process of confirming information such as insurance coverage, copayments, deductibles, and coinsurance with a patient’s insurance policy. Same or Similar inquiries refer to a patient’s 5-year Claim History for a device category and the discovery if the same device, or a similar one, has already been provided to the patient within 5 years. This is important because Medicare will not cover or replace same or similar devices that were received within the past 5 years.

Both Eligibility and Same or Similar inquiries can be processed within a matter of seconds, making results to our clients almost instantaneous.

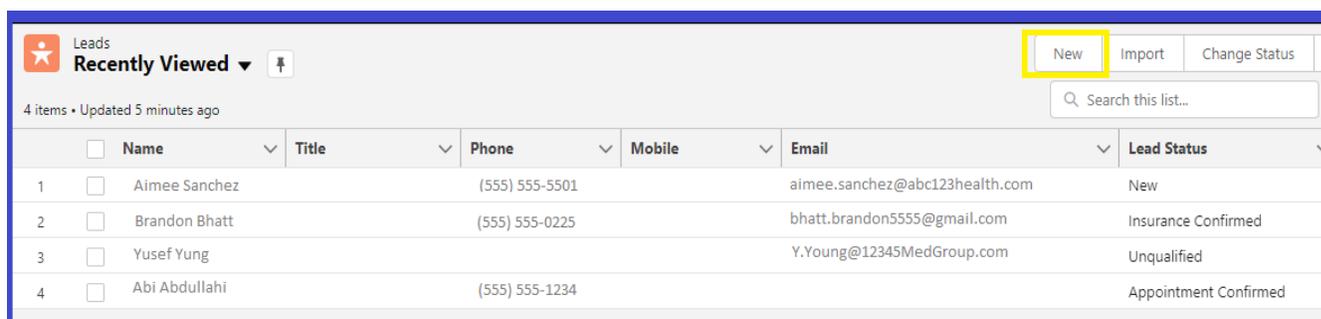
II. How to Download the pVerify App

The *pVerify Connect* application can be found on the Salesforce App Exchange. To download the application, first sign into your Salesforce account and ensure you have a valid license. Next, navigate to the home page and enter “AppExchange apps” in the search bar. Next search for “pVerify” to locate the pVerify Connect App. Next select the *download* button.

After downloading, please contact your pVerify Sales Rep to complete setup. Our Integrations team will be able to ensure that the pVerify App is correctly integrated with your system before use.

III. Check Eligibility

To check a patient’s eligibility, first select the *Leads* tab from the Salesforce menu. The Leads tab is where patient demographic information is entered, such as patient date of birth, address, gender, and insurance policy information. To enter a new patient to the *Leads* tab, select the *New* button in the top right corner of the page. Once all patient information is entered, click *Save*.



	Name	Title	Phone	Mobile	Email	Lead Status
1	Aimee Sanchez		(555) 555-5501		aimee.sanchez@abc123health.com	New
2	Brandon Bhatt		(555) 555-0225		bhatt.brandon5555@gmail.com	Insurance Confirmed
3	Yusef Yung				Y.Young@12345MedGroup.com	Unqualified
4	Abi Abdullahi		(555) 555-1234			Appointment Confirmed

To run eligibility on a particular patient, first select the patient’s name from the *Leads* tab by clicking on the patient’s name. Then, select the *Check Eligibility* button in the top right corner of the lead record. If the button is not visible, select the drop-down arrow then select *Check Eligibility* from the list. A window should appear that automatically pulls in the selected patient’s information. In the section labeled *Practice Types*, select the practice type that you want to verify eligibility on. Then click the *Check Eligibility* button in the bottom right corner.

Check Eligibility

Subscriber Details

First Name <input type="text" value="Aimee"/>	Last Name <input type="text" value="Sanchez"/>
Date of Birth <input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Mar 1, 1985"/>	Member ID <input type="text" value="0053175555"/>
* Payer <input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Aetna - 00001"/> ▼	* Provider <input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="ABC 123 Health Company"/> ▼

▼ Additional Details

* Practice Type
 ▼

IV. Same or Similar Inquiry

Checking a patient’s history for same or similar medical equipment, is very similar to the [Check Eligibility](#) process. First select the [Leads](#) tab from the Salesforce menu. The [Leads](#) tab is where patient demographic information is entered, such as patient date of birth, address, gender, and insurance policy information. To enter a new patient to the [Leads](#) tab, select the [New](#) button in the top right corner of the page. Once all patient information is entered, click [Save](#).

To run a Same or Similar inquiry on a particular patient, first select the patient’s name from the [Leads](#) tab by clicking on the patient’s name. Then, select the [Check Same or Similar Inquiry](#) button in the top right corner of the lead record. If the button is not visible, select the drop-down arrow then select [Check Same or Similar Inquiry](#) from the drop-down list. A window should appear that automatically pulls in the selected patient’s information. In the section labeled [HCPCS Codes](#), enter the HCPCS Code associated with the equipment that you are checking history on. Lastly, click the [Check Same or Similar Inquiry](#) button in the bottom right corner.

Same or Similar Inquiry

Subscriber Details

First Name <input type="text" value="Brandon"/>	Last Name <input type="text" value="Bhatt"/>
Date of Birth <input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Jan 1, 1969"/>	Member ID <input type="text" value="000125555"/>

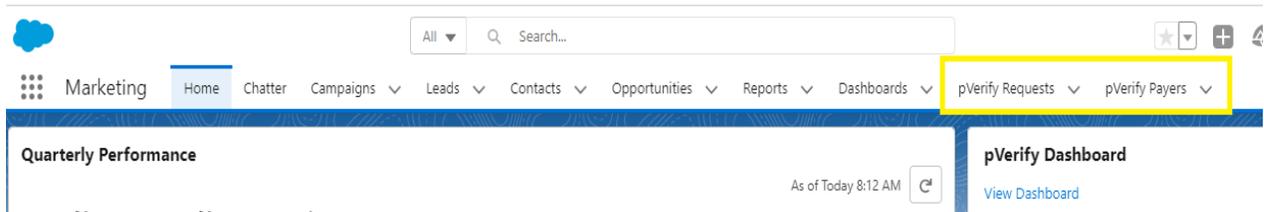
HCPCS Codes

X
 X
 X
 X
 X
 X
 X
 X
 X
 X

V. pVerify Menu Additions

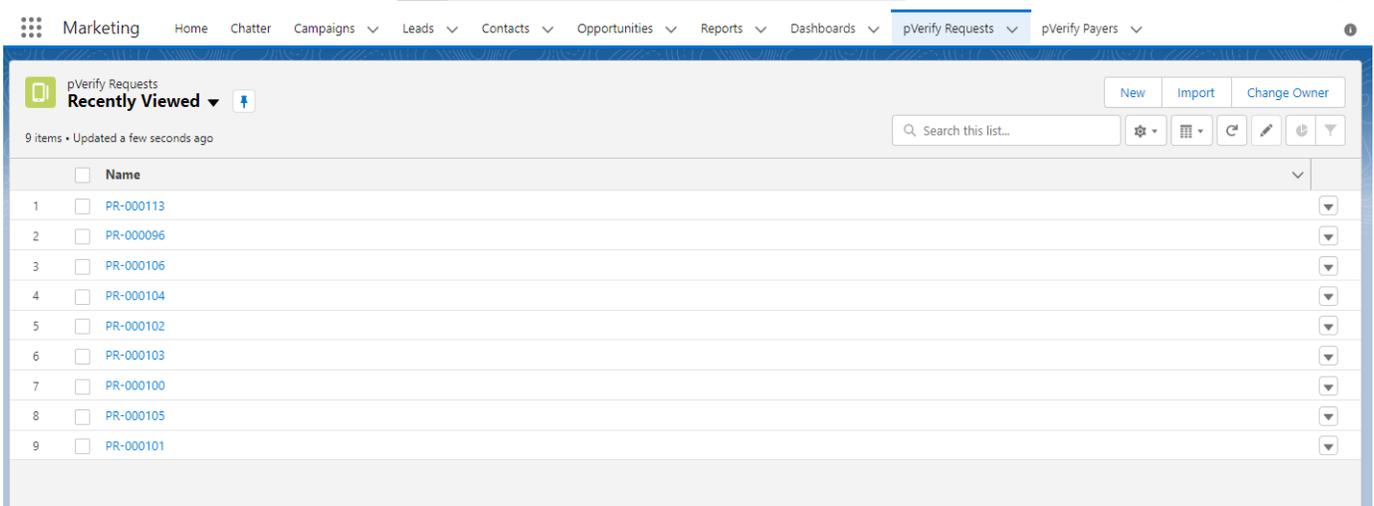
After downloading and properly integrating the pVerify Connect App with your organization’s Salesforce platform, a few new tabs will now appear on your Salesforce Menu. These tabs are:

- *pVerify Requests*
- *pVerify Payers*
- *pVerify Providers*



pVerify Requests

The pVerify Requests tab provides a history of all Eligibility and Same or Similar requests submitted through pVerify in a list view. These transactions will be assigned a unique alphanumerical Salesforce item ID number, for example “PR-000011”. Simply click on the ID number to view the details of the request.



Requests Details

The Request Details page displays the Subscriber’s demographic info, patient info, payer info, Payer response, status of the request, and time stamps of when the request was run. This page will also provide details on received from the payer, including whether the patient’s insurance coverage is Active or Inactive and benefit details for various services.

Marketing Home Chatter Campaigns Leads Contacts Opportunities Reports Dashboards pVerify Requests pVerify Payers

pVerify Request PR-000113 Change Owner Refresh Status Sharing

Details

Name	PR-000113	Owner	Jason Donahoe
pVerify Request Id	3321219	Parent Id	00QSY0001wUQYfUAO
Request Date	6/22/2022		
Request Status	Processed		
Expected Date Time			
Last Run Date	6/22/2022, 1:39 PM		
Insurance Status	N/A		
Advantage COB Start Date			
Advantage COB End Date			
Advantage Payer Name			
Effective Date			
Expired Date			

Claims (3+)

C-0000243	L1971
HCPCS:	No Claims
Status:	Ankle/Knee/Foot Brace
Category Name:	
C-0000244	L1833
HCPCS:	No Claims
Status:	Knee Orthoses
Category Name:	
C-0000245	L1851
HCPCS:	No Claims
Status:	Knee Orthoses
Category Name:	

[View All](#)

pVerify Payers

The pVerify Payers tab is used to add payers that are in the provider's network. Adding payers is necessary to run Eligibility requests to confirm a patient's insurance benefits. To add a payer simply navigate to this tab, select the "New" button, then enter Payer information, such as Payer Name and Payer Code.

Marketing Home Chatter Campaigns Leads Contacts Opportunities Reports Dashboards pVerify Requests pVerify Payers

pVerify Payers New Import Change Owner

Recently Viewed 2 items • Updated a few seconds ago

Search this list...

	pVerify Payer Name
1	Aetna
2	Select Health of Utah

Payers Details

Marketing Home Chatter Campaigns Leads Contacts Opportunities Reports Dashboards pVerify Requests pVerify Payers

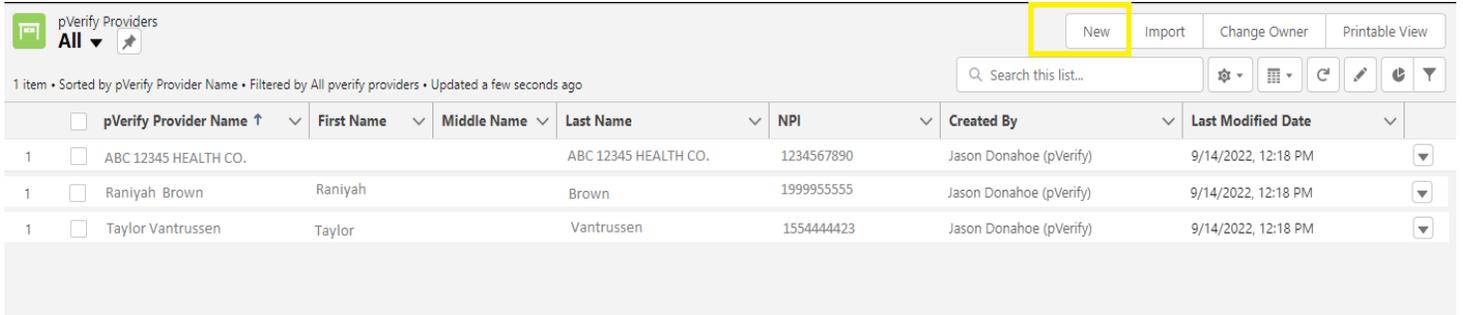
pVerify Payer Aetna New Contact Edit New Opportunity

Details

pVerify Payer Name	Aetna	Owner	Jason Donahoe
Payer Code	00001		
Archived	<input type="checkbox"/>		
Created By	Jason Donahoe, 6/3/2022, 12:55 PM	Last Modified By	Jason Donahoe, 6/3/2022, 12:55 PM

pVerify Providers Tab

The pVerify Providers tab allows users to manage the providers associated with their organization. To add a new provider to this list, simply select the [New](#) button, then enter the providers name and NPI number. Lastly select Save.



pVerify Providers
All 

1 item • Sorted by pVerify Provider Name • Filtered by All pverify providers • Updated a few seconds ago

Search this list...

[New](#) [Import](#) [Change Owner](#) [Printable View](#)

<input type="checkbox"/>	pVerify Provider Name ↑	First Name	Middle Name	Last Name	NPI	Created By	Last Modified Date	
1	<input type="checkbox"/> ABC 12345 HEALTH CO.			ABC 12345 HEALTH CO.	1234567890	Jason Donahoe (pVerify)	9/14/2022, 12:18 PM	
1	<input type="checkbox"/> Raniyah Brown	Raniyah		Brown	1999955555	Jason Donahoe (pVerify)	9/14/2022, 12:18 PM	
1	<input type="checkbox"/> Taylor Vantrussen	Taylor		Vantrussen	1554444423	Jason Donahoe (pVerify)	9/14/2022, 12:18 PM	