

# Orthodontic Benefits Checklist

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Date: \_\_\_\_\_ Rep Name: \_\_\_\_\_

Patient: \_\_\_\_\_

Patient's Date of Birth: \_\_\_\_\_

Relationship to Subscriber:

Self     Spouse     Dependent

Eligibility Date: \_\_\_\_\_

Subscriber: \_\_\_\_\_

Subscriber Date of Birth: \_\_\_\_\_

Subscriber ID# (SS or ID#): \_\_\_\_\_

Employer/Group Name: \_\_\_\_\_

Insurance Company: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Plan Type:

PPO     Traditional     Capitation     Fee schedule

Out-of-Network benefits:     Yes     No

If the Doctor is a member of the orthodontic patient's insurance network, does the plan control the maximum fee that the doctor may charge by contract, even though there is no orthodontic coverage by the plan?

Yes     No

Who is eligible for Orthodontic benefits:

Subscriber     Spouse     Dependents up to age \_\_\_\_\_

Maximum benefit: \$ \_\_\_\_\_

Annual     Lifetime     Combined Dental/Ortho

Remaining Benefit: \$ \_\_\_\_\_

Ortho Deductible: \$ \_\_\_\_\_

Annual     Lifetime     Combined Dental/Ortho

Waiting Period     Yes, how long? \_\_\_\_\_     No

## Payment of Orthodontic Benefits

Are benefits paid on an automatic schedule after the initial claim for active treatment?     Yes     No

If yes, what are the payment intervals?     Monthly     Quarterly     Other \_\_\_\_\_

Is the placement of post-orthodontic retainers paid separately?     Yes     No

Is it necessary to establish medical necessity for benefits to be paid?     Yes     No

If treatment is provided as a cosmetic service, does the PPO control the fee?     Yes     No

Note: Case fees may be subject to fee capping when participating with a PPO in a state without non-covered benefit legislation and for patients covered by self-funded (ERISA) plans. That is, the payer can dictate the fee charged for orthodontic services, even when no reimbursement is provided. If in a state with non-covered benefit legislation and orthodontic services are not a covered service, the patient will generally be responsible for the full orthodontic fee with no mandated write-offs if an insured plan.