



The 7 Checkpoints for Every Intake

Run before a new patient's first appointment. Repeat every January when deductibles reset.

1



Exact Modality + License Coverage

Confirm outpatient acupuncture (97810/97811) or manual therapy (97124/97140) is covered when billed by an independently licensed acupuncturist or massage therapist.

2



Diagnosis Restrictions

Verify which diagnoses are covered; benefits may be limited to chronic low back pain, migraines, or chemo-induced nausea.

3



Third-Party Carve-Outs

Confirm whether benefits are managed by the payer or carved out to ASH or Optum.

4



Authorization Thresholds

Ask whether prior auth is needed and what visit number triggers formal review.

5



Deductible Status

Check how much of the deductible has been met and whether alternative care applies to it.

6



Combined Therapy Pools

Verify annual visit caps and whether visits are shared with PT or chiropractic.

7



Timely Filing + Call Reference

Record the filing limit, rep name, date, and reference number.



Quick Reminder

Verify before treatment. Document every call. Collect patient responsibility up front.