

# GeneDx Healthcare Provider Guide: Benefit Investigation FAQs

Requesting a benefit investigation (BI) in the GeneDx Healthcare Provider Portal is fast and easy. The majority of benefit investigations generate an immediate patient out-of-pocket (OOP) estimate, while the remainder will usually be returned in 3-5 business days.

This guide should answer the most common questions. For any billing-related questions not in this guide, please contact your Sales Representative or the GeneDx Billing Team at [billing@genedx.com](mailto:billing@genedx.com), or by calling 1-888-729-1206, option 2.

## General Questions

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### What is changing?

We are making improvements to the process for obtaining a BI. Now completed online via the GeneDx Provider Portal, most BIs will return an instant result and the rest will be returned in approximately 3-5 business days. Additionally, as part of the BI process, a personalized Patient Letter is available for download within the Portal that provides the out of pocket price (OOP) and self-pay pricing information. This will help facilitate the patient's decision-making process and provide more information and visibility to healthcare providers. As part of this upgrade, we will be discontinuing the option to perform a BI or place a hold for BI via a paper Test Requisition Form (TRF).

### Why is this change in process happening?

The previous BI process resulted in long sample holds. Providing the BI at the point of patient interaction allows healthcare providers to make patients aware of their estimated OOP costs for both with insurance and self-pay options, so that patients can make a decision prior to sample collection and submission. In the end, this will lead to overall shorter sample receipt-to-test completion times.

### What is the timeline for this change in process?

- **January 14, 2021:** The new electronic, in-Portal BI process launches
  - "Hold for BI" option no longer available in Provider Portal when a result is returned with an OOP estimate.
  - Discontinue conducting courtesy BIs and patient notification for non-'Hold for BI' samples.
- **February 23, 2021:** Add "Hold for Benefit Investigation" checkbox to pending BIs in the Provider Portal.
- **February 25, 2021:** "Hold for BI" option removed from paper TRF on our website.
- **April 1, 2021:** Grace period for receipt of paper TRF "Hold for BI" ends.

- Samples will no longer be held for BIs in lab unless a Portal BI has a pending result, the provider checked the “Hold for Benefit Investigation” checkbox, the order is submitted, and the sample is received.
- The testing process will commence for samples received from Portal orders with a returned BI amount or for paper TRF orders once all testing paperwork is processed.

Is this the same BI tool that GeneDx used in the past?

No, it is new to GeneDx.

## Logistics

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During the grace period, if a manual BI is completed, will the sample be held for BI results?

It depends.

- When an order placed in the Portal returns a pending result, a provider may select the “Hold for Benefit Investigation” box before placing the order. In this case, the sample will be held for BI results after the sample is received.
- For samples that are submitted with paper TRFs on which the “Hold for BI” box is checked, they will be held, but only during the grace period, which ends on April 1, 2021.

Can a paper TRF still be used?

Yes, paper TRFs will remain as an option for ordering. However, BI requests can only be completed in the GeneDx Provider Portal.

Is a GeneDx Provider Portal account required?

Yes, all providers who would like to submit BI requests will need to have a Portal account. It takes just a few minutes to get started here: [www.genedx.com/registration](http://www.genedx.com/registration)

Can a BI be submitted via phone, fax, email, or a paper TRF?

BIs are no longer available via phone, fax, or email; however, there is a grace period until April 1 where the “Hold for BI” request will still be honored when marked on a paper TRF. After April 1, a BI can only be conducted within the GeneDx Provider Portal.

What happens if a provider sends an old TRF with a “Hold for BI” after the grace period is over? Will they be notified?

Once a test has been ordered and the sample is received at the GeneDx lab with all necessary paperwork and information provided, we will start the testing process. Should an old TRF with a “Hold for BI” be sent in after April 1, the provider will not be notified since the grace period has passed.

What should be done if the patient needs to change payment type (i.e., self-pay instead of commercial insurance)?

- If the healthcare provider has not yet submitted the order, the patient will need to let the provider know about the change. Then the provider will need to update the draft Portal order or fill out the TRF to ensure the correct payment type is selected.

- If the provider already submitted the order, the patient will need to call Billing at 1-888-729-1206, option 2, to update the bill type on the order.
- Once the test has been run and results returned, it is not possible to switch from insurance to self-pay or self-pay to insurance.

#### If a Prior Authorization (PA) is approved, does the BI estimated OOP change?

No. The BI OOP estimate does not change. Additionally, please note that an approved PA does not guarantee coverage.

#### If a Prior Authorization (PA) is denied, what options are available?

The two options are to either cancel the test, or the patient can opt to utilize the self-pay option. To help make the cost more affordable for a wider range of budgets, we offer the option of interest-free, no-fee installment plans.

#### If a patient has secondary insurance, how will the estimated OOP be calculated?

BIs are never performed on secondary insurance, so the estimated OOP only represents the primary insurance. We encourage patients who have questions about their estimated OOP to reach out to their health insurance company directly to ask about their medical benefit coverage.

#### If a patient's insurance changes, how does a provider update it for a pending BI?

- If the provider is waiting for the results of a pending BI to be returned and did not yet complete the test order, they may log into the Portal, update the patient's insurance in the DRAFT test order, then click the Conduct BI button again; alternately, they can create a new test order and click the Conduct BI button.
- If the order has already been submitted but the sample has not been sent in, the provider needs to cancel the order and submit a new one, following the same process.
- If the sample has already been shipped, the provider needs to call GeneDx Billing at 1-888-729-1206, option 2 to update the patient's health insurance information. This information can only be updated once the sample has arrived at GeneDx. The patient will need to reach out to their health insurance company directly, to ask about their estimated OOP amount. Patients shall be financially responsible for the OOP amount solely determined by their health insurance company based on the patient's medical benefit plan.

#### What happens if a provider orders a test but forgets to perform a BI before the sample is sent to GeneDx?

Once a sample is sent in and all necessary paperwork is received, the testing process will begin. The order may be canceled before the sample is tested; however, if the test is not canceled, the patient will be responsible for the cost of testing. We encourage patients who have questions about their estimated OOP to reach out to their health insurance company directly to ask about their medical benefit coverage.

#### What if the patient does not have their insurance information available?

Insurance information is required both to be able to submit the BI request in the Portal and to be able to order the test using their commercial insurance. The patient may opt for self-pay if they do not have or

choose not to use their health insurance. If the patient chooses the self-pay option, they will not be able to submit the GeneDx invoice to their health insurance company at any point.

#### How long is the BI good for? Is there an expiration date?

The BI is a snapshot of the moment it was run. There is no time period during which the BI is “valid,” nor any expiration date. The BI is only an estimate of the patient’s current medical benefits plan and usage at the time the estimate request was returned. The provider may conduct a new BI at any time prior to submitting the order by logging into the Portal, creating a DRAFT test order, then clicking the Conduct BI button again.

#### Can a provider create a new account and place an order immediately?

It depends.

- Newly registered ordering providers who entered their NPI number during registration will be able to place orders and perform a BI as soon as they verify their email address. This will initially be under the “House Account” ZX900; however, their new Portal account will get moved to their institution’s GeneDx account number once their account is confirmed by Sales Support.
- For ordering providers who didn’t register with their NPI or for providers without an NPI, they will not be able to place an order or perform a BI right away. The Portal account verification process can take up to 48 hours, but is often faster. Once verified, the provider can place orders and conduct BIs in the GeneDx Provider Portal.

#### For BIs that are not returned immediately, how will the provider be notified when it is complete?

The provider can subscribe to Benefit Investigation Results Notifications in their GeneDx Provider Portal preferences.

- To subscribe to Benefit Investigation Result Notifications:
  - Click on your account (person icon to the left of the SEARCH box).
  - Click on “Profile” and then click “Notifications”.
  - Check the box next to “Benefit Investigation Result” (lower left).
  - Click the green “Save All Notifications” button (bottom right).

#### Is the BI process different for Medicare or Medicaid patients?

There are no BIs for Medicare or Medicaid.

## Provider + Patient

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#### Can a patient opt to do self-pay instead of using commercial insurance?

Absolutely. They just need to let their provider know so that the correct payment type is selected in the test order.

#### What happens if a patient needs to cancel the test?

Patients may reach out to GeneDx Customer Service directly to discuss cancellation of their test order at [zebras@genedx.com](mailto:zebras@genedx.com), 1-888-729-1206.

### If a patient does not agree to the BI estimate, what are their options?

If the patient believes the BI estimate is incorrect, we encourage them to reach out to their health insurance company directly to ask about their medical benefits. GeneDx offers payment plans and programs for eligible patients who need financial assistance and self-pay pricing for those who do not have or elect not to use their insurance. Patients may also choose not to move ahead with testing.

## Customer Service + Billing

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### Will GeneDx contact the patient with the results of the BI?

- For any paper TRFs submitted with the “Hold for BI” box checked, no more than 3 patient contact attempts will be made during the grace period from January 14, 2021 through March 31, 2021.
- We no longer conduct non-“Hold for BI” courtesy benefit investigations and therefore, no longer offer courtesy BI calls.
- If a Portal BI result is a pending status, the provider checked the “Hold for Benefit Investigation” box, the order is submitted, and the sample is received, GeneDx will make up to 3 attempts to contact the patient with the BI results if the OOP estimate is over \$100.00. We will use the patient contact information listed in the Patient Details within the Portal, so please ensure the information is correct.
- When the grace period ends on April 1, 2021, patient outreach attempts will no longer be made for Portal orders with a completed BI or for any paper TRF orders that are placed with an old TRF version that includes the “Hold for BI” checkbox. We recommend that providers counsel patients on any potential OOP expenses once the BI has been returned. To facilitate this, a personalized Patient Letter is available for download within the Portal. The letter includes the patient’s OOP estimate, self-pay pricing, and payment assistance information to aid their testing decision. Note that once a test has been ordered and the sample received with all necessary paperwork at the GeneDx lab, we will start the testing process and the patient will be financially responsible for the cost of testing.

### What does “Not Returned” mean when displayed in the BI OOP Estimate details?

When we contact the patient’s insurance company for a BI, we request all categories of information listed in the BI details (ex. deductible, coinsurance, copay, etc.). If the insurance company does not return a value for one or more categories, we display “Not Returned”. Please note, this estimate is not a confirmation that the test has been authorized by the patient’s health insurance company. This amount, including any “Not Returned” information, is only an estimate and your patient will be billed and be responsible for the total member financial responsibility amount on the Explanation of Benefits sent to them by their health insurance company.

If there is a discrepancy between the BI and the Explanation of Benefits (EOB) received from the insurance company, which is accurate?

The EOB from the insurance company is what GeneDx uses to bill the patient. The BIs are provided by the patient's health insurance company and are based on the patient's current medical benefits plan and usage. The BI OOP amount is only an estimate, and the patient will be billed for and be held responsible for the total member financial responsibility amount on the EOB sent to them by their health insurance company.

If a provider or patient has billing questions, who should they contact?

Providers or patients may contact the GeneDx Billing team at [billing@genedx.com](mailto:billing@genedx.com) or call 1-888-729-1206, option 2. They should reference their Benefit Investigation Case ID, found in their Patient Letter.

Is there a Financial Assistance Program (FAP) for those with a financial hardship?

Yes, GeneDx offers a program to help qualifying patients by reducing the amount owed after insurance. The FAP Summary & Application forms in both English and Spanish are now available on our website at [www.genedx.com/FAP](http://www.genedx.com/FAP).