Eligibility Checks in the Appointment Window vs. the Patient's Chart
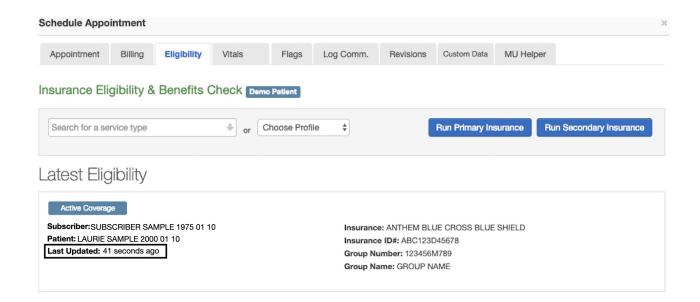
08/20/2024 10:13 am EDT

Patient Real-Time Eligibility Checks

You can run insurance eligibility in a few places in DrChrono, the appointment window, the patient's chart, and the eligibility dashboard. Any location will pull the insurance information for the patient. However, when you run the eligibility from a patient's chart, it will not be connected to an appointment.
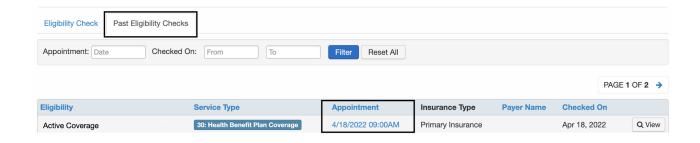
Note: Complete insurance information, including payer ID and Member ID number, is required for this function to run. Additionally, you must have eProvider Solutions (ePS) or Trizetto set up as your clearinghouse to use this feature as described in this article.

Eligibility from the Appointment Window

When you run an eligibility check from the appointment window, it will update the eligibility page on the appointment screen and the eligibility section on the patient's chart.

Under the **Past Eligibility Checks** tab, it will show the details referenced to the appointment.

Appointment: [Date]   Checked On: [From] [To]   [Filter] [Reset All]

Eligibility	Service Type	Appointment	Insurance Type	Payer Name	Checked On	
Active Coverage	30: Health Benefit Plan Coverage	4/18/2022 09:00AM	Primary Insurance		Apr 18, 2022	🔍 View

Eligibility from the Patient's Chart

You can also run eligibility from the patient's chart under the **Eligibility** section on the left.

This will only update the eligibility check details in the Eligibility section of the patient's chart.

Eligibility Check	Past Eligibility Checks

Insurance Eligibility & Benefits Check

| Search for a service type | or | Choose Profile | Run Primary Insurance | Run Secondary Insurance |

Latest Eligibility

Active Coverage

Subscriber: SUBSCRIBER SAMPLE 1975 01 10
Patient: LAURIE SAMPLE 2000 01 10
Last Updated: 20 seconds ago

Insurance: ANTHEM BLUE CROSS
Insurance ID#: 123456789
Group Number:
Group Name:

Health Benefit Plan Coverage   Print

Copayment

Deductible

Coinsurance

Active Coverage

Benefit Description

Benefit Disclaimer

Limitations

Out of Pocket (Stop Loss)
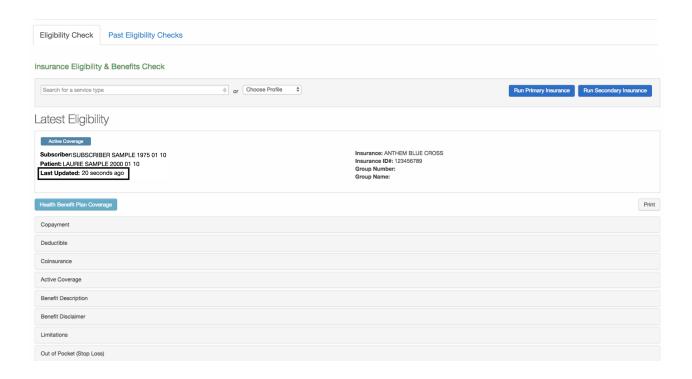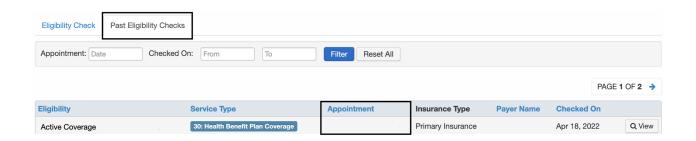
Under the **Past Eligibility Checks** tab, it will not show the details referenced to the appointment since there is not an appointment connected to the eligibility check.

Eligibility Check	Past Eligibility Checks

Appointment: [Date]   Checked On: [From] [To]   Filter   Reset All

PAGE **1** OF **2** →

Eligibility	Service Type	Appointment	Insurance Type	Payer Name	Checked On	
Active Coverage	30: Health Benefit Plan Coverage		Primary Insurance		Apr 18, 2022	Q View

The information in the appointment window will reflect the last check from the appointment screen.

Schedule Appointment

| Appointment | Billing | **Eligibility** | Vitals | Flags | Log Comm. | Revisions | Custom Data | MU Helper |

Insurance Eligibility & Benefits Check `Demo Patient`

| Search for a service type ⬇ | or | Choose Profile ⬍ | | **Run Primary Insurance** | **Run Secondary Insurance** |

Latest Eligibility

`Active Coverage`

Subscriber: SUBSCRIBER SAMPLE 1975 01 10
Patient: LAURIE SAMPLE 2000 01 10
Last Updated: 41 seconds ago

Insurance: ANTHEM BLUE CROSS BLUE SHIELD
Insurance ID#: ABC123D45678
Group Number: 123456M789
Group Name: GROUP NAME