

# Eligibility Checks in the Appointment Window vs. the Patient's Chart

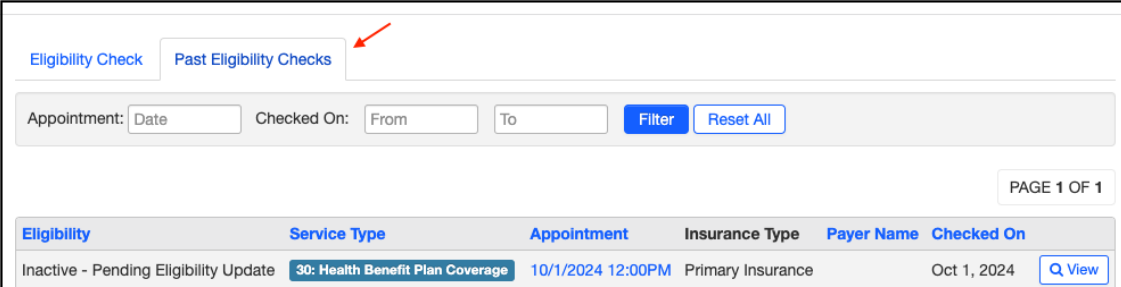
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You can run insurance eligibility in a few places in DrChrono, the appointment window, the patient's chart, and the eligibility dashboard. Any location will pull the insurance information for the patient that is made available by their insurance payer. 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

1. 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.
2. Under the **Past Eligibility Checks** tab, it will show the details referenced to the appointment.



Eligibility	Service Type	Appointment	Insurance Type	Payer Name	Checked On
Inactive - Pending Eligibility Update	30: Health Benefit Plan Coverage	10/1/2024 12:00PM	Primary Insurance		Oct 1, 2024

## Eligibility from the Patient's Chart

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

**sample sample**  
 Female | 2 years, 8 months old (04/01/2022)  
 SASA000001

Provider Doctor Doctor      Address  
 OnPatient [Not Enabled-Invite](#)      Date Added

Patient must have documented medications      Patient must have documented allergies

🚩 Patient Payment Plan: Patient Payment Plan

Documents  
 Eligibility ←

Patient Summary

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

Eligibility

Eligibility Check      Past Eligibility Checks

Insurance Eligibility & Benefits Check

Search for a service type      or      Choose Profile

Run Primary Insurance      Run Secondary Insurance

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

Eligibility Check      Past Eligibility Checks

Appointment: Date      Checked On: From      To      Filter      Reset All

PAGE 1 OF 1

Eligibility	Service Type	Appointment	Insurance Type	Payer Name	Checked On
Inactive - Pending Eligibility Update	30: Health Benefit Plan Coverage		Primary Insurance		View

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

**Schedule Appointment** ✕

Appointment | Billing | **Eligibility** | Vitals | Growthcharts | 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](#)

<b>Subscriber:</b> FIRST NAME LAST NAME 2000-01-01	<b>Insurance:</b> ANTHEM BLUE CROSS BLUE SHIELD
	<b>Insurance ID#:</b> ABC123D45678
	<b>Group Number:</b> 123456M789
	<b>Group Name:</b> GROUP NAME

[Health Benefit Plan Coverage](#) [Print](#)