

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

Last modified on 11/08/2024 9:19 am EST

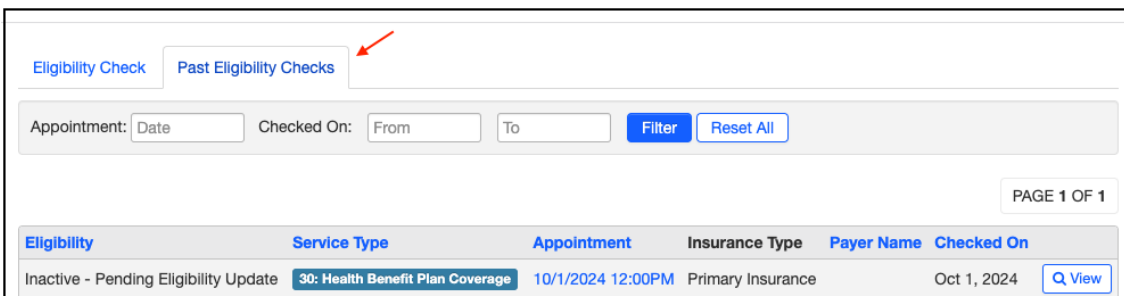
You can run insurance eligibility in a few places in DrChrono, the appointment window, the patient's chart, and the eligibility dashboard. Any location will pull the insurance information for the patient. However, when you run the eligibility from a patient's chart, it will not be connected to an appointment.

**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

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.

**+ Add new patient**

**Laurie Sample** (Female | 31 years old | Dec. 8, 1990)

**Phone:** **Email:**

**Address:** 328 Gibraltar Dr  
Sunnyvale, CA 60005

**CDS:** Adult Immunization Schedule Age: 27-49

onpatient access enabled

**Insurance Eligibility & Benefits Check**

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

**Eligibility**

**Insurance Eligibility & Benefits Check**

Search for a service type  or Choose Profile

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**

Appointment:  Checked On:

PAGE 1 OF 1

Eligibility	Service Type	Appointment	Insurance Type	Payer Name	Checked On
Inactive - Pending Eligibility Update	<input type="button" value="30: Health Benefit Plan Coverage"/>		Primary Insurance		<input type="button" value="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