

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 Check

Past Eligibility Checks

Appointment:

Checked On:

Filter


Reset All

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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	<div>Q View</div>

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

or

[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:

Checked On:

Filter

Reset All

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

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

Subscriber: FIRST NAME LAST NAME 2000-01-01

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

Health Benefit Plan Coverage

Print