Real-Time Eligibility Dashboard

Last modified on 11/19/2024 10:51 am EST

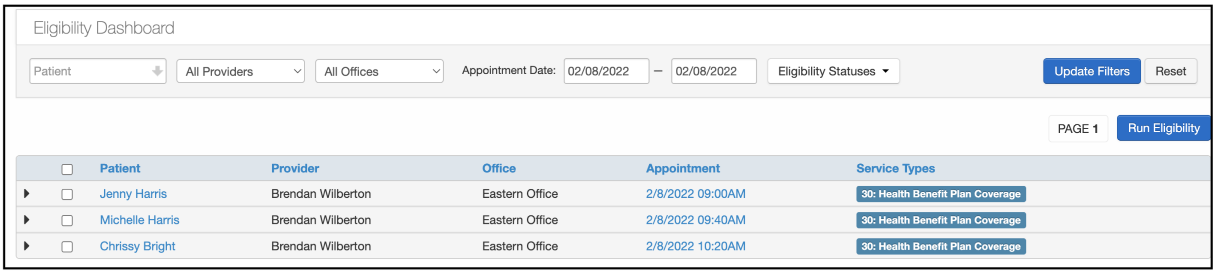
We are in the process of rolling this feature out to all clients, and we expect the feature to be live for all accounts by 11/26/2024. If you do not see this in your account on 11/26 please reach out to support for assistance.

You can use the Eligibility Dashboard to run eligibility at the same time for an entire group of patients.

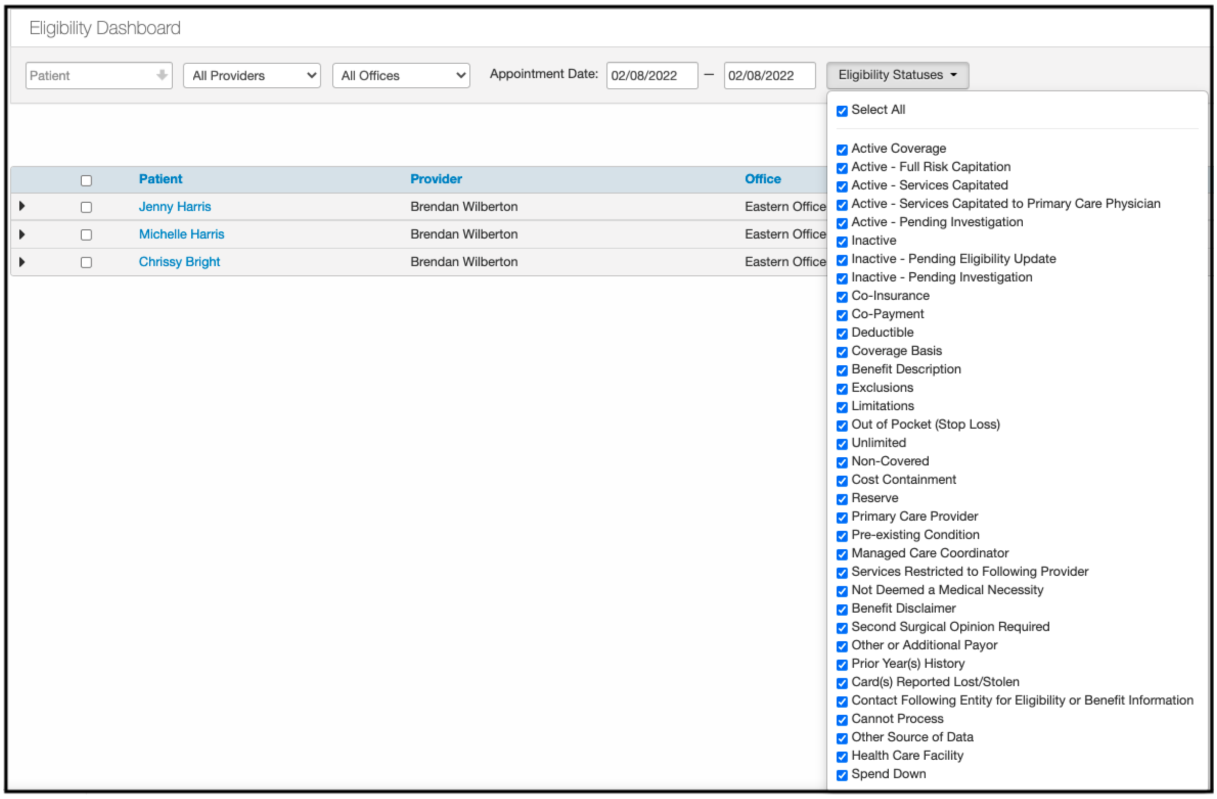
Note: Complete insurance information, including payer ID and ID number, is required for this function to run. Additionally, you must have **ePS; eProvider Solutions** set up as your clearinghouse to use this feature.

1. Navigate to **Schedule** > **Eligibility Dashboard**.

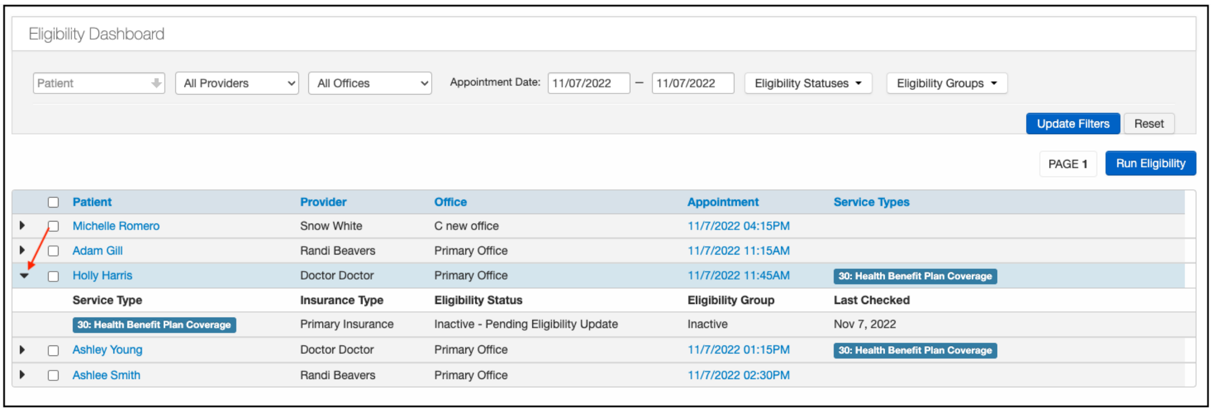
   You can run eligibility by searching for a patient, individual provider or office, date range, or status.



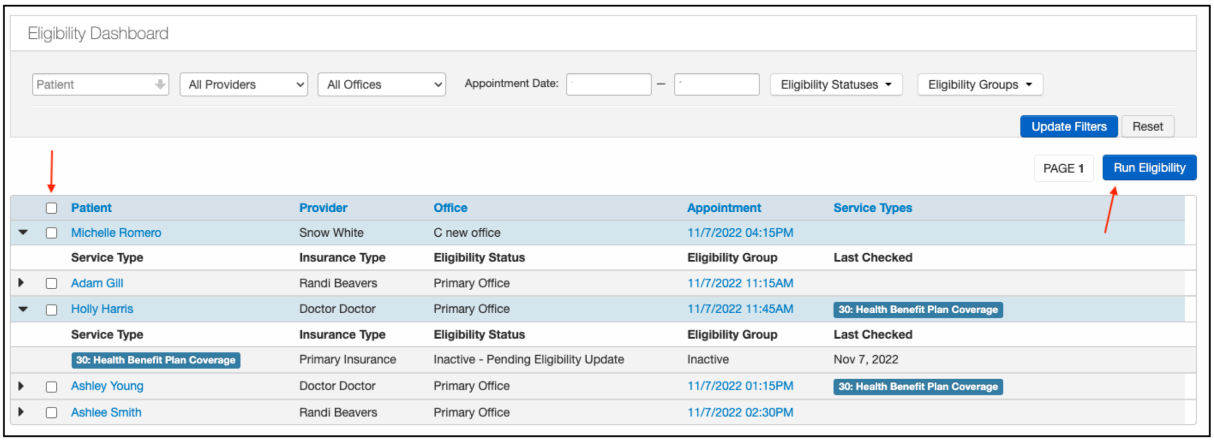
2. Under the **Eligibility Status** dropdown menu, you can select which statuses you would like to use in the eligibility check.



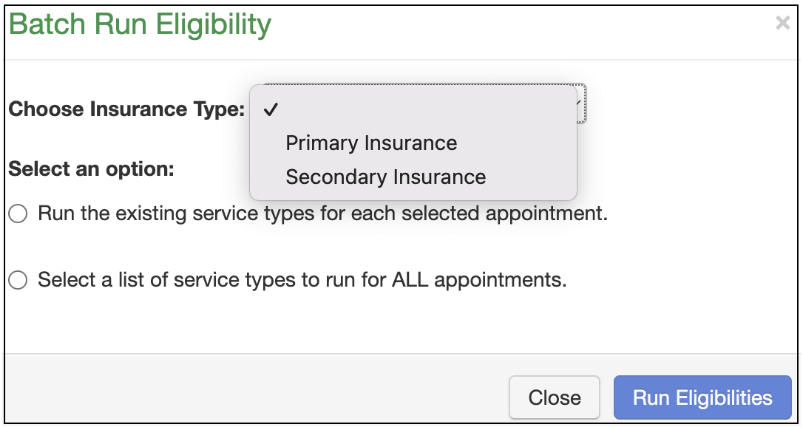
3. You can view more of the individual patient's info by selecting the down arrow icon.



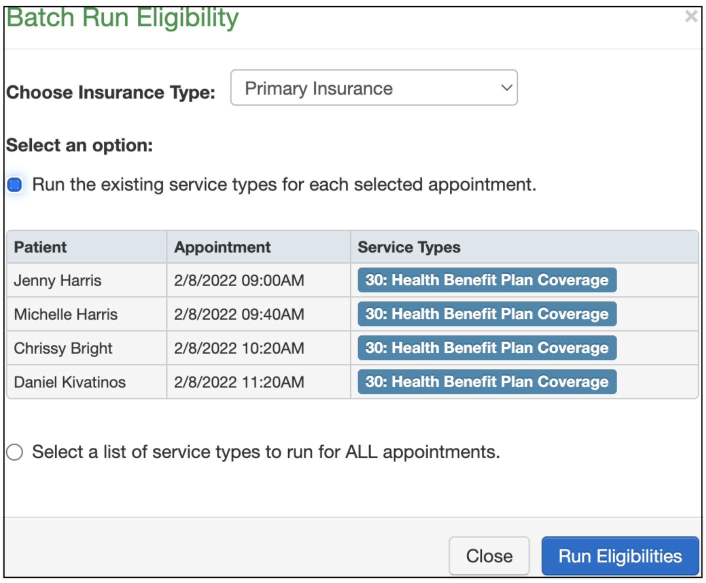
4. To run eligibility click the **Run Eligibility** button.



5. In the batch eligibility window, select **Primary** or **Secondary Insurance**.

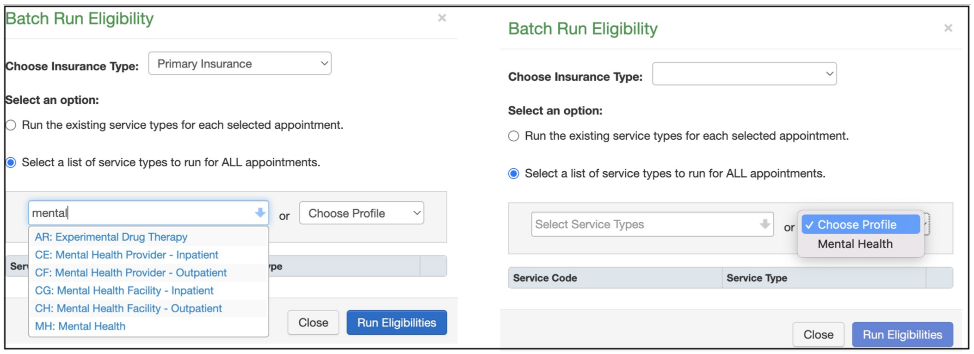


You can run eligibility for the selected appointments and existing service types.



--OR--

You can run eligibility by searching for a service type or by an eligibility profile that you can create. For more information click here.



1. Select **Run Eligibilities** after making your selections.

You will see a message in the top right of your screen. Once the check is complete after a few minutes you can come back to see the results.