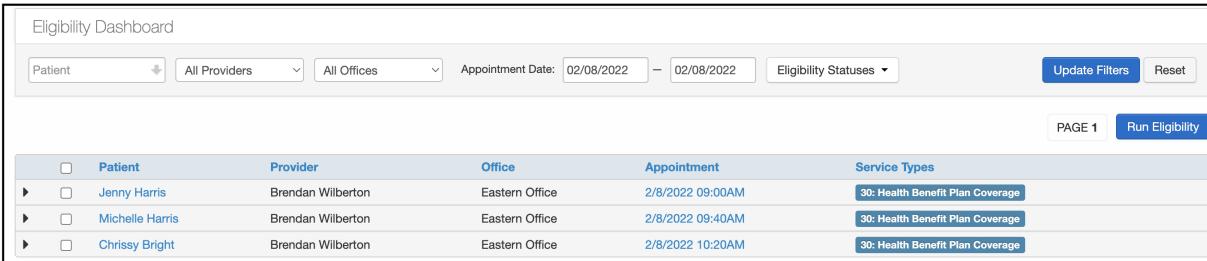# Real-Time Eligibility Dashboard

Last modified on 01/16/2026 3:13 pm EST

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 member 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.

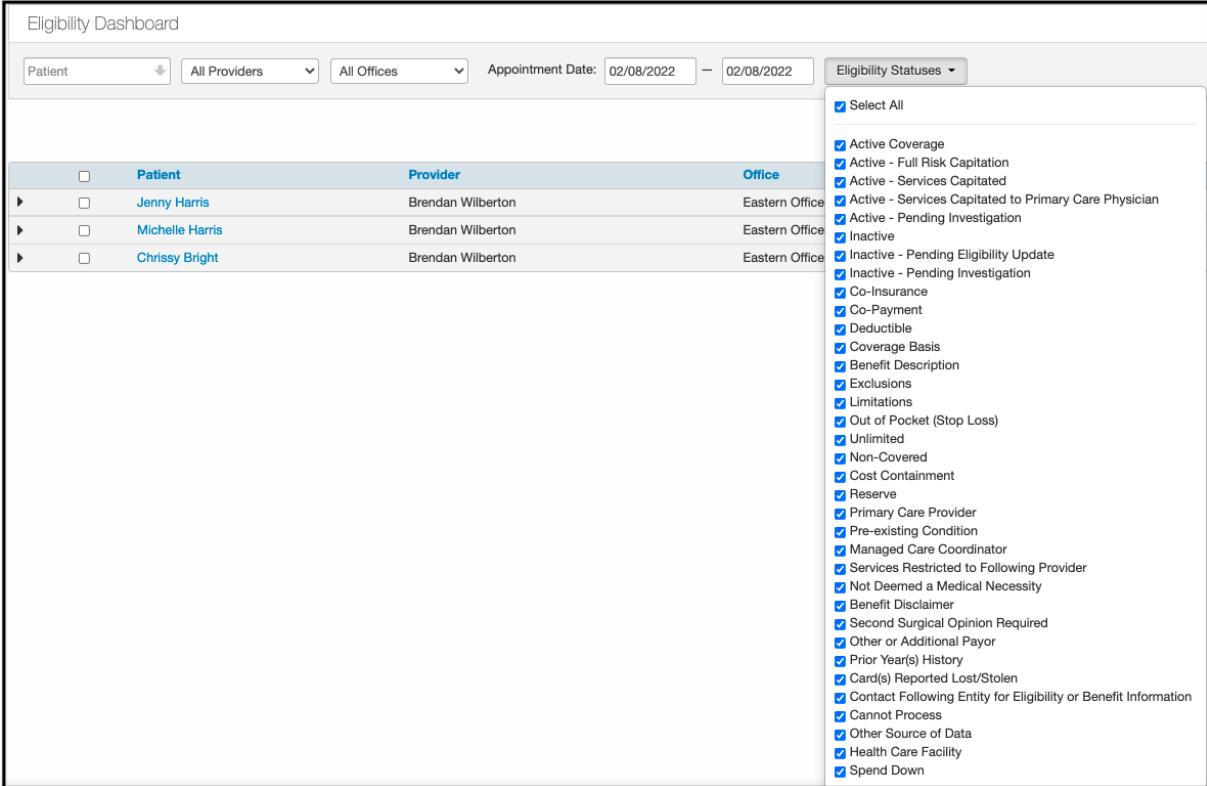1. Navigate to **Schedule** > **Eligibility Dashboard**.

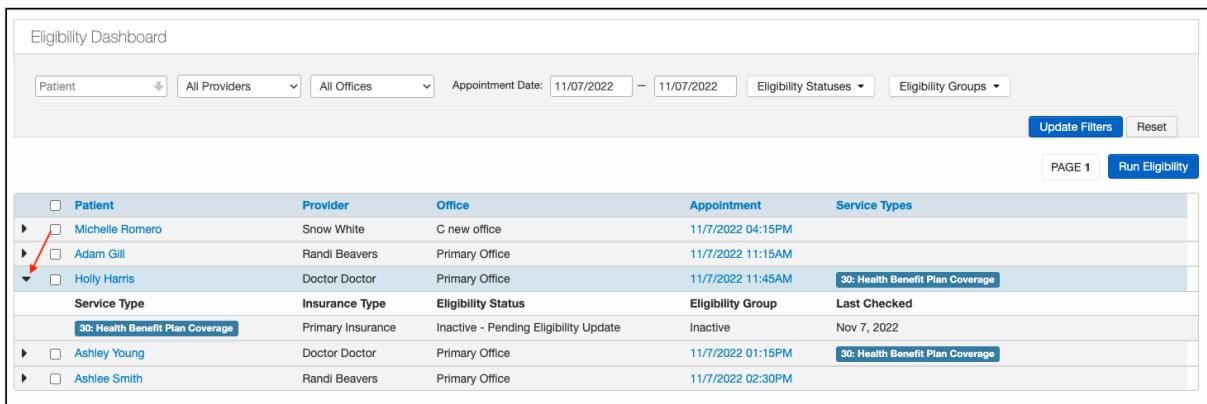   You can run eligibility by searching for a patient, individual provider or office, date range, or status.

2. Under the **Eligibility Status** dropdown menu, you can select which statuses 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 press 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.

Batch Run Eligibility

Choose Insurance Type: Primary Insurance

Select an option:
● Run the existing service types for each selected appointment.
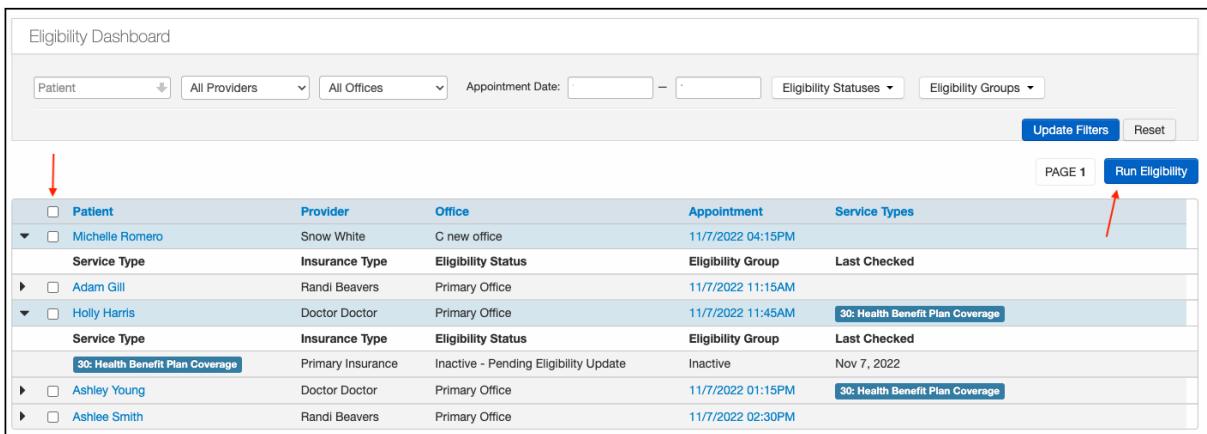
Patient	Appointment	Service Types
Jenny Harris	2/8/2022 09:00AM	30: Health Benefit Plan Coverage
Michelle Harris	2/8/2022 09:40AM	30: Health Benefit Plan Coverage
Chrissy Bright	2/8/2022 10:20AM	30: Health Benefit Plan Coverage
Daniel Kivatinos	2/8/2022 11:20AM	30: Health Benefit Plan Coverage

○ Select a list of service types to run for ALL appointments.

Close   Run Eligibilities

--OR--

You can run eligibility by searching for a service type or by creating an eligibility profile. For more information, press 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.

Requesting eligibilities...please check back in a few minutes. ✕

Reports   B

Eligibility Dashboard

Patient ⬇   All Providers ⌄