

Real-Time Eligibility Dashboard

Last modified on 12/11/2024 8:44 am 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.

The screenshot shows the 'Eligibility Dashboard' interface. At the top, there are search filters: 'Patient' (dropdown), 'All Providers' (dropdown), 'All Offices' (dropdown), 'Appointment Date: 02/08/2022 - 02/08/2022', and 'Eligibility Statuses' (dropdown). There are 'Update Filters' and 'Reset' buttons. Below the filters, there is a 'PAGE 1' indicator and a 'Run Eligibility' button. The main content is a table with the following columns: Patient, Provider, Office, Appointment, and Service Types. The table contains three rows of patient data.

<input type="checkbox"/>	Patient	Provider	Office	Appointment	Service Types
<input type="checkbox"/>	Jenny Harris	Brendan Wilberton	Eastern Office	2/8/2022 09:00AM	30: Health Benefit Plan Coverage
<input type="checkbox"/>	Michelle Harris	Brendan Wilberton	Eastern Office	2/8/2022 09:40AM	30: Health Benefit Plan Coverage
<input type="checkbox"/>	Chrissy Bright	Brendan Wilberton	Eastern Office	2/8/2022 10:20AM	30: Health Benefit Plan Coverage

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

The screenshot shows the 'Eligibility Dashboard' interface with the 'Eligibility Statuses' dropdown menu open. The dropdown menu contains a list of status options, each with a checkbox. The options are:

- Select All
- Active Coverage
- Active - Full Risk Capitation
- Active - Services Capitated
- Active - Services Capitated to Primary Care Physician
- Active - Pending Investigation
- Inactive
- Inactive - Pending Eligibility Update
- Inactive - Pending Investigation
- Co-Insurance
- Co-Payment
- Deductible
- Coverage Basis
- Benefit Description
- Exclusions
- Limitations
- Out of Pocket (Stop Loss)
- Unlimited
- Non-Covered
- Cost Containment
- Reserve
- Primary Care Provider
- Pre-existing Condition
- Managed Care Coordinator
- Services Restricted to Following Provider
- Not Deemed a Medical Necessity
- Benefit Disclaimer
- Second Surgical Opinion Required
- Other or Additional Payor
- Prior Year(s) History
- Card(s) Reported Lost/Stolen
- Contact Following Entity for Eligibility or Benefit Information
- Cannot Process
- Other Source of Data
- Health Care Facility
- Spend Down

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

Eligibility Dashboard

Patient: [dropdown] All Providers: [dropdown] All Offices: [dropdown] Appointment Date: 11/07/2022 - 11/07/2022 Eligibility Statuses: [dropdown] Eligibility Groups: [dropdown]

[Update Filters] [Reset]

PAGE 1 [Run Eligibility]

<input type="checkbox"/> Patient	Provider	Office	Appointment	Service Types
<input type="checkbox"/> Michelle Romero	Snow White	C new office	11/7/2022 04:15PM	
<input type="checkbox"/> Adam Gill	Randi Beavers	Primary Office	11/7/2022 11:15AM	
<input checked="" type="checkbox"/> Holly Harris	Doctor Doctor	Primary Office	11/7/2022 11:45AM	30: Health Benefit Plan Coverage
Service Type	Insurance Type	Eligibility Status	Eligibility Group	Last Checked
30: Health Benefit Plan Coverage	Primary Insurance	Inactive - Pending Eligibility Update	Inactive	Nov 7, 2022
<input type="checkbox"/> Ashley Young	Doctor Doctor	Primary Office	11/7/2022 01:15PM	30: Health Benefit Plan Coverage
<input type="checkbox"/> Ashlee Smith	Randi Beavers	Primary Office	11/7/2022 02:30PM	

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

Eligibility Dashboard

Patient: [dropdown] All Providers: [dropdown] All Offices: [dropdown] Appointment Date: [] - [] Eligibility Statuses: [dropdown] Eligibility Groups: [dropdown]

[Update Filters] [Reset]

PAGE 1 [Run Eligibility]

<input type="checkbox"/> Patient	Provider	Office	Appointment	Service Types
<input checked="" type="checkbox"/> Michelle Romero	Snow White	C new office	11/7/2022 04:15PM	
Service Type	Insurance Type	Eligibility Status	Eligibility Group	Last Checked
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Service Type	Insurance Type	Eligibility Status	Eligibility Group	Last Checked
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5. In the batch eligibility window, select **Primary** or **Secondary Insurance**.

Batch Run Eligibility [X]

Choose Insurance Type: **Primary Insurance**

Select an option:

Run the existing service types for each selected appointment.

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

[Close] [Run Eligibilities]

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

Batch Run Eligibility x

Choose Insurance Type: Primary Insurance v

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](#).

Batch Run Eligibility x

Choose Insurance Type: Primary Insurance v

Select an option:

Run the existing service types for each selected appointment.

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

mental v or Choose Profile v

- AR: Experimental Drug Therapy
- CE: Mental Health Provider - Inpatient
- CF: Mental Health Provider - Outpatient
- CG: Mental Health Facility - Inpatient
- CH: Mental Health Facility - Outpatient
- MH: Mental Health

Close Run Eligibilities

Batch Run Eligibility x

Choose Insurance Type: v

Select an option:

Run the existing service types for each selected appointment.

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

Select Service Types v or Choose Profile
Mental Health

Service Code v Service Type v

Close Run Eligibilities

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.

patients Reports B

Eligibility Dashboard

Patient ↓ All Providers ↓
