

# Real-Time Eligibility Dashboard

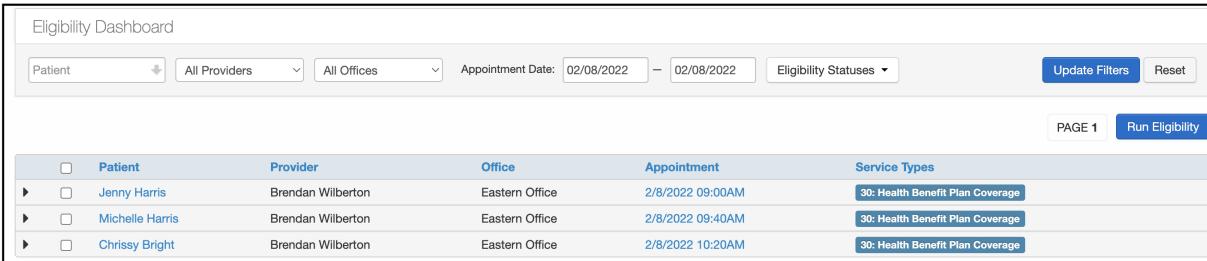
Last modified on 01/16/2026 3:13 pm EST

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.

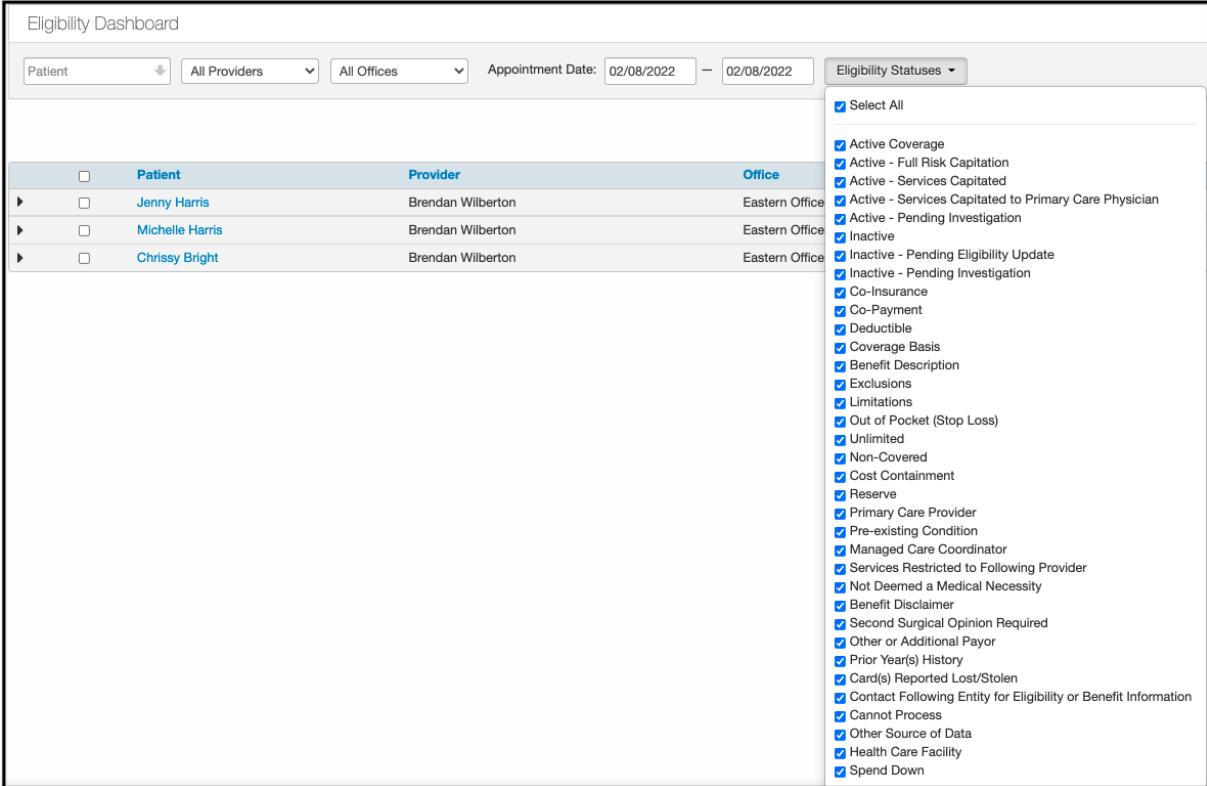
You can run eligibility by searching for a patient, individual provider or office, date range, or status.



The screenshot shows the 'Eligibility Dashboard' search interface. At the top, there are dropdown menus for 'Patient' (set to 'Patient'), 'All Providers' (set to 'All Providers'), 'All Offices' (set to 'All Offices'), 'Appointment Date' (set to '02/08/2022' to '02/08/2022'), and 'Eligibility Statuses' (dropdown menu open). Below these are buttons for 'Update Filters', 'Run Eligibility', 'PAGE 1', and 'Run Eligibility'. The main area displays a table with three rows of patient data:

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

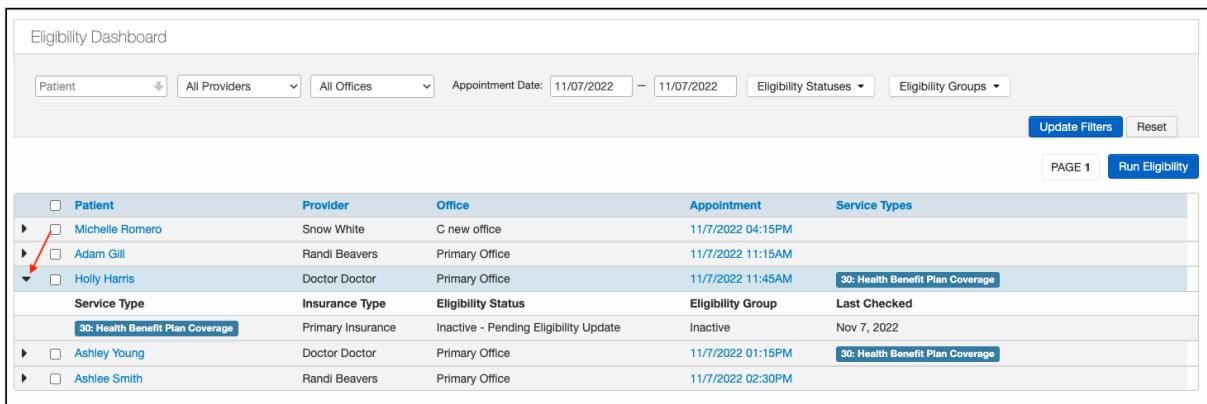
## 2. Under the **Eligibility Status** dropdown menu, you can select which statuses to use in the eligibility check.



The screenshot shows the 'Eligibility Dashboard' search interface with the 'Eligibility Statuses' dropdown menu open. The menu includes a 'Select All' checkbox and a long list of checked status options:

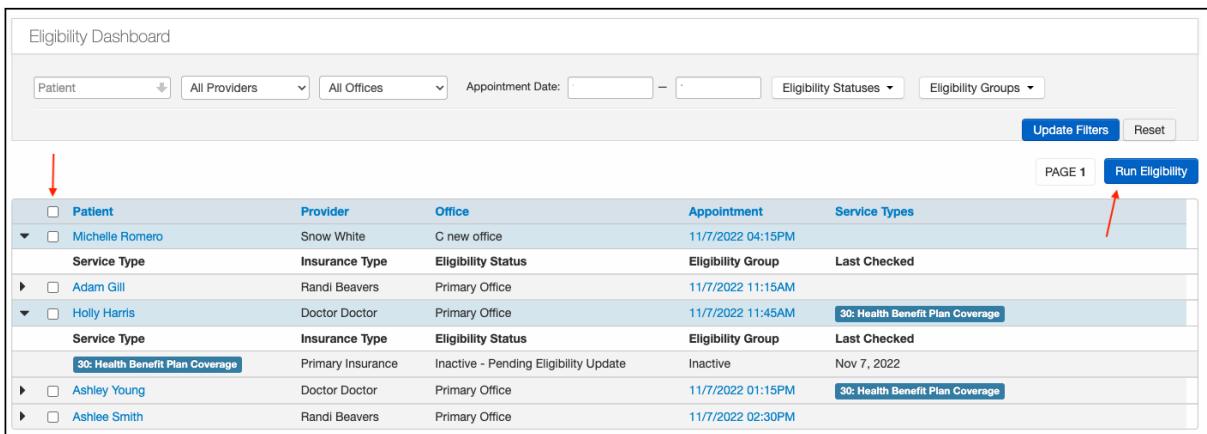
- Active Coverage
- Active - Full Risk Capitation
- Active - Services Capitated
- Active - Services Capitated to Primary Care Physician
- Active - Pending Investigation
- Inactive
- Inactive - Pending Eligibility Update
- Inactive - Pending Investigation
- Co-Insurance
- Co-Payment
- Deductible
- Coverage 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 Payer
- 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.



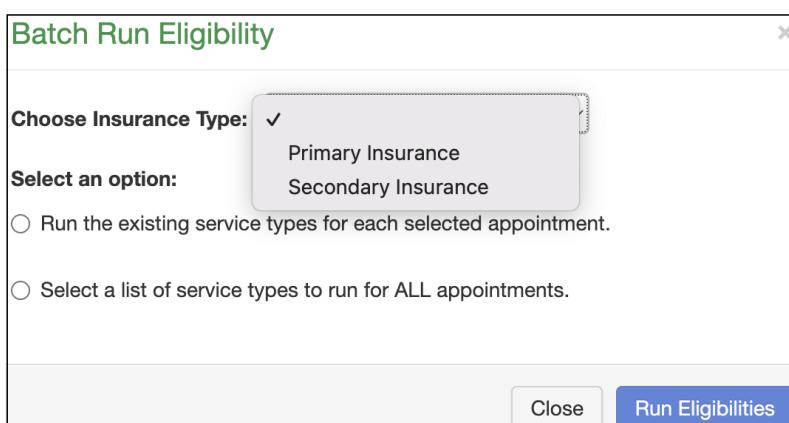
Patient	Provider	Office	Appointment	Service Types
Michelle Romero	Snow White	C new office	11/7/2022 04:15PM	
Adam Gill	Randi Beavers	Primary Office	11/7/2022 11:15AM	
Holly Harris	Doctor Doctor	Primary Office	11/7/2022 11:45AM	<b>30: Health Benefit Plan Coverage</b>
Service Type	Insurance Type	Eligibility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

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



Patient	Provider	Office	Appointment	Service Types
Michelle Romero	Snow White	C new office	11/7/2022 04:15PM	
Adam Gill	Randi Beavers	Primary Office	11/7/2022 11:15AM	
Holly Harris	Doctor Doctor	Primary Office	11/7/2022 11:45AM	<b>30: Health Benefit Plan Coverage</b>
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Ashlee Smith	Randi Beavers	Primary Office	11/7/2022 02:30PM	

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



**Batch Run Eligibility**

Choose Insurance Type:  Primary Insurance  
 Secondary Insurance

Select an option:

Run the existing service types for each selected appointment.

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

**Run Eligibilities**

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](#).

**Batch Run Eligibility**

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.

Service Type	Code	Type
mental	Close	Run Eligibilities
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		

**Batch Run Eligibility**

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.

Service Code	Service Type	
Select Service Types	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.

