

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.

Eligibility Dashboard

Patient

All Providers

All Offices

Appointment Date: 02/08/2022 – 02/08/2022

Eligibility Statuses

Update Filters

Reset

PAGE 1

Run Eligibility

<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.

Eligibility Dashboard

Patient

All Providers

All Offices

Appointment Date: 02/08/2022 – 02/08/2022

Eligibility Statuses

☐

Patient

Provider

Office

▶ ☐

Jenny Harris

Brendan Wilberton

Eastern Office

▶ ☐

Michelle Harris

Brendan Wilberton

Eastern Office

▶ ☐

Chrissy Bright

Brendan Wilberton

Eastern Office

☒ 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 All Providers All Offices Appointment Date: 11/07/2022 - 11/07/2022 Eligibility Statuses Eligibility Groups

PAGE 1

<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 All Providers All Offices Appointment Date: - Eligibility Statuses Eligibility Groups

PAGE 1

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<input type="checkbox"/> 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

Select an option:

☐ Run the existing service types for each selected appointment.

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

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.

mental

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

or

Choose Profile

Close

Run Eligibilities

Batch Run Eligibility

Choose Insurance Type:

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

✓ Choose Profile

Mental Health

or

Choose Profile

Service Code

Service Type

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.

PatientsReportsB

Eligibility Dashboard

Patient

All Providers
