Real-Time Eligibility Dashboard

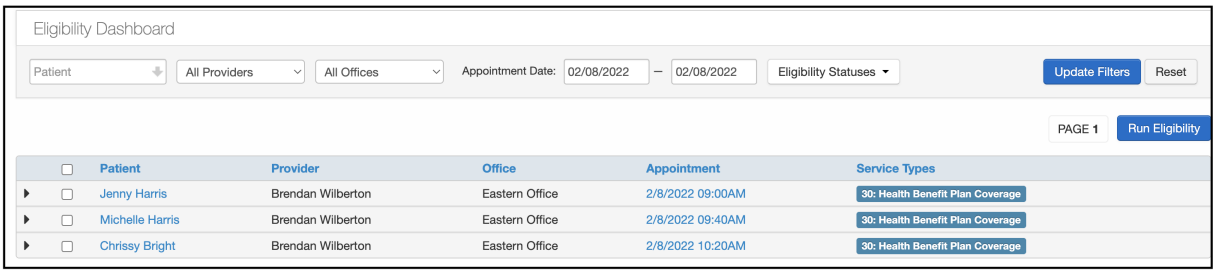
Last modified on 10/27/2026 11:08 am EDT

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

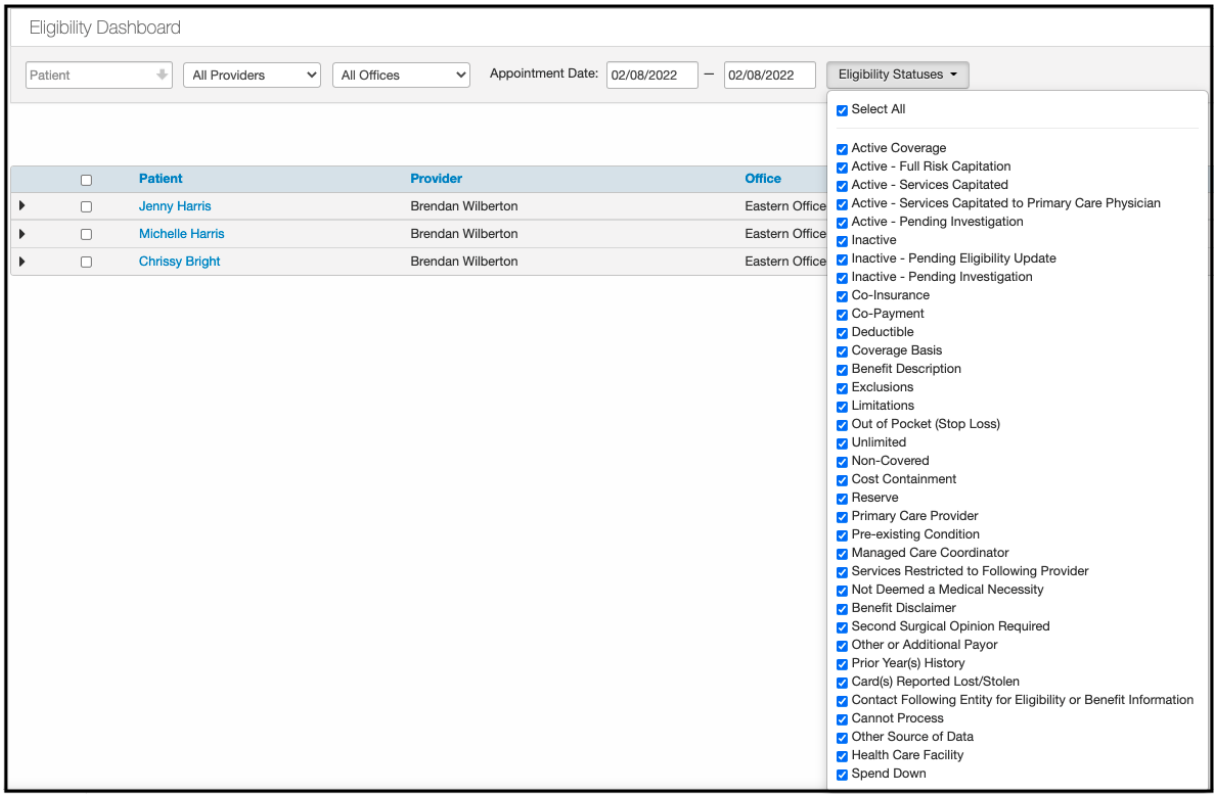
> Complete insurance information, including payer ID and member ID number, is required for this function to run. Additionally, you must have **ePS; eProvider Solutions** set up as your clearinghouse to use this feature.

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

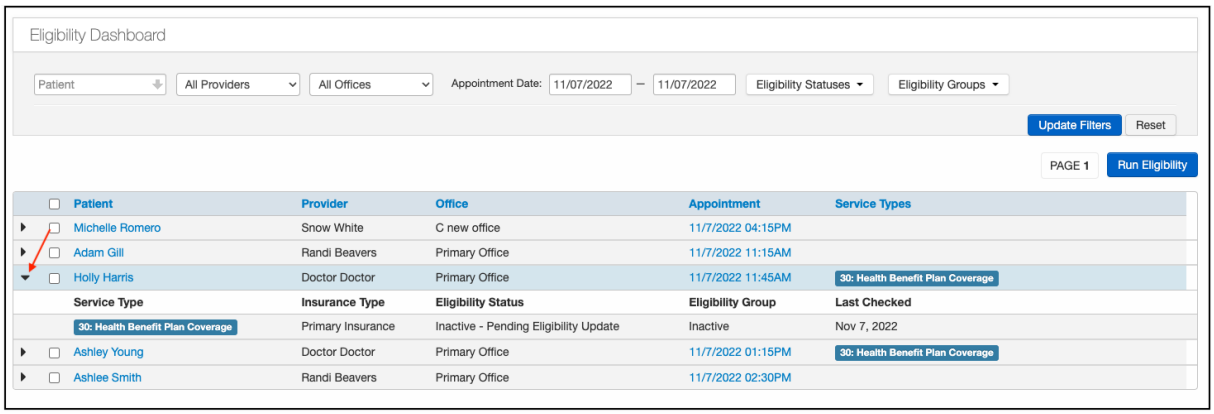
   You can run eligibility by searching for a patient, individual provider, or office, date range, or status.



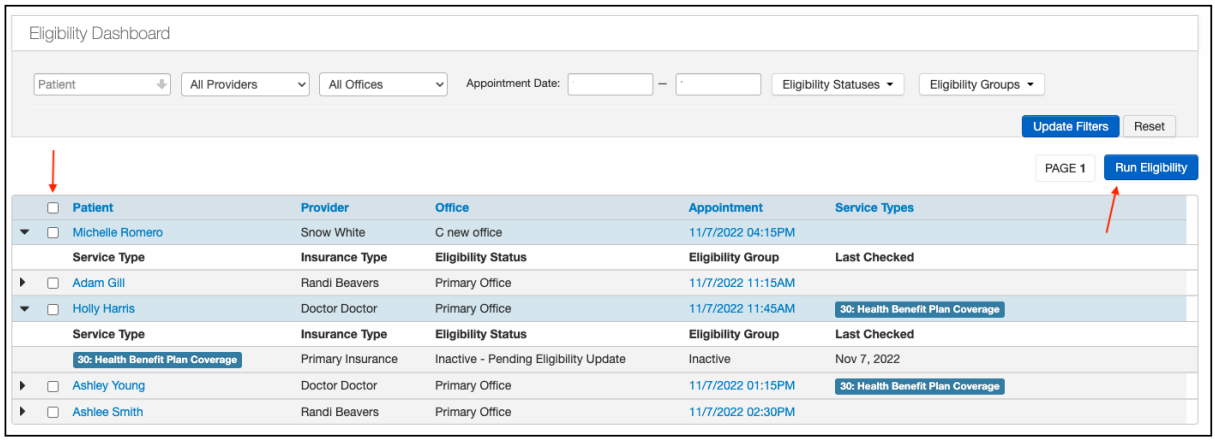
2. Under the **Eligibility Status** dropdown menu, you can select which statuses to use in the eligibility check.



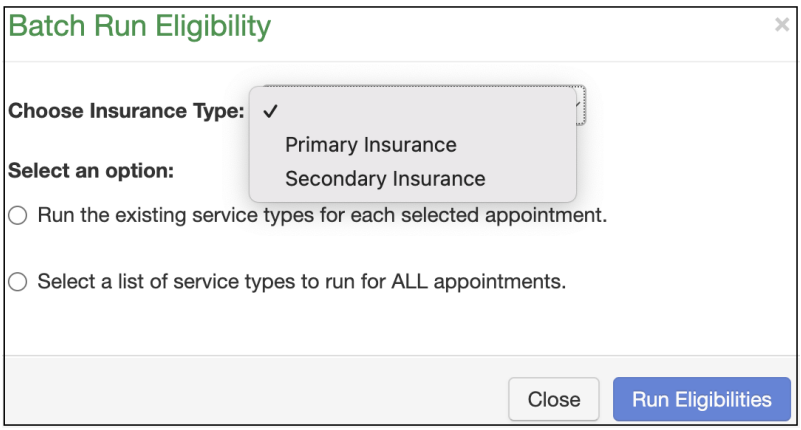
3. You can view more of the individual patient's info by selecting the down arrow icon.



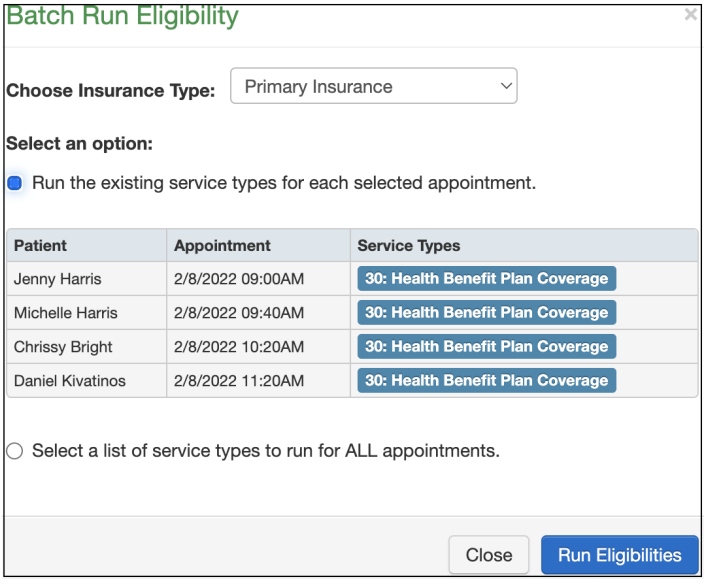
4. To run eligibility, press the **Run Eligibility** button.



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

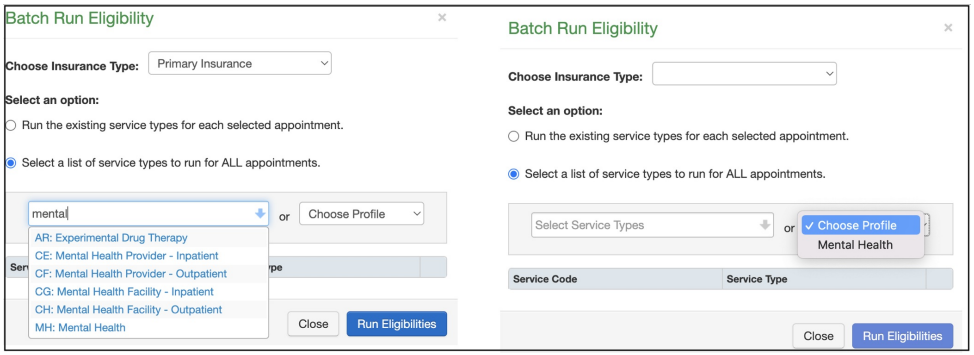


You can run eligibility for the selected appointments and existing service types.



--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.

