

# Real-Time Eligibility Dashboard

Last modified on 11/19/2024 10:51 am EST

**We are in the process of rolling this feature out to all clients, and we expect the feature to be live for all accounts by 11/26/2024. If you do not see this in your account on 11/26 please reach out to support for assistance.**

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 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 several filter controls: a 'Patient' dropdown menu, 'All Providers' and 'All Offices' dropdown menus, an 'Appointment Date' range from '02/08/2022' to '02/08/2022', and an 'Eligibility Statuses' dropdown menu. To the right of these filters are 'Update Filters' and 'Reset' buttons. Below the filters, there is a 'PAGE 1' indicator and a 'Run Eligibility' button. The main content area is a table with the following columns: Patient, Provider, Office, Appointment, and Service Types. The table contains three rows of 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 you would like to use in the eligibility check.

Eligibility Dashboard

Patient  All Providers  All Offices  Appointment Date: 02/08/2022 - 02/08/2022 Eligibility Statuses

<input type="checkbox"/>	Patient	Provider	Office
▶ <input type="checkbox"/>	Jenny Harris	Brendan Wilberton	Eastern Office
▶ <input type="checkbox"/>	Michelle Harris	Brendan Wilberton	Eastern Office
▶ <input type="checkbox"/>	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 type="checkbox"/>	Holly Harris	Doctor Doctor	Primary Office	11/7/2022 11:45AM	<input type="button" value="30: Health Benefit Plan Coverage"/>
Service Type		Insurance Type	Eligibility Status	Eligibility Group	Last Checked
<input type="button" value="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	<input type="button" value="30: Health Benefit Plan Coverage"/>
▶ <input type="checkbox"/>	Ashlee Smith	Randi Beavers	Primary Office	11/7/2022 02:30PM	

4. To run eligibility click 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	
<b>Service Type</b>				
<input checked="" 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]
<b>Service Type</b>				
[30: Health Benefit Plan Coverage]	Primary Insurance	Inactive - Pending Eligibility Update	Inactive	Last Checked: Nov 7, 2022
<input checked="" type="checkbox"/> Ashley Young	Doctor Doctor	Primary Office	11/7/2022 01:15PM	[30: Health Benefit Plan Coverage]
<input checked="" 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  
 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.

[Close] [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.

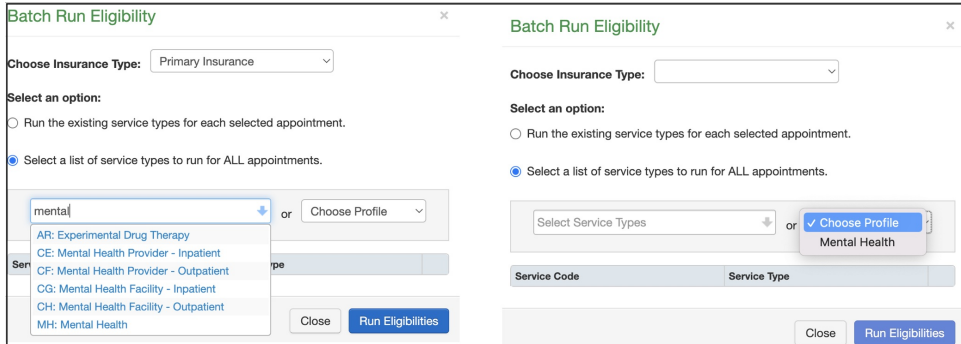
Patient	Appointment	Service Types
Jenny Harris	2/8/2022 09:00AM	[30: Health Benefit Plan Coverage]
Michelle Harris	2/8/2022 09:40AM	[30: Health Benefit Plan Coverage]
Chrissy Bright	2/8/2022 10:20AM	[30: Health Benefit Plan Coverage]
Daniel Kivatinos	2/8/2022 11:20AM	[30: Health Benefit Plan Coverage]

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 an eligibility profile that you can create. For more information click [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.

