

Real-Time Eligibility Verification from a Patient's Chart

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DrChrono allows you to verify eligibility and see what type of benefits your patient has under their insurance plan before you provide services.

1. To access the Real-Time Eligibility tool, you first need to open a patient's chart (**Patients > Patient List > Chart ID** or search directly for your patient's name).
2. Select the **Eligibility** tab in the left-hand navigation pane.

sample sample
Female | 2 years, 7 months old (04/01/2022)
SASA000001

Provider: Doctor Doctor | Phone: (515) 555-5151 | OnPatient: Not Enabled-Invite | Prev Appt: Next Appt
Address: 123 Main Street, Annapolis, MD 21403 | Email: email@gmail.com | Date Added: 04/14/2022

Patient must have documented medications | Patient must have documented allergies

Patient Payment Plan: Patient Payment Plan

Eligibility

Eligibility Check | Past Eligibility Checks

Insurance Eligibility & Benefits Check

Search for a service type or Choose Profile

Prescription benefits

Verifying Eligibility or Active Coverage

1. Ensure the patient's insurance information is loaded into their account; including the Payer ID for their insurance and their complete membership number.
2. Select **Run Primary Insurance** or **Run Secondary Insurance**, depending on which insurance you are verifying.

The system will ping the eligibility file provided by the payer and display the eligibility and benefit information obtained.

If the response is **Cannot Process**, it could be that the payer does not offer Real-Time Eligibility Checks, the payer ID is incorrect or missing or the patient ID number is wrong or missing.

Eligibility

Eligibility Check Past Eligibility Checks

Insurance Eligibility & Benefits Check

Search for a service type or Choose Profile

[Run Primary Insurance](#) [Run Secondary Insurance](#)

Checking Benefit Level/Services Covered

You are also able to check benefits/services covered for a particular specialty

1. Search for one or multiple from the specialty drop-down.
2. Select **Run Primary Insurance** or **Run Secondary Insurance**.

If you don't select a specialty, the function will return benefits for any/all specialties listed on the eligibility and benefit file provided by the payer.

Eligibility

Eligibility Check Past Eligibility Checks

Insurance Eligibility & Benefits Check

heal or Choose Profile

[Run Primary Insurance](#) [Run Secondary Insurance](#)

- 30: Health Benefit Plan Coverage
- 42: Home Health Care
- 43: Home Health Prescriptions
- 44: Home Health Visits
- Pt: Mental Health Provider - Inpatient
- CE: Mental Health Provider - Outpatient
- CG: Mental Health Facility - Inpatient
- CH: Mental Health Facility - Outpatient
- MH: Mental Health

Here you can view all the plan's coverage details about the specialty you have selected.

Insurance Eligibility & Benefits Check

Search for a service type or

Latest Eligibility

Active Coverage

Subscriber: JANE DOE 1980-01-01
Last Updated: 2 days ago

Insurance: ANTHEM BLUE CROSS
Insurance ID#: 123456789
Group Number:
Group Name:

Health Benefit Plan Coverage

Copayment

Deductible

Coinsurance

Active Coverage

Benefit Description

Benefit Disclaimer

Limitations

Out of Pocket (Stop Loss)

Copayment

Chiropractic

\$ 20

Emergency Services

\$ 150

Additional Information:

- FACILITY BENEFIT

Hospital - Emergency Accident

\$ 150

Hospital - Emergency Medical

\$ 150

Professional (Physician) Visit - Office

\$ 20

Professional (Physician) Visit - Office

\$ 20

Additional Information:

- SPECIALIST

Urgent Care

\$ 20

Copayment

Deductible

Coinsurance

Active Coverage

Service Types	Coverage Level	Insurance Type	Plan Coverage Description	In Plan Network	Notes
Physician Visit - Office: Well					
Hospital - Inpatient					
Urgent Care					
Medical Care					
Chiropractic					
Hospital					
Mental Health				Not Applicable for Plan Network	
Hospital - Outpatient					
Hospital - Emergency Accident					
Hospital - Emergency Medical					
Emergency Services					
Pharmacy					
Professional (Physician) Visit - Office					
Professional (Physician) Visit - Office				Not Applicable for Plan Network	SPECIALIST
Health Benefit Plan Coverage	Individual	Preferred Provider Organization (PPO)	PPO PRUDENT BUYER CLASSIC		

Benefit Description

Benefit Disclaimer

Limitations

Out of Pocket (Stop Loss)

Past Eligibility Checks

By selecting the **Past Eligibility Checks** tab, you can view eligibility checks previously run for the patient. You can filter by date of appointment, the date eligibility was checked, and sort by heading type. Failed eligibility checks are also recorded here.

The screenshot shows the 'Eligibility' section of a software interface. At the top, there are two tabs: 'Eligibility Check' and 'Past Eligibility Checks', with a red arrow pointing to the latter. Below the tabs is a filter section with 'Appointment: Date' and 'Checked On: From To' input fields, and 'Filter' and 'Reset All' buttons. A 'PAGE 1 OF 1' indicator is visible on the right. The main content is a table with the following data:

Eligibility	Service Type	Appointment	Insurance Type	Payer Name	Checked On	
Inactive - Pending Eligibility Update	30: Health Benefit Plan Coverage	10/1/2024 12:00PM	Primary Insurance		Oct 1, 2024	View
Inactive - Pending Eligibility Update	30: Health Benefit Plan Coverage	6/3/2024 09:00AM	Primary Insurance		Jun 3, 2024	View
Inactive - Pending Eligibility Update	30: Health Benefit Plan Coverage	1/4/2024 11:00PM	Primary Insurance		Jan 2, 2024	View

Prescription Benefits

The DrChrono EHR also allows you to check your patient's insurance for prescription benefits. Prescription benefits are updated every 72 hours.

1. Select Check Prescription Benefit
2. Select Benefit Summary to view the coverage information summary for prescriptions.

The screenshot shows the 'Prescription benefits' section of a software interface. It features a 'Benefit summary' section with a '0' in a circle next to it. Below this, there is a 'Coverage last checked' label with a 'Never' button. At the bottom, there is a prominent green button labeled 'Check prescription benefit'.

Prescription benefits

Benefit summary 2

Coverage last checked [09/13/2023](#)
Eligibility [Active](#)
PBM Name PBMF
Plan Name MID-CA PLAN7
Group name JW MID-CA#7
Group number JW92983
Coverage end date 2099-12-31
Member ID PBM-ZZ-T92293 8791%AD

Coverage information [Formulary](#) [PBM-specified alternatives](#)
[Copay information](#)
[Detailed coverage information](#)
BIN/PCN 001398 (PBMF-JW-2784-2)
Pharmacy benefits [Mail order pharmacy](#)
[Retail pharmacy](#)
[SPECIALTY PHARMACY](#)

Coverage last checked [09/13/2023](#)
Eligibility [Active](#)
PBM Name CERT PBM-A
Plan Name -
Group name SPC-9288
Group number Y8831_9
Coverage end date 2099-12-31
Member ID 2455_Y8831_92

Coverage information [Formulary](#) [PBM-specified alternatives](#)
[Copay information](#)
[Detailed coverage information](#)
BIN/PCN 002318 (PBMA-Y9288)
Pharmacy benefits [Mail order pharmacy](#)
[Retail pharmacy](#)
[SPECIALTY PHARMACY](#)

[Check prescription benefit](#)