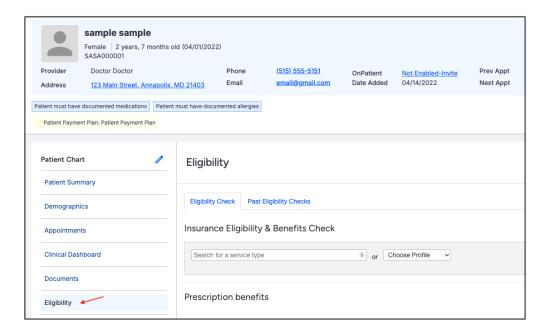# Real-Time Eligibility Verification from a Patient's Chart

Last modified on 12/11/2024 9:16 am EST

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.

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.

Checking Benefit Level/Services Covered

You are also able to check benefits/services covered for a particular specialty
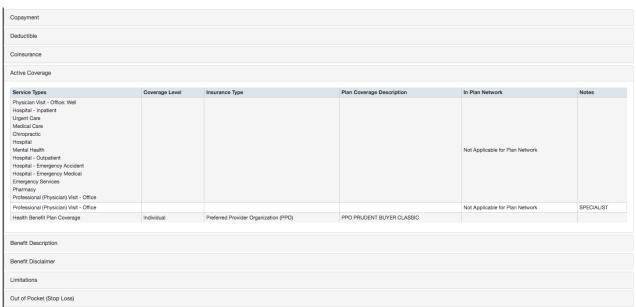
1. Search for one or multiple from the specialty drop-down.

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.

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 | Choose Profile ⬍ | | Run Primary Insurance | Run Secondary Insurance |

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   Print

Copayment

Deductible

Coinsurance

Active Coverage

Benefit Description

Benefit Disclaimer

Limitations

Out of Pocket (Stop Loss)

Copayment

Chiropractic $20
In-Plan-Network

Emergency Services $150
Not Applicable for Plan Network
Additional Information:
- FACILITY BENEFIT

Hospital - Emergency Accident $150
Not Applicable for Plan Network

Hospital - Emergency Medical $150
Not Applicable for Plan Network

Professional (Physician) Visit - Office $20
In-Plan-Network
Additional Information:
- SPECIALIST

Professional (Physician) Visit - Office $20
In-Plan-Network

Urgent Care $20
In-Plan-Network

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 Hospital - Outpatient Hospital - Emergency Accident Hospital - Emergency Medical Emergency Services Pharmacy Professional (Physician) Visit - Office				Not Applicable for Plan Network	
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.

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 from the patient's chart (**Patients > Patient List > Chart ID > Eligibility**)

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

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