

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.

The screenshot displays a patient's chart interface. At the top, a patient profile for 'sample sample' is shown, including demographic information (Female, 2 years, 7 months old, 04/01/2022, SASA000001) and contact details (Provider: Doctor Doctor, Phone: (515) 555-5151, Email: email@gmail.com, Address: 123 Main Street, Annapolis, MD 21403). Below this, there are buttons for 'Patient must have documented medications' and 'Patient must have documented allergies', and a note about the 'Patient Payment Plan: Patient Payment Plan'.

The left-hand navigation pane is visible, with the 'Eligibility' tab highlighted and indicated by a red arrow. The main content area shows the 'Eligibility' section, which includes tabs for 'Eligibility Check' and 'Past Eligibility Checks'. Under 'Eligibility Check', there is a section for 'Insurance Eligibility & Benefits Check' with a search bar for 'Search for a service type' and a dropdown for 'Choose Profile'. Below this, there is a section for '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

or

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

or

30: Health Benefit Plan Coverage
42: Home Health Care
43: Home Health Prescriptions
44: Home Health Visits
CE: Mental Health Provider - Inpatient
CF: 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

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	Emergency Services	\$ 150
In-Plan-Network		Not Applicable for Plan Network	
		Additional Information:	
		• FACILITY BENEFIT	
Hospital - Emergency Accident	\$ 150	Hospital - Emergency Medical	\$ 150
Not Applicable for Plan Network		Not Applicable for Plan Network	
Professional (Physician) Visit - Office	\$ 20	Professional (Physician) Visit - Office	\$ 20
In-Plan-Network		In-Plan-Network	
Additional Information:			
• SPECIALIST			
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				Not Applicable for Plan Network	
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.

Eligibility

Eligibility Check

Past Eligibility Checks

Appointment:

Checked On:

Filter

Reset All

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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