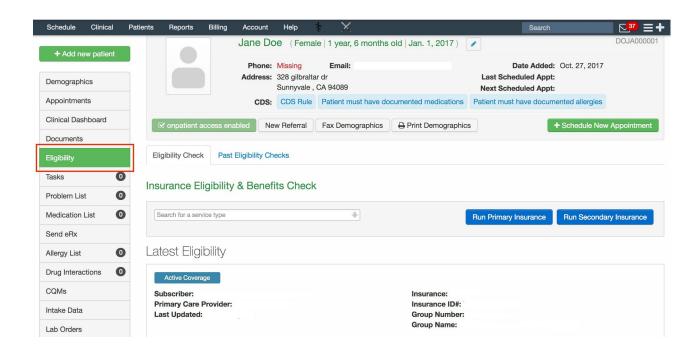
Real-Time Eligibility Verification from a Patient's Chart

09/17/2024 8:43 am ED

Real-Time Eligibility Verification from a Patient's Chart

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

- 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.

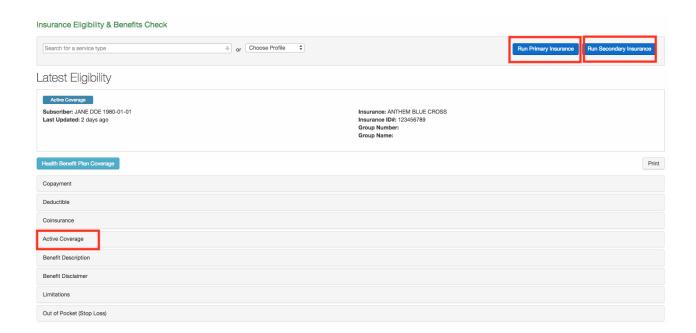


Verifying Eligibility or Active Coverage

- 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.

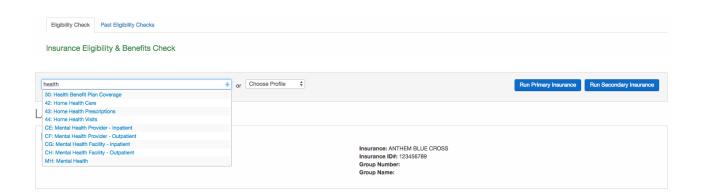


Checking Benefit Level/Services Covered

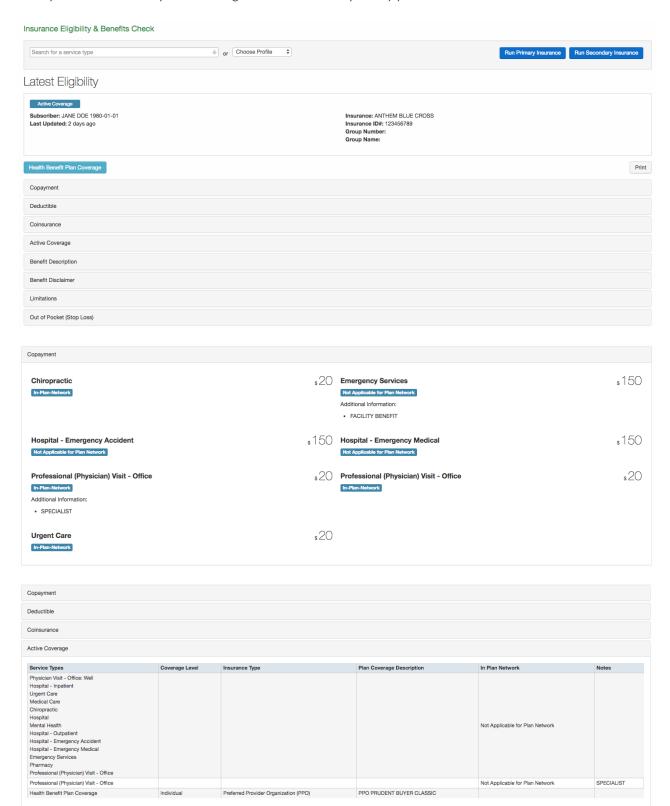
You are also able to check benefits/services covered for a particular specialty

- 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.



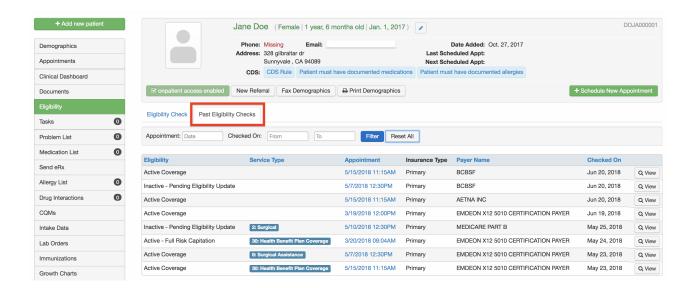
Benefit Description

Benefit Disclaimer

Out of Pocket (Stop Loss)

Past Eligibility Checks

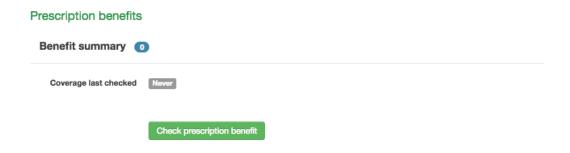
By selecting the **Past Eligibility Checks** tab, you can view eligibility checks previously run for the patient. You can filter by date of appointment, the date eligibility was checked, and sort by heading type. Failed eligibility checks are also recorded here.



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
- 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

Formulary PBM-specified alternatives Coverage information

Copay information

Detailed coverage information

001398 (PBMF-JW-2784-2) BIN/PCN

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 2099-12-31 Coverage end date 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