

# 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, the patient's name is "sample sample", a female, 2 years, 7 months old (DOB: 04/01/2022), with ID SASA000001. Below this, a table lists provider information: Doctor Doctor, phone (515) 555-5151, address 123 Main Street, Annapolis, MD 21403, email email@gmail.com, and insurance status Not Enabled-Invite. A yellow banner indicates "Patient Payment Plan: Patient Payment Plan". The left-hand navigation pane has "Eligibility" selected, highlighted with a red arrow. The main content area shows "Eligibility" with tabs for "Eligibility Check" and "Past Eligibility Checks". Below is an "Insurance Eligibility & Benefits Check" section with a search box for service types and a "Choose Profile" dropdown. The "Prescription benefits" section is partially visible at the bottom.

## 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**

**In-Plan-Network**

\$ 20

**Emergency Services**

**Not Applicable for Plan Network**

\$ 150

Additional Information:

- FACILITY BENEFIT

**Hospital - Emergency Accident**

**Not Applicable for Plan Network**

\$ 150

**Hospital - Emergency Medical**

**Not Applicable for Plan Network**

\$ 150

**Professional (Physician) Visit - Office**

**In-Plan-Network**

\$ 20

**Professional (Physician) Visit - Office**

**In-Plan-Network**

\$ 20

Additional Information:

- SPECIALIST

**Urgent Care**

**In-Plan-Network**

\$ 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.

Eligibility

Eligibility Check **Past Eligibility Checks**

Appointment:  Date  Checked On:  From  To

PAGE 1 OF 1

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	<input type="button" value="View"/>
Inactive - Pending Eligibility Update	30: Health Benefit Plan Coverage	6/3/2024 09:00AM	Primary Insurance		Jun 3, 2024	<input type="button" value="View"/>
Inactive - Pending Eligibility Update	30: Health Benefit Plan Coverage	1/4/2024 11:00PM	Primary Insurance		Jan 2, 2024	<input type="button" value="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 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 **0**

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Coverage last checked **Never**

## 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](#)