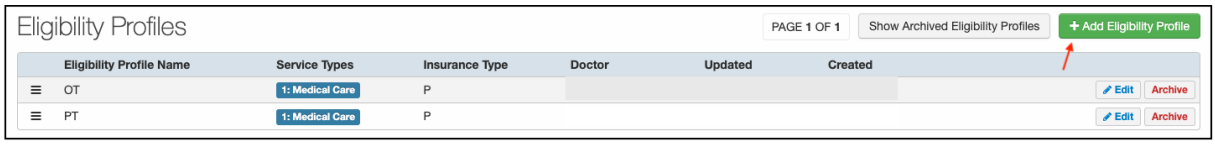
Creating an Eligibility Profile

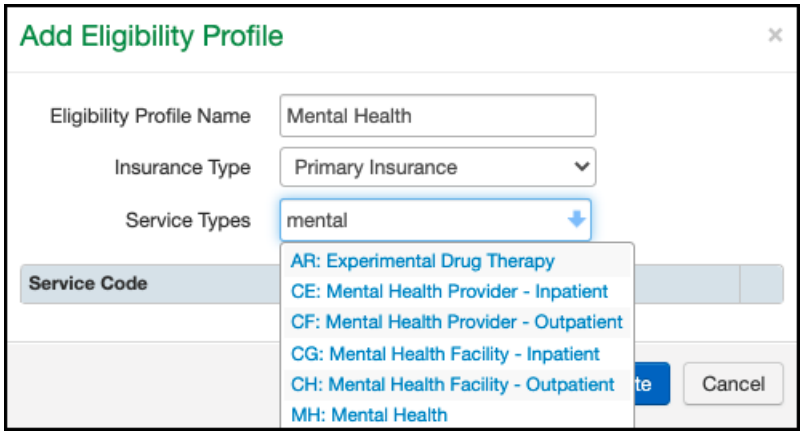
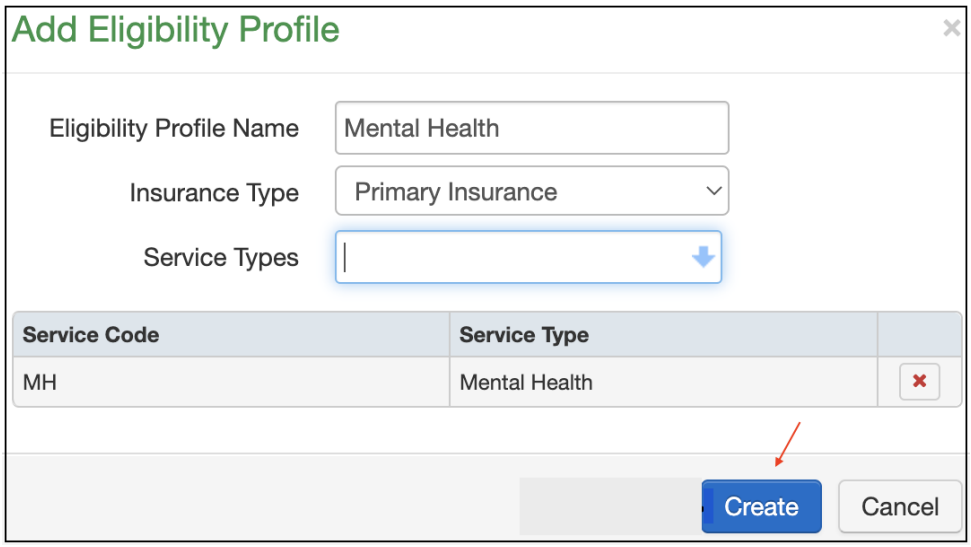
Last modified on 11/08/2024 9:37 am EST

You can create an eligibility profile to use with individual or batch eligibility checks.

1. Navigate to **Account** > **Custom Fields**.
2. Select **Eligibility Profiles** from the left menu and **+Add Eligibility Profile** to create a new profile.



3. Name the profile. Select Primary or Secondary. Search for your service type(s) to add to the profile.



4. Press **Create** to save the profile.