

Creating an Eligibility Profile

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Eligibility profiles help medical offices streamline real-time insurance eligibility checks by standardizing how coverage information is requested and reviewed across payers. By reducing manual entry and ensuring consistent, accurate eligibility responses, eligibility profiles enable staff to quickly confirm benefits and patient responsibility during scheduling and check-in. The result is a more efficient intake process, fewer eligibility-related issues, and a better experience for both staff and patients.

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.

Eligibility Profiles						PAGE 1 OF 1	Show Archived Eligibility Profiles	+ Add Eligibility Profile
Eligibility Profile Name	Service Types	Insurance Type	Doctor	Updated	Created			
OT	1: Medical Care	P						Edit Archive
PT	1: Medical Care	P						Edit Archive

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

Add Eligibility Profile

Eligibility Profile Name

Mental Health

Insurance Type

Primary Insurance

Service Types

mental

Service Code

AR: Experimental Drug Therapy

CE: Mental Health Provider - Inpatient

CF: Mental Health Provider - Outpatient

CG: Mental Health Facility - Inpatient

CH: Mental Health Facility - Outpatient

MH: Mental Health

Create

Cancel

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

Add Eligibility Profile

Eligibility Profile Name

Mental Health

Insurance Type

Primary Insurance

Service Types

Service Code	Service Type	
MH	Mental Health	<div></div>

Create

Cancel

