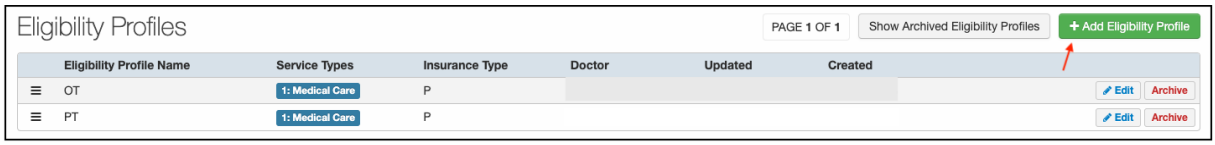
Creating an Eligibility Profile

Last modified on 09/28/2026 11:28 am EDT

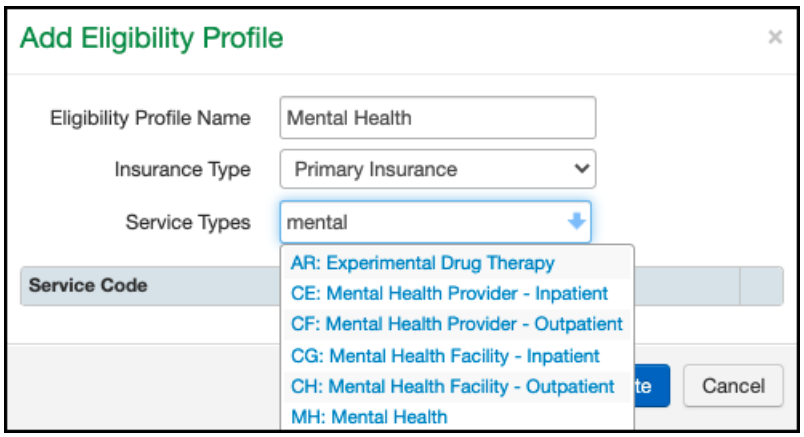
Eligibility profiles help medical offices streamline real-time insurance eligibility checks by standardizing how coverage information is requested and reviewed across payers. By reducing manual entry and ensuring consistent, accurate eligibility responses, eligibility profiles enable staff to quickly 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.

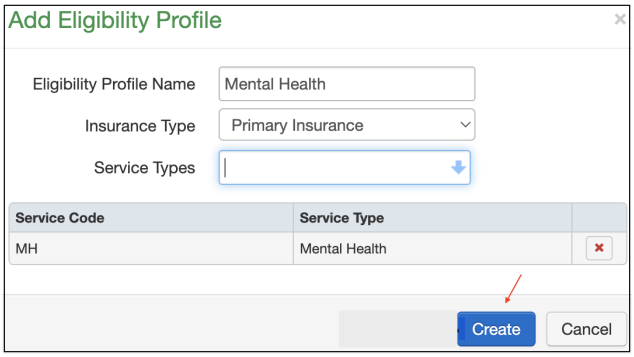
1. Navigate to **Account** > **Custom Fields**.
2. Select **Eligibility Profiles** from the left menu and **+Add Eligibility Profile** to create a new profile.



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.


Add Eligibility Profile
Eligibility Profile Name
Mental Health
Insurance Type
Primary Insurance
Service Types
Service Code
Service Type
MH
Mental Health
Create
Cancel