

Creating an Eligibility Profile

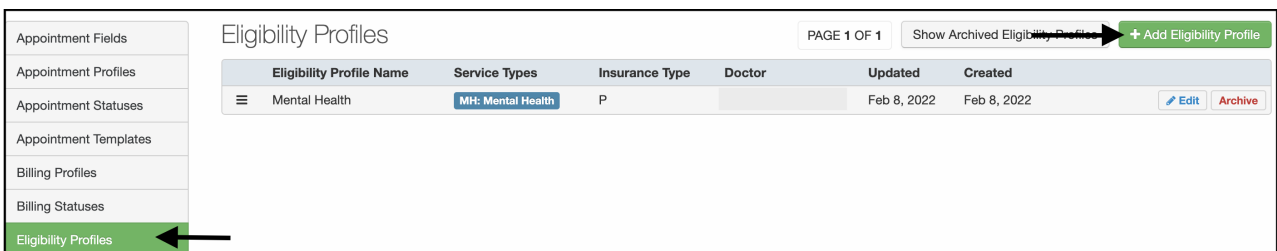
08/29/2024 8:54 am EDT

Eligibility Profiles

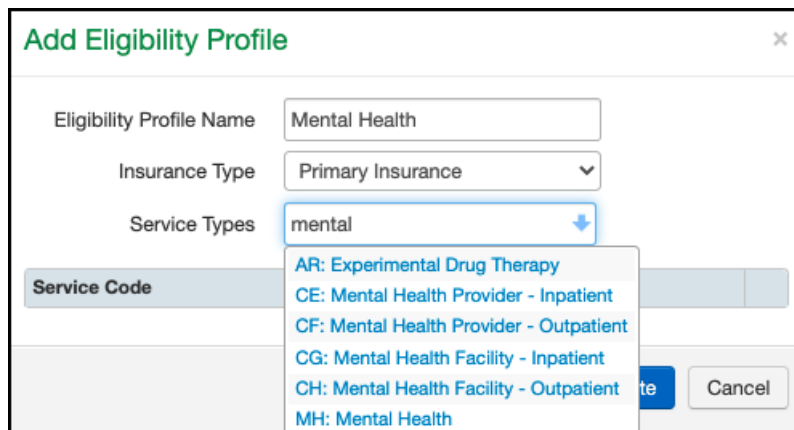
You can create an eligibility profile to use with individual or batch eligibility checks.

1. Go 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. Click **Create** to save the profile.

Add Eligibility Profile ✕

Eligibility Profile Name

Insurance Type

Service Types

Service Code	Service Type	
MH	Mental Health	✕

