

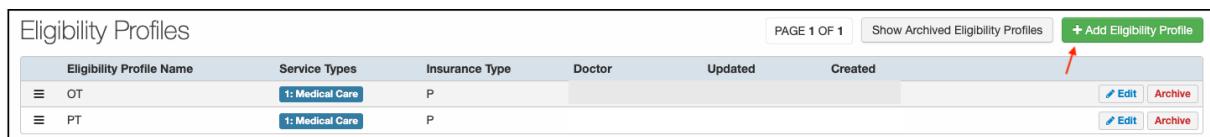
# Creating an Eligibility Profile

Last modified on 01/30/2026 12:32 pm EST

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.

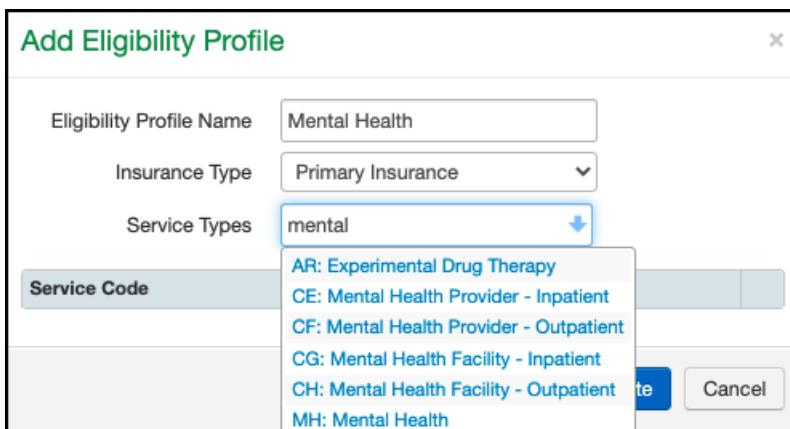
You can create an eligibility profile to use with individual or batch eligibility checks.

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



Eligibility Profile Name	Service Types	Insurance Type	Doctor	Updated	Created	
OT	1: Medical Care	P				<a href="#">Edit</a> <a href="#">Archive</a>
PT	1: Medical Care	P				<a href="#">Edit</a> <a href="#">Archive</a>

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	<input type="text" value="Mental Health"/>	
Insurance Type	<input type="text" value="Primary Insurance"/>	
Service Types	<input type="text" value=""/>	
Service Code	Service Type	
MH	Mental Health	<input type="button" value="x"/>