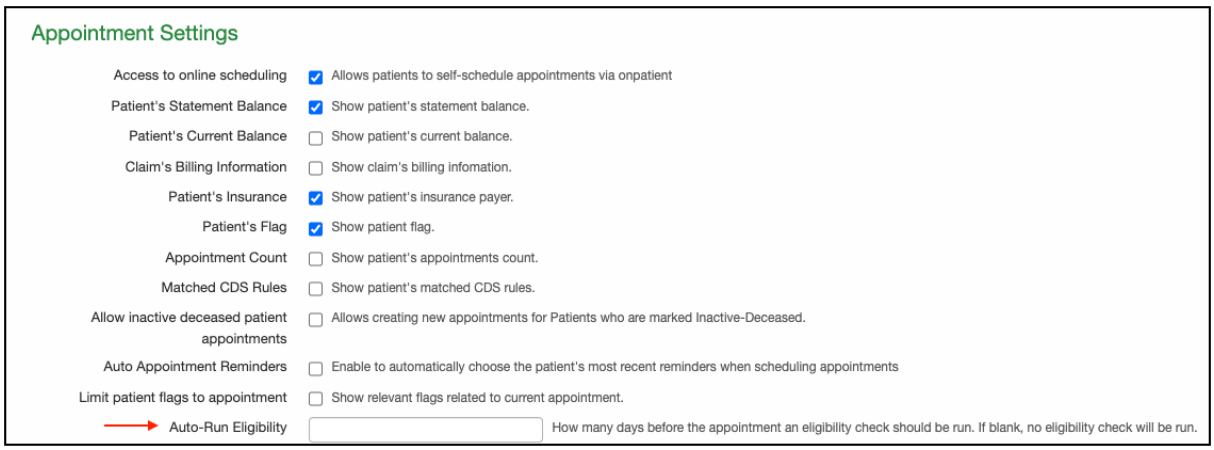
Save Time with Auto Eligibility Checks

Last modified on 09/28/2026 11:27 am EDT

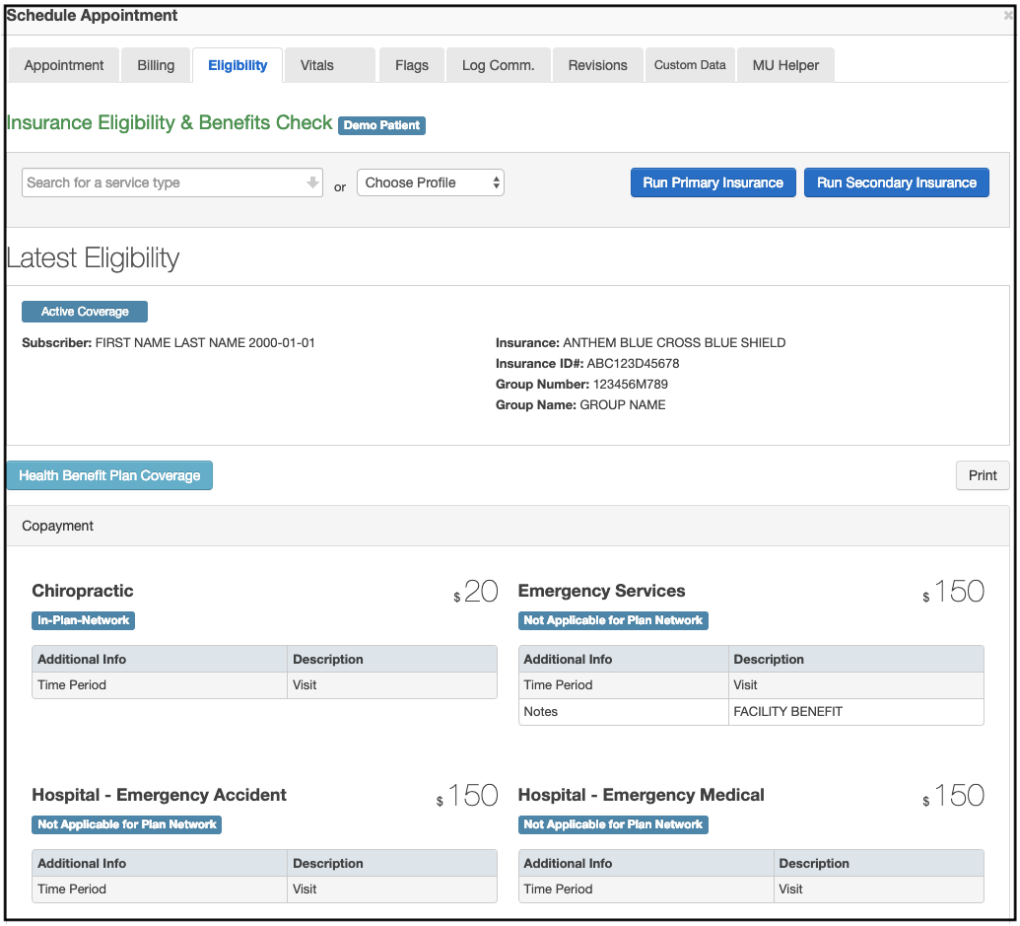
With DrChrono Real-Time Eligibility you can automatically check patient eligibility prior to a scheduled appointment, saving you the time of running the checks manually.

1. To configure an eligibility check to run automatically navigate to **Account** > **Provider Settings.**
2. Press the ***General*** tab and scroll down to the **Appointment Settings**.
3. In the **Auto-Run Eligibility** select the number of days prior to a scheduled appointment that you want the Eligibility Check to be run.

> ** **Please note**, that complete insurance information, including payer ID and patient ID number, are required for this function to run. Additionally, you must have ePS or TriZetto set up as your clearinghouse to utilize this feature. **



When **Auto-Run Eligibility** is enabled, you will be able to view eligibility details in scheduled appointments without having to run them manually each time. Eligibility details will be visible in the **Eligibility** tab from the Appointment Screen.


Schedule Appointment
Appointment
Billing
Eligibility
Vitals
Flags
Log Comm.
Revisions
Custom Data
MU Helper
Insurance Eligibility & Benefits Check
Demo Patient
Search for a service type
or
Choose Profile
Run Primary Insurance
Run Secondary Insurance
Latest Eligibility
Active Coverage
Subscriber: FIRST NAME LAST NAME 2000-01-01
Insurance: ANTHEM BLUE CROSS BLUE SHIELD
Insurance ID#: ABC123D45678
Group Number: 123456M789
Group Name: GROUP NAME
Health Benefit Plan Coverage
Print
Copayment
Chiropractic
$20
In-Plan-Network
Additional Info
Description
Time Period
Visit
Emergency Services
$150
Not Applicable for Plan Network
Additional Info
Description
Time Period
Visit
Notes
FACILITY BENEFIT
Hospital - Emergency Accident
$150
Not Applicable for Plan Network
Additional Info
Description
Time Period
Visit
Hospital - Emergency Medical
$150
Not Applicable for Plan Network
Additional Info
Description
Time Period
Visit