

Save Time with Auto Eligibility Checks

08/29/2024 8:59 am EDT

Auto Eligibility Checks

With DrChrono Real-Time Eligibility you have the ability to 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. Click 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 **TriZetto** set up as your clearinghouse to utilize this feature. ******

Appointment Settings

Access to online scheduling	<input checked="" type="checkbox"/>	Allows patients to self-schedule appointments via onpatient
Patient's Statement Balance	<input checked="" type="checkbox"/>	Show patient's statement balance.
Patient's Current Balance	<input checked="" type="checkbox"/>	Show patient's current balance.
Claim's Billing Information	<input type="checkbox"/>	Show claim's billing information.
Patient's Insurance	<input checked="" type="checkbox"/>	Show patient's insurance payer.
Patient's Flag	<input checked="" type="checkbox"/>	Show patient flag.
Appointment Count	<input checked="" type="checkbox"/>	Show patient's appointments count.
Matched CDS Rules	<input type="checkbox"/>	Show patient's matched CDS rules.
Auto Appointment Reminders	<input type="checkbox"/>	Enable to automatically choose the patient's most recent reminders when scheduling appointments
Limit patient flags to appointment	<input type="checkbox"/>	Show relevant flags related to current appointment.
Auto-Run Eligibility	2	How many days before the appointment an eligibility check should be run. If blank, no eligibility check will be run.

Auto-Run Eligibility	<input type="text"/>	How many days before the appointment an eligibility check should be run. If blank, no eligibility check will be run.
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When **Auto-Run Eligibility** is enabled you will be able to view eligibility details in scheduled appointments without having to run them each manually. 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