

# Save Time with Auto Eligibility Checks

Last modified on 01/16/2026 3:14 pm EST

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.

\*\*

**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 type="checkbox"/> Show patient's current balance.
Claim's Billing Information	<input type="checkbox"/> Show claim's billing infomation.
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 type="checkbox"/> Show patient's appointments count.
Matched CDS Rules	<input type="checkbox"/> Show patient's matched CDS rules.
Allow inactive deceased patient appointments	<input type="checkbox"/> Allows creating new appointments for Patients who are marked Inactive-Deceased.
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.
 <b>Auto-Run Eligibility</b>	<input type="text"/> How many days before the appointment an eligibility check should be run. If blank, no eligibility check will be run.

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

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](#)

Copayment

<b>Chiropractic</b> <small>In-Plan-Network</small>	\$20	<b>Emergency Services</b> <small>Not Applicable for Plan Network</small>	\$150								
<table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="width: 50%;">Additional Info</th><th style="width: 50%;">Description</th></tr></thead><tbody><tr><td>Time Period</td><td>Visit</td></tr></tbody></table>	Additional Info	Description	Time Period	Visit	\$150	<table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="width: 50%;">Additional Info</th><th style="width: 50%;">Description</th></tr></thead><tbody><tr><td>Time Period</td><td>Visit</td></tr></tbody></table>	Additional Info	Description	Time Period	Visit	\$150
Additional Info	Description										
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**Hospital - Emergency Accident** Not Applicable for Plan Network

Additional Info	Description
Time Period	Visit

**Hospital - Emergency Medical** Not Applicable for Plan Network

Additional Info	Description
Time Period	Visit