Create and use eligibility groups

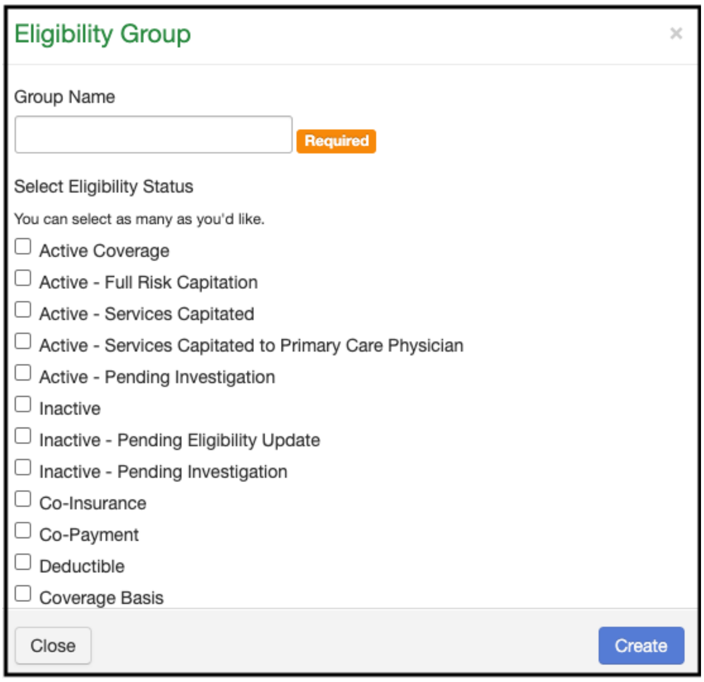
Last modified on 10/01/2024 2:32 pm EDT

DrChrono has added enhancements to the Real Time Eligibility (RTE) feature to help your office efficiently check your patient's eligibility by grouping like statuses.

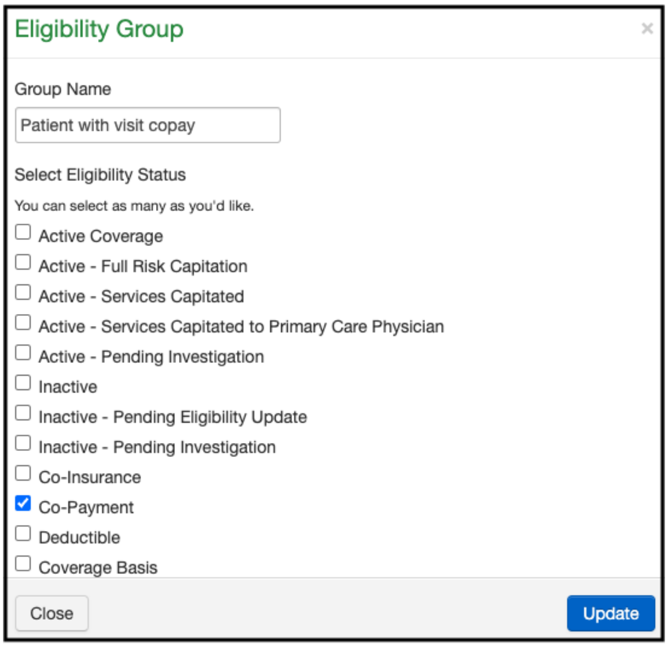
Creating Eligibility Groups

First, you will need to create applicable eligibility groups for your practice.

1. Navigate to **Account > Custom Fields.**
2. Select **Eligibility Groups** from the column on the left.
3. Click on **+ Create Group**.



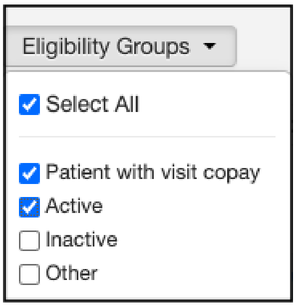
4. Fill in a name for your new eligibility group.
5. Select the status(es) that you would like to be returned for this group when eligibility checks are returned.
6. Here is an example of a group that will show patients who will owe a copay for their appointment.



Utilizing Eligibility Groups

To utilize your new eligibility group, follow the steps below.

1. Navigate to **Schedule > Eligibility Dashboard**
2. Select the **provider/office/appointment date** as desired.
3. Select the eligibility group from the drop-down box on the right of the screen.



3. Select **Run Eligibility.**

The patients who meet the criteria you selected will appear.   You can export the report by clicking **Export to CSV** on the right of the screen. The report will be available in your message center.