Create and Use Eligibility Groups

Last modified on 11/19/2024 10:44 am EST

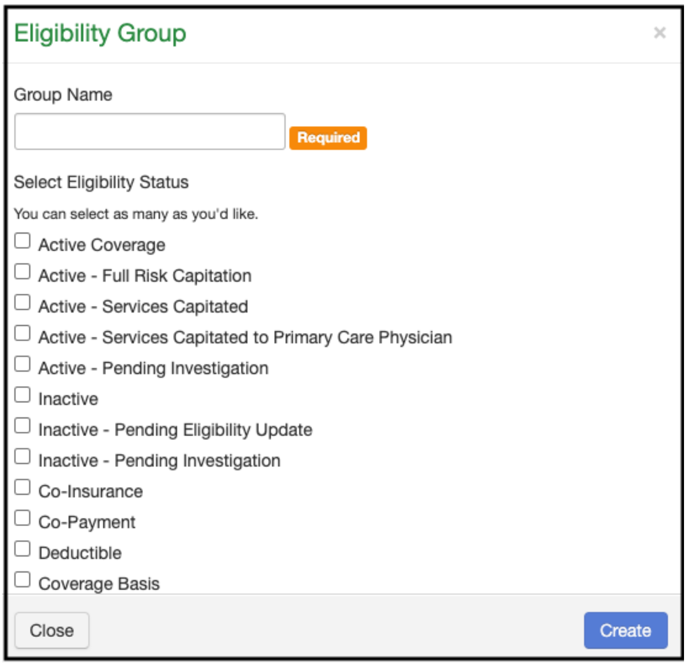
We are in the process of rolling this feature out to all clients, and we expect the feature to be live for all accounts by 11/26/2024. If you do not see this in your account on 11/26 please reach out to support for assistance.

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

Create Eligibility Groups

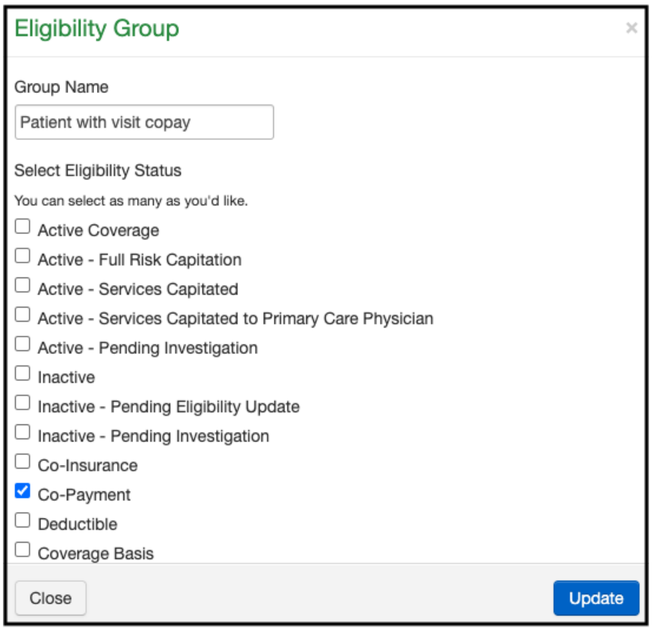
First, you need to create applicable eligibility groups for your practice.

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



4. Fill in a name for your new eligibility group.
5. Select the statuses you would like to be returned for this group when eligibility checks are returned.

Here is an example of a group that shows patients who will owe a copay for their appointment.

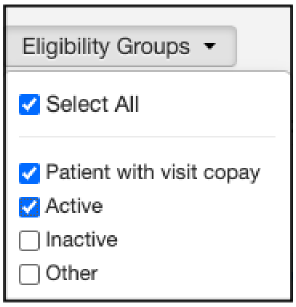


Use Eligibility Groups

1. Select **Schedule > Eligibility Dashboard**

2. Select the provider/office/appointment date as desired.

3. Select the eligibility group from the dropdown box on the right of the screen.



4. Select **Run Eligibility**.

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