

Create and Use Eligibility Groups

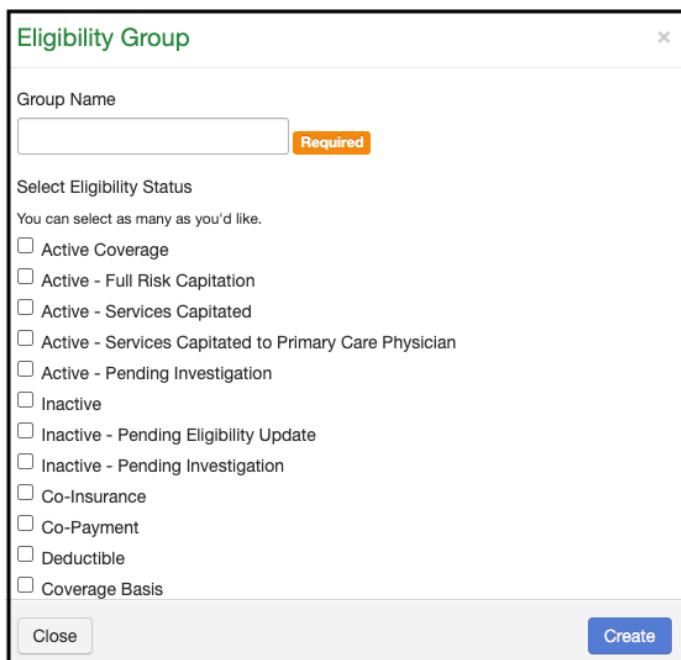
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DrChrono has added enhancements to the Real-Time Eligibility (RTE) feature to help your office efficiently check patients' eligibility by grouping similar statuses.

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**.



Eligibility Group

Group Name Required

Select Eligibility Status

You can select as many as you'd like.

- Active Coverage
- Active - Full Risk Capitation
- Active - Services Capitated
- Active - Services Capitated to Primary Care Physician
- Active - Pending Investigation
- Inactive
- Inactive - Pending Eligibility Update
- Inactive - Pending Investigation
- Co-Insurance
- Co-Payment
- Deductible
- Coverage Basis

Close Create

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.

Eligibility Group

Group Name
Patient with visit copay

Select Eligibility Status
You can select as many as you'd like.

Active Coverage
 Active - Full Risk Capitation
 Active - Services Capitated
 Active - Services Capitated to Primary Care Physician
 Active - Pending Investigation
 Inactive
 Inactive - Pending Eligibility Update
 Inactive - Pending Investigation
 Co-Insurance
 Co-Payment
 Deductible
 Coverage Basis

Close **Update**

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.

Eligibility Groups ▾

Select All

Patient with visit copay
 Active
 Inactive
 Other

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.