

Create and use eligibility groups

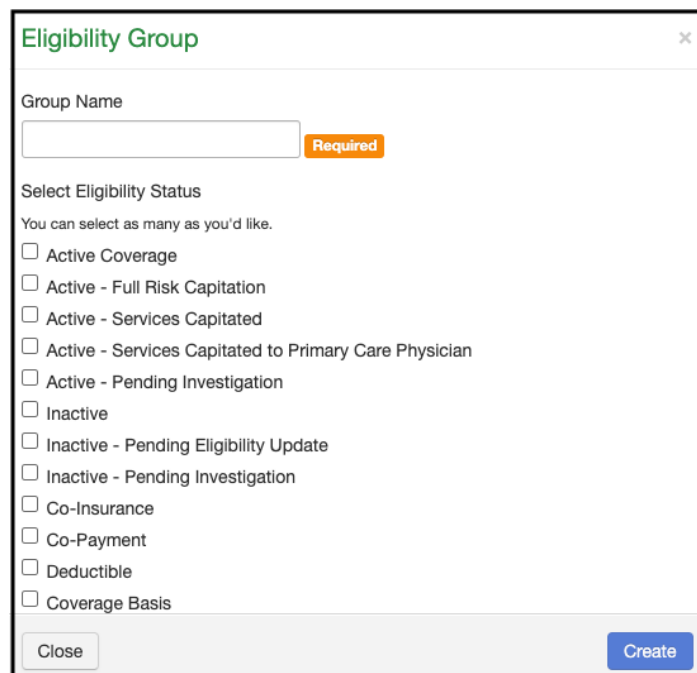
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DrChrono has added enhancements to the Real Time Eligibility (RTE) feature to help your office efficiently check your patient's eligibility by grouping like statuses.

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**.



The screenshot shows a modal window titled "Eligibility Group" with a close button (x) in the top right corner. The form contains the following elements:

- Group Name:** A text input field with a "Required" label to its right.
- Select Eligibility Status:** A section with the instruction "You can select as many as you'd like." followed by a list of checkboxes:
 - 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
- Buttons:** A "Close" button in the bottom left and a "Create" button in the bottom right.

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.

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

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.

Eligibility Groups ▾

- Select All

- Patient with visit copay
- Active
- Inactive
- Other

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.

