

Create and Use Eligibility Groups

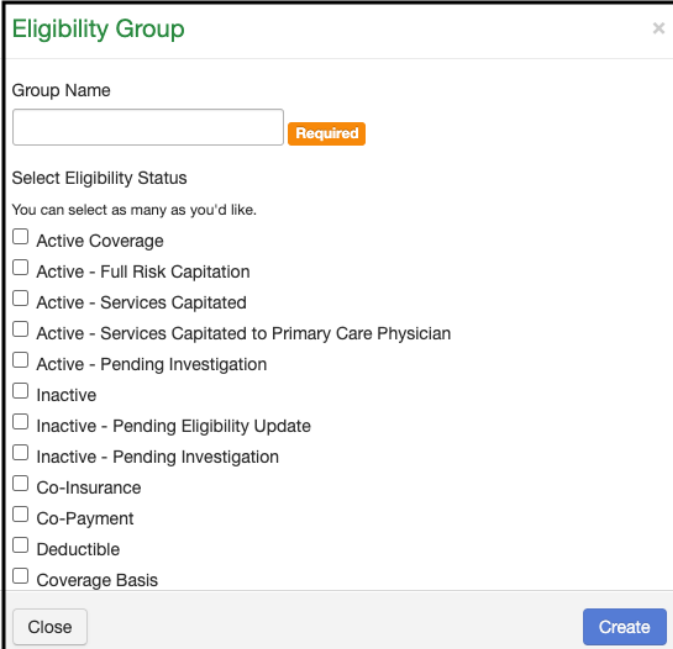
Last modified on 01/20/2026 10:54 am EST

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**.



The screenshot shows a modal window titled "Eligibility Group" with a close button (X) in the top right corner. Inside the modal, there is a "Group Name" label above a text input field, followed by a "Required" label in an orange box. Below this is the "Select Eligibility Status" section, which includes the instruction "You can select as many as you'd like." and a list of 12 checkboxes with corresponding status names: 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, and Coverage Basis. At the bottom of the modal, there are two buttons: "Close" on the left and "Create" on the right.

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.
