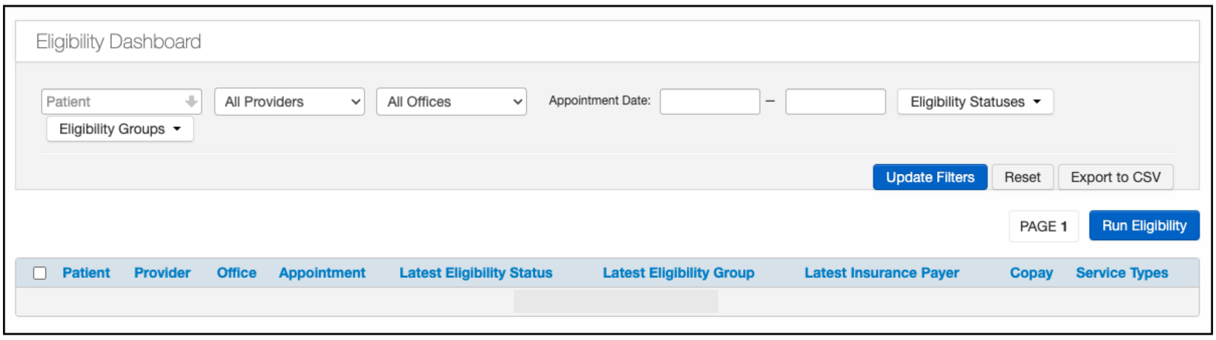
Eligibility Dashboard

Last modified on 11/19/2024 11:01 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.

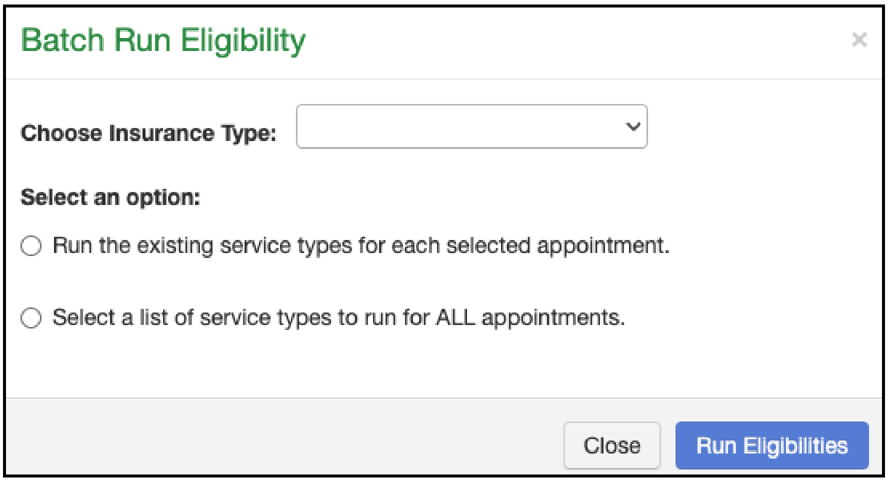
Options to run eligibility checks include Patient, Provider, Office, Appointment Date (single date or range), Eligibility Status, or Eligibility Group.
To help you verify your patient's eligibility more efficiently, we have added additional columns to the Eligibility Dashboard.

1. Navigate to **Schedule > Eligibility Dashboard**



2. Once you have selected filter options, click **Run Eligibility**.

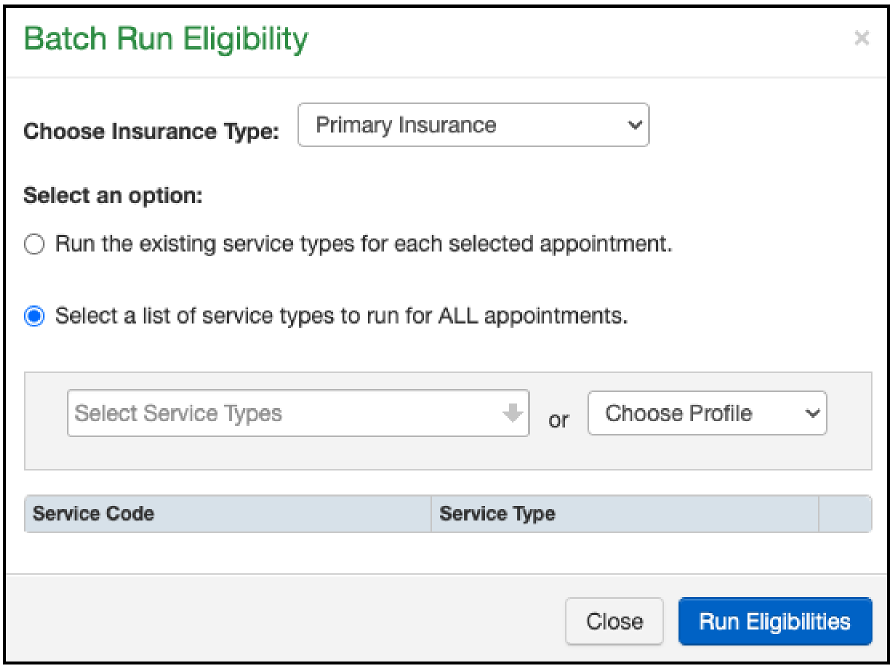
3. A second box, Batch Run Eligibility, will open.



a. **Choose Insurance Type**: Here you will select which insurance, Primary or Secondary, you would like to run eligibility for.

b. **Select an option:** Here you will select whether you want to run eligibility for selected or all appointments.

1. If you select *Select a list of service types to run for ALL appointments*, a dropdown will appear for you to choose the appropriate service type or appointment profile.



4. Once you have made your selections, click on **Run Eligibilities**.

5. Once the report is generated, it will appear on your screen.

6. If you would like to export it, you can do so by clicking **Export to CSV** on the right of the screen. The report will generate and be available in your message center.