

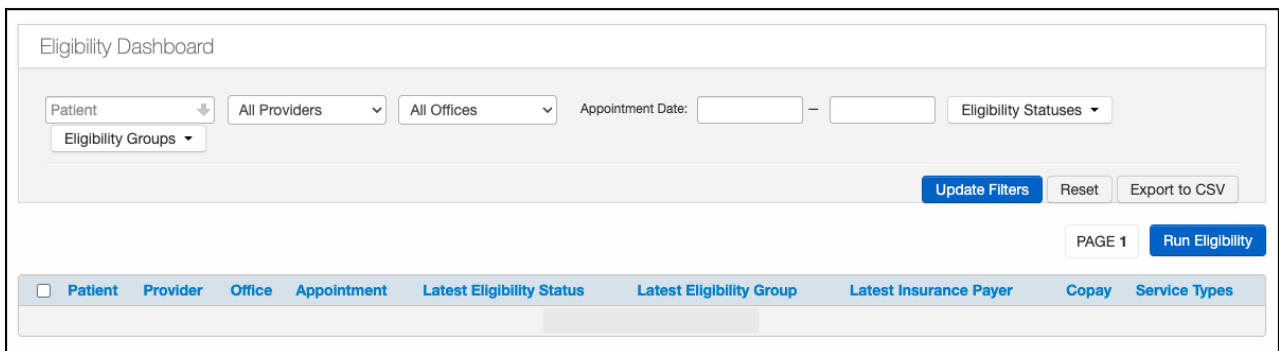
# Enrollment Dashboard

Last modified on 10/02/2024 9:03 am EDT

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.

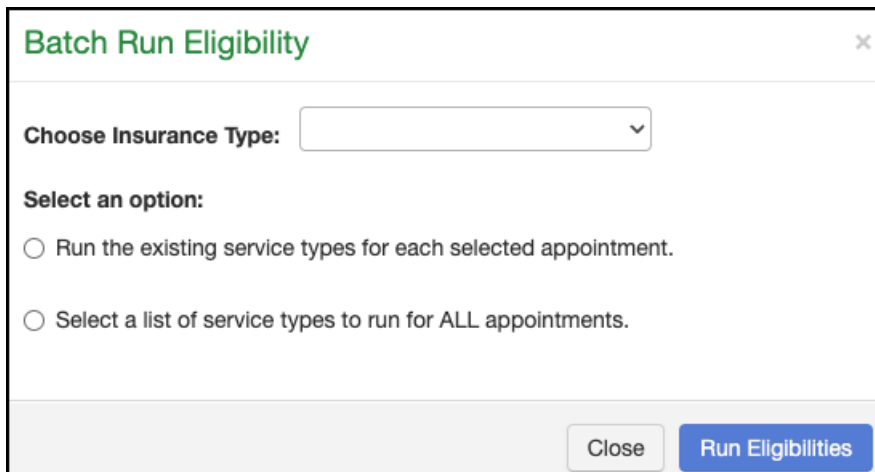
## 1. Navigate to **Schedule > Eligibility Dashboard**



The screenshot shows the 'Eligibility Dashboard' interface. At the top, there are several filter dropdowns: 'Patient', 'All Providers', 'All Offices', 'Appointment Date' (with a date range selector), and 'Eligibility Statuses'. Below these is an 'Eligibility Groups' dropdown. On the right side, there are buttons for 'Update Filters', 'Reset', and 'Export to CSV'. At the bottom right, there is a 'PAGE 1' indicator and a 'Run Eligibility' button. Below the filters, there is a table header with columns: 'Patient', 'Provider', 'Office', 'Appointment', 'Latest Eligibility Status', 'Latest Eligibility Group', 'Latest Insurance Payer', 'Copay', and 'Service Types'. Each column has a checkbox next to it.

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

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



The screenshot shows a dialog box titled 'Batch Run Eligibility'. It has a close button (X) in the top right corner. The dialog contains a 'Choose Insurance Type:' dropdown menu. Below that, it says 'Select an option:' followed by two radio button options: 'Run the existing service types for each selected appointment.' and 'Select a list of service types to run for ALL appointments.' At the bottom of the dialog, there are two buttons: 'Close' and 'Run Eligibilities'.

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.

**Batch Run Eligibility** ×

**Choose Insurance Type:** Primary Insurance ▾

**Select an option:**

Run the existing service types for each selected appointment.

Select a list of service types to run for ALL appointments.

Select Service Types ▾ or Choose Profile ▾

Service Code	Service Type
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Close Run Eligibilities

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.
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