

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**

The screenshot shows the 'Eligibility Dashboard' interface. At the top, there's a title 'Eligibility Dashboard'. Below it, there are several filter options: 'Patient' (with a dropdown arrow), 'All Providers' (with a dropdown arrow), 'All Offices' (with a dropdown arrow), 'Appointment Date:' followed by two input fields separated by a minus sign, and 'Eligibility Statuses' (with a dropdown arrow). Below these filters, there are three buttons: 'Update Filters' (blue), 'Reset' (light gray), and 'Export to CSV' (light gray). To the right of these buttons, there's a 'PAGE 1' label and a 'Run Eligibility' button (blue). Below the filters and buttons, there's a table with columns: 'Patient', 'Provider', 'Office', 'Appointment', 'Latest Eligibility Status', 'Latest Eligibility Group', 'Latest Insurance Payer', 'Copay', and 'Service Types'. The 'Patient' column has a checkbox icon.

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

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

The screenshot shows a modal box titled 'Batch Run Eligibility' with a close button (X) in the top right corner. Inside the modal, there's a section 'Choose Insurance Type:' followed by a dropdown menu. Below this, there's a section 'Select an option:' with 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 modal, there are two buttons: 'Close' (light gray) and 'Run Eligibilities' (blue).

- 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.