

Overview of new Insurance and Eligibility Screen

Last modified on 02/09/2026 11:33 am EST



This feature is in beta. If you would like to become a beta partner, please reach out to support.

The Insurance & Eligibility screen brings insurance management and eligibility verification into one unified experience. This update reduces clicks, improves visibility, and helps front-desk and billing teams work more efficiently.

What's New

- Insurance and eligibility are now combined into a single screen
- Eligibility results display directly under each insurance
- Insurance priority changes are easier and safer
- Archiving replaces deleting to preserve historical data
- Modernized design for faster, more intuitive workflows

Key improvements include

- A unified **Insurance & Eligibility** screen that combines insurance details and eligibility verification in one place.
- Easier management of **insurance priority**, including safe switching between primary, secondary, and tertiary coverage with system safeguards.
- Simplified **archiving** of all insurance types, including Auto Accident and Workers' Compensation.
- Inline **eligibility results** are displayed directly beneath each insurance, reducing navigation and context switching.
- Improved **insurance ID card uploads and visibility**.
- A refreshed, modernized design to support faster, more intuitive workflows.
- Expanded support for specialized insurance types, including Auto Accident, Workers' Compensation, DME, and tertiary insurance data capture.

dr

chrono

ScheduleClinicalPatientsReportsBillingAccountMarketplaceHelp

Search

21

+

sample sample

Female | 3 years, 9 months old (04/01/2022) | SASA000001

ProviderCathy Consultant

OnPatientNot Enabled-Invite

Address123 Main Street, Annapolis, MD 21403

Date Added04/14/2022

Phone(515) 555-5151

Prev Appt01/12/2026

Emailemail@gmail.com

Next ApptNone

Patient must have documented medications

Patient must have documented allergies

View All

Patient Chart

Patient Summary

Demographics

Appointments

Clinical Dashboard

Documents

Eligibility

Tasks0

Problem List3

Medication List0

Send eRx

Allergy List0

Drug Interactions0

CQMs

Intake Data

Lab Orders

Demographics

Demographics

Insurances

Authorizations

Patient Flags

Payments

Standard Insurance

Up to 3 insurances.

No Insurance on File

Patient doesn't have any active insurance on file. You can add insurance by clicking the button on the right.

Add Insurance

Hospital Insurance

Up to 2 insurances.

No Insurance on File

Patient doesn't have any active insurance on file. You can add insurance by clicking the button on the right.

Add Insurance

Auto Accident Insurance

No Insurance on File

Patient doesn't have any active insurance on file. You can add insurance by clicking the button on the right.

Add Insurance

Worker's Compensation

No Insurance on File

Patient doesn't have any active insurance on file. You can add insurance by clicking the button on the right.

Add Insurance

Additional resources:

- [Understanding the Layout of the Screen](#)
- [Adding, Editing, and Archiving Insurance](#)
- [Requesting an Eligibility check and viewing eligibility history](#)
- [Auto Accident / Workers' Compensation / Durable Medical Equipment Payers](#)
- [Best Practices for Check-In](#)
- [Video Walkthrough](#)