

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.

The screenshot shows the drchrono patient chart interface. The top navigation bar includes links for Schedule, Clinical, Patients, Reports, Billing, Account, Marketplace, and Help. The patient details at the top are for a female named sample sample, 3 years old, born on 04/01/2022, with the identifier SASA0000001. The provider listed is Cathy Consultant, an OnPatient with the status 'Not Enabled-Invite'. The address is 123 Main Street, Annapolis, MD 21403. The phone number is (515) 555-5151, and the email is email@gmail.com. The date added is 04/14/2022, and there are no previous or next appointments.

Demographics

Standard Insurance
Up to 3 insurances. Add Insurance

Hospital Insurance
Up to 2 insurances. 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

Demographics Insurances Authorizations Patient Flags Payments

Patient Chart Edit

Patient Summary

Demographics

Appointments

Clinical Dashboard

Documents

Eligibility

Tasks 0

Problem List 3

Medication List 0

Send eRx

Allergy List 0

Drug Interactions 0

CQMs

Intake Data

Lab Orders

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](#)