

Requesting an Eligibility check and viewing eligibility history

Last modified on 05/07/2026 11:43 am EDT



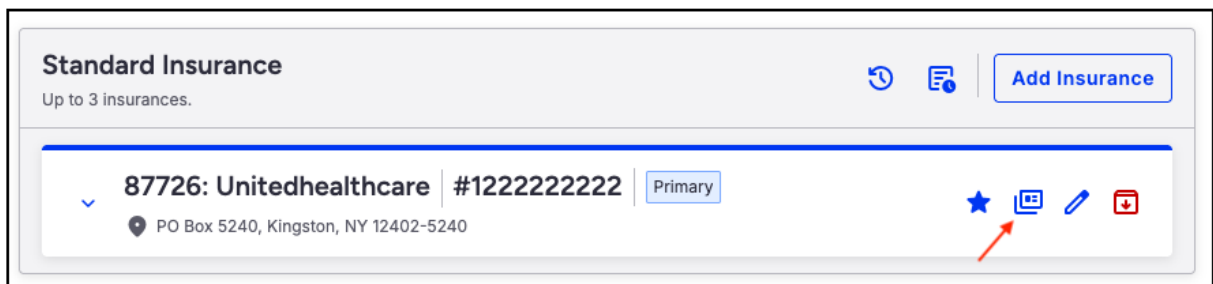
This feature is in beta. If you would like to become a beta partner, please reach out to support.

Once a payer is added to a patient's chart, an eligibility and benefits check can be run quickly and seamlessly.

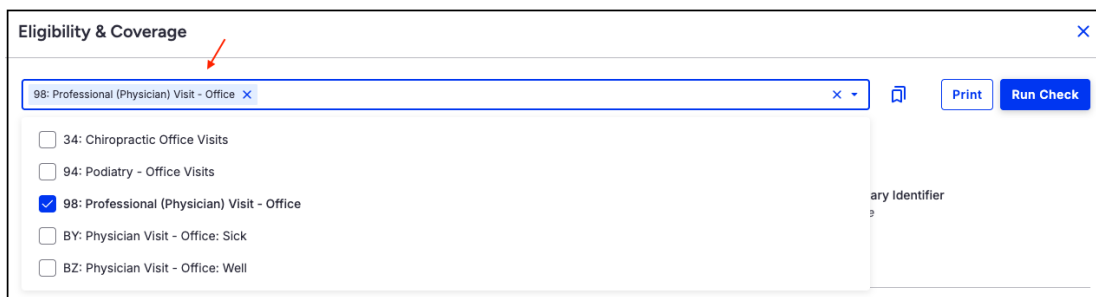
Requesting Eligibility | Viewing Eligibility History | Utilizing Eligibility Profiles

Requesting Eligibility and Benefits

1. Navigate to the patient's chart > Demographics > Insurance tab
2. Press the dual cards to open the eligibility and benefits window.



3. Use the Search box to identify what type of benefits you would like returned.



4. Press Run Check on the top right of the screen.
5. The system will return the eligibility and benefit information for the patient.

Eligibility & Coverage ✕

98: Professional (Physician) Visit - Office ✕ 📄 Print Run Check

Active Coverage | Last checked: 01/28/2026, 12:41 PM

87726: Unitedhealthcare
 P.O. Box 30539, Salt Lake City, UT 84130-0539

Subscriber Name FIRST NAME LAST NAME	Patient Name Chrissy Bright	Group Name GROUP NAME	Primary Identifier None
Subscriber DOB 01/01/2000	Patient DOB 09/10/1971	Group Number 123456M789	
Insurance ID ABC123D45678			

Patient's Deductible
 \$0.00 spent / \$250.00 remaining \$250.00

Patient's Out of Pocket (In-Network) \$0.00 spent / \$2250.00 remaining	\$2250.00	Patient's Out of Pocket (Out-of-Network) \$0.00 spent / \$6500.00 remaining	\$6500.00
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Professional (Physician) Visit - Office

Copayment ⌵

Service Type	Amount	Additional Info
Professional (Physician) Visit - Office In-Plan-Network	\$20.00	Time Period: Visit Notes: Specialist
Professional (Physician) Visit - Office In-Plan-Network	\$20.00	Time Period: Visit

Deductible ⌵

Coinsurance ⌵

Active Coverage ⌵

Benefit Description ⌵

Benefit Disclaimer ⌵

Out of Pocket ⌵

Viewing Eligibility History

When eligibility and benefit requests are made, the system stores them in the patient's history. Viewing eligibility for a specific date of service is quick and easy.

1. Navigate to the patient's chart > Demographics > Insurances
2. Press the clock icon on the top right of the screen.

Demographics

✓ Sufficient patient demographics to bill insurance.

Demographics **Insurances** Authorizations Patient Flags Payments

Standard Insurance
Up to 3 insurances.

Active Coverage Last checked: 01/28/2026, 12:41 PM

87726: Unitedhealthcare #122222222 Primary

P.O. Box 30539, Salt Lake City, UT 84130-0539

3. The eligibility history window will open and show each eligibility check run for the patient. Filters for appointment date and date range are available if the list is long.

Eligibility Check History

Appointment Date: MM/DD/YYYY Date Checked Range: MM/DD/YYYY - MM/DD/YYYY

Service Type	Eligibility	Payer Name	Type	Appointment	Date Check	Action
98: Professional (Physician) Visit - Office	Active Coverage	Unitedhealthcare	Primary	No Appointment	01/28/2026	View
98: Professional (Physician) Visit - Office	Active Coverage	Unitedhealthcare	Primary	No Appointment	01/28/2026	View

Showing 2 of 2 records

4. To view the eligibility and benefit information for a specific date, press the blue View on the right side of the row.

Eligibility Check History

Appointment Date: MM/DD/YYYY Date Checked Range: MM/DD/YYYY - MM/DD/YYYY

Service Type	Eligibility	Payer Name	Type	Appointment	Date Check	Action
98: Professional (Physician) Visit - Office	Active Coverage	Unitedhealthcare	Primary	No Appointment	01/28/2026	View
98: Professional (Physician) Visit - Office	Active Coverage	Unitedhealthcare	Primary	No Appointment	01/28/2026	View

Showing 2 of 2 records

Utilizing Eligibility Profiles

Eligibility Profiles improve efficiency by allowing you to group patients or service types and run eligibility and benefits checks in batches rather than individually. For detailed instructions on setting up and using Eligibility Profiles, please refer to the articles linked [here](#).