

Real-Time Eligibility Dashboard

07/24/2024 7:45 pm EDT

You can use the Eligibility Dashboard to run eligibility at the same time for an entire group of patients.

Note: Complete insurance information, including payer ID and id number, is required for this function to run. Additionally, you must have **ePS**, **eProvider Solutions** or **Trizetto** set up as your clearinghouse to use this feature.

- Navigate to **Schedule > Eligibility Dashboard**.

The screenshot shows the 'Eligibility Dashboard' interface. At the top is a navigation bar with tabs: Schedule, Clinical, Patients, Reports, Billing, Account, Marketplace, and Help. A 'SCHEDULING TOOLS' dropdown menu is open, listing various tools like Calendar, Availability Search, and 'Eligibility Dashboard' (which is highlighted). Below the menu is an 'Offices' selection panel with checkboxes for Eastern Office, Main PG Office, Mountain Office, and Telehealth, all of which are checked. The main area displays a calendar view for 02/08/2022 with appointments for Jenny (Jen) Harris, Michelle Harris, and Chrissy Bright.

- You can run eligibility by searching for a patient, individual provider or office, date range, or status.

The screenshot shows the search and results interface. At the top, there are filters for Patient, All Providers, All Offices, Appointment Date (02/08/2022 - 02/08/2022), and Eligibility Statuses. There are 'Update Filters' and 'Reset' buttons. Below the filters, it shows 'PAGE 1' and a 'Run Eligibility' button. The results table below lists three patients: Jenny Harris, Michelle Harris, and Chrissy Bright, all with '30: Health Benefit Plan Coverage' status.

<input type="checkbox"/>	Patient	Provider	Office	Appointment	Service Types
<input type="checkbox"/>	Jenny Harris	Brendan Wilberton	Eastern Office	2/8/2022 09:00AM	30: Health Benefit Plan Coverage
<input type="checkbox"/>	Michelle Harris	Brendan Wilberton	Eastern Office	2/8/2022 09:40AM	30: Health Benefit Plan Coverage
<input type="checkbox"/>	Chrissy Bright	Brendan Wilberton	Eastern Office	2/8/2022 10:20AM	30: Health Benefit Plan Coverage

- Under the **Eligibility Status** dropdown menu, you can select which statuses you would like to use in the eligibility check.

Eligibility Dashboard

Patient All Providers All Offices Appointment Date: 02/08/2022 - 02/08/2022 Eligibility Statuses

<input type="checkbox"/>	Patient	Provider	Office
▶ <input type="checkbox"/>	Jenny Harris	Brendan Wilberton	Eastern Office
▶ <input type="checkbox"/>	Michelle Harris	Brendan Wilberton	Eastern Office
▶ <input type="checkbox"/>	Chrissy Bright	Brendan Wilberton	Eastern Office

Select All

- Active Coverage
- Active - Full Risk Capitation
- Active - Services Capitated
- Active - Services Capitated to Primary Care Physician
- Active - Pending Investigation
- Inactive
- Inactive - Pending Eligibility Update
- Inactive - Pending Investigation
- Co-Insurance
- Co-Payment
- Deductible
- Coverage Basis
- Benefit Description
- Exclusions
- Limitations
- Out of Pocket (Stop Loss)
- Unlimited
- Non-Covered
- Cost Containment
- Reserve
- Primary Care Provider
- Pre-existing Condition
- Managed Care Coordinator
- Services Restricted to Following Provider
- Not Deemed a Medical Necessity
- Benefit Disclaimer
- Second Surgical Opinion Required
- Other or Additional Payor
- Prior Year(s) History
- Card(s) Reported Lost/Stolen
- Contact Following Entity for Eligibility or Benefit Information
- Cannot Process
- Other Source of Data
- Health Care Facility
- Spend Down

- You can view more of the individual patient's info by clicking on the (▶) icon.

Eligibility Dashboard

Patient All Providers All Offices Appointment Date: 02/08/2022 - 02/08/2022 Eligibility Statuses Update Filters Reset

PAGE 1 Run Eligibility

<input type="checkbox"/>	Patient	Provider	Office	Appointment	Service Types
▶ <input type="checkbox"/>	Jenny Harris	Brendan Wilberton	Eastern Office	2/8/2022 09:00AM	30: Health Benefit Plan Coverage
	Service Type	Insurance Type	Eligibility Status	Last Checked	
	30: Health Benefit Plan Coverage	Primary Insurance	Inactive - Pending Eligibility Update	Feb 8, 2022	
▼ <input type="checkbox"/>	Michelle Harris	Brendan Wilberton	Eastern Office	2/8/2022 09:40AM	30: Health Benefit Plan Coverage
	Service Type	Insurance Type	Eligibility Status	Last Checked	
	30: Health Benefit Plan Coverage	Primary Insurance	Inactive - Pending Eligibility Update	Feb 8, 2022	
▼ <input type="checkbox"/>	Chrissy Bright	Brendan Wilberton	Eastern Office	2/8/2022 10:20AM	30: Health Benefit Plan Coverage
	Service Type	Insurance Type	Eligibility Status	Last Checked	
	30: Health Benefit Plan Coverage	Primary Insurance	Inactive - Pending Eligibility Update	Feb 8, 2022	

- To run eligibility click the **Run Eligibility** button.

Eligibility Dashboard

Patient All Providers All Offices Appointment Date: 02/08/2022 - 02/08/2022 Eligibility Statuses Update Filters Reset

PAGE 1 Run Eligibility

<input checked="" type="checkbox"/>	Patient	Provider	Office	Appointment	Service Types
▶ <input checked="" type="checkbox"/>	Jenny Harris	Brendan Wilberton	Eastern Office	2/8/2022 09:00AM	30: Health Benefit Plan Coverage
▶ <input checked="" type="checkbox"/>	Michelle Harris	Brendan Wilberton	Eastern Office	2/8/2022 09:40AM	30: Health Benefit Plan Coverage
▶ <input checked="" type="checkbox"/>	Chrissy Bright	Brendan Wilberton	Eastern Office	2/8/2022 10:20AM	30: Health Benefit Plan Coverage
▶ <input checked="" type="checkbox"/>	Daniel Kivatinos	Brendan Wilberton	Eastern Office	2/8/2022 11:20AM	30: Health Benefit Plan Coverage

- In the batch eligibility window, select **Primary** or **Secondary Insurance**.

Batch Run Eligibility



Choose Insurance Type:



- Primary Insurance
- Secondary Insurance

Select an option:

- Run the existing service types for each selected appointment.
- Select a list of service types to run for ALL appointments.

Close

Run Eligibilities

You can run eligibility for the selected appointments and existing service types.

Batch Run Eligibility



Choose Insurance Type:

Primary Insurance



Select an option:

- Run the existing service types for each selected appointment.

Patient	Appointment	Service Types
Jenny Harris	2/8/2022 09:00AM	30: Health Benefit Plan Coverage
Michelle Harris	2/8/2022 09:40AM	30: Health Benefit Plan Coverage
Chrissy Bright	2/8/2022 10:20AM	30: Health Benefit Plan Coverage
Daniel Kivatinos	2/8/2022 11:20AM	30: Health Benefit Plan Coverage

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

Close

Run Eligibilities

--OR--

You can run eligibility by searching for a service type or by an eligibility profile that you can create. For more information click [here](#).

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.

mental or Choose Profile

- AR: Experimental Drug Therapy
- CE: Mental Health Provider - Inpatient
- CF: Mental Health Provider - Outpatient
- CG: Mental Health Facility - Inpatient
- CH: Mental Health Facility - Outpatient
- MH: Mental Health

Close Run Eligibilities

Batch Run Eligibility ✕

Choose Insurance Type:

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 Mental Health

Service Code	Service Type
--------------	--------------

Close Run Eligibilities

- Click **Run Eligibilities** after making your selections.

You will see a message in the top right of your screen. Once the check is complete after a few minutes you can come back to see the results.

Requesting eligibilities...please check back in a few minutes. ✕

Eligibility Dashboard

Patient All Providers