## **Creating an Eligibility Profile**

07/24/2024 1:30 pm EDT

You can create an eligibility profile to use with individual or batch eligibility checks.

1. Go to Account > Custom Fields.

Account	Marketplace		
ACCOUNTS	SETTINGS		
User Settir	ngs		
Provider Settings			
onpatient Settings			
Account Setup			
Custom Fi	elds		
Account S Custom Fi	etup elds		

2. Select Eligibility Profiles from the left menu and +Add Eligibility Profile to create a new profile.

Appointment Fields	Eliç	gibility Profiles				PAGE 1 OF	1 Show	Archived Eligib <del>ility Prefiles</del>	+ Add Eligibi	lity Profile
Appointment Profiles		Eligibility Profile Name	Service Types	Insurance Type	Doctor	U	pdated	Created		
Appointment Statuses	=	Mental Health	MH: Mental Health	Ρ	Brendan Wil	berton F	eb 8, 2022	Feb 8, 2022		Archive
Appointment Templates										
Billing Profiles										
Billing Statuses										
Eligibility Profiles										

3. Name the profile. Select Primary or Secondary. Search for your service type(s) to add to the profile.

Add Eligibility Profile ×				
Eligibility Profile Name	Mental Health			
Insurance Type	Primary Insurance			
Service Types	mental			
Service Code	AR: Experimental Drug Therapy CE: Mental Health Provider - Inpatient			
	CF: Mental Health Provider - Outpatient			
	CG: Mental Health Facility - Inpatient			
	CH: Mental Health Facility - Outpatient te Cancel			

4. Click **Create** to save the profile.

## Add Eligibility Profile

Eligibility Profile Name	Mental Health		
Insurance Type	Primary Insurance ~		
Service Types	•		
Service Code	Service Type		
МН	Mental Health	×	
	Create	Cancel	

×