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 SETTINGS User Settings Provider Settings onpatient Settings Account Setup Custom Fields	Account	Marketplace
Provider Settings onpatient Settings Account Setup	ACCOUNT S	ETTINGS
onpatient Settings Account Setup	User Settin	ngs
Account Setup	Provider S	ettings
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Custom Fields	Account Se	etup
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2. Select Eligibility Profiles from the left menu and +Add Eligibility Profile to create a new profile.

Appointment Fields	Elig	ibility Profiles			F	PAGE 1 OF 1	Show	Archived Eligibility Profiles	+ Add Eligibi	ility Profile
Appointment Profiles		Eligibility Profile Name	Service Types	Insurance Type	Doctor	Upd	ated	Created		
Appointment Statuses	≡	Mental Health	MH: Mental Health	Ρ	Brendan Wilber	ton Feb	8, 2022	Feb 8, 2022	Sec. 2010	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			
	MH: Mental Health			

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

×