

Eligibility Checks in the Appointment Window vs. the Patient's Chart

07/24/2024 2:20 pm EDT

You can run insurance eligibility in a few places in DrChrono, the appointment window, the patient's chart, and the [eligibility dashboard](#). Any location will pull the insurance information for the patient. However, when you run the eligibility from a patient's chart, it will not be connected to an appointment.

Note: complete insurance information, including payer id and id number, is required for this function to run. Additionally, you must have **Trizetto** set up as your clearinghouse to use this feature as described in this article.

Eligibility from the Appointment Window

When you run an eligibility check from the appointment window, it will update both the eligibility page in the appointment screen and the eligibility section in the patient's chart.

Schedule Appointment ✕

Appointment Billing **Eligibility** Vitals Flags Log Comm. Revisions Custom Data MU Helper

Insurance Eligibility & Benefits Check Demo Patient

Search for a service type or Choose Profile

Latest Eligibility

Active Coverage

Subscriber: SUBSCRIBER SAMPLE 1975 01 10
Patient: LAURIE SAMPLE 2000 01 10
Last Updated: 41 seconds ago

Insurance: ANTHEM BLUE CROSS BLUE SHIELD
Insurance ID#: ABC123D45678
Group Number: 123456M789
Group Name: GROUP NAME

Under the **Past Eligibility Checks** tab, it will show the details referenced to the appointment.

Eligibility Check **Past Eligibility Checks**

Appointment: Date Checked On: From To

PAGE 1 OF 2

Eligibility	Service Type	Appointment	Insurance Type	Payer Name	Checked On	
Active Coverage	30: Health Benefit Plan Coverage	4/18/2022 09:00AM	Primary Insurance		Apr 18, 2022	<input type="button" value="Q View"/>

Eligibility from the Patient's Chart

You can also run eligibility from the patient's chart under the **Eligibility** section on the left.

- + Add new patient
- Demographics
- Appointments
- Clinical Dashboard
- Documents
- Eligibility
- Tasks 1
- Problem List 7

Laurie Sample (Female | 31 years old | Dec. 8, 1990) ✎

Phone: **Email:**

Address: 328 Gibraltar Dr
Sunnyvale , CA 60005

CDS: Adult Immunization Schedule Age: 27-49

onpatient access enabled

New Referral

Fax Demographics

Eligibility Check

Past Eligibility Checks

Insurance Eligibility & Benefits Check

This will only update the eligibility check details in the Eligibility section of the patient's chart.

Eligibility Check

Past Eligibility Checks

Insurance Eligibility & Benefits Check

Search for a service type

or Choose Profile

Run Primary Insurance

Run Secondary Insurance

Latest Eligibility

Active Coverage

Subscriber:SUBSCRIBER SAMPLE 1975 01 10

Patient: LAURIE SAMPLE 2000 01 10

Last Updated: 20 seconds ago

Insurance: ANTHEM BLUE CROSS

Insurance ID#: 123456789

Group Number:

Group Name:

Health Benefit Plan Coverage Print

Copayment
Deductible
Coinsurance
Active Coverage
Benefit Description
Benefit Disclaimer
Limitations
Out of Pocket (Stop Loss)

Under the **Past Eligibility Checks** tab, it will not show the details referenced to the appointment since there is not an appointment connected to the eligibility check.

Eligibility Check

Past Eligibility Checks

Appointment:

Checked On:

Filter

Reset All

PAGE 1 OF 2 ➔

Eligibility	Service Type	Appointment	Insurance Type	Payer Name	Checked On	Q View
Active Coverage	30: Health Benefit Plan Coverage		Primary Insurance		Apr 18, 2022	

The information in the appointment window will reflect the last check from the appointment screen.

Schedule Appointment ✕

Appointment

Billing

Eligibility

Vitals

Flags

Log Comm.

Revisions

Custom Data

MU Helper

Insurance Eligibility & Benefits Check Demo Patient

Search for a service type



or

Choose Profile



Run Primary Insurance

Run Secondary Insurance

Latest Eligibility

Active Coverage

Subscriber: SUBSCRIBER SAMPLE 1975 01 10

Patient: LAURIE SAMPLE 2000 01 10

Last Updated: 41 seconds ago

Insurance: ANTHEM BLUE CROSS BLUE SHIELD

Insurance ID#: ABC123D45678

Group Number: 123456M789

Group Name: GROUP NAME