

# Real-Time Eligibility Verification from a Patient's Chart

07/24/2024 7:45 pm EDT

DrChrono allows you to verify eligibility and see what type of benefits your patient has under their insurance plan before you provide services.

To access the Real-Time Eligibility tool, you first need to open a patient's chart (**Patients > Patient List > Chart ID** or search directly for your patient's name).

In your patient's chart, select the **Eligibility** tab in the left-hand navigation pane.

The screenshot shows the DrChrono patient chart interface for Jane Doe. The left-hand navigation pane has the **Eligibility** tab selected and highlighted in green. The main content area displays patient information for Jane Doe, including demographics, contact info, and insurance details. The 'Eligibility' tab is highlighted in green in the navigation pane. The main content area shows 'Insurance Eligibility & Benefits Check' with buttons for 'Run Primary Insurance' and 'Run Secondary Insurance'. Below this, there is a section for 'Latest Eligibility' with a sub-tab for 'Active Coverage' and fields for Subscriber, Primary Care Provider, Last Updated, Insurance, Insurance ID#, Group Number, and Group Name.

## Verifying Eligibility or Active Coverage

To verify that the patient has active coverage under their plan, ensure the patient's insurance information is loaded into their chart and click on **Run Primary Insurance** or **Run Secondary Insurance**. The system will ping the eligibility file provided by the payer and display eligibility and benefit information obtained from the file.

If the response is **Cannot Process**, it could be that the payer does not offer Real-Time Eligibility Checks, the payer ID is incorrect or missing or the patient ID number is wrong or missing.

## Insurance Eligibility & Benefits Check

Search for a service type  or Choose Profile

[Run Primary Insurance](#) [Run Secondary Insurance](#)

### Latest Eligibility

**Active Coverage**

Subscriber: JANE DOE 1980-01-01  
Last Updated: 2 days 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)

## Checking Benefit Level/Services Covered

To check benefits/services covered for a particular specialty, search for one or multiple from the drop-down and then select **Run Primary Insurance** or **Run Secondary Insurance**.

If you don't select a specialty, the function will return benefits for any/all specialties listed on the eligibility and benefit file provided by the payer.

Eligibility Check [Past Eligibility Checks](#)

### Insurance Eligibility & Benefits Check

health  or Choose Profile

[Run Primary Insurance](#) [Run Secondary Insurance](#)

30: Health Benefit Plan Coverage  
42: Home Health Care  
43: Home Health Prescriptions  
44: Home Health Visits  
CE: Mental Health Provider - Inpatient  
CF: Mental Health Provider - Outpatient  
CG: Mental Health Facility - Inpatient  
CH: Mental Health Facility - Outpatient  
MH: Mental Health

Insurance: ANTHEM BLUE CROSS  
Insurance ID#: 123456789  
Group Number:  
Group Name:

Here you can view all the plan's coverage details about the specialty you have selected.

## Insurance Eligibility & Benefits Check

or

### Latest Eligibility

**Active Coverage**

**Subscriber:** JANE DOE 1980-01-01  
**Last Updated:** 2 days ago

**Insurance:** ANTHEM BLUE CROSS  
**Insurance ID#:** 123456789  
**Group Number:**  
**Group Name:**

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

Copayment	
<p><b>Chiropractic</b> <span style="background-color: #0070c0; color: white; padding: 2px;">In-Plan-Network</span></p> <p><b>Hospital - Emergency Accident</b> <span style="background-color: #0070c0; color: white; padding: 2px;">Not Applicable for Plan Network</span></p> <p><b>Professional (Physician) Visit - Office</b> <span style="background-color: #0070c0; color: white; padding: 2px;">In-Plan-Network</span></p> <p>Additional Information: • SPECIALIST</p> <p><b>Urgent Care</b> <span style="background-color: #0070c0; color: white; padding: 2px;">In-Plan-Network</span></p>	<p><b>Emergency Services</b> <span style="background-color: #0070c0; color: white; padding: 2px;">Not Applicable for Plan Network</span></p> <p>Additional Information: • FACILITY BENEFIT</p> <p><b>Hospital - Emergency Medical</b> <span style="background-color: #0070c0; color: white; padding: 2px;">Not Applicable for Plan Network</span></p> <p><b>Professional (Physician) Visit - Office</b> <span style="background-color: #0070c0; color: white; padding: 2px;">In-Plan-Network</span></p>
\$ 20	\$ 150
\$ 150	\$ 150
\$ 20	\$ 20
\$ 20	

Copayment

Deductible

Coinsurance

Active Coverage

Service Types	Coverage Level	Insurance Type	Plan Coverage Description	In Plan Network	Notes
Physician Visit - Office: Well					
Hospital - Inpatient					
Urgent Care					
Medical Care					
Chiropractic					
Hospital					
Mental Health				Not Applicable for Plan Network	
Hospital - Outpatient					
Hospital - Emergency Accident					
Hospital - Emergency Medical					
Emergency Services					
Pharmacy					
Professional (Physician) Visit - Office					
Professional (Physician) Visit - Office				Not Applicable for Plan Network	SPECIALIST
Health Benefit Plan Coverage	Individual	Preferred Provider Organization (PPO)	PPO PRUDENT BUYER CLASSIC		

Benefit Description

Benefit Disclaimer

Limitations


Out of Pocket (Stop Loss)

### Past Eligibility Checks

By selecting the **Past Eligibility Checks** tab, you can see eligibility checks previously run for the patient. You can filter by date of appointment, the date eligibility was checked, and sort by heading type. Failed eligibility checks are also recorded here.

[+ Add new patient](#)

- Demographics
- Appointments
- Clinical Dashboard
- Documents
- Eligibility
- Tasks 0
- Problem List 0
- Medication List 0
- Send eRx
- Allergy List 0
- Drug Interactions 0
- CQMs
- Intake Data
- Lab Orders
- Immunizations
- Growth Charts



**Jane Doe** (Female | 1 year, 6 months old | Jan. 1, 2017) DOJA000001

Phone: Missing    Email:

Address: 328 gilbraltar dr    Sunnyvale, CA 94089    Date Added: Oct. 27, 2017

CDS: CDS Rule    Patient must have documented medications    Patient must have documented allergies

onpatient access enabled
New Referral
Fax Demographics
Print Demographics
+ Schedule New Appointment

Eligibility Check Past Eligibility Checks

Appointment:  Date    Checked On:  From     To    Filter    Reset All

Eligibility	Service Type	Appointment	Insurance Type	Payer Name	Checked On	
Active Coverage		5/15/2018 11:15AM	Primary	BCBSF	Jun 20, 2018	<a href="#">Q View</a>
Inactive - Pending Eligibility Update		5/7/2018 12:30PM	Primary	BCBSF	Jun 20, 2018	<a href="#">Q View</a>
Active Coverage		5/15/2018 11:15AM	Primary	AETNA INC	Jun 20, 2018	<a href="#">Q View</a>
Active Coverage		3/19/2018 12:00PM	Primary	EMDEON X12 5010 CERTIFICATION PAYER	Jun 19, 2018	<a href="#">Q View</a>
Inactive - Pending Eligibility Update	2: Surgical	5/10/2018 12:30PM	Primary	MEDICARE PART B	May 25, 2018	<a href="#">Q View</a>
Active - Full Risk Capitation	30: Health Benefit Plan Coverage	3/20/2018 09:04AM	Primary	EMDEON X12 5010 CERTIFICATION PAYER	May 24, 2018	<a href="#">Q View</a>
Active Coverage	8: Surgical Assistance	5/7/2018 12:30PM	Primary	EMDEON X12 5010 CERTIFICATION PAYER	May 23, 2018	<a href="#">Q View</a>
Active Coverage	30: Health Benefit Plan Coverage	5/15/2018 11:15AM	Primary	EMDEON X12 5010 CERTIFICATION PAYER	May 23, 2018	<a href="#">Q View</a>

## Prescription Benefits

The DrChrono EHR also allows you to check your patient's insurance for prescription benefits. Prescription benefits can only be updated every 72 hours. To check prescription benefits, select the **Check Prescription Benefit** button.

### Prescription benefits

#### Benefit summary 0

Coverage last checked Never

Check prescription benefit

Once you select **Check Prescription Benefit**, click on **Benefit Summary** to view the coverage information summary for prescriptions.

## Prescription benefits

### Benefit summary 2

**Coverage last checked** [09/13/2023](#)  
**Eligibility** [Active](#)  
**PBM Name** PBMF  
**Plan Name** MID-CA PLAN7  
**Group name** JW MID-CA#7  
**Group number** JW92983  
**Coverage end date** 2099-12-31  
**Member ID** PBM-ZZ-T92293 8791%AD

**Coverage information** [Formulary](#) [PBM-specified alternatives](#)  
[Copay information](#)  
[Detailed coverage information](#)  
**BIN/PCN** 001398 (PBMF-JW-2784-2)  
**Pharmacy benefits** [Mail order pharmacy](#)  
[Retail pharmacy](#)  
[SPECIALTY PHARMACY](#)

**Coverage last checked** [09/13/2023](#)  
**Eligibility** [Active](#)  
**PBM Name** CERT PBM-A  
**Plan Name** -  
**Group name** SPC-9288  
**Group number** Y8831\_9  
**Coverage end date** 2099-12-31  
**Member ID** 2455\_Y8831\_92

**Coverage information** [Formulary](#) [PBM-specified alternatives](#)  
[Copay information](#)  
[Detailed coverage information](#)  
**BIN/PCN** 002318 (PBMA-Y9288)  
**Pharmacy benefits** [Mail order pharmacy](#)  
[Retail pharmacy](#)  
[SPECIALTY PHARMACY](#)

[Check prescription benefit](#)

For additional information regarding:

Configuring Auto Eligibility click [here](#)

Checking eligibility for multiple specialties click [here](#) to see how Batch Eligibility works.