

How to check Eligibility

Find out the patient you need and click **'Edit patient'** button:

The screenshot shows a medical dashboard interface. At the top right, there is a navigation menu with a red box around the 'EDIT PATIENT' button, which is pointed to by a red arrow. Below this, there are buttons for 'DASHBOARD' and 'INSURANCE'. The main area features a calendar grid for appointments, with a search bar for patient names and a '+ Add new appointment' button. Below the calendar, there is an 'Appointments table' for 'ON MONDAY, JULY 31, 2017' showing a slot from 09:00 AM to 09:15 AM. To the right, an 'Appointment info' panel displays details like 'Patient Note', 'Appointment Note', 'Appointment made by', and 'Location'.

You can also reach **'Edit patient'** form by clicking **'Edit'** icon on the Search patient page:

The screenshot shows a 'Search patient' page. It includes search filters for Doctor, Location, Address, Name, Telephone, Date of Birth, Gender, and Show options (Active patients, Inactive patients). A 'Search' button is present. Below the filters is a 'List of patients' section with an 'Add Patient' button. A table lists patient records with columns for Patient Name, DOB, Gender, Address, and Actions. The 'Actions' column for the second patient, ANTHONY, has a red arrow pointing to the 'Edit' icon.

Patient Name	DOB	Gender	Address	Actions
MICHAEL		M		
ANTHONY		M		
SEBASTIAN		M		
Carl		M		

Switch to 'Insurances' tab in the 'Edit Patient' form and click 'E' icon which stands for 'Check Eligibility':

The screenshot shows the 'EDIT PATIENT' interface. At the top, there is a header 'EDIT PATIENT' with a close button. Below the header, there is a checkbox for 'Active' which is checked. A row of tabs includes 'Common', 'Contact Info', 'Identifiers', 'Comments', 'Insurances' (highlighted with a red box), 'Parents', 'Ledger', and 'Guarantor Info'. Below the tabs, there is a 'Patient Panel Credentials' button with a 'mu' icon. Two sets of buttons are present: 'Save changes', 'Save and continue', and 'Cancel'. A table with the following columns is shown: Insurance, ParticipantId, Type, Status, and Action. The first row contains 'AETNA', a masked ID, 'Primary', and 'Effective'. The 'Action' column for this row contains three icons: a pencil, a minus sign, and a green 'E' icon (highlighted with a red box and a red arrow pointing to it). Below the table is an 'Add Insurance' button. At the bottom, there is another set of 'Save changes', 'Save and continue', and 'Cancel' buttons.

Once procession is finished, you will see the summary of eligibility information:

The screenshot shows the 'CHECK ELIGIBILITY' interface. At the top, there is a header 'CHECK ELIGIBILITY' with a close button. Below the header, there is a section titled 'Member Information'. A note states: 'This eligibility request information obtained on 7/31/2017 4:24:41 PM. Click "Refresh" button if you need up-to-date eligibility information. Standard transaction fee applies'. A green 'Refresh' button is located below the note. The member information is displayed in two columns. The left column includes: Member Name, Member ID, Member Date Of Birth, Relation to Subscriber: Self, Plan Name: Open Access HMO, Plan Begin, Eligibility Begin, Type: Health Maintenance Organization (HMO), Period Start, Primary Care Provider: MORETTI & RACCO MEDICAL, and Address. The right column includes: Address, Member Gender: Male, Health Benefit Plan Coverage: Active Coverage, Coverage Level, Payer, and Address. At the bottom, there is a green 'More Info' button. A disclaimer at the bottom states: 'The provider understands that receipt or use of this information does not guarantee payment of any health care claim and such information is subject to change, even retroactively, at any time.'