Check Batch Eligibility

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ollow the steps below to find patients/payers to check eligibility for.

1. Select **Patient** > **Batch Eligibility**.
2. Fill in the option to search by **Appointment** or **Claims**, then enter your **Search Criteria** or Load a Searcl Filter.
    1. **Appointment Date**: Select the date range you wish to view appointments for.
    2. **Appointment Resources**: Select an appointment resource to filter by.
    3. **Appointment Statuses**: Select an appointment status to filter by.
    4. **Claim Date of Service**: Select the date range you wish to view claims for.
    5. **Patient**: Search for a specific patient you would like to use.
    6. **Include Dependents**: Place a check in the box to include dependents in your search results.
    7. **Payers**: Select one or more options when searching for a specific payer(s) you would like to use.
    8. **Eligibility CPID**: Search for payers using the eligibility CPID.
    9. **Payer Priority**: Select if the payer is a primary, secondary or tertiary payer.
    10. **Days since Last eligibility Check**: Select a date range (in "number of days") the last eligibility check was performed.
    11. **Only show patients and payers configured for electronic eligibility**: Place a check in the box to only show patients and payers that have been previously configured for electronic eligibility.
3. Click **Search**.
4. ***Optional***: Click on the icon to edit your search criteria.

    > Sort your search results. Visit our Reorder Table Columns Help Article for detailed steps on how to hide, rearrange or add header columns.

5. You are able to interact with the search results by right-clicking on a row.
    1. **Copy**: Copies the patient's information to your clipboard.
    2. **Open Patient**: Opens the selected patient's record within the patient screen.

3. **Show Past Reports**: Shows the selected patient’s Eligibility History.
4. **View Last Eligibility Report**: View the patient's last Eligibility Response.

6. Place a check in the box next to the patient(s) you would like to check eligibility for.
7. Click on the ✔ **Check Eligibility** button.
8. On the Check Eligibility Confirmation window, select one of the following:
    1. **Use default service type based on provider/payer configuration.**
    2. **Specify Service Type.**
9. Modify the **Service Date Range** as applicable.
10. Click **Check Eligibility.**
11. The results will display within the screen for each patient.
12. Click **Close** to exit.
