Manage Real-Time Eligibility

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liminate the time your staff spends on verifying patient eligibility with our Real-Time and Batch Patient ligibility feature. With this feature, you can determine if a patient is eligible for insurance benefits in econds, avoiding possible loss of payment. Eligibility is the first step to a clean claim.

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you're the Auth Rep, follow the steps below to enable, configure, or disable Real-Time Eligibility:

1. Select **Account Administration** > **Services**.
2. Click the **button** next to Real-Time Eligibility.
3. The ***Enable eligibility checking*** **checkbox** allows you to **enable or disable this service**.
4. Set your **Eligibility Settings**:
    1. **Automatically check eligibility when saving appointment?**
        1. Select **Yes** to have the system automatically verify a patient's eligibility when an appointment is saved.
    2. **Automatically check eligibility when an appt has been set to Status** Use the drop-down menu t **determine the (appointment) status that triggers** the automatic eligibility check.
    3. **Limit automatic eligibility checking to**: Use the drop-down menu to **select the frequency** in whic you would like automated eligibility to run.
    4. **Show user an alert if they lack permissions to check eligibility when saving an appointment tha otherwise would have run eligibility automatically?**
        1. Select **Yes** to alert the user when they don't have the necessary permissions to check Patie Eligibility.
5. ***Optional***: Select **Copy Configuration** to copy these settings to another customer account.
    1. Check the box next to the customer account(s) to copy the settings to, then click **Copy**.
6. Click **Save**.
