

Run Batch Insurance Eligibility Verification in the Billing Engine

Last Modified on 03/22/2023 9:06 am EDT

About

Batch eligibility is run in the Billing System. This type of eligibility check can be run prior to the patient being seen, and is used to show a list of all patients that are being seen within a specific date range in the future.

In order to run eligibility for a specific Payer, the **Elig Payer ID/Name** fields need to be completed on Page 2 in the Master Insurance Form. This information can be obtained from your clearinghouse. A 270 file is generated by the Billing System which you need to manually upload to the clearinghouse. A 271 response file with client eligibility information can be downloaded from your clearinghouse and manually reviewed in the Billing System or printed, or you can review the report from the clearinghouse.

Table of Contents

Create and Submit a 270 Eligibility Request File

- 1. Navigate to the HIPAA 270 Transfer Form: File > Claims Processing > Eligibility > 270 (Outbound)
- 2. Set filters around which clients to run eligibility for:
 - a. Enter the Event Date From and Event Date To criteria.
 - b. Deselect the Only Clients with Line Items For Date(s) checkbox.
 - c. Select the Only Clients With Appointments Scheduled For Event Dates $\mbox{checkbox}.$
 - d. Select the Active Only radio button.

Notes:

Π

- Event Date is the Date of Service and Control Date is the last time the Line Item was changed.
- If your Agency is using the VPO Billing System, you can filter by Program ID if necessary.
- The "Only Clients With Appointments Scheduled For Event Dates" checkbox can only be selected if the "Only Clients With Line Items for Date(s)" checkbox is deselected.
- 3. Click the Start button.

NS		HI	PAA 270 Transfe	r Form - (HIP270F)	- • ×			
Γ	Filters:							
	Event Date From	02/20/2023	Event Date To	02/20/2023				
	Control Date From	11	Control Date To	11				
	Site ID	ALL	✓ ALL					
	Agency ID	ALL	✓ ALL					
	Program ID	ALL	✓ ALL					
	Insurance ID		~					
	Active Only	All Cases		Appointments Scheduled For Event Date(s) 🗹				
		Clients With Line Items For Date(s) Only Clients With Line Item Print Status "Y"						
	Case No.		<i>P</i> 4					
Γ	File Configuratio							
	File Configuration:							
	Add Carriage Return After Segments 🔽							
	Send As Test Request							
	Override Agency NPI 1 0							
	File Progress	:	0%					
			Start	Exit				

4. Select the location you wish to save your file.





- 5. Enter a file name, and click the **Save** button.
- 6. A verification prompt is displayed, listing the number of client eligibility requests that have been created within the batch file. Click the **OK** button.



7. Navigate to your clearinghouse and manually upload the file from the location you saved it.

Print or View a 271 Response File

- 1. Navigate to your clearinghouse and download the 271 Eligibility Response file.
- 2. Within the Billing Engine, navigate to the HIPAA 271 Report: File > Claims Processing > Eligibility > 271 (Inbound)
- 3. The HIPAA 271 Report window displays. Confirm the eligibility responses to include in the report file:
 - Check the Report No Change checkbox to include all eligibility responses.
 - To show only clients where eligibility has changed, the Report No Change checkbox should be unchecked.
- 4. Click the Print button.

NS	HIPAA 271 Report				
Click Print To Upload File					
		Report No Change 🔲			
	Print Cancel	Include Pharmacy 🔲			

- 5. In the Report Output Options window, select one of the following radio buttons:
 - Report to Printer: to send to the printer
 - Display Report On-Screen: to review the report on-screen

S8 Report Output Options - (RPTOUTO)					
[Report To Printer] Display Report On-Screen Export Report Data	Export Options © Excel (XLS) CSV Tab-Delimited Text (TXT) Comma-Delimited Text (ASC) Report Format (RPT)				
Printer Setup Continue Cancel					

- 6. Click the Continue button.
- 7. Locate the 271 file that you downloaded from your clearinghouse and select the file name.
- 8. Click the **OK** button. The report will either be displayed on-screen or sent to the printer based on your previous Report Output Options selection. See the CMS Guide to interpreting eligibility files for more information on the 271 files.
- 9. Manually update any discrepancies in coverage in the Billing Engine.

View a Batch Eligibility File

- 1. Navigate to File > Claims Processing > Eligibility > 270 (View).
- 2. Click Start.
- 3. Find and select the Batch Eligibility File.





85	Open					
Look in:	UPO_BlingTestUseMe v			G 🗊 🗈 🛄-		
(The	Name			Date modified	Type	
24	KASEV A	NYA ELIGIBILTY		12/30/2022 3:26 PM	File	
Recent places	KCELIG	N		12/30/2022 11:41	File	
	FITT fo6	13		12/29/2022 5:18 PM	Applic	
	fo6_4_0_1	ive		12/29/2022 5:18 PM	Applic	
Desktop	ttll ctb6			12/29/2022 5:17 PM	Applic	
	rtb6_4_0	live		12/29/2022 5:17 PM	Applic	
	KASEY EL	IG		12/29/2022 2:14 PM	File	
Libraries	TEST 123	5		12/29/2022 2:11 PM	File	
cionarico	ERRORLO	G.DBF		12/29/2022 1:41 PM	DBF Fil	
	ERRORLO	OG.FPT		12/29/2022 1:41 PM	FPT Fil	
This PC	KASEY TE	TSTING READ ONLY		12/29/2022 11:10	File	
INSPC	bill_log.D	BF		12/29/2022 11:08	DBF Fil	
	bill_log.D	BT		12/29/2022 11:08	DBT Fi	
Network	<	III			>	
NETWORK	File name:	1		~ [ОК	
	Files of type:	Al Files (".")		~	Cancel	
					ode Page.	
					-	

- 4. Click on Ok.
- 5. The Batch Eligibility File will open in the viewer. See the CMS Guide to interpreting eligibility files for more information on the 270 files.

48		HIPAA View Form -	(HIPAAVFM)		
Click Start To	View File				
C.PROGRAM FILES (X8	6)_VPO_BILLINGTEST	USEMEKASEY ANYA EL	JGIBILTY.		
184/00 109 20 67/1970-022/1920/00 67/1970-022/1920/00 67/022/1920/00 67/022/1920/00 67/022/1920/00 67/022/1920/00 67/022/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/22/1920/00 77/20/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/20 77/2	928*20221230*1526*6 79941- 21230*1526~ ****PI*60054- ****PI*60054- ************************************		1528***00501*0000000	8604	
	Start	Exit	Resubmit	Delete	

