Add a Realtime Eligibility Field to a Form or a Note

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About

If your Agency is contracted with Trizetto to check client eligibility, the NSS Implementation team will set up specific Forms and or/Notes with a Realtime Eligibility field that will allow your staff to check insurance eligibility. If you'd like to add the Realtime Eligibility field to any other Forms or Notes follow the steps below.

📌 **Note**: The Face Sheet does not support this field type.

Add Realtime Eligibility Field to a Form

1. Navigate to Form Builder: **Main Menu > Admin Tools Menu > Form Builder.**
2. From the **Select Form** drop-down menu, select the Form you want to add the field to.
3. Click the **Add New Field** button.

4. From the **Type** drop-down menu, select **Realtime Eligibility**.
5. Enter a **Field Name**. This is what will be displayed on the Form.
6. *(Optional)* Add an **Alias Field Name**.
7. *(Optional)* Enter a **Prompt** that you want to be displayed on the Form for users.
8. *(Optional)* Select the **Print Prompt** checkbox if you want the prompt to be printed when printing the Form.
9. *(Optional)* Select the **Disable Print** checkbox if you don't want this field to print when printing the Form.

10. From the **Payer List** select the Payers that should be displayed in the Payer Name drop-down menu for selection.
11. From the **Provider List** select the Providers to be displayed in the Provider Name drop-down menu for selection.
12. Click the **Add Field** button.

Add Realtime Eligibility Field to a Note

1. Navigate to the Note Builder: **Main Menu > Admin Tools Menu > Note Builder**.
2. From the **Select Note Type** drop-down menu, select the Note you want to add the field to.
3. Click the **Add a New Field** button.
4. From the **Type** drop-down menu, select **Realtime Eligibility**.
5. Enter a **Field Name**. This is what will be displayed on the Form.

6. *(Optional)* Add an **Alias Field Name**.
7. *(Optional)* Enter a **Prompt** that you want to be displayed on the Form for users.

ADD A NEW FIELD TO THE NOTE:	
Field Name:	
Alias Field Name:	
Prompt:	
Type:	Realtime Eligibility ▼
Location:	3 ▼

8. From the **Payer List** select the Payers that should be displayed in the Payer Name drop-down menu for selection.
9. From the **Provider List** select the Providers to be displayed in the Provider Name drop-down menu for selection.
10. Click the **Add Field** button.