Run Insurance Eligibility Verification in Clinical

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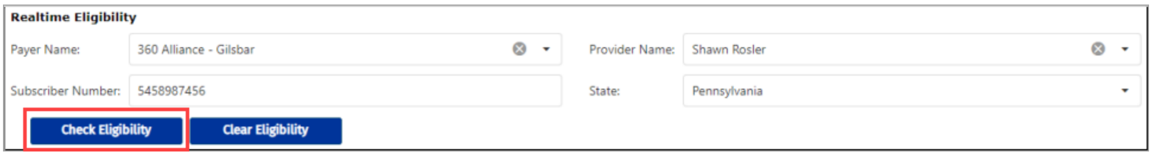
About

If your Agency has contracted with Trizetto to check client eligibility, you will have access to a Realtime Eligibility field that can be displayed on Forms or Notes so that the client's insurance coverage can be checked prior to providing Services. This is frequently used by non-residential/outpatient facilities so that eligibility can be checked on a per-client basis. The information returned will vary by Payer.

Note: If the Realtime Eligibility field has been added to Clinical Forms, the client has to be admitted to a program first to be able to access it. If it is added to a Note, it can be accessed whether or not the client is admitted.

Run Eligibility for a Specific Client

1. Navigate to a Form or Note that contains the Realtime Eligibility field.
2. Search for and select the client.
3. In the Form or the Note, scroll to the **Realtime Eligibility** field. This field may be called something different depending on how your Agency named it.
4. Select a **Payer Name** from the drop-down menu.
5. Enter the **Subscriber Number**.
6. Select a **Provider Name** from the drop-down menu.
7. Select a **State** from the drop-down menu.
8. Click the **Check Eligibility** button.



Note: To clear your selections, click the **Clear Eligibility** button.