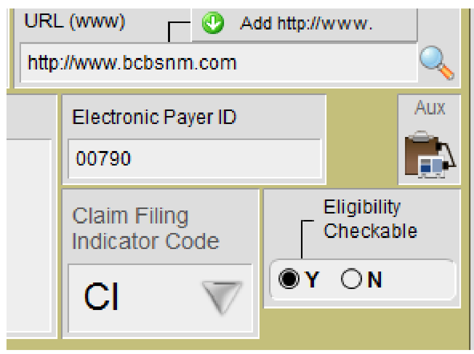
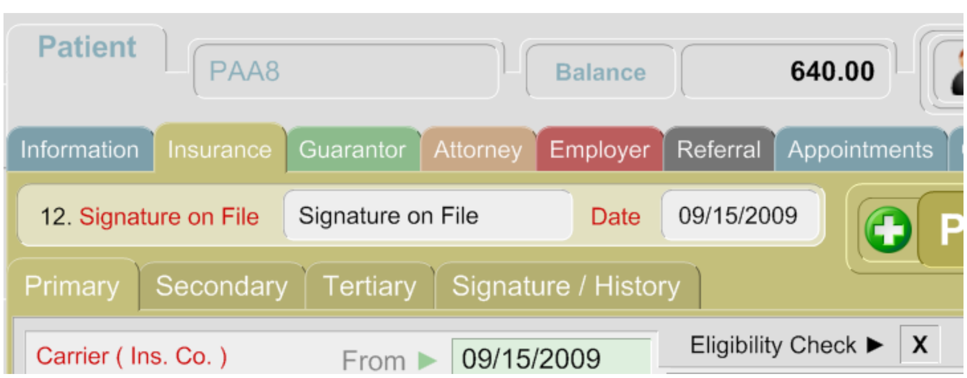
Eligibility Requests

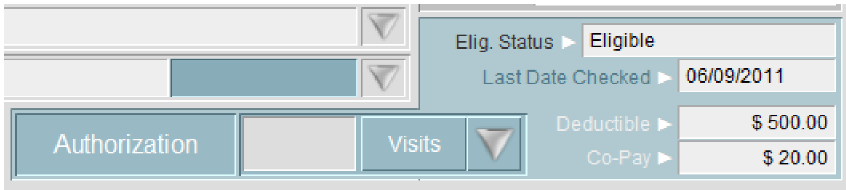
- Eligibility Requests can be sent in an electronic file to IMS Pro. Eligibility information can be sent electronically, but is entered manually back into Easy Billing Professional on the processing event screen, or the patients' insurance screen.
- On the Carriers screen, the Eligibility Checkable field can be set to "Y" or "N" for that Carrier. If the Eligibility Checkable field is set to "N", you will not be able to run an Eligibility Request for that carrier for any patient.



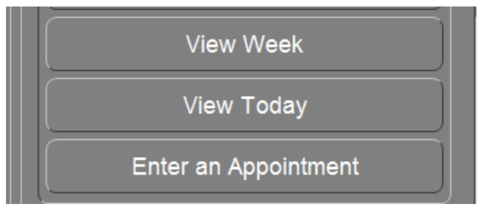
- In the **Patient** menu, on the **Insurance** tab you can choose to show if the carrier should be eligible for checking for this patient.



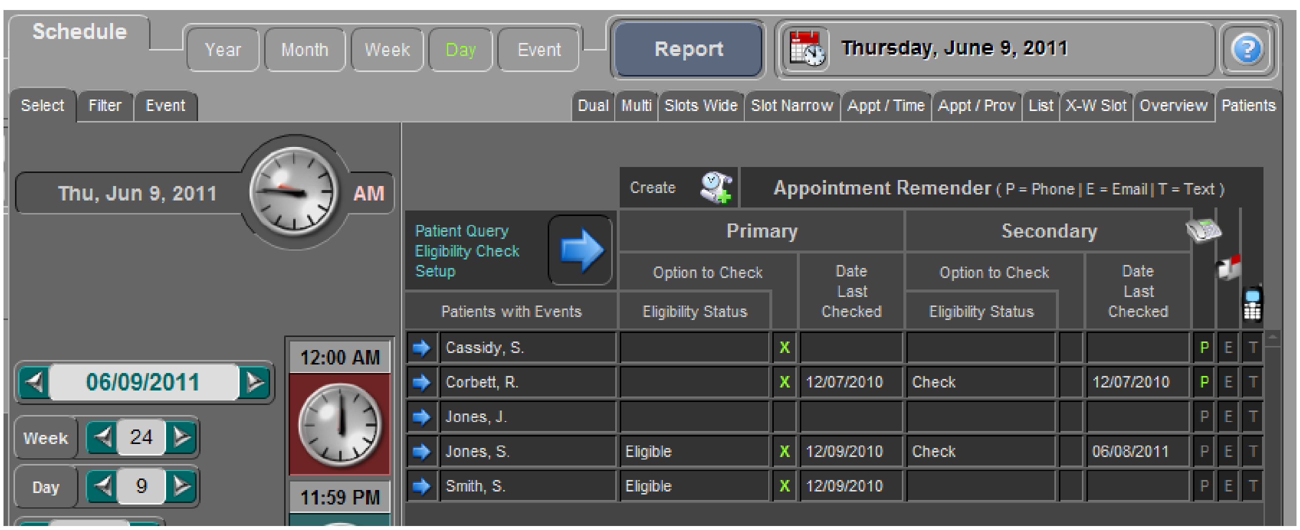
- Also on the **Insurance** tab, you can set the “Eligibility Status”, “Last Date Checked”, “Deductible” and “Co-pay” amounts.



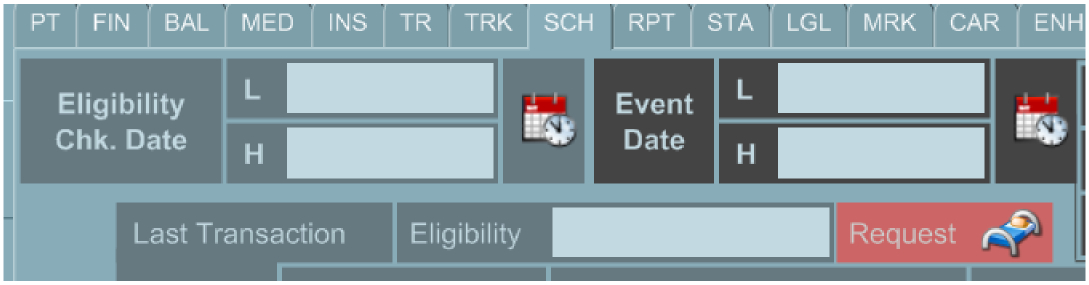
- To create an Eligibility Request report, go to the **Scheduling** menu and click “**Enter an Appointment**”, “**View Today**” or “**View Week**”.



- Click the **Patients** tab, at the far right of the screen.

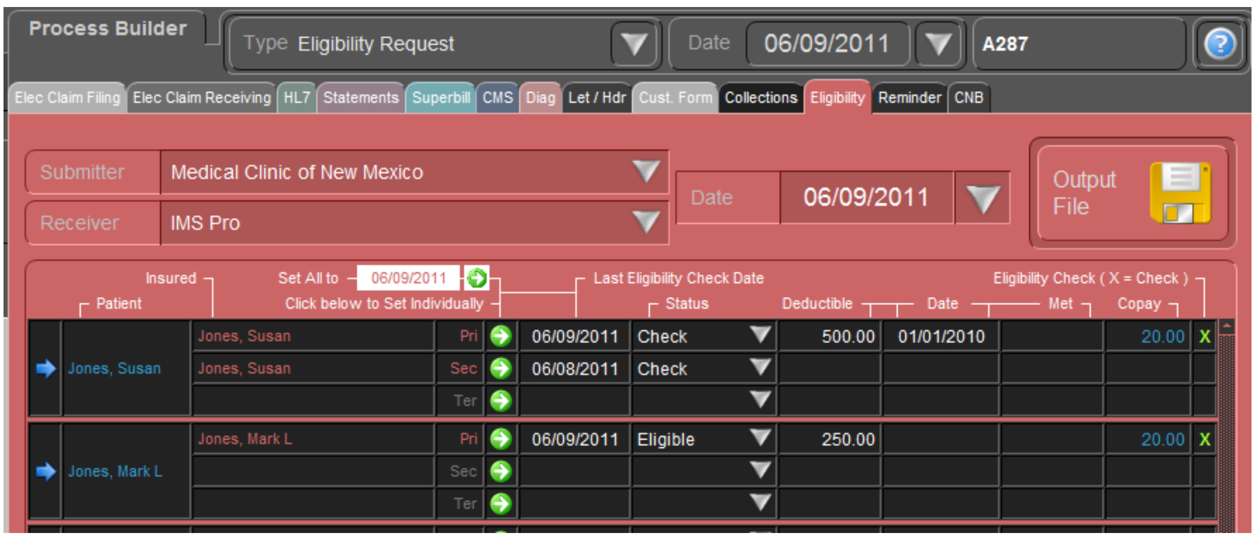


- Click the blue arrow labeled “**Patient Query Eligibility Check Setup**” and you will be taken to the **SCH** tab of the **Patient Query** screen.



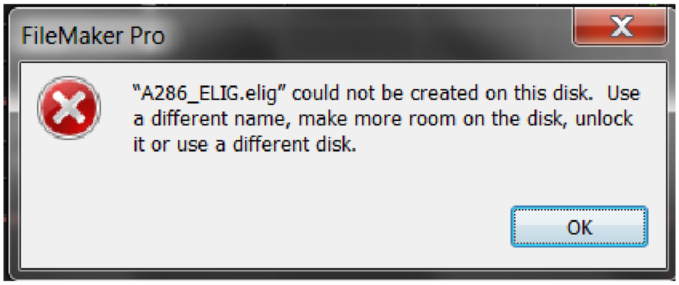
- Click the **Request** icon to generate a processing event. 

- This brings up the **Process Builder** screen.

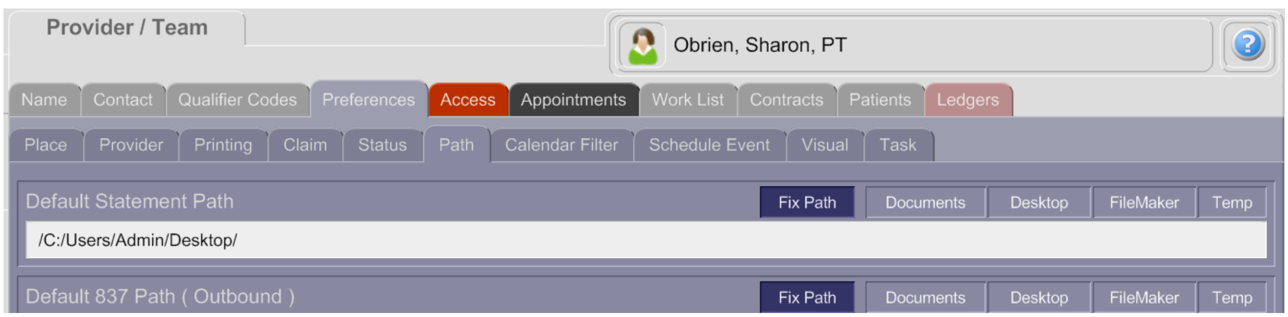


- In the Process Builder, click the green icon next to “Set All to” to set all items to the date shown, or set the dates individually on the line to show the current date of eligibility checking.
- You may return to the patient account to enter information or update on this screen if you will want the carriers marked to be sent in the file.
- You can update information in this file before sending it and after the report is returned from IMS Pro.
- You can then remove any empty records.
- Click the “**Output File**” gold disc icon to generate a file to send to IMS Pro. The file will be labeled by the number and letter in the upper corner (example: A287).

- The “Statement Path” must be set in the Provider / Team preferences for the current user for the processing event to be created. If the Statement Path is not a valid path, the file will not be created. Instead, you will get an error message like the one shown here.



Go to the **Preferences** tab, **Path** tab to set the “Default Statemtent Path” for the current user. Alternatively, you can go to the **Preferences** menu, **Path** tab to set the “Default Statemtent Path” for the current user.



Eligibility in the Patient Query

- You can also create a different group of patients without using the scheduler if that should be helpful. Simply search for those patients in the Patient Query and on the **SCH** tab click the **Request** icon.
- Follow the directions above from the Process Builder.