

Eligibility Requests



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.

A screenshot of a web browser window showing a form for carrier information. The browser address bar contains "http://www.bcbsnm.com". The form includes fields for "Electronic Payer ID" (00790), "Claim Filing Indicator Code" (CI), and "Eligibility Checkable" (radio buttons for Y and N, with Y selected). There is also an "Aux" icon.

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

A screenshot of the "Patient" menu in the software. The patient ID is "PAA8" and the balance is "640.00". The "Insurance" tab is selected. Below the tabs, there is a section for "12. Signature on File" with a date of "09/15/2009". At the bottom, there is a field for "Carrier (Ins. Co.)" and a date "From" set to "09/15/2009". An "Eligibility Check" button is visible next to the date field.

Eligibility Requests

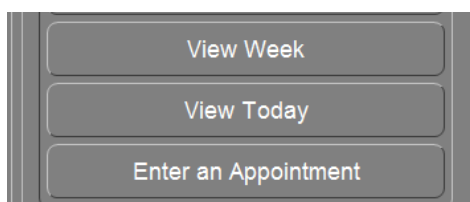
- Also on the **Insurance** tab, you can set the “Eligibility Status”, “Last Date Checked”, “Deductible” and “Co-pay” amounts.

The screenshot shows a form with the following fields:

- Elig. Status: Eligible
- Last Date Checked: 06/09/2011
- Deductible: \$ 500.00
- Co-Pay: \$ 20.00

Below the form are buttons for "Authorization" and "Visits".

- 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.

The screenshot shows the "Patient Query Eligibility Check Setup" screen. It features a table with columns for "Patients with Events", "Eligibility Status", "Date Last Checked", "Option to Check", and "Date Last Checked". The table is divided into "Primary" and "Secondary" sections. A blue arrow labeled "Patient Query Eligibility Check Setup" points to the table.

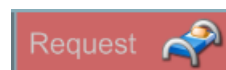
Patients with Events	Primary		Secondary		P	E	T
	Eligibility Status	Date Last Checked	Option to Check	Date Last Checked			
Cassidy, S.		X					
Corbett, R.		X 12/07/2010	Check	12/07/2010			
Jones, J.							
Jones, S.	Eligible	X 12/09/2010	Check	06/08/2011			
Smith, S.	Eligible	X 12/09/2010					

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

Eligibility Requests

The screenshot shows a form with several tabs at the top: PT, FIN, BAL, MED, INS, TR, TRK, SCH, RPT, STA, LGL, MRK, CAR, ENH. Below the tabs are two main sections: 'Eligibility Chk. Date' and 'Event Date'. Each section has 'L' and 'H' (Lower and Higher) date fields. To the right of these fields are calendar icons. Below these sections are 'Last Transaction' and 'Eligibility' fields. At the bottom right is a red 'Request' button with a blue icon of a person sitting at a desk.

- Click the **Request** icon to generate a processing event.
- This brings up the **Process Builder** screen.



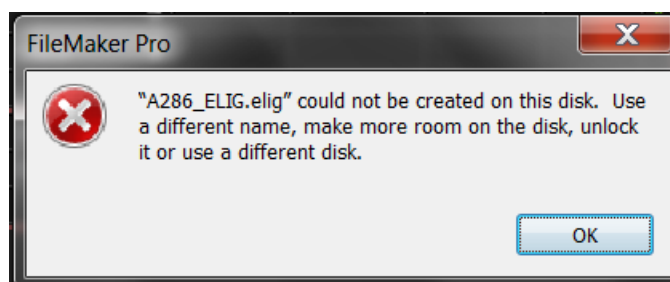
The screenshot shows the 'Process Builder' interface. At the top, it says 'Type Eligibility Request' and 'Date 06/09/2011 A287'. Below this are several tabs: Elec Claim Filing, Elec Claim Receiving, HL7, Statements, Superbill, CMS, Diag, Let / Hdr, Cust. Form, Collections, Eligibility (highlighted), Reminder, CNB. The main area has 'Submitter Medical Clinic of New Mexico' and 'Receiver IMS Pro'. A date field shows '06/09/2011' and an 'Output File' button with a gold disc icon. Below this is a table with columns: Patient, Insured, Set All to (06/09/2011), Last Eligibility Check Date, Status, Deductible, Date, Met, Copay, and Eligibility Check (X = Check). The table contains data for two patients: Susan Jones and Mark L. Jones.

Patient	Insured	Set All to	Last Eligibility Check Date	Status	Deductible	Date	Met	Copay	Eligibility Check (X = Check)
→ Jones, Susan	Jones, Susan	Pri	06/09/2011	Check	500.00	01/01/2010		20.00	X
	Jones, Susan	Sec	06/08/2011	Check					
		Ter							
→ Jones, Mark L	Jones, Mark L	Pri	06/09/2011	Eligible	250.00			20.00	X
		Sec							
		Ter							

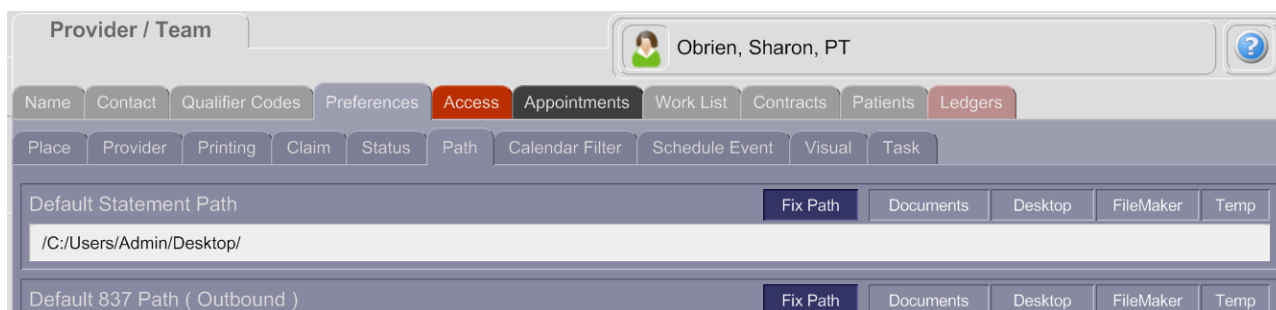
- In the Process Builder, click the green icon next to “Set All to” to set all items to the date shown, or set the dates individually on the line to show the current date of eligibility checking.
- You may return to the patient account to enter information or update on this screen if you will want the 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).

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