

Batch Eligibility Setup

Last Modified on 02/20/2024 9:43 am EST

Batch Eligibility Setup

Pulling Days:

Default Provider:

Coverage:

- Primary Insurance
- Primary and Secondary Insurance
- Primary, Secondary and Tertiary Insurance

NPI Location:

- Provider NPI
- Provider Group NPI
- Provider Group NPI if it exists, otherwise use Provider NPI

Pulling Type:

- Monthly (Perform eligibility if patient has not had eligibility pulled within the current month)
- Bi-Monthly (Perform eligibility if patient has not had eligibility pulled for the current month, or since the 15th of the month)
- Always (Perform eligibility for a patient each and every time)

Auto-Retry Error Batch Eligibilities

Appointment Status:

- Scheduled
- Confirmed
- No-Show
- Checked-In
- Checked-Out
- Cancelled
- Reminder Sent
- Arrived
- Blackout
- Telehealth
- Custom
- QA Status Test
- 22.16
- qa test cases
- Rescheduled

Appointment Type:

- 16813
- Advanced Prostate Cancer Cl...
- Appointment Reminder
- azb
- azzb
- azzz
- azzzc
- BCG
- Biopsy
- Bladder Fulgeration
- Bladder Instillation
- Block
- Blood Draw
- Cancer Discussion
- Cath UA
- CIC

Appointment Resource:

- Lab
- Lauren P. Herrmann, MD
- Legacy Resource
- Matthew L. Heinlein, PA-C
- Michael R. Thompson MD
- Michell Test
- Paul C. Wolf, P.A.
- Paul Goldsmith, MD
- Sara E. Irving, NP-C
- Ua Only
- Ultrasound
- Urodynamics
- Wesley D. Smith, MD
- William H. Newhart, MD
- William T. Thompson, MD

Refresh Save

The Batch Eligibility Setup screen consolidates all of the settings for Batch Eligibility into one screen. On this screen you will configure the settings for batch eligibility according to the preferences of your practice. In addition you can override some of these setting by payer in [Payer Setup](#).

Fields

- **Pulling Days:** The number of days in advance to pull eligibility requests. ex. if set to 3, eligibility requests will be made 3 days prior to the appointment date.
- **Default Provider:** The default provider to send with the eligibility request.
- **Coverage:** The coverage levels to check for each appointment.
 - Primary Insurance - will only run for the primary insurance associated with the patient even if they have multiple insurances.
 - Primary and Secondary Insurance - will run for both primary and secondary insurances if they exist.
 - Primary, Secondary, and Tertiary Insurance - will run for all 3 level of insurance if they exist.
- **NPI Location:** The location of the NPI to send with the eligibility requests.
 - Provider NPI - will pull the individual provider NPI for the appointment resource associated with the appointment.
 - Provider Group NPI - will pull the group provider NPI for the appointment resource associated with the appointment.
 - Provider Group NPI if it exists, otherwise use Provider NPI - will pull the group provider NPI if it exists.

If it does not exist then it will pull the provider individual NPI for the appointment resource associated with the appointment.

- **Pulling Type:** The frequency of which to pull eligibility requests for a patient.
 - Monthly - will pull eligibility only if the patient has not already had a request ran that month.
 - Bi-Monthly - will pull eligibility only if the patient has not already had a request ran in the same half of the month.
 - Always - will pull eligibility for every patient appointment regardless of their last eligibility check.
 - **Auto-Retry Error Batch Eligibilities:** This will retry eligibility checks that have errored on the next batch eligibility run.
 - **Appointment Status:** Multi-Select box that allows you to select every appointment status that you wish to have eligibility ran for.
 - **Appointment Type:** Multi-Select box that allows you to select every appointment type that you wish to have eligibility ran for.
 - **Appointment Resource:** Multi-Select box that allows you to select every appointment resource that you wish to have eligibility ran for.
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