

Eligibility Checks – Kareo

Many payers will allow you to check a patient's eligibility for coverage with the insurance plan on file with just a couple of clicks in the Kareo Provider Platform.



Best Practice

- Best practice is to check eligibility 1–3 days before the patient appointment.
- A copy of the report is saved in Kareo's Desktop Application
- Not all insurance companies support eligibility checks.

Check Patient's Eligibility

Patient specific eligibility can be checked through the *Appointment Card* or the *Appointment*.

1. Hover over the *Platform* icon and click on **Dashboard**. The *Dashboard* page opens.
2. Click on the patient's appointment to view the *Appointment Card*.
3. Click the **more options** icon and select *Check Eligibility*. The eligibility field updates with the patient's eligibility status.

The screenshot shows the Kareo Provider Platform interface. At the top, there's a search bar with the text "Start typing a patient name or DOB". Below that is a "Dashboard" section for "Wednesday, September 01" with 6 Scheduled, 0 In Office, and 1 Finished appointments. A calendar on the left shows the date. The main area lists appointments for Alisha Reyes, John Lee, Grace Chen, and Logan Martinez. A modal window is open for Logan Martinez's appointment on 11:00 AM - 11:45 AM. The modal shows patient details, appointment information, and a "Check Eligibility" button highlighted with a red dashed box. The eligibility status is currently "Status not checked or Unknown".

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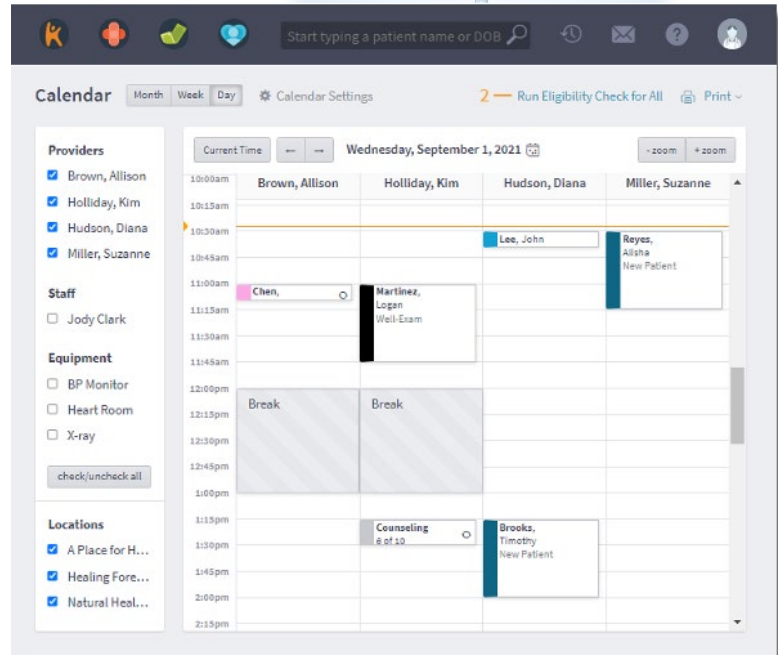
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From the Calendar – Appointment Scheduling

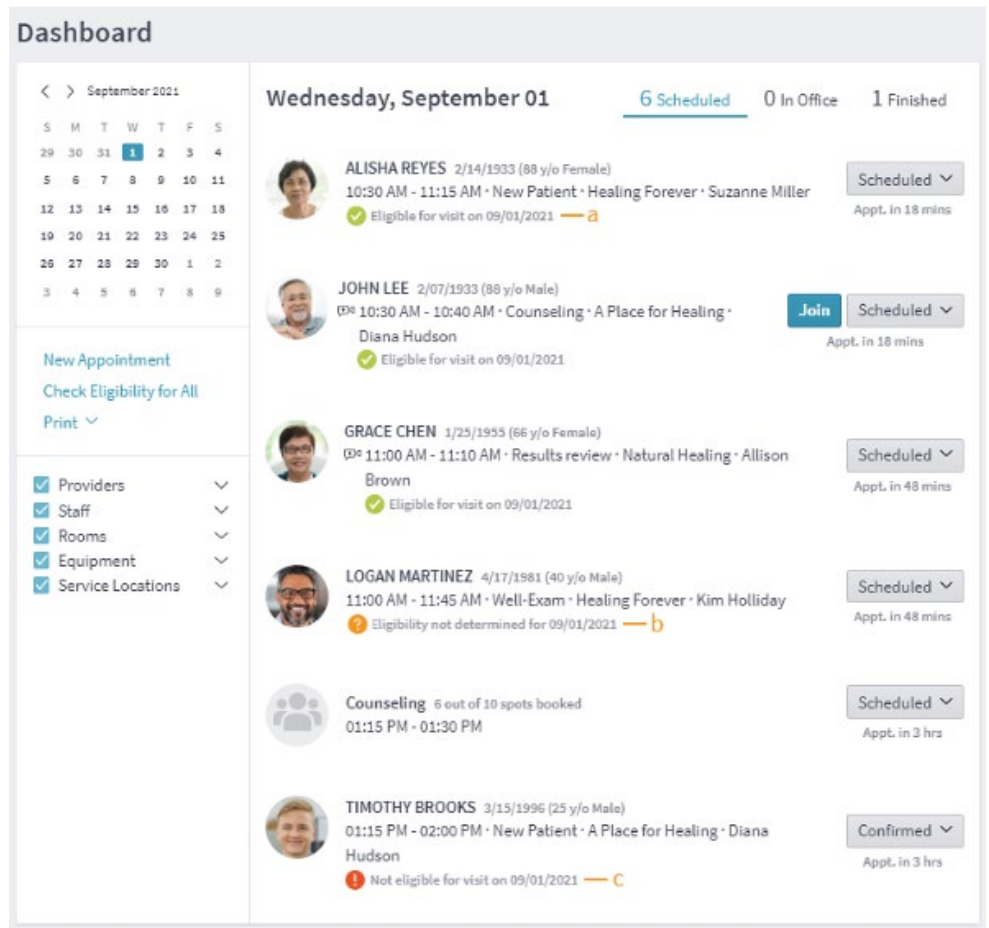
1. Hover over the Platform icon and click on Calendar. The Calendar page opens.
2. Click Run Eligibility Check for All. An eligibility icon displays on the appointment.



Eligibility Icons and Status Messages

Once an eligibility check has been performed, a status message shows if the patient is covered and how recently eligibility was checked. You also have the option to run the eligibility check again or view the eligibility report.

- Eligibility Verified:** Verified patient eligibility displays with a green icon and the date eligibility was checked.
- Eligibility Not Determined:** Insurance eligibility that cannot be determined displays with an orange icon and



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the date eligibility was checked.

- c. **Not Eligible:** Insurance coverage that is no longer valid displays with a red icon and the date eligibility was checked.

