

# Eligibility Verification and Benefits Guide

## Overview

Before rendering services to a plan member, it is important to verify the member's eligibility. It is recommended to verify eligibility on the date of service. It is also recommended to verify eligibility each time the patient is seen. Benefit plan information is available on the eligibility screen.

## Eligibility Search

1. From the *Home* screen > **Office Management** > **Eligibility**. The *Eligibility Search* screen displays.

**Figure 1: Eligibility Search Screen**

2. On the *Eligibility Search* screen, select the **Last Name** radio button to search for a member using last name or select the **Member ID** radio button to search for a member using member ID.  
**Note:** You must enter at least 2 characters to search by last name.
3. The **As of** field defaults to the current date but can be adjusted by clicking the calendar or manually entering a date.  
**Note:** It is recommended to always verify a member's eligibility on the date of service.
4. Click **Search** and a list of members matching the search criteria will display on the *Eligibility Search Results* screen.  
**Note:** The most recent eligibility span displays in the search results. Terminated eligibility spans display in **red**.

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Figure 2: Eligibility Search Results Screen

Eligibility Search Results								
	Name	Sex	Effective Dates	Birth Date	Member ID	Medicare ID	Primary Care Provider	Product
<a href="#">Select</a>	<a href="#">SMITH, JOHN</a>		1 Dec 2020-					Medicaid
<a href="#">Select</a>	<a href="#">SMITH, JOHN</a>		15 Jan 2018-					Medicaid
<a href="#">Select</a>	<a href="#">SMITH, JOHN</a>		1 Jan 2018- 2 Sep 2021					Medicaid

- To display member eligibility details, click on a member's hyperlinked name.
- Before additional details can be displayed, a requesting provider must be selected. Click **search providers**.

Figure 3: Requesting Provider Screen Dropdown

**Select Requesting Provider**

Provider: \*

[Submit Eligibility Request](#) [Cancel](#)

- On the *search provider* pop up, enter the name or NPI number of a provider within your organization, then click **Search**. From the search results, locate the appropriate provider and click **"Add"**.

**Note:** If you have fewer than 50 affiliated providers, you may see a dropdown menu.

Figure 4: Search Provider Pop up

**Search Provider**

Name

Identifier  
 NPI

[Search](#) [CANCEL](#)

1 - 1 of 1

Name
Shah

[Add More Info](#)

- Once provider is added, click **Submit Eligibility Request**.


# Eligibility Verification and Benefits Guide


Benefit plan information and detailed benefit information are displayed in the *Benefits* and *Eligibility Detail* screen.

For additional benefit information for each line of business, visit the below applicable links:

- Health Partners Medicaid and CHIP - [Provider Manual](#) Chapters 4 and 6, respectively
- Jefferson Health Plans Medicare - [Medicare Plan Details - Jefferson Health Plans](#)
- Jefferson Health Plans Individual and Family Plans - [Summary of Benefits - Jefferson Health Plans](#)

Figure 5: Benefits and Eligibility Detail Screen

**Benefits and Eligibility as of 30 Jun 2022**
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 **John Smith**

DOB

Gender

Member ID

Address

Map

PCP

**Benefit Plan Information**

**Product** HealthChoices Adult Copay

**Status** Active Coverage

**Start Date** 12/01/2020

**End Date** 01/01/3000

[View Eligibility History](#)

**Benefits**

**Health Benefit Plan Coverage**

**Family**

Active Coverage

HealthChoices Adult

Copay

\$0

In and Out of Network