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How to Check Eligibility for Insurance Claims (Patient) Jay-Ileen (Ai) - 2023-07-17 - VSee Clinic for Patients

As a Patient, you are able to fill out your insurance information and check for eligibility in two ways:

- During Intake Process
- When Updating Your Insurance Information via Patient Portal

You may also check:

- Scope and Limitations
- <u>Related Article</u>

Note: This feature may not be available on your clinic. Please contact <u>Sales</u> *or your Account Manager to enable this feature.*

Checking Eligibility During Intake Process

1. After filling up intake form, click on Continue.

WHAT IS YOUR HEALTH CONCERN TO	X YADC
Patient Information	
First Name*	Last Name*
Alena	Workman
Date of Birth*	
January ~ 1 ~ 1991	~
Gender*	
🔵 Male (Female	
Address*	
3188 Kimlee Drive	
City*	Zip*
San Jose	95132
State*	
California	~
Phone Number*	
555 12345678	
Reason for visit*	
Cough	~
	Continue >

2. Update your **Electronic Medical Record** or **Electronic Health Record**. Click on **Continue** to proceed.

Note: Proceed to next step if this is not applicable for this clinic.

PLEASE VERIFY AND UPDATE THE FOLLOWING INFORM	MATION X
Past and Current Medical Conditions Update	
Allergies Update	
Current Medications Update	
'	
< Back	Continue >

3. Toggle to **Yes** to add your health insurance information.

The insurance form will show up below. Please enter all the required fields.

PLEASE PROVIDE THE HEALTH INSURANCE INFORMATION	×
Do you have health insurance?*	
< Back	Continue >

The "Primary Insurance Company Name" field will be a dropdown field containing only the names of insurance companies accredited in this clinic.

The "Patient Relationship to Insured" is also a dropdown.

When you choose to select "Child", "Spouse" or "Others" in the "Patient Relationship to Insured" dropdown field, the succeeding fields will be blank and you are required

to fill up the form with correct information.

Note: If you have already <u>Updated your Insurance Information via Patient Portal</u>, when you select "Self" in the "Patient Relationship to Insured" dropdown field, the succeeding fields except "Upload Insurance Card (Front) and (Back)", will be prefilled with your patient information.

PLEASE PROVIDE THE HEALTH INSURANCE INFORMATION	×
Do you have health insurance?*	
● Yes ○ No	
Insurance Company Name*	
Select Primary Insurance Company Name	~
Policy Number / Subscriber ID*	
Enter Policy Number / Member ID	
Group Number (Optional)	
Enter Group Number	
Patient Relationship to Insured*	
Select Relationship	^
Self	
Child	
Spouse	
Others	

4. After completing the insurance form, click on **Continue.**

Enter Address		
Insured City*	Insured	Zip*
Enter City	Enter 2	Zip
Insured State*		
Alaska		~
Upload Insurance	Card (Front)*	
	Drag and Drop files he Or Click Here to browse	files
Upload Insurance	Card (Back)*	
	Drag and Drop files he Or Click Here to browse	files
(Back		Continue >

If the check returns an error or if you entered an invalid information, an Error message will be displayed. Please try correcting the details and click "Continue" button again or go **Back** to select the "No" answer to the question above the form to proceed to the consultation without a health insurance. You cannot proceed to the next step if there is an "Error" message.

There was an error while che	cking your health insurance. Please update the
insurance details and try agai	n. You may also choose not to add this insurance.
Rack	Continuo

If ever the check returns an "Inactive" status, an Inactive message will be displayed. Please try entering another insurance plan if you have another one. Click "Continue" button again or go **Back** to select the "No" answer to the question above the form to proceed to the consultation without a health insurance. You cannot proceed to the next step if there is an "Error" message.



When eligibility check returns no response, a Pending status message will be displayed. You will see this message for about 5 seconds. Then the form will proceed to the next step automatically. You will be able to proceed to the consultation.



When eligibility check returns an "Active" status, an Active status message will be displayed. You will see this message for about 5 seconds. Then the form will proceed to the next step automatically. You will be able to proceed to the consultation.

n.
Processing

- 5. Select the **Visit Option**.
- 6. Click on Continue.

PLEASE SELECT YOUR VISIT	OPTION	×
Visit Option		
Description	Duration	Fee
15-min Consultation	15 minutes	USD 50
30-min Consultation	30 minutes	USD 100
< Back		Continue >

- 7. Add credit card details.
- 8. Click on Add Card.
- 9. Click on **Continue.**

PLEASE ENTER YOUR PA	AYMENT ME	THOD	×
Estimated Charge			
15-min consultation			USD 50.00
Subtotal			USD 50.00
Discount			0%
Total Charge			USD 50.00
Promo Code			
Have a promo code? En	ter it here.		Apply
ayment Method			
Name	Card	Number	Expires
New Credit Card			
Name on Card*			
Enter Name on Card			
Card Number *		Expiry Date (M	M/YY) CVC/CVV
Enter Card Number		MM / YY	CVC 😧
			Add Card
ou will only be charged afte	er the consulta	tion.	
К Васк			Continue >

Wait for the Provider to join the call.

VSee Clinic



Help Login Sign Up

Note: After the provider has started the visit, only the provider may change your insurance details if there is a need to update it during the consultation.

Updating Insurance Information via Patient Portal

You can fill up your insurance information and check for eligibility status through your Patient portal.

1. After logging in to your patient account, click on **your name** or your **profile menu**.

- 2. Select My Profile.
- 3. Click on **Insurance** tab.
- 4. Click on **+Add Insurance** button.

VSee Clinic Home Visits Schedule Health	Help 🗩	Alena Workman -
		My Profile 2
MYACCOUNT		Help
Profile Pharmacy Insurance Billing Preferences Notifications		Test Device
		Log Out
Insurance Manage your insurance information here.		
+ Add Insurance		
4		
Powered by VSee		

5. Fil up the insurance form.

6. After you have filled up at least all the required fields, the **CheckEligibility** button will be clickable. Click on it to proceed. Please wait as we then verify your insurance details.

MYACCOUNT		
Profile Pharmacy Insurance Billing Preferences		
nsurance		
Manage your insurance information here.		
+ Add Insurance		
Deiman Incorpora	Filelbillar Cashur Montain	
Primary insurance	Englointy Status: No stat	
Insurance Company Name*	Policy Number / Subscriber ID*	
Select Primary Insurance Company Name	Enter Policy Number / Member ID	
Group Number (Optional)	Patient Relationship to Insured*	
Enter Group Number	Select Relationship	
Insured Name*	Insured Date of Birth*	
Enter Insured Name	Enter Insured Date of Birth	
Insured Address*	Insured City"	
Enter Insured Address	Enter Insured City	
Insured Zip*	Insured State*	
Enter Zip	Alaska	
Upload Insurance Card (Front)*	Upload Insurance Card (Back)*	
Drag and Drop files here Or Click Here to browse files	Drag and Drop files here Or Click Here to browse files	

If the check returns an error or if the you entered an invalid information, an "Error" message will be displayed. Please try correcting the details and click "Check Eligibility" button again.

Note: An insurance claim can only be created using an insurance plan with an "Active" status.

VSee Clinic	ome Visits Schedule Health	Help 🔎 🔗 Alena Workman 🕶
MY ACCOUNT Profile Pharmacy Insurance	Billing Preferences	
Insurance Manage your insurance information h + Add Insurance	iere.	
There was an error while check	king your health insurance. Please update the insurance details and try again. You r	may also choose not to add this insurance.
Primary Insurance	Last updated 04/04/2022 1	10:10AM by Alena Workman Eligibility Status: No status

If ever the check returns an "Inactive" status, an Inactive alert message will be displayed. Please try correcting some information or enter another insurance plan if you have another one.

MY ACCOUNT				
Profile Pharmacy	Insurance Bil	ing Preferences		
Insurance				
Manage your insurance	information here.			
+ Add Insurance				

When eligibility check returns no response, a "Pending" status message will be displayed. You may continue to use this insurance plan even with a "Pending" status. As the status may change in the future once there is a response when eligibility is checked again.

1Y ACCOUNT				
Profile Pharmacy	Insurance Bill	ing Preferences		
nsurance				
lanage your insurance in	nformation here.			
+ Add Insurance				

An "Active" eligibility status may remain an eligible status for as long as the next scheduled appointment is covered within the insurance plan's effective date.

For example, the date today is Apr 1, 2022. The patient's insurance plan's effective dates are Apr 1, 2021 - Apr 1, 2022. And there is a scheduled appointment on Apr 4, 2022. Then this insurance plan's status can be tagged as "Expired". And will require to be checked again if there is an update in the effective dates before the scheduled appointment on Apr 4, 2022.

ACCOUNT					
Profile Pharmacy	Insurance	Billing Prefe	rences		
nsurance					
fanage your insurance	information her	e.			

When eligibility check returns an "Active" status, an Active status message will be displayed.

Note: While the status is "Active", insurance details/fields and the "Check Eligibility" button will be disabled until the eligibility period expires. At this point, only the provider may be able to update the insurance details, to prevent accidental changes to the "Active" insurance plan.

1Y ACCOUNT				
Profile Pharmacy	Insurance Bil	ling Preferences		
ISUFANCE anage your insurance in	nformation here.			

Note: Two is the maximum number of insurance plans a patient may add per patient account. If ever the primary insurance plan is removed, the secondary insurance plan will become the primary.

Whenever you start an appointment, your insurance information will be pre-filled with the "Active" insurance plan during the intake step. This is also how it would look like on this page after you successfully added your insurance information during the intake process.

Scope and Limitations:

- An insurance claim can only be created using an insurance plan with an "Active" status.
- An insurance plan with an "Active" eligibility status cannot be edited or

removed by the patient until the eligibility period has expired. Or if the provider chooses to update it themselves on their end.

- Two is the maximum number of insurance plans a patient may add per patient account. If ever the primary insurance plan is removed, the secondary insurance plan will become the primary.
- Currently unable to view claim status in Patient Portal.
- Currently, Procedure and Diagnosis details are not reflected on the invoice.

Related Article:

How the Eligibility Feature Works

If you have any questions, please contact us at help@vsee.com.

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Tags claims insurance payment