



Knowledgebase > VSee Clinic for Patients > How to Check Eligibility for Insurance Claims (Patient)

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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](#)
- [Related Article](#)

*Note: This feature may not be available on your clinic. Please contact [Sales](#) 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 TODAY? ✕

**Patient Information**

**First Name\***  **Last Name\***

**Date of Birth\***

**Gender\***  
 Male  Female

**Address\***

**City\***  **Zip\***

**State\***

**Phone Number\***

**Reason for visit\***

**Continue >** <sup>1</sup>

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 INFORMATION ✕

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?\*

Yes  No

< 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 Updated your Insurance Information via Patient Portal, when you select "Self" in the "Patient Relationship to Insured" dropdown field, the succeeding fields except "Upload Insurance Card (Front) and (Back)", will be pre-filled 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**.

**Insured Address\***

**Insured City\*** **Insured Zip\***

**Insured State\***

Alaska ▼

**Upload Insurance Card (Front)\***

Drag and Drop files here  
Or [Click Here](#) to browse files

**Upload Insurance Card (Back)\***

Drag and Drop files here  
Or [Click Here](#) to browse files

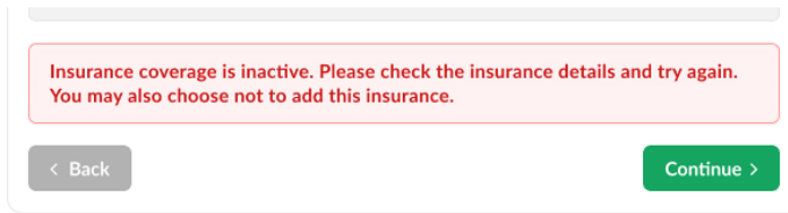
[< Back](#) [Continue >](#)

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.

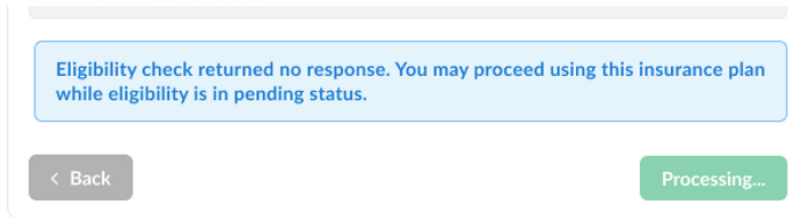
**There was an error while checking your health insurance. Please update the insurance details and try again. You may also choose not to add this insurance.**

[< Back](#) [Continue >](#)

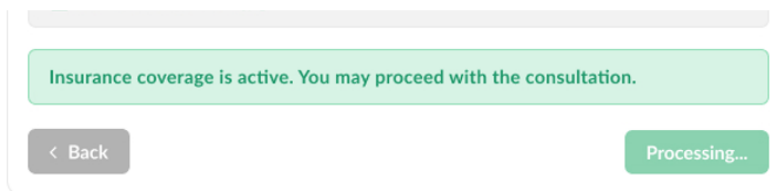
If ever the check returns an “Inactive” status, an Inactive message will be displayed. Please try entering another insurance plan if you have another one. Click “Continue” button again or go **Back** to select the “No” answer to the question above the form to proceed to the consultation without a health 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.



5. Select the **Visit Option**.

6. Click on **Continue**.

PLEASE SELECT YOUR VISIT OPTION ×

**Visit Option**

Description	Duration	Fee
<input checked="" type="radio"/> 15-min Consultation	15 minutes	USD 50
<input type="radio"/> 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 PAYMENT METHOD ✕

Estimated Charge	
15-min consultation	USD 50.00
Subtotal	USD 50.00
Discount	0%
<b>Total Charge</b>	<b>USD 50.00</b>

**Promo Code**

Have a promo code? Enter it here. Apply

**Payment Method**

Name	Card	Number	Expires
<input checked="" type="radio"/> New Credit Card			

**Name on Card \***

Enter Name on Card

**Card Number \***      **Expiry Date (MM / YY) \***      **CVC/CVV \***

Enter Card Number      MM / YY      CVC ?

Add Card

You will only be charged after the consultation.

< Back      Continue >

Wait for the Provider to join the call.



Session with Dr. Adison Kenter is in progress...  
Please do not leave this page until your consultation is over.

Invite guests to the meeting:  
[Copy Instruction](#)

Having issues with your in-browser video? [Join via VSee Messenger App](#)

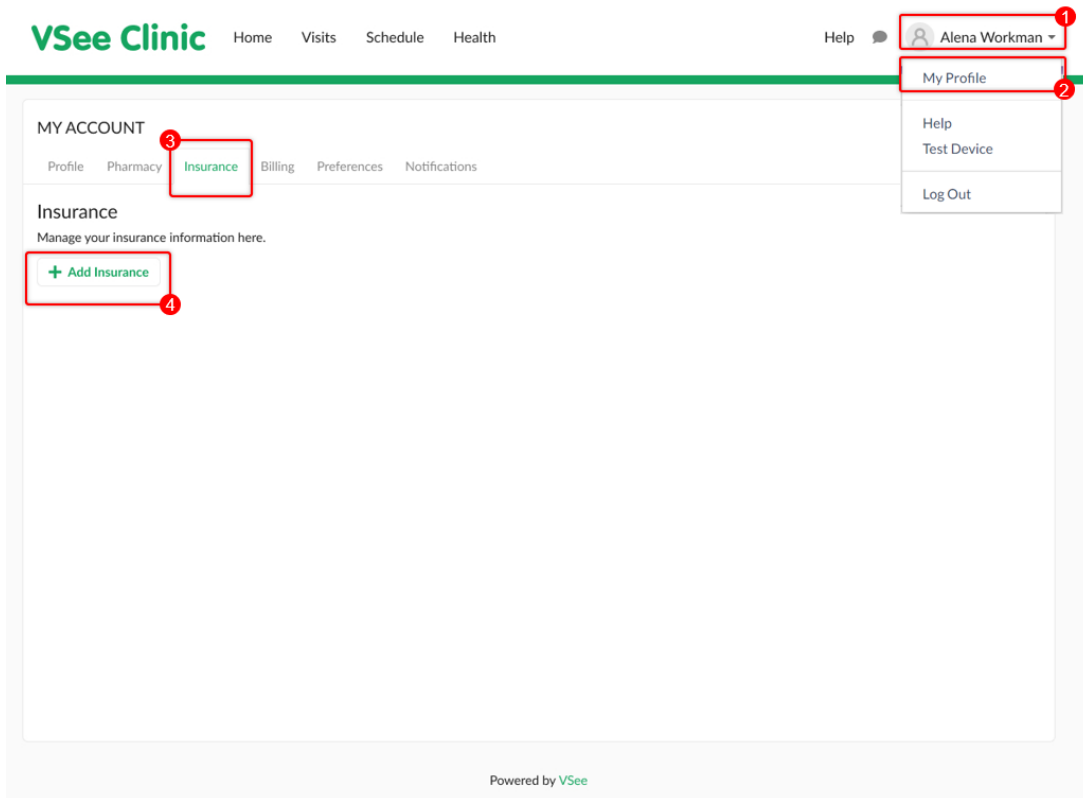
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*Note: After the provider has started the visit, only the provider may change your insurance details if there is a need to update it during the consultation.*

## 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.



5. Fill up the insurance form.

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

MY ACCOUNT

Profile Pharmacy **Insurance** Billing Preferences

**Insurance**  
Manage your insurance information here.

[+ Add Insurance](#)

**Primary Insurance** Eligibility Status: No status

**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  Drag and Drop files here   
Or [Click Here](#) to browse files Or [Click Here](#) to browse files

[Remove Insurance](#) [Check Eligibility](#)

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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.*

MY ACCOUNT

Profile Pharmacy **Insurance** Billing Preferences

**Insurance**  
Manage your insurance information here.

[+ Add Insurance](#)

**There was an error while checking your health insurance. Please update the insurance details and try again. You may also choose not to add this insurance.**

**Primary Insurance** Last updated 04/04/2022 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](#) [Billing](#) [Preferences](#)

## Insurance

Manage your insurance information here.

[+ Add Insurance](#)

Insurance coverage is inactive. Please check the insurance details and try again. You may also choose not to add this insurance.

Primary Insurance

Last updated 04/04/2022 10:10AM by Alena Workman **Eligibility Status:**  Inactive

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.

## MY ACCOUNT

[Profile](#) [Pharmacy](#) [Insurance](#) [Billing](#) [Preferences](#)

## Insurance

Manage your insurance information here.

[+ Add Insurance](#)

Eligibility check returned no response. You may proceed using this insurance plan while eligibility is in pending status.

Primary Insurance

Last updated 04/04/2022 10:10AM by Alena Workman **Eligibility Status:**  Pending Eligibility

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.

The screenshot shows the VSee Clinic user interface. At the top, there is a navigation bar with the VSee Clinic logo and links for Home, Visits, Schedule, and Health. On the right, there are links for Help and a user profile for Alena Workman. Below the navigation bar is a 'MY ACCOUNT' section with tabs for Profile, Pharmacy, Insurance (selected), Billing, and Preferences. Under the 'Insurance' tab, there is a sub-section titled 'Insurance' with the instruction 'Manage your insurance information here.' and a '+ Add Insurance' button. A red-bordered message box contains the text: 'Eligibility period has already expired. Please click update to check eligibility again.' Below this message, there is a table entry for 'Primary Insurance' with a last update date of '04/04/2021 10:10AM by Dr. Adison Kenter' and an 'Eligibility Status: ✓ Active (Expired)'.

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.*

The screenshot shows the VSee Clinic user interface, similar to the first one. The 'MY ACCOUNT' section has the 'Insurance' tab selected. Under the 'Insurance' sub-section, there is a '+ Add Insurance' button. A green-bordered message box contains the text: 'Insurance coverage is active. You may proceed using this insurance plan.' Below this message, there is a table entry for 'Primary Insurance' with a last update date of '04/04/2022 10:10AM by Alena Workman' and an 'Eligibility Status: ✓ Active'.

*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](mailto:help@vsee.com).

Last updated on: 15 July 2022

Tags

claims

insurance

payment