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How to Check Eligibility for Insurance Claims (Provider)

Jay-Ileen (Ai) - 2022-07-15 - VSee Clinic for Providers

In order for the Patient's health insurance to pay for the services you have rendered, you must check first if the Patient is Eligible for you to submit a claim.

Note: This feature may not be available in your clinic. Please contact [Sales](#) or your Account Manager to enable this feature.

- [Add the Diagnosis and Procedure Codes for the Visit](#)
- [Add Patient's Insurance Information](#)
- [Check the Patient's Eligibility](#)
- [Scope and Limitations](#)
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Adding the Diagnosis and Procedure Codes for the Visit

During the visit, it is important that you add the diagnosis (dx) and procedure (cpt) codes related to the services rendered to the Patient;

1. On the visit details page, click on **Notes** tab. And scroll down past the Patient's EMR section.

VSee Clinic Dashboard Patients Schedule Health

Dr. Adison Kenter

Ready for Physician Add Tag

Status: In Progress Add Participants

All Participants Alena Workman

Alena Workman In call
Age 62, Jan 1, 1960, Female
3188 Kimlee Drive, San Jose, CA, 95132
patient1@email.com, +55512345678
Lorem ipsum dolor sit amet, consectetur adipiscing elit
See more

Visit ID 123456
04/04/2022 10:10 AM
Video Visit
15-min consultation
15 mins
USD 50.00
Dr. Adison Kenter's Room

Intake **Notes** Billing Visits Insurance Medical History Allergies Medications Docu

Notes

Past Medical History Edit Last updated on 03/14/2022 10:10AM by Dr. Adison Kenter

- Lung problems
- Asthma

Past Surgeries Edit Last updated on 03/14/2022 10:10AM by Dr. Adison Kenter

- Appendectomy

Social History Edit Last updated on 03/14/2022 10:10AM by Dr. Adison Kenter

- Marital Status: Single
- Highest Level of Education: College
- Living Situation: Alone
- Served in Military: Yes
- Legal History: None

Health Habits Edit

You may update the SOAP notes section accordingly. Then continue to scroll down to the bottom of the page.

Having issues with your in-browser video? Join via VSee Messenger App

Health Habits Edit

Family History Edit

Medications Edit Last updated on 03/14/2022 10:10AM by Dr. Adison Kenter

- Vitamin C
- Aderol - ADHD Medication
- Salbutamol

Allergies Edit Last updated on 03/14/2022 10:10AM by Dr. Adison Kenter

- Seafood

New Prescriptions Edit

Preferred Pharmacy Edit Last updated on 03/14/2022 10:10AM by Dr. Adison Kenter

- CVS/Pharmacy #9793, 2700 Homestead Rd, Santa Clara, CA, 95051, 4082478700

Subjective (Optional) Note Templates

Write a comment

Objective (Optional) Note Templates

Write a comment

Assessment (Optional) Note Templates

Write a comment

Plan (Optional) Note Templates

Write a comment

2. Add the **Diagnosis code/s** by selecting from the dropdown list.
3. After selecting each code, make sure to click on the **Add** button.
4. Add the **Diagnosis code/s** by selecting from the dropdown list.
5. After selecting each code, make sure to click on the **Add** button.
6. You may **Save** it for now OR click on **Sign & Send** to complete.

Note: Currently, the Diagnosis and Procedure codes will only be added to the

insurance claim form after the provider has clicked the “Sign & Send” button.

The screenshot shows a web form for entering medical codes and patient information. Red boxes and numbers highlight specific areas:

- 2**: Points to the "Diagnosis Codes" section, which includes a text input field "Select ICD Diagnosis Code(s)" and an "Add" button.
- 3**: Points to the "Add" button in the "Diagnosis Codes" section.
- 4**: Points to the "Procedure Codes" section, which includes a text input field "Select CPT, HCPCS Procedure Code(s)" and an "Add" button.
- 5**: Points to the "Add" button in the "Procedure Codes" section.
- 6**: Points to the "Sign & Send" button at the bottom right of the form.

The form also contains a table for codes, a section for patient instructions, and an upload file section.

DX	Codes	
1	ICD-10-CM Z32.2 - Childbirth education; Childbirth instruction; Childbirth Ed...	X
2	ICD-10-CM Z71.89 - Health education; Individual or group safety & first aid...	X

Codes	Qty	Modifiers	DX	
G2012 Brief communication (5-10 minutes) techn...	1		1, 2	X
G2010 Remote evaluation of recorded video and/or...	1		1	X

Adding Patient's Insurance Information

If the Patient did not choose to add their Insurance information before getting into the visit, you still have the option to do it on behalf of the Patient.

1. Click on the **Insurance** tab. This tab is related to the patient's profile. And can be accessed throughout the patient's profile details regardless of the visit number.
2. Click on **+Add Insurance**.

Note: You can add a maximum of 2 insurance plans per patient.

The screenshot shows the VSee Clinic interface during a video visit. The top navigation bar includes "VSee Clinic", "Dashboard", "Patients", "Schedule", and "Health". The user is logged in as "Dr. Adison Kenter".

The main content area is divided into two sections. The left section shows a video feed of a patient, Alena Workman, smiling. The right section shows the patient's profile and visit details.

The patient's profile includes:

- Alena Workman** (In call)
- Age 62, Jan 1, 1960, Female
- 3188 Kinlee Drive, San Jose, CA, 95132
- patient1@gmail.com, +55512345678
- See more

The visit details include:

- # Visit ID 123456
- 04/04/2022 10:10 AM
- Video Visit
- 15-min consultation
- 15 mins
- USD 50.00
- Dr. Adison Kenter's Room

The bottom section shows the "Insurance" tab, which is highlighted. It includes a "+ Add Insurance" button, which is circled in red.

3. Ask the Patient for the details of their Health insurance and fill them in the form.

The screenshot shows the VSee Clinic interface. On the left is a video call window with a patient. On the right is a sidebar with tabs: Intake, Notes, Billing, Visits, Insurance (selected), Medical History, Allergies, Medications, and Documents. The Insurance tab contains a form for adding insurance. The form is titled 'Primary Insurance' and includes fields for: Primary Insurance Company Name, Policy Number / Subscriber ID, Group Number (Optional), Patient Relationship to Insured, Insured Name, Insured Date of Birth, Insured Address, Insured City, Insured Zip, and Insured State. There are also upload buttons for 'Upload Insurance Card (Front)' and 'Upload Insurance Card (Back)'. A red box highlights the entire form, and a red circle with the number 3 is next to it.

Powered by VSee

Once all the required fields have been answered, you may now proceed to Check Eligibility.

Checking the Patient's Eligibility

Once the Patient's health insurance is already added by the Patient or by you, you can now proceed to check eligibility.

1. Go to the **Insurance** tab.
2. Click on the **Check Eligibility** button.

VSee Clinic Dashboard Patients Schedule Health Dr. Adison Kenter

Ready for Physician Add Tag

Status: In Progress Add Participants

All Participants Alena Workman

Alena Workman In call
Age 62, Jan 1, 1960, Female
3188 Kimlee Drive, San Jose, CA, 95132
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See more

Visit ID 123456
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Dr. Adison Kenter's Room

Intake Notes Billing Visits Insurance Medical History Allergies Medications Documents

Insurance

Check Eligibility Eligibility Status: No status

Primary Insurance

Primary Insurance Company Name* Policy Number / Subscriber ID*
Health Insurance Co. 0001234567890

Group Number (Optional) Patient Relationship to Insured*
8881234567890 Spouse

Insured Name* Insured Date of Birth*
John Workman January 2, 1992

Insured Address* Insured City*
3188 Kimlee Drive San Jose

Insured Zip* Insured State*
95132 California

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
Insurance card front.jpg Insurance card back.jpg

In this example, the status is "Inactive". It means the Patient is currently ineligible or their insurance coverage is not active.

Clicking the "Check Eligibility" button will save the changes. You have the option to keep it in the patient's profile or remove it.

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

Insurance

+ Add Insurance

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

Check Eligibility Eligibility Status: ▲ Inactive

Last updated 03/30/2022 10:10AM by Dr. Adison Kenter

In this example, the status is "Pending Eligibility". This will be the status if the check returns "no response". You may try to check the eligibility status as many times as you want until it returns an "Active" or "Inactive" status. But you may not be able to create a claim while the status is "Pending Eligibility".

Insurance

+ Add Insurance

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

Check Eligibility

Eligibility Status: Pending Eligibility

Last updated 03/30/2022 10:10AM by Dr. Adison Kenter

A “Verifying..” message will be shown until there is a response from the checking.

Insurance

+ Add Insurance

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

Processing...

Eligibility Status: Pending Eligibility

Last updated 03/30/2022 10:10AM by Dr. Adison Kenter

Primary Insurance

Primary Insurance Company Name*

Health Insurance Co.

Policy Number / Subscriber ID*

0001234567890

Group Number (Optional)

8881234567890

Patient Relationship to Insured*

Spouse

Insured Name*

John Workman

Insured Date of Birth*

January 2, 1992

Insured Address*

3188 Kimlee Drive

Insured City*

San Jose

Insured Zip*

95132

Insured State*

California

Upload Insurance Card (Front)*

Upload Insurance Card (Back)*

Drag and Drop files here

Or [Click Here](#) to browse files

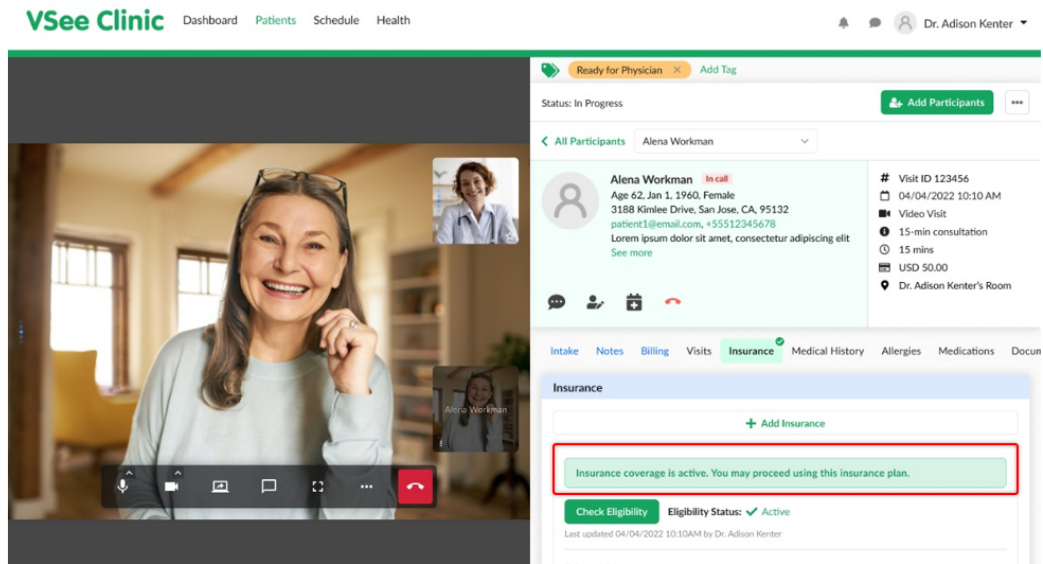
Drag and Drop files here

Or [Click Here](#) to browse files

Remove Insurance

Please wait while we verify your insurance details...

Once the checking returns an eligible status, the provider will see an “Active” status and success message. A response will display all the details related to the patient’s insurance coverage below. An **Active** status icon (green circle with a check symbol) will be displayed beside the “Insurance” tab as well to indicate that the most recent eligibility check is “Active”. You may click the “Check Eligibility” button anytime.



Here’s an example of when the Patient has 2 insurance plans. You or the Patient may add a maximum of 2 insurance plans per patient account. As long as there is 1 “Active” status insurance, the “Active” icon beside the “Insurance” tab will be displayed, regardless of the status of the other insurance.

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Scope and Limitations:

- An insurance claim can only be created using an insurance plan with an “Active” status.
- Currently unable to view claim status via VSee Clinic / Patient Portal.
- Currently, Procedure and Diagnosis details are not reflected on the invoice.
- 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, the Diagnosis and Procedure codes will only be added to the insurance claim form after the Provider has clicked the “Sign & Send” button.

Related Articles:

- [How the Eligibility Feature Works](#)
- [How to Submit a Claim \(Provider\)](#)

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

Last updated on: 15 July 2022

Tags

billing

claim

eligibility

insurance

payment

submit claim