



Knowledgebase > VSee Clinic for Providers > How to Check Eligibility for Insurance Claims (Provider)

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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.

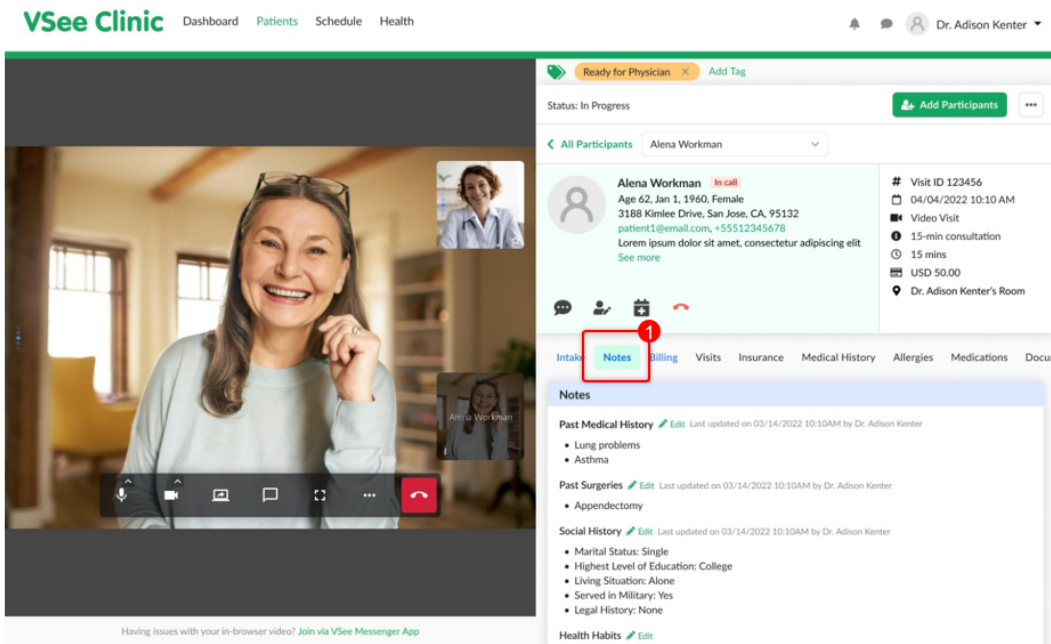
*Note: This feature may not be available in your clinic. Please contact [Sales](#) or your Account Manager to enable this feature.*

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

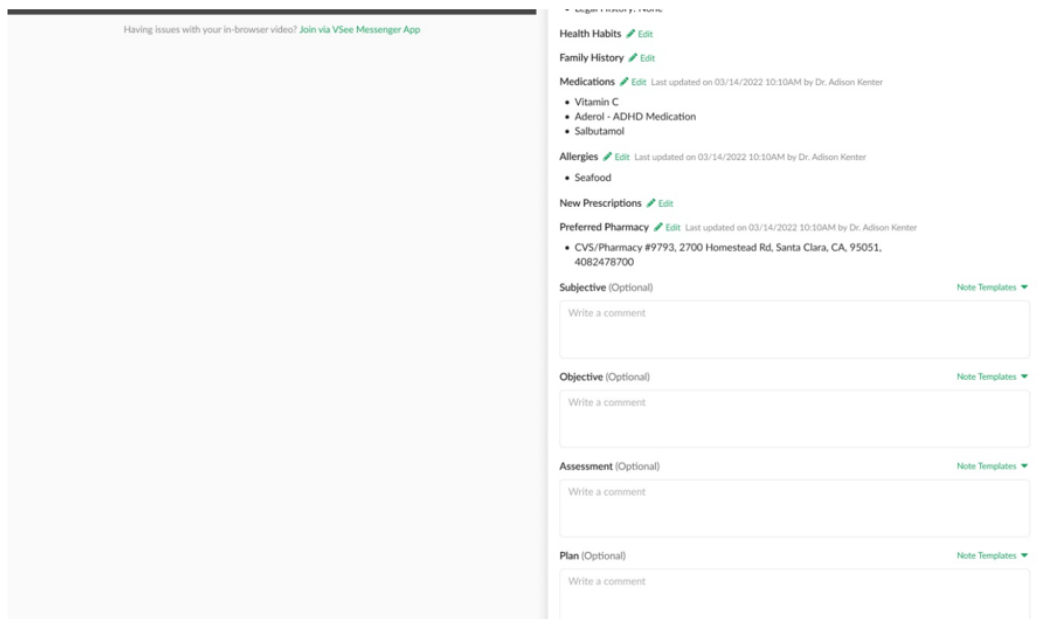
### **Adding the Diagnosis and Procedure Codes for the Visit**

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.



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



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 form for adding diagnosis and procedure codes. It includes a table for codes, a section for patient instructions, and an upload file section. Numbered callouts highlight the following elements:

- 2: Diagnosis Codes input field
- 3: Add button for diagnosis codes
- 4: Procedure Codes input field
- 5: Add button for procedure codes
- 6: Sign & Send button

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 patient's profile is visible, and the Insurance tab is selected. A red box highlights the '+ Add Insurance' 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  
patient11@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...

Insurance  
+ Add Insurance

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

Powered by VSee

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, a video call is in progress with a patient, Alena Workman. On the right, there is a patient information panel and a navigation menu. The 'Insurance' tab is selected, and the 'Check Eligibility' button is highlighted. The form for entering insurance details is also highlighted with a red box and a red circle with the number 3.

Primary Insurance

Primary 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

Remove Insurance

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.

The screenshot shows the VSee Clinic interface. On the left, a video call is in progress with a patient, Alena Workman. On the right, the patient's profile is displayed, including their name, age, address, and contact information. Below the profile, the 'Insurance' tab is selected, and the 'Check Eligibility' button is highlighted with a red box and a '2'. The insurance details form is visible, showing fields for Primary Insurance Company Name, Policy Number / Subscriber ID, Group Number, Patient Relationship to Insured, Insured Name, Insured Date of Birth, Insured Address, Insured City, Insured Zip, and Insured State. The 'Eligibility Status' is currently 'No status'.

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.*

The screenshot shows the 'Insurance' tab in the VSee Clinic interface. A red warning message is displayed: "Insurance coverage is inactive. Please check the insurance details and try again. You may also choose not to add this insurance." Below the message, the 'Check Eligibility' button is highlighted with a green box, and the 'Eligibility Status' is 'Inactive' with a red warning icon. The last updated date is 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

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Primary Insurance ^

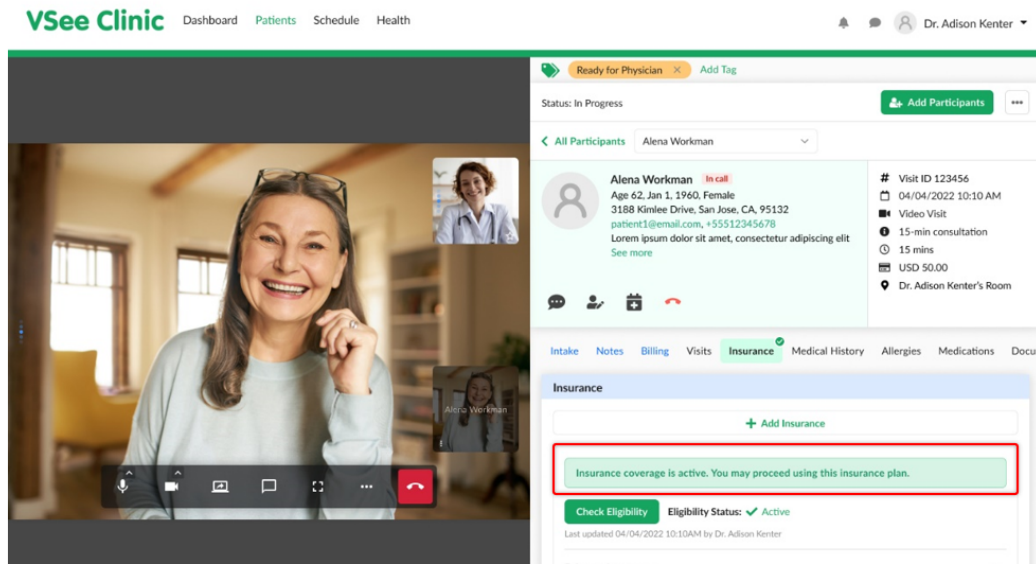
Primary Insurance Company Name*	Policy Number / Subscriber ID*
<input type="text" value="Health Insurance Co."/>	<input type="text" value="0001234567890"/>
Group Number (Optional)	Patient Relationship to Insured*
<input type="text" value="8881234567890"/>	<input type="text" value="Spouse"/>
Insured Name*	Insured Date of Birth*
<input type="text" value="John Workman"/>	<input type="text" value="January 2, 1992"/>
Insured Address*	Insured City*
<input type="text" value="3188 Kimlee Drive"/>	<input type="text" value="San Jose"/>
Insured Zip*	Insured State*
<input type="text" value="95132"/>	<input type="text" value="California"/>

**Please wait while we verify your insurance details...**

Upload Insurance Card (Front)*	Upload Insurance Card (Back)*
<input type="text" value="Drag and Drop files here"/> <input type="text" value="Or Click Here to browse files"/>	<input type="text" value="Drag and Drop files here"/> <input type="text" value="Or Click Here to browse files"/>
<input type="text" value="Insurance card front.jpg"/> <span style="float: right;">✕</span>	<input type="text" value="Insurance card back.jpg"/> <span style="float: right;">✕</span>

[Remove Insurance](#)

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.



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

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 Kinlee Drive, San Jose, CA, 95132

subert1@gmail.com, +55512345678

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 Docum

Insurance coverage is active. You may proceed using this insurance plan.

**Check Eligibility** Eligibility Status: Active

Last checked 04/04/2022 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 Kinlee Drive Insured City\* San Jose

Insured Zip\* 95132 Insured State\* California

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

Eligibility Details

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

Insured Address 3188 Kinlee Drive, San Jose, CA, 95132 Eligibility Effective Dates Start: 01/01/2021 - End: 12/31/2022

Plan 444400 Health Insurance Co. Premium Plan

Subscriber Name Alena Workman Subscriber ID 0001234567890

Gender Female Subscriber Date of Birth January 1, 1991

Subscriber Address 3188 Kinlee Drive, San Jose, CA, 95132 Service Type Code 30

Plan Primary Care Provider

**Health Benefit Plan Coverage**

Contracted Service Provider N/A

Payer Health Insurance Co. Premium Plan

Third Party Administrator N/A

Utilization Management Organization N/A

Independent Physicians Association N/A

Administrative Plan N/A

MSP Information N/A

Co Payment Deductible

	In Network	Out of Network
Professional (Physician) Visit - Office (Employee Only)	15.00	
Professional (Physician) Visit - Office (Employee Only)	15.00	
General (Employee Only)		15.00
Emergency Services (Employee Only)	125.00	
Emergency Services (Employee Only)		125.00

See more

Co-Insurance Active Coverage

- Health Benefit Plan Coverage (Employee Only)
- Plan Coverage Description: Health Insurance Co. Premium Plan POS II
- Insurance Type: POINT OF SERVICE (POS)
- Professional (Physician) Visit - Office (Employee Only)
- General (Employee Only)
- Emergency Services (Employee Only)

See more

Remove Insurance

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

**Check Eligibility** Eligibility Status: Pending Eligibility

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

**Secondary Insurance**

Primary Insurance Company Name\* New Health Insurance Inc. Policy Number / Subscriber ID\* 000987654321

Group Number (Optional) 8880987654321 Patient Relationship to Insured\* Spouse

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

Insured Address\* 3188 Kinlee Drive Insured City\* San Jose

Insured Zip\* 95132 Insured State\* California

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

Remove Insurance



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

Last updated on: 15 July 2022

### Tags

billing

claim

eligibility

insurance

payment

submit claim