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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.

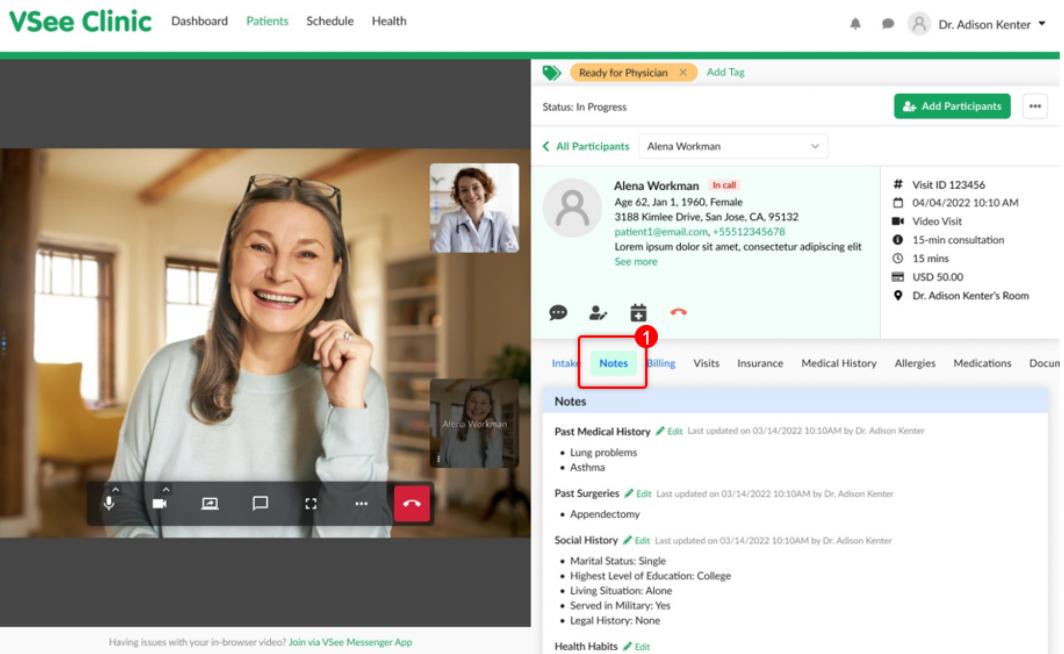
Note: This feature may not be available in your clinic. Please contact [Sales](#) or your Account Manager to enable this feature.

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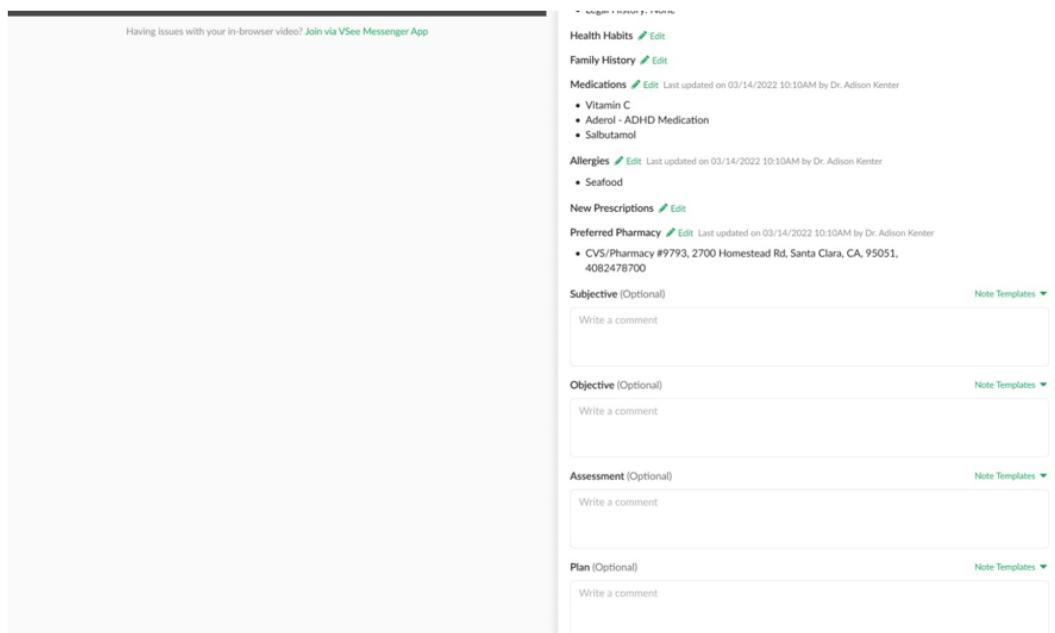
Adding the Diagnosis and Procedure Codes for the Visit

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.



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 medical claim form interface with the following numbered callouts:

- 2** Diagnosis Codes: A red box highlights the "Select ICD Diagnosis Code(s)" input field. A green "Add" button is located to the right.
- 3** A green "Add" button is located in the top right corner of the Diagnosis Codes section.
- 4** Procedure Codes: A red box highlights the "Select CPT, HCPCS Procedure Code(s)" input field. A green "Add" button is located to the right.
- 5** A green "Add" button is located in the top right corner of the Procedure Codes section.
- 6** A red box highlights the "Save" and "Sign & Send" buttons at the bottom right. The "Sign & Send" button is highlighted with a red border.

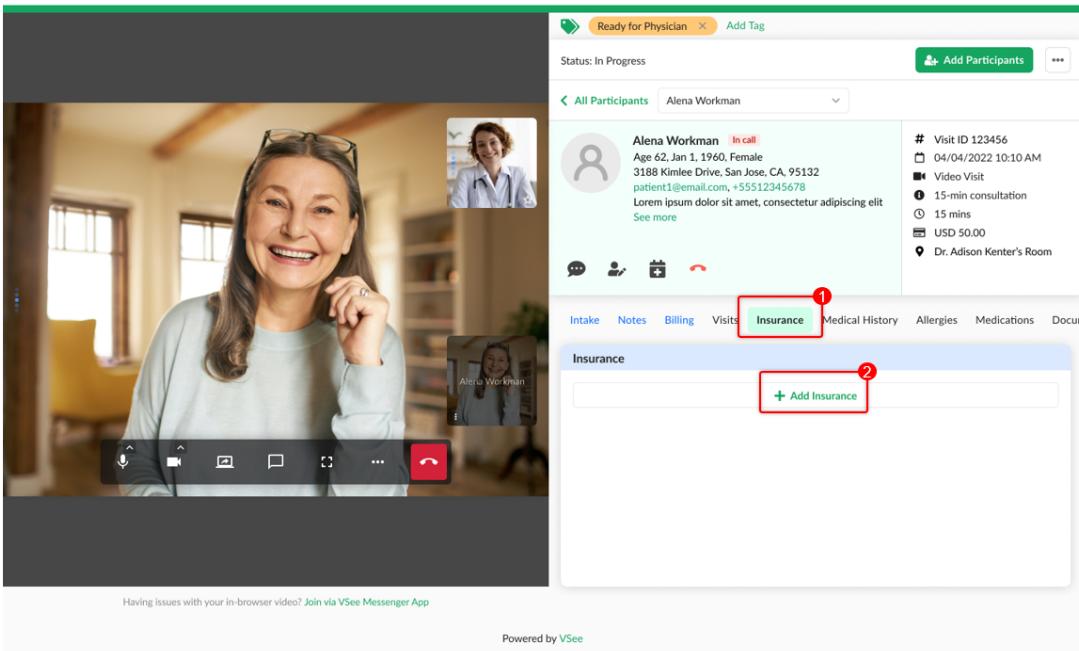
Other visible elements include a "Patient Instructions (Optional)" text area, a "Note Templates" dropdown, a "Write a comment" text area, and an "Upload Files (Optional)" section with a "Drag and Drop files here" and "Or Click Here to browse files" instruction.

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**.

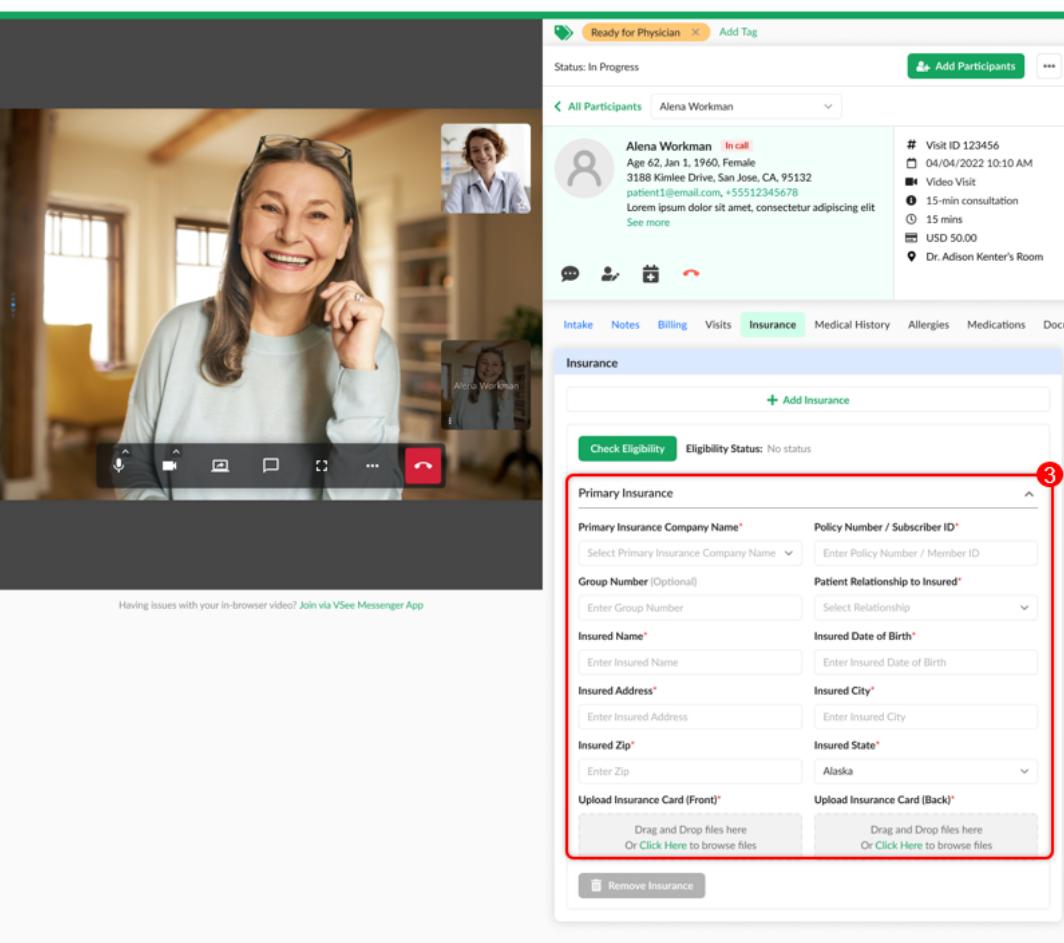
Note: You can add a maximum of 2 insurance plans per patient.



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.



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

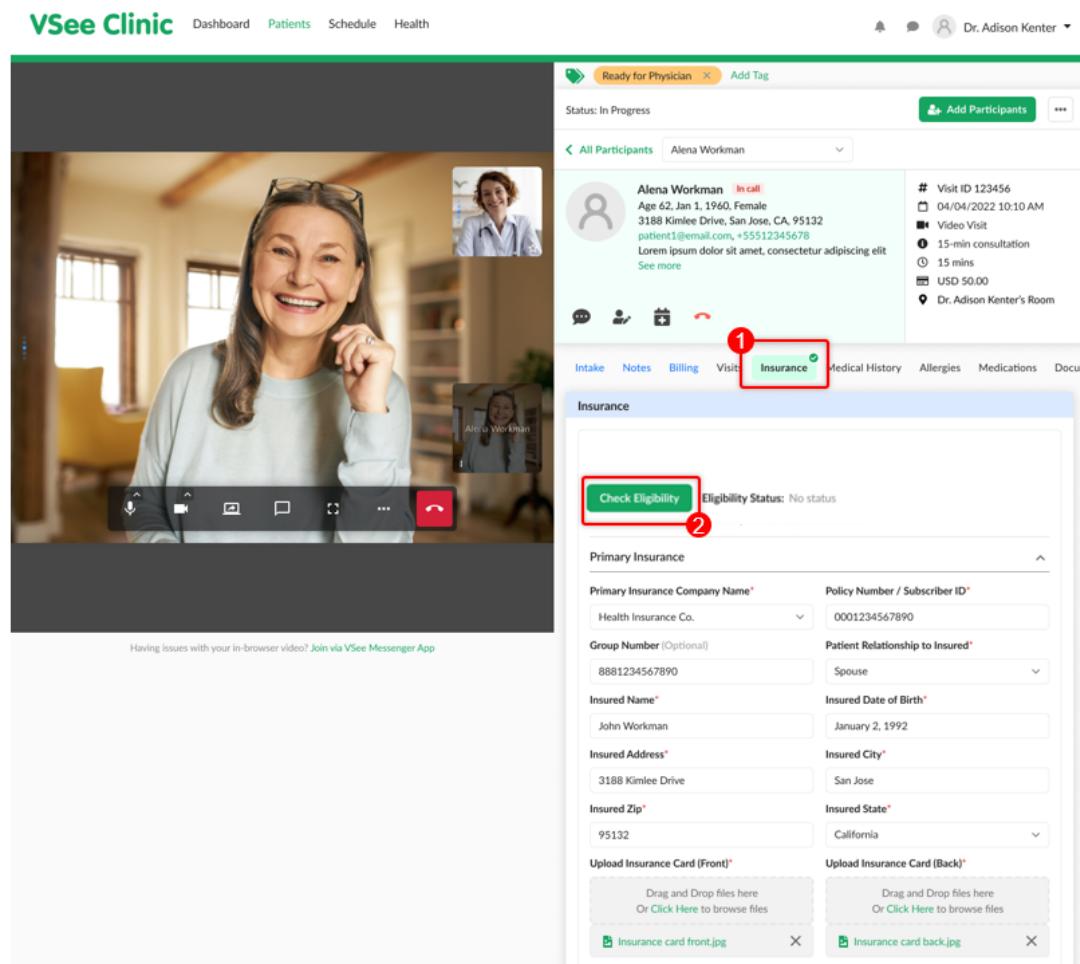
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Once all the required fields have been answered, you may now proceed to Check Eligibility.

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 a video call interface. On the left, a large video frame displays a smiling woman with long brown hair. On the right, a smaller video frame shows a doctor in a white coat. Below the video frames are video control buttons. At the top, the VSee Clinic logo is followed by navigation links: Dashboard, Patients, Schedule, and Health. On the far right, there is a user profile for 'Dr. Adison Kenter' with a dropdown arrow. The main content area has a header 'Ready for Physician' with an 'Add Tag' button. Below this, the status is listed as 'In Progress'. A green button labeled 'Add Participants' is visible. A sidebar on the left shows 'All Participants' with a list for 'Alena Workman'. The main panel shows a detailed patient profile for 'Alena Workman' with fields for Visit ID, Date, Time, and Duration. The 'Insurance' tab is highlighted with a red box and the number '1' above it. Below the tab, a green button labeled 'Check Eligibility' is highlighted with a red box and the number '2' above it. The status is shown as 'No status'. The 'Insurance' tab is expanded, showing a form for 'Primary Insurance' with fields for Company Name, Policy Number, Group Number (optional), Patient Relationship, Insured Name, Insured Date of Birth, Insured Address, Insured City, Insured Zip, Insured State, and two file upload fields for insurance card front and back. Below the form, a note says 'Having issues with your in-browser video? Join via VSee Messenger App'.

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 a user interface for managing insurance. At the top, a blue header bar says "Insurance". Below it is a white input field with a green "Add Insurance" button. A red-bordered message box contains the text: "Insurance coverage is inactive. Please check the insurance details and try again. You may also choose not to add this insurance." At the bottom of the page, there are two buttons: "Check Eligibility" (green) and "Eligibility Status: ⚠ Inactive". Below these buttons, a small note says "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".

The screenshot shows a user interface for managing insurance. At the top, a blue header bar says "Insurance". Below it is a white input field with a green "Add Insurance" button. A blue-bordered message box contains the text: "Eligibility check returned no response. You may proceed using this insurance plan while eligibility is in pending status." At the bottom of the page, there are two buttons: "Check Eligibility" (green) and "Eligibility Status: ⌚ Pending Eligibility". Below these buttons, a small note says "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

Please wait while we verify your insurance details...

California

Upload Insurance Card (Front)*

Drag and Drop files here

Or Click Here to browse files

 Insurance card front.jpg

X

Upload Insurance Card (Back)*

Drag and Drop files here

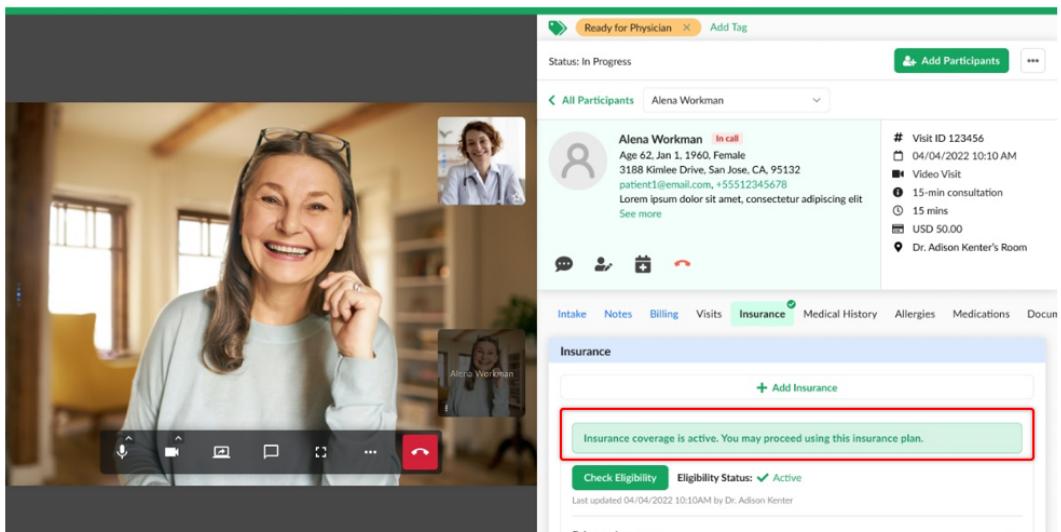
Or Click Here to browse files

 Insurance card back.jpg

X

 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.

Ready for Physician Add Tag

Status: In Progress Add Participants

Alena Workman Info Video ID: 123456 04/04/2022 10:10 AM

Age: 42, Jon 1, 1940, Female
3188 Kinlee Drive, San Jose, CA, 95132
patient@email.com, +55512345678
Lorem ipsum dolor sit amet, consectetur adipiscing elit
See more

Video Visit 15-min consultation
15 mins USD 50.00
Dr. Adison Kenter's Room

Intake Notes Billing Visits Insurance Medical History Allergies Medications Document

Insurance

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

Check Eligibility Eligibility Status: Active

Last checked 04/04/2022 10:10 AM 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): Insurance card front.jpg Upload Insurance Card (Back): Insurance card back.jpg

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: 4J4Y00 Health Insurance Co. Premium Plan

Subscriber Name: Alena Workman Subscriber ID: 0001234567890

Gender: Female Subscriber Date of Birth: January 1, 1992

Subscriber Address: 3188 Kinlee Drive, San Jose, CA, 95132 Service Type Code: 90

Plan Primary Care Provider

Health Benefit Plan Coverage

	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	

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	

Co-Insurance Active Coverage

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

Eligibility Eligibility Status: Pending Eligibility

Last checked 04/04/2022 10:10 AM by Dr. Adison Kenter

Secondary Insurance

Primary Insurance Company Name: New Health Insurance Inc. Policy Number / Subscriber ID: 0000987654321

Group Number (Optional): 888097654321 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): Insurance card front.jpg Upload Insurance Card (Back): Insurance card back.jpg

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.

Last updated on: 15 July 2022

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