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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.

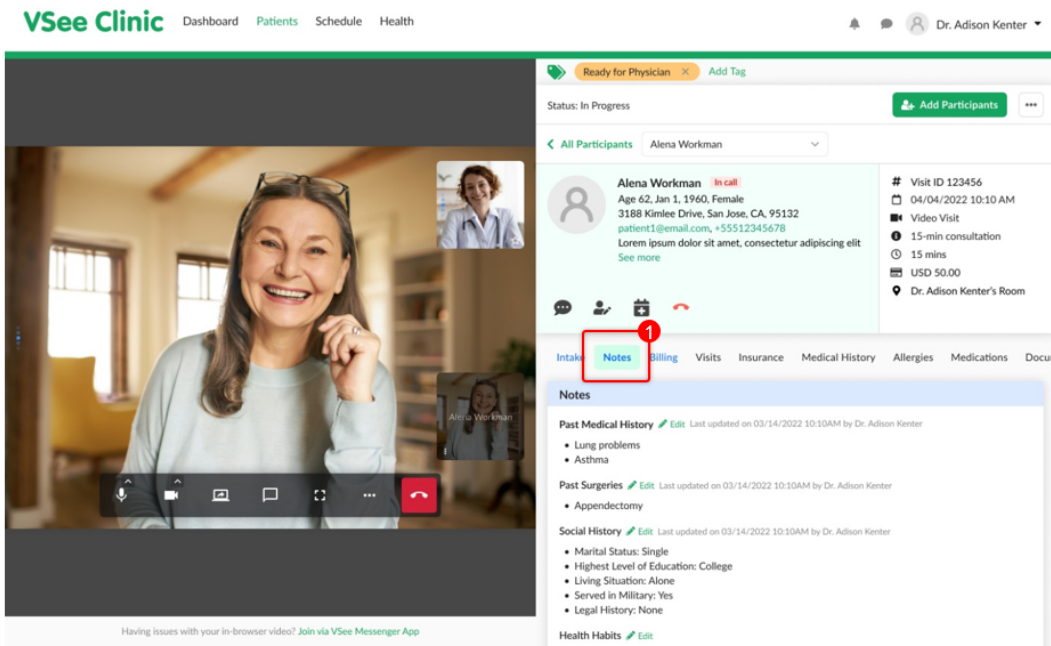
Note: This feature may not be available in your clinic. Please contact [Sales](#) or your Account Manager to enable this feature.

- [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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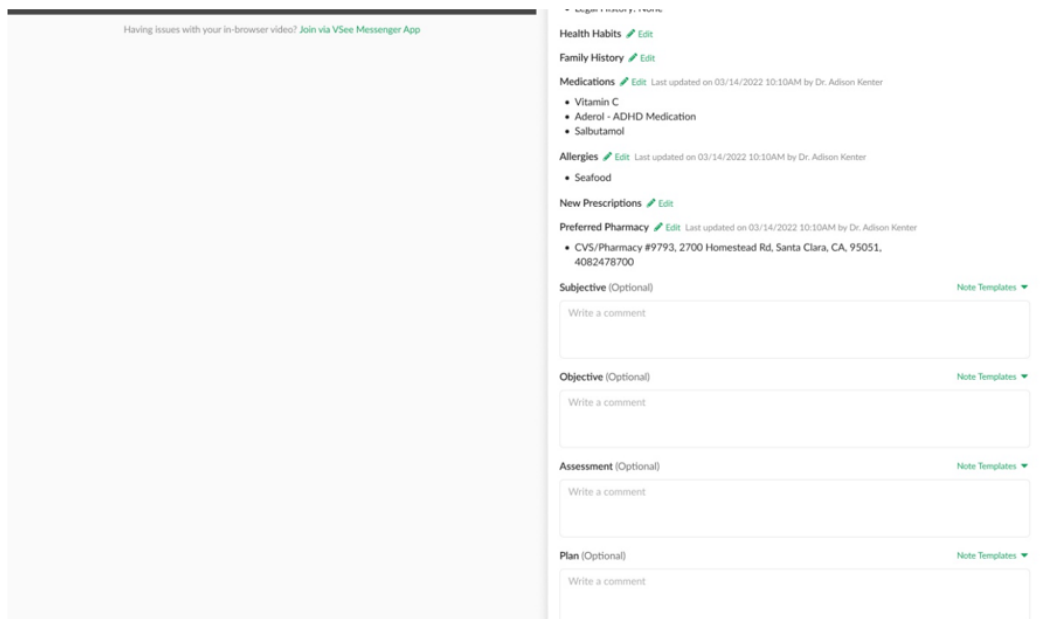
Adding the Diagnosis and Procedure Codes for the Visit

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.



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 displays the VSee Clinic interface. On the left, a video call is in progress with a patient, Alena Workman. The patient's profile information is visible on the right, including her name, age, gender, address, and contact details. Below the profile, there are tabs for Intake, Notes, Billing, Visits, Insurance, Medical History, Allergies, and Medications. The 'Insurance' tab is selected, and the 'Check Eligibility' button is highlighted. The form below the button contains 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 insurance cards (Front and Back) and a 'Remove Insurance' button. A red circle with the number '3' is placed over the 'Check Eligibility' button.

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
 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 Docum

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
 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](#)

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Primary Insurance ^

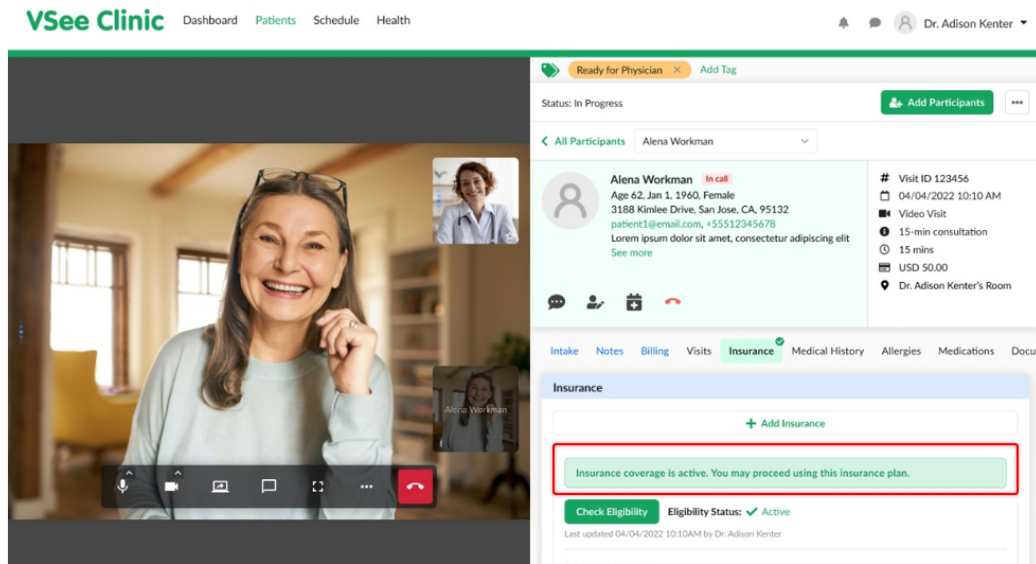
Primary Insurance Company Name*	Policy Number / Subscriber ID*
<input type="text" value="Health Insurance Co."/>	<input type="text" value="0001234567890"/>
Group Number (Optional)	Patient Relationship to Insured*
<input type="text" value="8881234567890"/>	<input type="text" value="Spouse"/>
Insured Name*	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"/> ✕	<input type="text" value="Insurance card back.jpg"/> ✕

[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 42, Jan 1, 1960, Female

3188 Kinlee Drive, San Jose, CA, 95132

alena@ipsum.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 Docum

Insurance

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

Check Eligibility Eligibility Status: Active

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Primary Insurance

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* Insured State*

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

Eligibility Details

Insured Name Insured Date of Birth

Insured Address Eligibility Effective Dates

Plan 444400 Health Insurance Co. Premium Plan

Subscriber Name Subscriber ID

Gender Subscriber Date of Birth

Subscriber Address Service Type Code

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

	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

- 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

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Secondary Insurance

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* Insured State*

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.

Last updated on: 15 July 2022

Tags

billing

claim

eligibility

insurance

payment

submit claim