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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

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.

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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 medical claim form with several sections. Red boxes and numbers highlight specific areas:

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

The form also includes a table for "Codes" with columns for "DX", "Codes", "Qty", "Modifiers", and "DX". It lists two codes: "ICD-10-CM Z32.2 - Childbirth education; Childbirth instruction; Childbirth Ed..." and "ICD-10-CM Z71.89 - Health education; Individual or group safety & first aid...". Below the table, there are sections for "Patient Instructions (Optional)" and "Upload Files (Optional)".

DX	Codes	Qty	Modifiers	DX
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

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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.

VSee Clinic Dashboard Patients Schedule Health Dr. Adison Kenter

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

Insurance

+ Add Insurance

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

VSee Clinic Dashboard Patients Schedule Health Dr. Adison Kenter

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Alena Workman *In call*
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Intake Notes Billing Visits **Insurance** Medical History Allergies Medications Docu

Insurance

+ Add Insurance

Check Eligibility Eligibility Status: No status

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

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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 the VSee Clinic interface. On the left, a video call is in progress with a patient, Alena Workman. On the right, the 'Insurance' tab is selected in the sidebar. The 'Check Eligibility' button is highlighted with a red box and a red circle with the number 2. The patient's information is displayed above the form, including name, age, gender, address, and contact details. The form fields are as follows:

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

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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)*

Drag and Drop files here



Or [Click Here](#) to browse files


 Insurance card front.jpg 

Upload Insurance Card (Back)*

Drag and Drop files here

Or [Click Here](#) to browse files

 Insurance card back.jpg 

 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.

VSee Clinic Dashboard Patients Schedule Health

Dr. Addison Kenter

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

Insurance

+ Add Insurance

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

Check Eligibility Eligibility Status: **Active**
Last updated 04/04/2022 10:10AM by Dr. Addison Kenter

Primary Insurance

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 PhysicianAdd Tag

Status: In ProgressAdd Participants

All ParticipantsAlena Workman

Alena Workman

in call

Age 62, Jan 1, 1960, Female

3188 Kinlee Drive, San Jose, CA, 95132

patient1@email.com, +55512345678

See more

Visit ID 123456

04/04/2022 10:10 AM

Video Visit

15-min consultation

15 mins

USD 50.00

Dr. Addison Kenter's Room

Intake

Notes

Billing

Visits

Insurance

Medical History

Allergies

Medications

Docu...

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*

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)*

Drag and Drop files here
Or Click Here to browse files

Insurance card front.jpg

Upload Insurance Card (Back)*

Drag and Drop files here
Or Click Here to browse files

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

4144/00 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. Addison Kenter

Secondary Insurance

Primary Insurance Company Name*

New Health Insurance Inc.

Policy Number / Subscriber ID*

0000987654321

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)*

Drag and Drop files here
Or Click Here to browse files

Insurance card front.jpg

Upload Insurance Card (Back)*

Drag and Drop files here
Or Click Here to browse files

Insurance card back.jpg

Remove 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

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- [payment](#)
- [submit claim](#)