

Eligibility Verification and Benefits Guide

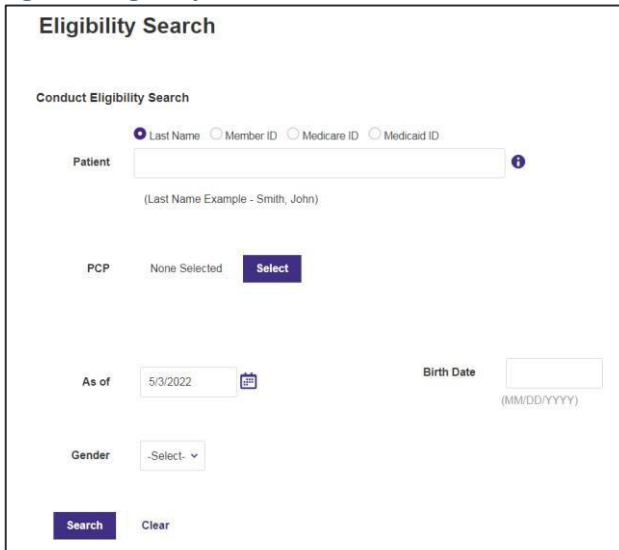
Overview

Before rendering services to a plan member, it is important to verify the member's eligibility. It is recommended to verify eligibility on the date of service. It is also recommended to verify eligibility each time the patient is seen. Benefit plan information is available on the eligibility screen.

Eligibility Search

1. From the *Home* screen > **Office Management** > **Eligibility**. The *Eligibility Search* screen displays.

Figure 1: Eligibility Search Screen



The screenshot shows the 'Eligibility Search' interface. At the top, it says 'Conduct Eligibility Search' with four radio buttons: 'Last Name' (selected), 'Member ID', 'Medicare ID', and 'Medicaid ID'. Below this is a 'Patient' text input field with a blue information icon to its right. A hint '(Last Name Example - Smith, John)' is shown below the field. Underneath is a 'PCP' section with 'None Selected' and a blue 'Select' button. The 'As of' field contains '5/3/2022' and a calendar icon. To its right is a 'Birth Date' field with '(MM/DD/YYYY)' as a hint. Below these is a 'Gender' dropdown menu set to '-Select-'. At the bottom left are 'Search' and 'Clear' buttons.

2. On the *Eligibility Search* screen, select the **Last Name** radio button to search for a member using last name or select the **Member ID** radio button to search for a member using member ID.
Note: You must enter at least 2 characters to search by last name.
3. The **As of** field defaults to the current date but can be adjusted by clicking the calendar or manually entering a date.
Note: It is recommended to always verify a member's eligibility on the date of service.
4. Click **Search** and a list of members matching the search criteria will display on the *Eligibility Search Results* screen.
Note: The most recent eligibility span displays in the search results. Terminated eligibility spans display in **red**.

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Figure 2: Eligibility Search Results Screen

	Name	Sex	Effective Dates	Birth Date	Member ID	Medicare ID	Primary Care Provider	Product
Select	SMITH, JOHN		1 Dec 2020-					Medicaid
Select	SMITH, JOHN		15 Jan 2018-					Medicaid
Select	SMITH, JOHN		1 Jan 2018- 2 Sep 2021					Medicaid

5. To display member eligibility details, click on a member’s hyperlinked name.
6. Before additional details can be displayed, a requesting provider must be selected. Click **search providers**.

Figure 3: Requesting Provider Screen Dropdown

Select Requesting Provider

Provider: *

[Cancel](#)

7. On the *search provider* pop up, enter the name or NPI number of a provider within your organization, then click **Search**. From the search results, locate the appropriate provider and click **“Add”**.

Note: If you have fewer than 50 affiliated providers, you may see a dropdown menu.

Figure 4: Search Provider Pop up

Search Provider

Name: shah

Identifier: [] NPI

[CANCEL](#)

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Name
Shah

8. Once provider is added, click **Submit Eligibility Request**.

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Benefit plan information and detailed benefit information are displayed in the *Benefits* and *Eligibility Detail* screen.

For additional benefit information for each line of business, visit the below applicable links:

- Jefferson Health Plans EverWell and Jefferson Health Plans CHIP - [Provider Manual](#) Chapters 4 and 6, respectively
- Jefferson Health Plans Medicare - [Medicare Plan Details - Jefferson Health Plans](#)
- Jefferson Health Plans Individual and Family Plans - [Summary of Benefits - Jefferson Health Plans](#)

Figure 5: Benefits and Eligibility Detail Screen

Benefits and Eligibility as of 30 Jun 2022 Download PDF

John Smith

DOB Address PCP
Gender
Member ID
Map

Benefit Plan Information

Product HealthChoices Adult Copay Status Active Coverage
Start Date 12/01/2020
End Date 01/01/3000

[View Eligibility History](#)

Benefits

Health Benefit Plan Coverage

Family

Active Coverage
HealthChoices Adult
Copay
\$0

In and Out of Network