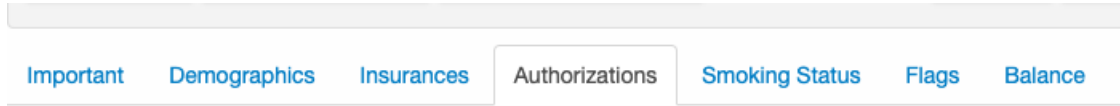


Entering an authorization number

07/24/2024 2:30 pm EDT

If you have been issued an authorization number from a payer for your services, you can enter the information into the patient's chart so it will automatically populate on the patient's claim form (either the HCFA-1500 or UB04).

- While in the patient's chart, click on the **Authorizations** tab.



- Click on **+ Add New Authorization**

Insurance Authorizations

+ Add New Authorization

Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes
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- Fill in all of the information you have available, including the authorization number, effective dates, as well as any notes that you may want to include.

New Authorization

×

Authorization number

Start date

End date
(End date and/or number of visits must be provided)

Number of visits
(End date and/or number of visits must be provided)

Specialty (optional)

Notes

Pending (optional: Pending authorization will not be applied to claim)







Procedure codes (optional)

Create

You can add additional information by returning to the Authorizations section of the patient's chart and clicking on the **Edit** icon (blue pencil).

Insurance Authorizations

+ Add New Authorization

Authorization #	Status	Procedure Codes	Start Date	End Date	Visits Approved	Visits Remaining	Notes	
583953892	Active	00400	10/27/2016	10/27/2017	8.0	8.0		 
488385839	Active	2945	10/27/2016		5.0	5.0		 
837458485	Pending	A4602	10/27/2016					 

Any authorizations entered and listed as active (and not checked as "pending") will automatically print on either the HCFA-1500 form or UB04 when the date of service on the claim matches the start/end date or procedure code listed.

If you are billing on a UB04, the authorization number can also be entered on the patient's claim by navigating to Billing > Live Claims Feed > Inside the patient's claim > right side of the screen > Insurance tab. Authorizations for the patient's primary payer (red box) and secondary payer (blue box) can be entered.

Info Cond & Occ Value Code **Insurance** Attending

Primary Insurer UB04 box 50a
Plan ID UB04 box 51a
Release Info ▾ UB04 box 52a
AOB ▾ UB04 box 53a
Subscriber UB04 box 58a, 60a
Ins Group UB04 box 61a - 62a
Payer pre-auth # ▾ UB04 box 63a

Secondary Insurer UB04 box 50b
Plan ID UB04 box 51b
Release Info ▾ UB04 box 52b
AOB ▾ UB04 box 53b
Subscriber UB04 box 58b, 60b
Ins Group UB04 box 61b - 62b
Payer pre-auth # UB04 box 63b
