

Patient Prior Authorization Report

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If your office utilizes the [authorization](#) feature within DrChrono, you may want to run a report based on authorizations. DrChrono has a built-in report that makes this task a breeze!

Here is how can run the report:

- Navigate to Reports > Patient Insurance Authorization

The screenshot shows a navigation menu with three main categories: Reports, Billing, and Account. Under the Reports category, there is a sub-section for PRACTICE REPORTS. The items listed are: Account / User Report, Productivity Report, Reminder Report, Outgoing Prescriptions, Patient Insurance Authorization (highlighted in blue), Appointment Report, Telehealth Report, Patient Report, Communication Log Report, Medication Report, Problem Report, Allergy Report, Labs Report, and Advanced Report.

- You will be given several options to customize your report.

The screenshot shows the 'Patient Insurance Authorization' report interface. It includes a title bar, a filter section with dropdowns for Patient, Authorization Number, Doctor Name, Office Name, and Comma-separated Proc. Below this is a status filter set to '-- All --' and date range fields for 'From' and 'To'. There is a checkbox for 'Filter by appointment date' and an 'Update Filter' button. Below the filter section is an 'Export to File' button. At the bottom, there is a table header with columns: Auth Number, Patient, Procedure Codes, Start, End, Specialty, Total Visits, Visits, Visits Remaining, Notes, and Status. The table content shows 'No Authorizations Found'.

This is a detailed view of the filter section from the previous screenshot. It shows the title 'Patient Insurance Authorization' and the following filter options: Patient (dropdown), Authorization Number (text input), Doctor Name (dropdown), Office Name (dropdown), Comma-separated Proc (text input), Status: -- All -- (dropdown), From (text input), To (text input), Filter by appointment date (checkbox), and Update Filter (button).

- **Patient** - Pull information regarding a particular patient
- **Authorization Number** - Pull information when all you have is an auth number
- **Doctor Name** - Pull information by the provider
- **Office Name** - Pull information by office
- **Comma-separated Proc** - Pull by procedure code (can pull multiple, separate by comma)
- **Status** - Pull information by active, expired, pending, or all authorizations
- **From / To** - Pull information by date range

There is also an option to filter the information by appointment date.

Once your filters are set, click on the blue **Update Filter** button in the middle of the screen.

You can also export the information, in MS Excel by clicking on "Export to File". The report will be generated and available in your message center.
