

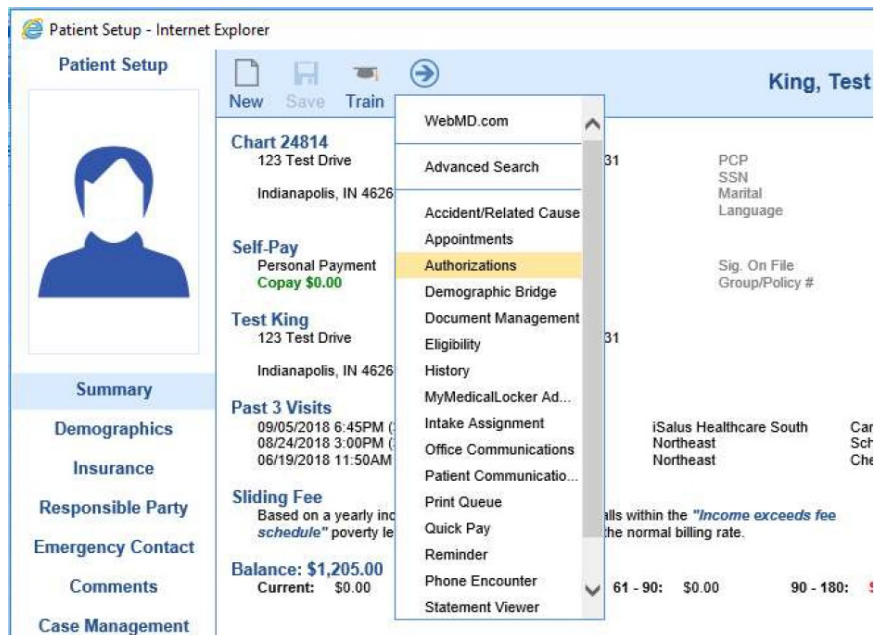
Authorizations

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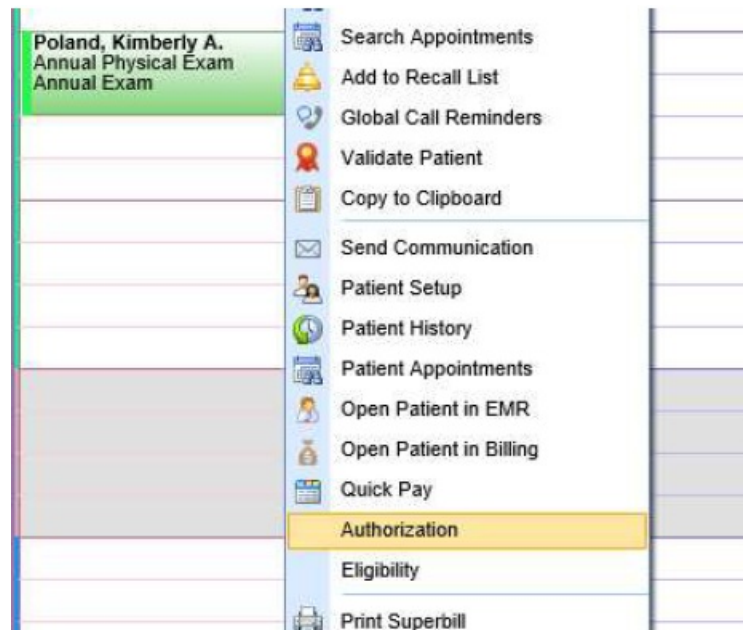
Authorizations

The Authorization screen allows the documentation and tracking of authorizations within the system. The Authorization screen can be accessed from:

- The Patient Setup Screen



- iScheduler



- The Claim Screen

Claim #30446 for Kimberly A. Poland 01/06/1972 (46y)

Open Save History Payments Patient

Status

Claim 30446

Status Sent, Electronic

Substatus

Level Primary Billing Electronic

Type Medical

Owner Farias, Michell

837 Professional Institutional

Patient

Patient 9389 - Kimberly A. Poland (317) 687-8119 4833 North Indianapolis IN 45210

Pat. Location Patient Location

Pat. Provider Patient Provider

Resp. Party Poland, Kimberly A.

Primary (1) United Health Care

Secondary Secondary Insurance

Tertiary Tertiary Insurance

☐ Override Insurance  Authorization

Procedures and Diagnoses (1)

Authorization Values for Claim 30446

Insurance	Name	Referral #	Prior Auth. #	Authorizations
Primary	United Health Care			 Authorization

How to create an Authorization

- Once in the Authorization screen you will be able to document a new authorization by clicking the New button (sheet of paper with a green plus sign) in the left lower corner.

Referred By Referred To Claim # 30446

Authorizations ☐ Show all authorizations Row 0 of 0

	Status	Reason	#	Referred By	Payer	Coverage	Start	End
No data found								

Menu       ☒ Primary Required ☒ Secondary Required ☒ Tertiary Required Assign Close

- This will open the Authorization - New screen. Enter the necessary information as described below.

- **Reason:** The reason for the authorization.
- **Status:** The system status of the authorization.
- **Tracking:** This flags under what tab the authorization applies to.
- **Type:** This allows the identification of what you are documenting Referral/Authorization
- **Auth Date:** Date authorization was acquired.
- **Ref # / Auth #:** Number provided for either.
- **Auth by:** If a documentation of the rep the authorization was provided by is needed.
- **Insurance:** Allows you to select the insurance the authorization applies too.
- **Rendering:** If the authorization was only approved for a specific rendering provider.
- **Referring:** Allows to document the referring provider.
- **Indicators (check boxes):** Allows further documentation on the authorization, however this is only for documentation purposes.
- **Effective:** Utilized when the authorization is provided for a date range.
- **Visits:** Utilized when the authorization is provided for a number of visits.
- **Amount:** Utilized when the authorization is provided for a dollar amount.
- **Units:** Utilized when the authorization is provided for a specific number of units.
- **Comment:** Blank text field for internal documentation on the authorization.
- **Procedure:** If the authorization was only approved for a specific procedure.
- **Diagnosis:** If the authorization was only approved for a specific diagnosis.

Assigning an authorization to a claim

1. To assign an authorization to a claim you will want to click the Authorization button in the claim screen.

Claim #30446 for Kimberly A. Poland 01/06/1972 (46y)

Open Save History Payments Patient

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Claim 30446

Status Sent, Electronic

Substatus

Level Primary Billing Electronic

Type Medical

Owner Farias, Michell

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Patient

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☐ Override Insurance [Authorization](#)

Procedures and Diagnoses (1)

- You would then click the Prior Auth. # drop down and select the authorization. You can also click the word Authorization to look at more details and assign it from the authorization screen.

Authorization Values for Claim 30446

Insurance	Name	Referral #	Prior Auth. #	Authorizations
Primary	United Health Care		123454 ✓ 123454 09789776	✓ Authorization

☒ Close window after save

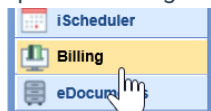
Clear Save

Authorizations Report

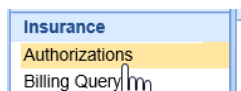
The Authorization report window allows the user to search for authorizations in the system by many different criteria options. This will quickly allow the practice to review Authorizations by payer, status, provider, procedure, diagnosis, or date range.

Workflow

1. Open the Billing Portal



2. Click on Authorizations under the Blue Insurance Bar



3. Now you can view the search criteria to find an Authorization

Search Criteria Search Results Max Rows 25 Clear Search

Authorization

Reason: Now

Type: ☒ Free Form
 Appointments with Missing/Invalid Authorizations
 Claims with Missing/Invalid Authorizations

Status: Needs Review
 Received
 Auth not required
 Inactive

Tracking: Referred By
 Referred To

Claim: Authorization
 Referral

Created: [Date Picker] User ID: [Text Box]

☐ Payer

☐ Rendering

☐ Provider

☐ Procedure

☐ Diagnosis

Effective Start Date
 Start: [Date Picker]
 End: [Date Picker]

Effective End Date
 Start: [Date Picker]
 End: [Date Picker]

Authorization Date
 Start: [Date Picker]
 End: [Date Picker]

Visits/Amount
 Visits Left: [Text Box]
 Units Left: [Text Box]
 Amount Left: [Text Box]

Menu [Icons] Close

4. After entering your criteria click the search button

Authorization

in: test

Type: ☒ Free Form
 Appointments with Missing/Invalid Authorizations
 Claims with Missing/Invalid Authorizations

Appointment Date
 Start: 02/15/2021
 End: 02/26/2021

Scheduled With
 Byrd MD, Gregory F.
 Cameron MD, Brent
 Castor PA-C, Zachary
 Clinical Research
 Conference Room
 Cook MD, Barbara
 CT
 Davis MD, Jeffrey
 East DTE
 East Lab
 Farha MD, Ayham

Appointment Status
 Scheduled
 Confirmed
 No Show
 Checked-In
 Checked-Out
 Cancelled
 Reminder Sent

☐ Provider List of referring providers

5. The search results will open in the next tab

Search Criteria Search Results Max Rows 25 Clear Search

Appointments with Missing/Invalid Authorizations							Row 0 of 25
	Status	Patient	Scheduled	▼ App. Date	Primary	Second.	Tertiary
1	Checked-Out	Galindo Moreno, Ramon	Castor PA-C, Zachary	02/26/2021 3:30PM	!	✓	✓
2	Checked-Out	Weber, Denise A.	Jensen MD, Jonathan A.	02/26/2021 2:30PM	!	✓	✓
3	Checked-Out	Robl, Richard M.	Nabbout MD, Philippe	02/26/2021 2:00PM	!	✓	✓
4	Scheduled	Ryan, John P. II (Patrick)	Farha MD, Ayham	02/26/2021 11:30AM	!	✓	✓
5	Checked-Out	Jones, James M. (Jim)	East DTE	02/25/2021 4:00PM	!	✓	✓
6	Checked-Out	Higbee, Dan F.	Saad MD, Kahlil	02/25/2021 3:30PM	!	✓	✓

6. Double click on the authorization to view the Authorization screen or change information in the

Authorization -

Reason

Status

Needs Review

Received

Auth not required

External PA

Inactive

Tracking

Referred To

Referred By

Type

Referral

Authorization

Auth Date

Ref #

Created

Call Date

Service

Referring

Patient has been seen

Referral letter with results sent out/received

Care for condition was assumed

Rendering

Insurance

Active Payer

VA CCN CLAIMS-MEDICAL

Coverage

Primary

Effective

Start

End

Warning

Visits

Warning will occur after

Facility

Amount

Used

Warning >

Amount

Units

Warning will occur after

Comment

Procedure

Code

Description

Diagnosis

Code

Description

Menu

OK

Cancel

Apply

Authorization