

Search for Authorizations (BETA)

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Use Authorization Search to catch missing or invalid authorizations before they turn into denied claims. Also, allowing you to quickly answer questions like “which authorizations are expiring this month?” or “does this scheduled appointment already have an authorization on file?”

The screen has three tabs, each built around a specific use case:

- **Authorizations** — Search your full authorization list by reason, status, payer, provider, procedure, diagnosis, or date range. Use this to audit existing authorizations, track down a specific one, or find any that are running low on approved visits or dollar amount.
- **Appointments** — Find scheduled appointments whose insurance doesn't have a valid authorization yet. A red/yellow/green indicator flags each appointment's Primary, Secondary, and Tertiary insurance at a glance, so you can work the list before the patient's visit instead of after a claim gets rejected.
- **Claims** — Same idea, but for claims: instantly spot which submitted claims are missing an authorization or have an invalid one, so you can fix it before the payer denies the claim.

Where to find it: Open the Authorization Search screen from the Authorizations window in the Billing portal. For an overview of the whole workflow, see [Authorizations \(BETA\)](#).

Authorizations tab

Search parameters:

- **Reason** — text search for the authorization reason.
- **Status, Tracking, Type** — multiselect; leave blank to include all.
- **Created By** — multiselect for who created the authorization; leave blank to include all.
- **Payer, Rendering, Referring** — multiselect; leave blank to include all.
- **Creation Date Range** — date range for when the authorization was created.
- **Authorization Date, Effective Start Date, Effective End Date** — date ranges.
- **Visits/Amounts** — filter to authorizations with less than X visits, units, or dollar amount left.
- **Chart** — patient chart number to filter for a specific patient.
- **Rows** — maximum number of results displayed.
- **Procedure, Diagnosis** — multiselect; leave blank to include all.

Results columns: Chart #, Patient, Status, Reason, Auth. No. (prefixed A or R based on Type), Referred To, Payer, Coverage, Start, End, and an Action column with View Authorization.

Authorization Search

Authorizations 20 Appointments 46 Claims 32

Reason: Status: Tracking: Type:

Created By: Insurance Payer: Rendering Provider: Referring Provider:

Creation Date Range: 08/01/2026 08/26/2026 Authorization Date Range: month/day/year month/day/year Effective Start Date Range: month/day/year month/day/year Effective End Date Range: month/day/year month/day/year

Visit: Units: Amounts: Chart: Rows: 50

Indicators: Selected insurance is primary ☒ N/A ☐ Yes ☐ No Patient Seen ☒ N/A ☐ Yes ☐ No Referral Letter ☒ N/A ☐ Yes ☐ No Assumed Care ☒ N/A ☐ Yes ☐ No Future ☒ N/A ☐ Yes ☐ No Inactive ☒ N/A ☐ Yes ☐ No

CHART	PATIENT	STATUS	REASON	AUTH/REF NO.	REFERRED TO	PAYER	COVERAGE	START	END	ACTION
93853	Benes, Elaine (Call)	Received	5 Star Life	A:4111111		5 Star Life Insurance	Secondary	01/01/2026	01/01/2028	🔗 👤
96162	Doubleinsured, Angela	Received	AuthFor2ndUHCChoice	A:AuthFor2ndUHCChoice		Uhc Choice	Secondary			🔗 👤
96166	ManyAuthPrimaryPayer, an...	Received	AuthWithRenderingProvider	A:AuthWithRenderingProvider	Goldsmith, Clarence	Aetna Auth	Primary	08/07/2026	08/06/2027	🔗 👤
96166	ManyAuthPrimaryPayer, an...	Received	AuthWithProcedureCode	A:AuthWithProcedureCode		Aetna Auth	Primary	08/07/2026	08/06/2027	🔗 👤
96166	ManyAuthPrimaryPayer, an...	Received	AuthProcCode10021, code ...	A:AuthProcCode10021		Aetna Auth	Primary	08/01/2026	08/31/2026	🔗 👤
96165	NoAuthReqAuthAvailable, A...	Received	OneAuthForPrimaryPayer	A:OneAuthForPrimaryPayer		Aetna Auth	Primary	08/01/2026	07/31/2027	🔗 👤
94904	Patient_123872, Lukas T	Received	Test Yield Auth.	A:4111111		Anthem BCBS	Primary	01/01/2026	01/01/2028	🔗 👤

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Hide Clear Search

Appointments Missing/Invalid tab

Search parameters:

- **Start Date, End Date** — appointment date range.
- **Chart** — patient chart number to filter for a specific patient.
- **Rows** — maximum number of results displayed.
- **Appointment Status** — multiselect; leave blank to include all.
- **Scheduled With** — multiselect resources; leave blank to include all.
- **Scheduled At** — multiselect locations; leave blank to include all.

Results columns: Chart #, Patient, Appt. Status, Scheduled, Appt. Type, Location, Appt. Date, and a Primary / Secondary / Tertiary indicator for each insurance:

-  — authorization missing.
-  — authorization invalid.
-  — authorization valid.

Click on the Link Action to open the Authorization Assign screen for that appointment. See [Assign an Authorization to an Appointment or Claim](#).

Authorizations 20

Appointments 46

Claims 32

Start Date

End Date

Chart

Rows

Appointment Status

Scheduled With

Scheduled At

08/01/2026

08/26/2026

Chart

50

Appointment status

Scheduled With

Service location(s)

Appointment Start Date

Appointment End Date

Patient Chart

Maximum Rows Returned: 1000

CHART	PATIENT	APPT. STATUS	SCHEDULED	APPT. TYPE	LOCATION	DATE	PRIMARY	SECONDARY	TERTIARY	ACTION
92901	Test, Wes	Scheduled	Goldsmith, Clarence	Allergy Shot	AAOE 1	08/26/2026 3:45PM	✗	✗	✗	🔗 👤
93980	Test, Michell	Scheduled	Goldsmith, Clarence	Biopsy	Choice - Main Office	08/26/2026 12:00PM	✗	N/A	N/A	🔗 👤
94904	Patient_123872, Lukas T	Scheduled	Goldsmith, Clarence	Biopsy	Choice - Main Office	08/25/2026 2:00PM	✗	✗	N/A	🔗 👤
96169	Test, Kevin	Checked-In	Goldsmith, Clarence	Biopsy	Choice - Main Office	08/25/2026 12:00PM	✗	N/A	N/A	🔗 👤
96159	SurerestPrimary, Angela1est	Scheduled	Goldsmith, Clarence	Biopsy	Choice - Main Office	08/25/2026 11:00AM	✗	N/A	N/A	🔗 👤
96172	Test, Auth Angela	Scheduled	Goldsmith, Clarence	Biopsy	Choice - Main Office	08/24/2026 4:00PM	✗	N/A	N/A	🔗 👤
96169	Test, Kevin	Scheduled	Goldsmith, Clarence	Biopsy	Choice - Main Office	08/24/2026 12:00PM	✗	N/A	N/A	🔗 👤
96159	SurerestPrimary, Angela1est	Scheduled	Goldsmith, Clarence	Biopsy	Choice - Main Office	08/24/2026 10:00AM	✗	N/A	N/A	🔗 👤
93916	Long, Cynthia	Scheduled	Clark NP-C, Katelyn C.	Biopsy	AAOE 4	08/20/2026 9:00AM	✗	N/A	N/A	🔗 👤
93915	Inman, Beverly A	Scheduled	Clark NP-C, Katelyn C.	Biopsy	AAOE 3	08/20/2026 8:15AM	✗	N/A	N/A	🔗 👤
37711	Davis, TERRY JR (TERRY)	Scheduled	Goldsmith, Clarence	Biopsy	AAOE 1	08/19/2026 4:30PM	✗	N/A	N/A	🔗 👤
96161	Tripleinsured, Angela1est	Scheduled	Goldsmith, Clarence	Allergy Shot	Choice - North	08/19/2026 11:15AM	✗	✗	✗	🔗 👤

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Claims Missing/Invalid tab

Search parameters:

- **Start Date, End Date** – claim date of service.
- **Chart** – patient chart number to filter for a specific patient.
- **Rows** – maximum number of results displayed.
- **Rendering** – multiselect providers; leave blank to include all.
- **Service Location** – multiselect; leave blank to include all.

Results columns: Chart #, Patient, Claim, Rendering, Location, Service Date, and the same Primary / Secondary / Tertiary indicators used on the Appointments tab.

Click on the Link Action to open the Authorization Assign screen for that claim or click the View Details Action to open the Claim Entry screen for that claim.

Authorization Search

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Start Date	End Date	Chart	Rows	Rendering	Service Location
08/01/2026	08/26/2026	Chart => Claim Start DOS <=< Claim End DOS	50 Maximum Rows Returned: <= 7000	Rendering provider(s)	Service location(s)

CHART	PATIENT	CLAIM	RENDERING	LOCATION	DOS	PRIMARY	SECONDARY	TERTIARY	ACTION
94622	2Test, Michell	71548	Goldsmith, Clarence	Choice - Main Office	08/26/2026				
92901	Test, Wes	71546	Goldsmith, Clarence	AAOE 1	08/26/2026				
94904	Patient_123872, Lukas T	71547	Goldsmith, Clarence	Choice - Main Office	08/25/2026				
96161	Tripleinsured, Angellatest	71540	Goldsmith, Clarence	Choice - North	08/13/2026			N/A	
93980	Test, Michell	71538	Clark NP-C, Katelyn C.	AAOE 4	08/12/2026				
93980	Test, Michell	71537	Goldsmith's MD, Clarence S.	AAOE 4	08/12/2026				
96161	Tripleinsured, Angellatest	71536	Clark NP-C, Katelyn C.	Choice - North	08/12/2026				
96161	Tripleinsured, Angellatest	71534	Goldsmith, Clarence	Choice - North	08/12/2026				
96161	Tripleinsured, Angellatest	71533	Goldsmith, Clarence	Choice - North	08/12/2026				
96162	Doubleinsured, Angellatest	71529	Goldsmith, Clarence	Choice - North	08/12/2026				
96162	Doubleinsured, Angellatest	71524	Goldsmith, Clarence	Choice - North	08/12/2026				
96161	Tripleinsured, Angellatest	71523	Goldsmith, Clarence	Choice - North	08/12/2026				

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