

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 7

Appointments

Claims

Reason

Status

Tracking

Type

Created By

Insurance Payer

Rendering Provider

Referring Provider

Creation Date Range

Authorization Date Range

Effective Start Date Range

Effective End Date Range

Visit

Units

Amounts

Patients

Rows

Procedure

Diagnosis

Indicators

Selected insurance is primary

Patient Seen

Referral Letter

Assumed Care

Future

Inactive

Chart	Patient	Status	Reason	Auth/Ref No.	Referred To	Payer	Coverage	Start	End	Action
10503	Wayne, Cody Middy	Needs Review	AUTHORIZATION 1- Elec Claim	R:Claim Level Only 1	Adekile MD, Ayoola	Benefit System	Primary	01/08/2026	01/31/2026	Link
10553	Wayne, Bruce B (Batman)	Received	ESRD	AJZZ1234567		Medicaid - Indiana 1	Primary	01/01/2024	01/01/2028	Link
9331	Haven, Brian X	Needs Review	9331 Test 1	R:12345				01/01/2026	12/31/2026	Link
312423	MyDog, Kona xy	Received	testing	Aabc123		American United Life	Secondary		04/21/2027	Link
312423	MyDog, Kona xy	Received		R:R123		Aetna	Primary		01/01/2027	Link
312423	MyDog, Kona xy	Received		A:Proc123		Aetna	Primary		01/01/2028	Link
10503	Wayne, Cody Middy	Auth not required	Joy Testing	A:1234	Acanfora DC, Michael	Benefit System	Primary	06/05/2026	06/05/2026	Link

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](#).

Authorization Search

Authorizations (19) Appointments (32) Claims (17)

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

Chart	Patient	Claim	Rendering	Location	DOS	Primary	Secondary	Tertiary	Action
94904	Patient_123872, Lukas T	71547	Goldsmith, Clarence	Choice - Main Office	08/25/2026				
96161	Tripleinsured, Angelestest	71540	Goldsmith, Clarence	Choice - North	08/13/2026				
96161	Tripleinsured, Angelestest	71536	Clark NP-C, Katelyn C.	Choice - North	08/12/2026				
96161	Tripleinsured, Angelestest	71534	Goldsmith, Clarence	Choice - North	08/12/2026				
96162	Doubleinsured, Angelestest	71524	Goldsmith, Clarence	Choice - North	08/12/2026				
96166	ManyAuthPrimaryPayer, anglestest	71518	Clark NP-C, Katelyn C.	Choice - North	08/12/2026				
96161	Tripleinsured, Angelestest	71535	Goldsmith, Clarence	Choice - North	08/11/2026				
96162	Doubleinsured, Angelestest	71521	Goldsmith, Clarence	Choice - North	08/11/2026				
96166	ManyAuthPrimaryPayer, anglestest	71513	Goldsmith, Clarence	Choice - North	08/11/2026				
96165	OneAuthPrimaryPayer, Angelestest	71512	Goldsmith, Clarence	Choice - North	08/11/2026				
96166	ManyAuthPrimaryPayer, anglestest	71511	Clark NP-C, Katelyn C.	Choice - North	08/11/2026				
96166	ManyAuthPrimaryPayer, anglestest	71509	Goldsmith, Clarence	Choice - North	08/11/2026				
96165	OneAuthPrimaryPayer, Angelestest	71506	Goldsmith, Clarence	Choice - North	08/11/2026				
96162	Doubleinsured, Angelestest	71517	Goldsmith, Clarence	Choice - North	08/10/2026				
96162	Doubleinsured, Angelestest	71525	Goldsmith, Clarence	Choice - North	08/05/2026				
96162	Doubleinsured, Angelestest	71526	Goldsmith, Clarence	Choice - North	08/04/2026				
96162	Doubleinsured, Angelestest	71527	Goldsmith, Clarence	Choice - North	08/03/2026				

17 Records Displayed

