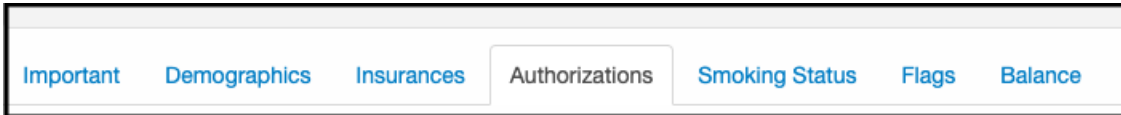


# Enter an Authorization Number

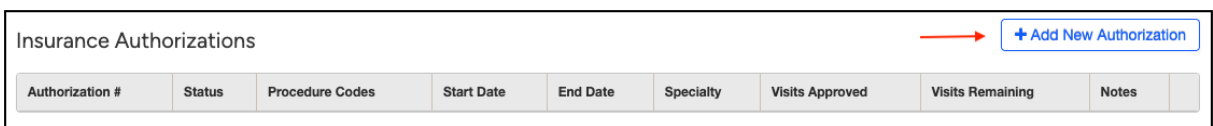
Last modified on 10/31/2024 5:00 pm EDT

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 automatically populates on the patient's claim form (either the HCFA-1500 or UB04).

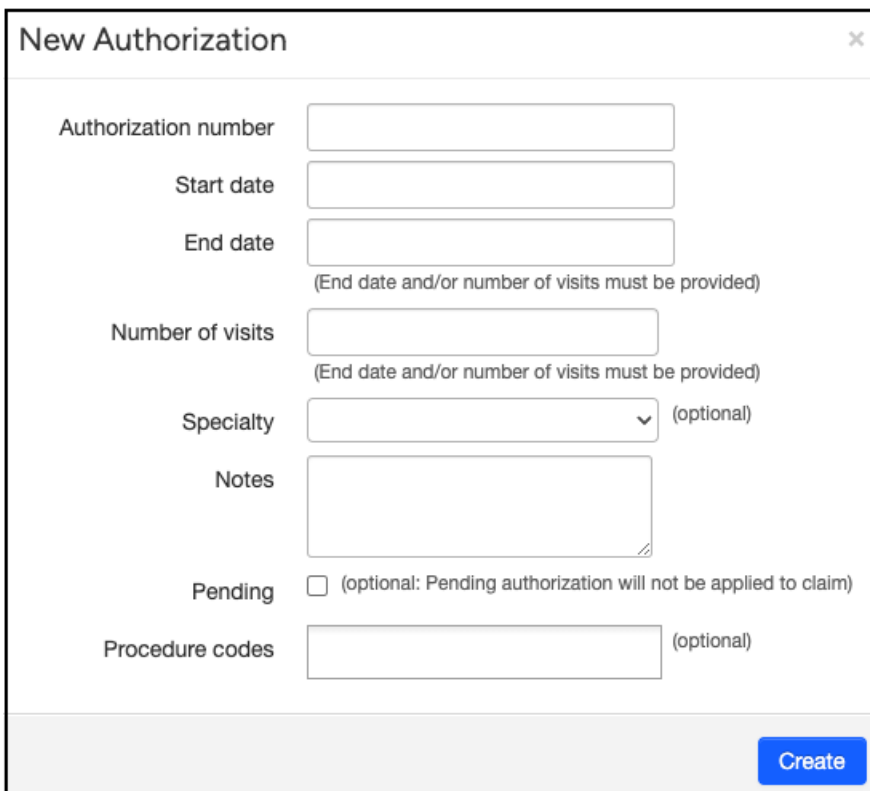
1. In a patient's chart, select the **Authorizations** tab.



2. Select **Add New Authorization**.



3. Fill in all of the information you have available, including the authorization number, effective dates, and any notes that you may want to include.

A screenshot of a 'New Authorization' form. The form contains the following fields:

- Authorization number: text input field
- Start date: text input field
- End date: text input field, with a note below it: '(End date and/or number of visits must be provided)'
- Number of visits: text input field, with a note below it: '(End date and/or number of visits must be provided)'
- Specialty: dropdown menu, with '(optional)' to its right
- Notes: text area
- Pending: checkbox, with '(optional: Pending authorization will not be applied to claim)' to its right
- Procedure codes: text input field, with '(optional)' to its right





A blue 'Create' button is located at the bottom right of the form.

You can add additional information by returning to the **Authorizations** section of the patient's chart and selecting



## Insurance Authorizations

[+ Add New Authorization](#)

Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes	
123456	Active	00400	10/30/2024	10/31/2025		8.0	8.0		 
488385839	Active	29450	10/01/2023	10/31/2024		5.0	5.0		 

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 going to **Billing > Live Claims Feed > Inside the patient's claim > right side of the screen > Insurance tab**. You can enter authorizations for the patient's primary payer (red box) and secondary payer (blue box).

Info
Cond & Occ
Value Code
Insurance
Attending

**Primary Insurer**

**Plan ID**

**Release Info**  UB04 box 52a

**AOB**  UB04 box 53a

**Subscriber**

**Ins Group**

**Payer pre-auth #**

**Secondary Insurer**

**Plan ID**

**Release Info**  UB04 box 52b

**AOB**  UB04 box 53b

**Subscriber**

**Ins Group**

**Payer pre-auth #**

UB04 box 50a

UB04 box 51a

UB04 box 52a

UB04 box 53a

Insured ID  UB04 box 58a, 60a

Group No.  UB04 box 61a - 62a

UB04 box 63a

UB04 box 50b

UB04 box 51b

UB04 box 52b

UB04 box 53b

Insured ID  UB04 box 58b, 60b

Group No.  UB04 box 61b - 62b

UB04 box 63b