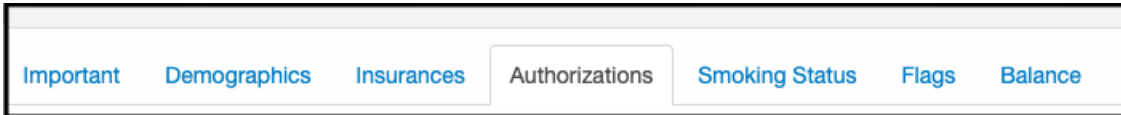


Enter an Authorization Number

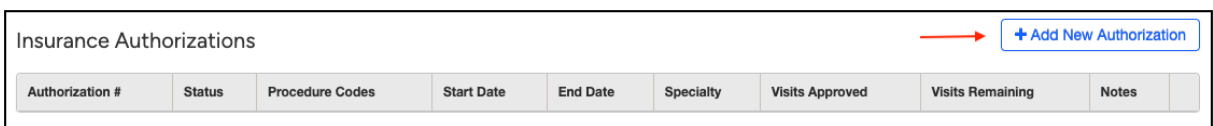
Last modified on 11/18/2024 9:46 am EST

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 the 'New Authorization' form. The form has a title bar with 'New Authorization' and a close button (X). The form contains the following fields:

- Authorization number: text input field
- Start date: date input field
- End date: date 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 with a small icon in the bottom right corner
- 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





At the bottom right of the form is a blue button labeled 'Create'.

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.

Info
Cond & Occ
Value Code
Insurance
Attending

Primary Insurer UB04 box 50a


Plan ID UB04 box 51a

Release Info UB04 box 52a

AOB UB04 box 53a

Subscriber UB04 box 58a, 60a

Ins Group UB04 box 61a - 62a

 **Payer pre-auth #** UB04 box 63a

Secondary Insurer UB04 box 50b


Plan ID UB04 box 51b

Release Info UB04 box 52b

AOB UB04 box 53b

Subscriber UB04 box 58b, 60b

Ins Group UB04 box 61b - 62b

 **Payer pre-auth #** UB04 box 63b