

Patient Prior Authorization Report

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If your office utilizes the authorization feature within DrChrono, you may want to run a report based on authorizations. DrChrono has a built-in report that makes this task a breeze!

Here is how can run the report:

1. Navigate to **Reports > Patient Insurance Authorization**. You will be given several options to customize your report.

The screenshot shows the 'Patient Insurance Authorization' report interface. At the top, there are search filters: 'Patient' (dropdown), 'Authorization Number', 'Doctor Name' (dropdown), 'Office Name' (dropdown), and 'Comma-separated Proc'. Below these is a 'Status' dropdown set to '-- All --', 'From' and 'To' date fields, a checkbox for 'Filter by appointment date', and a blue 'Update Filter' button. An 'Export to File' button is also present. Below the filters is a table header with columns: Auth Number, Patient, Procedure Codes, Start, End, Specialty, Total Visits, Visits, Visits Remaining, Notes, and Status. The table content shows 'No Authorizations Found'.

This is a close-up of the search filters section. It includes the same dropdowns and input fields as the full screenshot: Patient, Authorization Number, Doctor Name, Office Name, and Comma-separated Proc. The Status dropdown is set to '-- All --', and there are 'From' and 'To' date fields. A checkbox for 'Filter by appointment date' and a blue 'Update Filter' button are also visible.

- **Patient** - Pull information regarding a particular patient
- **Authorization Number** - Pull information when all you have is an auth number
- **Doctor Name** - Pull information by the provider
- **Office Name** - Pull information by office
- **Comma-separated Proc** - Pull by procedure code (can pull multiple, separate by comma)
- **Status** - Pull information by active, expired, pending, or all authorizations
- **From / To** - Pull information by date range

There is also an option to filter the information by appointment date.

Once your filters are set, press the blue **Update Filter** button in the middle of the screen.

You can also export the information, in MS Excel by clicking on "Export to File". The report will be generated and available in your message center.

