Patient Insurance Authorization Report

Last modified on 04/10/2025 3:34 pm EDT

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 you can run the report:

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

- **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.