Prior Authorization Alerts

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For practices that work with prior authorizations, the DrChrono system has a feature that alerts you when five or fewer visits are left. It also includes a counter that alerts you to the number of future visits scheduled. This alert will allow you to submit for additional visits to maintain your patient's continuity of care.

The Authorizations functionality is accessed within a Patient Chart by selecting **Demographics > Authorizations** tab, as shown below.

1. Select **Add New Authorization**.

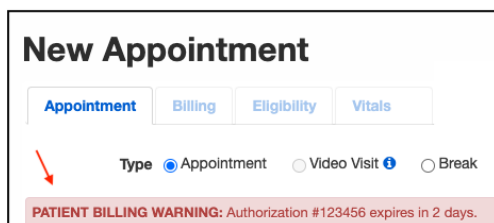The New Authorization dialog, shown below, is displayed.

Enter the following information:
- The authorization number
- The start date
- The end date field
- And/or the number of visits
- Specialty (optional)
- Notes (optional)
- Check box to ensure that a Pending Authorization is not applied to the claim
- Optionally enter any relevant procedures in the **Procedure codes** field.

2. When finished, press **Create**.

You need to enter at least the **End Date OR** the **Number of visits**. You can enter information for both, but at least one is required.

There is also an "Expiration" counter/alert as well as an indicator for the remaining allowable scheduled visits, as shown below.

3. Press the Authorization number to view the visits connected to the authorization.

Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes	
123456	Active		05/20/2025	06/30/2025		5.0	4.0		✏️ ❌
8APPOINTMENTPACK	Active		05/01/2025	06/30/2025		8.0	7.0		✏️ ❌

Reporting

1. To run a report of all of your patient authorizations, navigate to **Reports > Patient Insurance Authorization.** This report will allow you to sort by patient, provider, office, active/expired authorizations among other fields.

Patient Insurance Authorization

Patient	Authorization Number	Doctor Name	Office Name	Comma-separated Proc

Status: -- All -- ⌄ | _____ — ._____ | ☐ Filter by appointment date | **Update Filter**

| Export to File | | | | | | | | | | 1 - 4 OF 4 |

⇕ Auth Number	⇕ Patient	⇕ Procedure Codes	⇕ Start	⇕ End	⇕ Specialty	⇕ Total Visits	Visits	⇕ Visits Remaining	⇕ Notes	Status
abcd			05/16/2022			10	08/07/2023 07/18/2024 07/18/2024	7		Active
488385839		29450	10/01/2023	10/31/2024		5		5		Expired
123456		00400	10/30/2024	10/31/2025		8		8		Active
123456		97110	11/01/2024	11/03/2024		5	11/01/2024	4		Active