

Prior Authorization Alerts

Last modified on 06/13/2025 1:36 pm EDT

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.

1. To access the area, navigate to **Demographics > Authorizations tab**.

Demographics

✓ Sufficient patient demographics to bill insurance.

Demographics

Insurances

Authorizations

Patient Flags

Payments

2. Select **Add New Authorization**.

Insurance Authorizations

+ Add New Authorization

Authorization #	Status	Procedure Codes	Start Date	End Date	Specialty	Visits Approved	Visits Remaining	Notes
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3. The New Authorization dialog, shown below, is displayed.

New Authorization

Authorization number

Start date

End date

(End date and/or number of visits must be provided)

Number of visits

(End date and/or number of visits must be provided)

Specialty

(optional)

Notes

Pending

☐

(optional: Pending authorization will not be applied to claim)

Procedure codes

(optional)

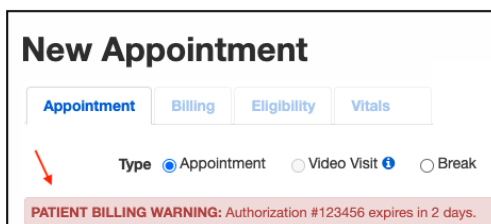
Create

4. Enter the following information:

- a. The authorization number
- b. The start date
- c. The end date field
- d. And/or the number of visits
- e. Specialty (optional)
- f. Notes (optional)
- g. Check the box to ensure that a Pending Authorization is not applied to the claim
- h. Optionally, enter any relevant procedures in the **Procedure codes** field.

5. 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.

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



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

Insurance Authorizations									+ Add New 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		Edit Delete
8APPOINTMENTPACK	Active		05/01/2025	06/30/2025		8.0	7.0		Edit Delete

Reporting

1. To run a report of all of your patient authorizations, navigate to **Reports > Patient Insurance Authorization**.
2. 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