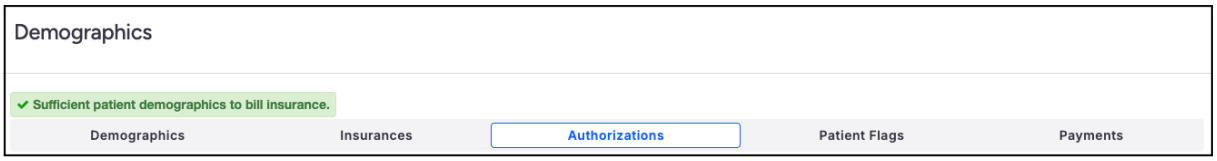
Entering a Pending Pre-Authorization Number

Last modified on 09/25/2026 4:25 pm EDT

If you have been issued a preliminary pre-authorization number from a patient's insurance payer and it has not yet been officially approved, you can still enter the information you have into the patient's chart.

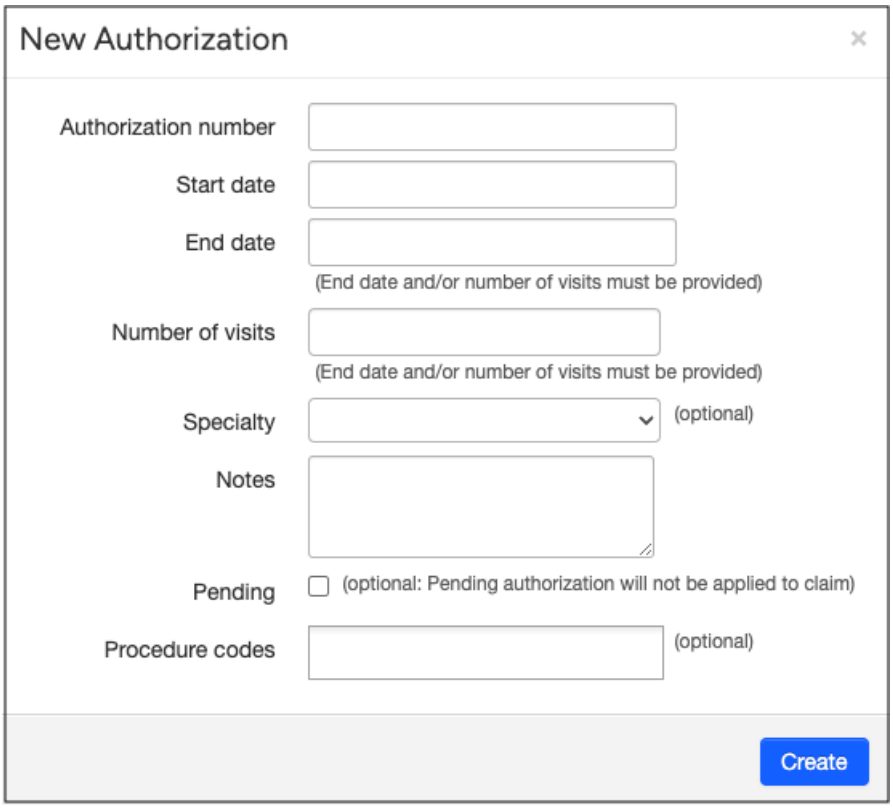
1. While in the patient's chart, select **Demographics** > **Authorizations** tab.



2. Press **Add New Authorization**.

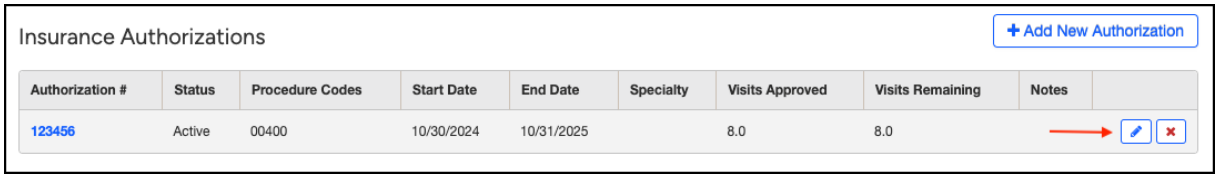


3. Fill in all of the information you have available, including the pending authorization number and any notes that you may want to include.



4. To save the pending authorization, you will need to check the **Pending** box.

5. Once you receive the formal approval, you can add additional information by returning to the Authorizations section of the patient's chart and pressing the **Edit** icon (blue pencil).



Please note that any *pending* authorizations (where the pending box is checked) will not appear on the HCFA-1500 form, whereas any without the pending box marked will.