Patient Insurance Authorization Report: Summary Tab

Last modified on 07/24/2025 10:20 am 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. Including:
 - a. Start and End Date
 - b. Filter by Appt Date
 - c. Patient Name
 - d. Chart ID
 - e. Authorization ID
 - f. Provider Name
 - g. Procedure Code
 - h. Status: Active, Expired, or Both

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Summary Appt Details					
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Start Date 01/01/2023	End Date 12/31/2025	Filter By Appt Date	Patient Name	Chart ID All	Authorization
Provider Name	Procedure Codes	Status :			
All	All	All			

2. After the parameters are set, the information will populate. The Data Freshness date and time will display on the right side of the screen.

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Start Date 01/01/2023 Provider Name All	End Date 12/31/2025 Procedure Codes All	Filter By Appt Dat No Status All	•	Patient Nar All	ne *	Chart ID	Authorization Nun	nber T
	Data Freshness 07-24-2025 9:18 am						5 9:18 am	(e* 11 :)
Authorization Patient	Procedure Codes Start D	te End Date Speci.	. Total Visits	Used Visits	Visits Remaining	Notes	Status	
11111	22222 07-21-2	025 07-21-2025	1	0	1		Expiried	
11111	22222 07-21-2	025 07-21-2025	1	1	0		Expiried	
123456	00400 10-30-2	024 11-17-2024	8	0	8		Expiried	
123456 :	NEW.CUSTOM.CODE 05-17-2	025 12-31-2025	3	2	2		Active	

3. Hovering over the right side of the screen will expose additional options. The diagonal arrows will maximize the report on the screen. The up and down arrows will sort the report. The three vertical dots will allow the report to be exported to a CSV or MS Excel file. The report will be available on your device.

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All	All	*	All		Ŧ						
									Data Freshness 07-24-2025 5	9:18 am	(<u>v</u> ⁿ ↓† :)
Authorization Patient	Procedure Codes	Start Date	End Date	Speci	Total Visits	Used Visits	Visits Remaining	Notes		Status	
11111	22222	07-21-2025	07-21-2025		1	0	1			Expiried	
11111	22222	07-21-2025	07-21-2025		1	1	0			Expiried	
123456	00400	10-30-2024	11-17-2024		8	0	8			Expiried	
123456 .	NEW.CUSTOM.CODE	05-17-2025	12-31-2025		3	2	2			Active	