

# NextStep Billing

## Add a New Authorization

Last Modified on 05/11/2026 5:05 pm EDT

### About

Some insurance payers require clients to receive Authorization prior to a Service or Services. To use the Authorization Tracker in NSS, agencies must mark the client insurance as requiring Prior Authorization. Agencies can do this for specific payers from NextStep Billing or per client by using the Client Insurance widget on the Face Sheet.

### Mark Client Insurance as Requiring Prior Authorization

1. Within the Face Sheet, scroll to the **Client Insurance** widget.
2. Click the plus sign on the right side to add an insurance for the client.
3. Enter Priority, Insurance, and Subscriber Number.
4. If the box is not already checked, check the "Prior Auths Required" checkbox.
5. Fill out the remaining Subscriber Information as necessary.
6. Click Save.
7. Then click Update on the Face Sheet.



**Note:** You can also set requiring Prior Authorization at the insurance payer level from NextStep Billing so that it auto-checks the box in the Client Insurance widget.

### Add a New Authorization for a Client

Once an insurance is marked as requiring Prior Authorization for a client, the Authorization Tracker will display within NSS. The Authorization Tracker can be displayed on any kind of Note, Face Sheet, or within the Individualized Treatment Plan (ITP) Wizard.

1. Navigate to a **Note, Face Sheet, or ITP** from the Main Menu.
2. Search for the client if the client is not already displayed.
3. Click **Add a New Authorization**

### MISC NOTES

BEGIN ENTERING LAST NAME AND CLICK ON CLIENT TO SELECT:

 +

SEARCH BY BIRTHDATE FORMAT:  MM/DD/YY  MM/DD/YYYY

LIST  ACTIVE CLIENTS  ALL CLIENTS

Name:	Harriet Spy	Date of Birth:	
Referral Source:		Age:	N/A
Admit Date:	5/5/2021	Gender:	
Programs:	Medication Management	Case No.:	1035053-1
Primary Clinician:	Knowledge Team SME	Self Pay Balance:	<a href="#">Get Balance</a>

Authorizations are required by one or more insurances. There are no open authorizations.

[Add a New Authorization](#) [View Authorization History](#)

4. Complete the following fields as necessary for the Authorization:
  - **Insurance:** Select the insurance that the authorization is for.
  - **Auth Units:** Enter the units of services approved by the insurance, if applicable.
  - **Auth Visit:** Enter the number of visits approved by the insurance, if applicable. Visits are distinct days of service (e.g.:





If the client is authorized for 5 visits, that means within the 5 day time frame they are authorized for as many services as needed).

- **Effective Date:** Enter the Authorization start date.
- **Expiration Date:** Enter the Authorization end date.
- **Procedure:** Select the procedure authorized by the insurance payer. If multiple procedures are authorized, you must select the group option for those codes from the drop-down.

**Note:** The Activity Codes that are displayed here come from the information added to the Activity Code field in [Add Activity Codes to Clinical Billing Widget](#). For Authorization Groups to be displayed, see [Set Up Authorization Groups](#)

- **Authorization Number:** Enter the number provided by the payer.
- **(Optional) Notes:** Enter any notes as necessary.

Search for:  +

SEARCH BY BIRTHDATE FORMAT:  MM/DD/YY  MM/DD/YYYY

LIST  ACTIVE CLIENTS  ALL CLIENTS

---

Name: Harriet Spy      Date of Birth:      Gender:      Programs: Medication Management  
 Age: N/A      Current Status: Admitted 5/5/2021      Primary Clinician: Knowledge Team SME  
 Case No.: 1035053-1  
 Self Pay Balance: [Get Balance](#)

Authorizations are required by one or more insurances. There are no open authorizations.

---

Insurance:       Effective Date:       Expire Date:

Auth Units:       Auth Visits:

Procedure:       Auth #:

Note:       [Save Auth](#)      [Cancel](#)

[Main Menu](#)      [Edit](#)      [Add New](#)

5. Click **Save Auth**. The Authorization Tracker now displays the authorization information for the client on Notes, Face Sheet, and within the ITP.

Procedure	Authorized	Used	Remaining	Effective Date	Expire Date	Auth #
90832,90834,90837,90846,90847 HALF INDIVIDUAL, INDIVIDUAL, INDIVIDUAL EXTENDED,FAMILY WITHOUT CLIENT AND FAMILY	12 Visits/Days	0 Visits/Days	12 Visits/Days	5/7/2021	8/7/2021	123456789

[Add a New Authorization](#)      [View Authorization History](#)

## Send Authorization Information to Billing Engine

1. To send the Authorization details to NextStep Billing, click the **plus sign** to expand the Authorization. (If you do not see the plus sign, refresh your page.)

Procedure	Authorized	Used	Remaining	Effective Date	Expire Date	Auth #
90832,90834,90837,90846,90847 HALF INDIVIDUAL, INDIVIDUAL, INDIVIDUAL EXTENDED,FAMILY WITHOUT CLIENT AND FAMILY	12 Visits/Days	0 Visits/Days	12 Visits/Days	5/7/2021	8/7/2021	123456789

[Add a New Authorization](#)      [View Authorization History](#)

2. Click **CONFIRM TO Billing**. Do not select anything from the dropdown.



Procedure	Authorized	Used	Remaining	Effective Date	Expire Date	Auth #
90791 INITIAL	12 Visits/Days	0 Visits/Days	12 Visits/Days	5/7/2021	8/7/2021	123456789

Insurance:  History:

Auth Units:  Used Units:  Eff. Date:  Expire Date:

Auth Visits/Days:  Used Visits/Days:

Procedure:  Auth #:

Note:

CONFIRM ONLY  Save Only

[Add a New Authorization](#) [View Authorization History](#)

**Note:** If you do not see the CONFIRM TO Billing option when editing an Authorization, it is because you do not have the **Confirm Auths** user permission set in **Maintain Users > Process Permissions**

- Once you've confirmed the Authorization information to the Billing Engine, a **C** is displayed next to the Auth # within the Authorization Tracker. The information is displayed in the Caps section of the Client Insurance Details List in NextStep Billing.

Client Insurance Details List - (CLINSL)

Forms

Client

Insurance

Effective Dates		Caps - Effective dates		Act. Code	Ability to Pay		Act. Code
		06/15/2021	To 06/30/2021	90840			
		05/07/2021	To 08/07/2021	90791			

Act. Code	Screen Amount	Copay/Deductible - Eff Dates	Act. Code	Act. Code	Diagnosis	Pl Of Cont
12345	0.00	05/03/2021 To / /	GLOBAL			