Office Practicum

Manage Client Authorizations Using Reports

Last Modified on 09/26/2022 8:19 am EDT

About

The following reports can be run in NextStep Clinical to help you manage Authorizations.

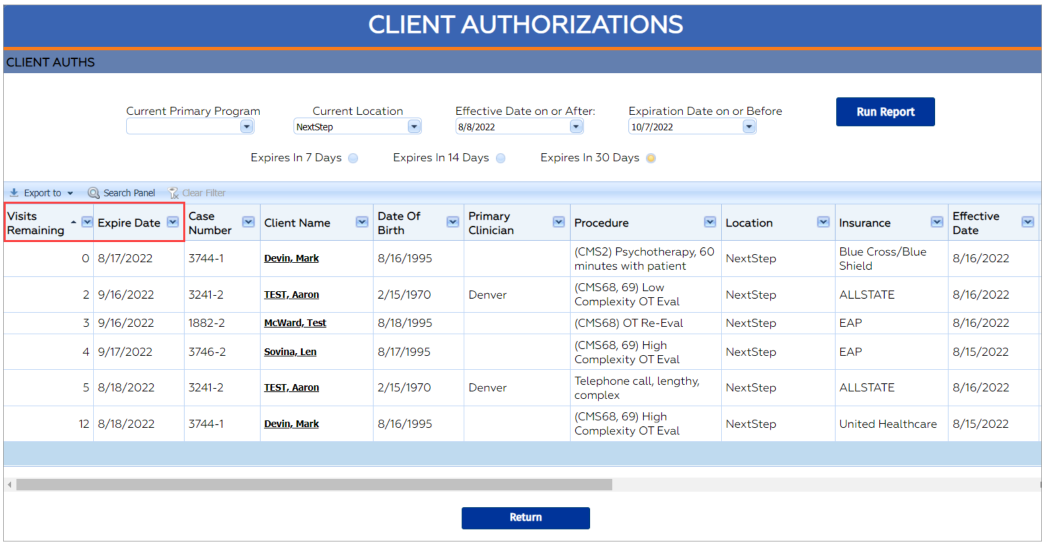
- **Client Authorizations** report: Gives you an overview of the status of your client's Authorizations while providing information such as Authorizations that are expiring soon or running low.
- **Unconfirmed Auths** report: Displays Authorizations that have yet to be confirmed to the Billing Engine by your staff.

Run the Client Authorizations Report

1. Navigate to Administrative Reports: **Main Menu > Reports Menu > Administrative Reports**
2. Under Administration, click the **Insurance Authorizations Management** button.
3. The report displays Authorizations that expire within 30 days as default. Change the **Effective Date on or After** and the **Expiration Date on or Before** drop-downs as necessary or select another radio button such as **Expires in 7 days** or **Expires in 14 days** to change the **Expiration Date on or Before** drop-down date.
4. *(Optional)* Click the **Current Primary Program** drop-down to select a Program.
5. *(Optional)* Click the **Current Location** drop-down to select a Location.
6. Click the **Run Report** button.

Notes:

- You can drag and drop the **Visits Remaining** and **Expire Date** columns to columns 1 and 2 for easier viewing.



7. *(Optional)* Click the **Export to** button to export the report.
8. *(Optional)* Click the **Client Name** to be taken to the Misc Note where you can manage the client's Authorizations.
9. Click the **Return** button to exit the report.

Run the Unconfirmed Auths Report

1. Navigate to the Unconfirmed Auths Report: **Main Menu > Reports Menu > Reports**
2. Click the **Unconfirmed Auths** button.
3. Sort by selecting a radio button: **Last Name, First Name, Auth Date, Added By,** or **Insurance Name**.

UNCONFIRMED AUTHORIZATIONS

Authorizations sorted by Last Name Run on 1/27/2022

Sort By: (•) Last Name ( ) First Name ( ) Auth Date ( ) Added By ( ) Insurance Name

Client Name	Insurance	Eff. Date	Expire Date	Auth Units	Units Used	Auth Daily Visits	Daily Visits Used	Auth Number	Date Added
Procedure(s)									
Bill AAA	AAA INSURANCE	5/1/2021	5/1/2022	5	0	5	1	987654321	5/25/2021 03:10:50 PM
90834 INDIVIDUAL SESSION (90834)									
Captain America	Burnam Insurance	10/1/2021	10/31/2021	--	--	5	0	1313131312	10/26/2021 10:53:52 AM
90832 INDIVIDUAL HALF SESSION 20-30 MINUTES (90832)									

4. Use the list and navigate to the Authorization Tracker for each client listed to click**Confirm to Billing**. See **Send Authorization Information to Billing Engine** in *Add a New Authorization*. The Authorization is no longer displayed on the list once the information has been sent to the Billing Engine.
5. Click the **Main Menu** button to exit the report.