

# Manage Client Authorizations Using Reports

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## About

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

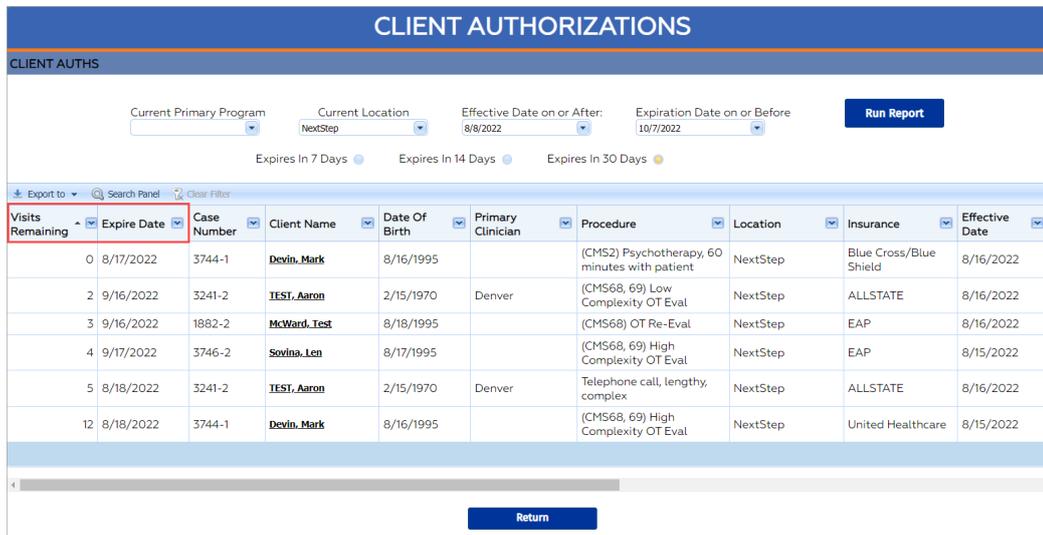
- **Client Authorizations** report: Gives you an overview of the status of your client's Authorizations while providing information such as Authorizations that are expiring soon or running low.
- **Unconfirmed Auths** report: Displays Authorizations that have yet to be confirmed to the Billing Engine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



| Visits Remaining | Expire Date | Case Number | Client Name  | Date Of Birth | Primary Clinician | Procedure                                     | Location | Insurance              | Effective Date |
|------------------|-------------|-------------|--------------|---------------|-------------------|---|----------|------------------------|----------------|
| 0                | 8/17/2022   | 3744-1      | Devin, Mark  | 8/16/1995     |                   | (CMS2) Psychotherapy, 60 minutes with patient | NextStep | Blue Cross/Blue Shield | 8/16/2022      |
| 2                | 9/16/2022   | 3241-2      | TEST, Aaron  | 2/15/1970     | Denver            | (CMS68, 69) Low Complexity OT Eval            | NextStep | ALLSTATE               | 8/16/2022      |
| 3                | 9/16/2022   | 1882-2      | McWard, Test | 8/18/1995     |                   | (CMS68) OT Re-Eval                            | NextStep | EAP                    | 8/16/2022      |
| 4                | 9/17/2022   | 3746-2      | Sovina, Len  | 8/17/1995     |                   | (CMS68, 69) High Complexity OT Eval           | NextStep | EAP                    | 8/15/2022      |
| 5                | 8/18/2022   | 3241-2      | TEST, Aaron  | 2/15/1970     | Denver            | Telephone call, lengthy, complex              | NextStep | ALLSTATE               | 8/16/2022      |
| 12               | 8/18/2022   | 3744-1      | Devin, Mark  | 8/16/1995     |                   | (CMS68, 69) High Complexity OT Eval           | NextStep | United Healthcare      | 8/15/2022      |

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: <input checked="" type="radio"/> Last Name <input type="radio"/> First Name <input type="radio"/> Auth Date <input type="radio"/> Added By <input type="radio"/> 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)  |                  |           |             |            |            |                   |                   |             |                        |

- 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.
- Click the **Main Menu** button to exit the report.