Copy Authorizations

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Path: Main Menu > Admin Tools Menu > Copy Auths

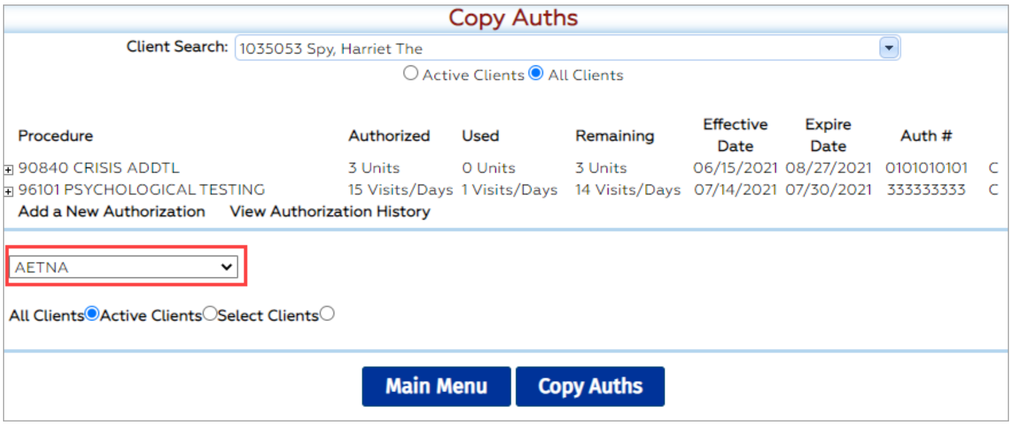
About

There may be times when clients who have coverage under a certain insurance payer may need their Authorizations renewed on the same date. Adding the Authorizations to the Authorization Tracker for each client can be tedious. The Copy Auths tool allows a user to copy an Authorization to all clients, active clients, or to select clients.

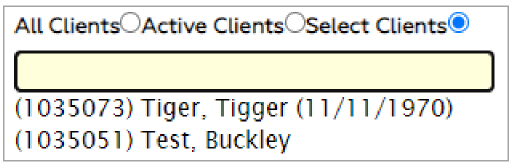
User Permission: Users that have the **Copy Auths** permission checked in Maintain Users will be able to use this feature. If you do not see this as an option in Maintain Users, please contact Support.

Copy Authorizations

1. **Add a new Authorization** to the Authorization Tracker for a single client and in the Auth # field type 'Pending'. This Auth # will be copied to all clients you select below and will need to be updated after using the Copy Authorizations functionality.
2. Navigate to **Copy Auths** by following the path above.
3. Search for the client you added the Authorization to. The added Authorization is displayed.
4. Select an insurance payer from the drop-down menu.

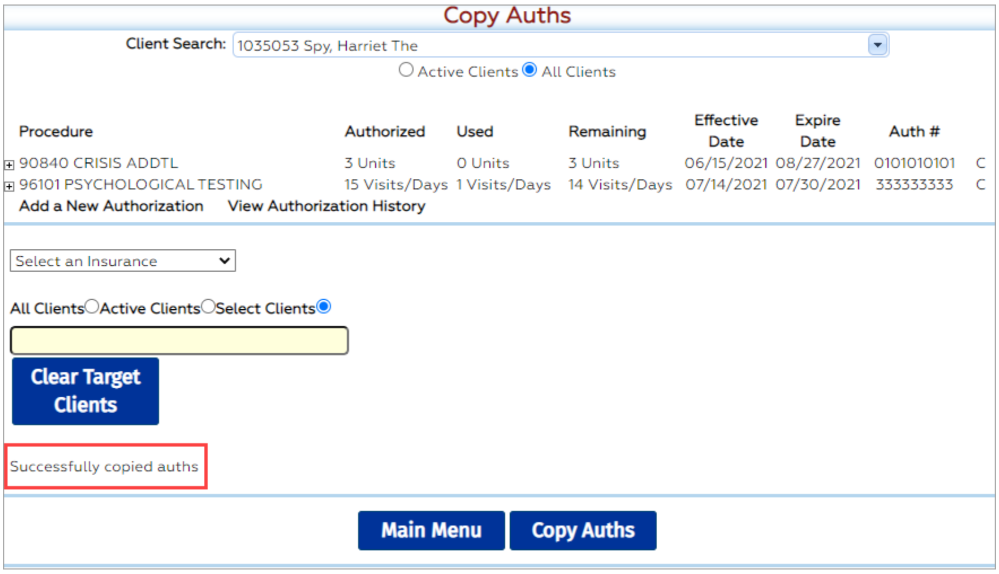


5. Select the **All Clients**, **Active Clients**, or **Select Clients** radio button. If selecting the Select Clients radio button, start typing the client names into the yellow text box and select the name. The name will appear in a list below the text field.



Note: To clear the list, click the **Clear Target Clients** button.

6. Click the **Copy Auths** button. "Successfully copied auths" is displayed once the process is complete.



7. Navigate to the Authorization Tracker for the client(s) you copied the Authorization information to and update the **Auth #** and save.