

# Copy Authorizations

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Path: Main Menu > Admin Tools Menu > Copy Auths

## About

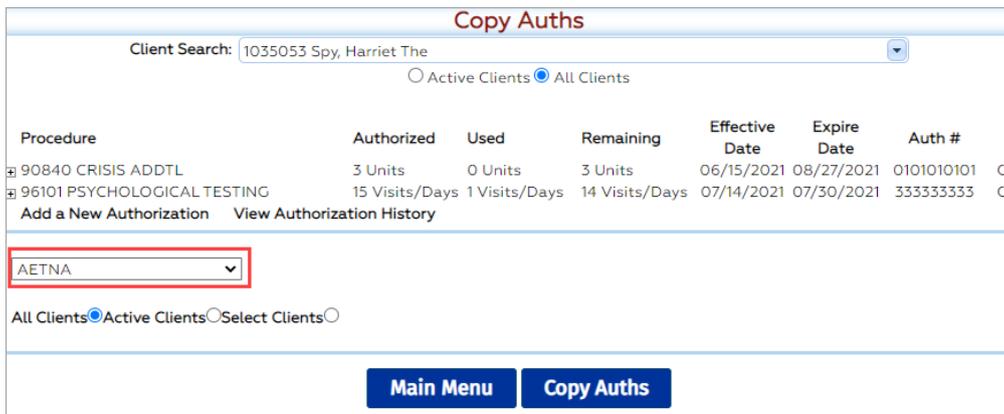
There may be times when clients who have coverage under a certain insurance payer may need their Authorizations renewed on the same date. Adding the Authorizations to the Authorization Tracker for each client can be tedious. The Copy Auths tool allows a user to copy an Authorization to all clients, active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

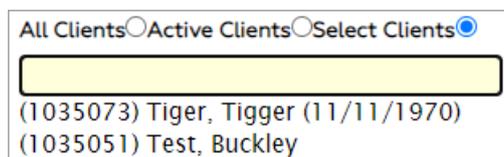
## Copy Authorizations

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.



The screenshot shows the 'Copy Auths' interface. At the top, there is a 'Client Search' field containing '1035053 Spy, Harriet The'. Below it are radio buttons for 'Active Clients' and 'All Clients', with 'All Clients' selected. A table displays authorization details with columns: Procedure, Authorized, Used, Remaining, Effective Date, Expire Date, and Auth #. Two rows are visible: '90840 CRISIS ADDTL' and '96101 PSYCHOLOGICAL TESTING'. Below the table are links for 'Add a New Authorization' and 'View Authorization History'. A dropdown menu for insurance payers is open, showing 'AETNA' selected. At the bottom, there are radio buttons for 'All Clients', 'Active Clients', and 'Select Clients', with 'Active Clients' selected. Two buttons, 'Main Menu' and 'Copy Auths', are at the bottom right.

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.



The screenshot shows the 'Select Clients' dropdown menu. It features radio buttons for 'All Clients', 'Active Clients', and 'Select Clients', with 'Select Clients' selected. Below the radio buttons is a yellow text input field. A list of client names is displayed below the input field: '(1035073) Tiger, Tigger (11/11/1970)' and '(1035051) Test, Buckley'.



**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.

### Copy Auths

Client Search:  ▼

Active Clients  All Clients

Procedure	Authorized	Used	Remaining	Effective Date	Expire Date	Auth #	
<input type="checkbox"/> 90840 CRISIS ADDTL	3 Units	0 Units	3 Units	06/15/2021	08/27/2021	0101010101	C
<input type="checkbox"/> 96101 PSYCHOLOGICAL TESTING	15 Visits/Days	1 Visits/Days	14 Visits/Days	07/14/2021	07/30/2021	333333333	C

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

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Select an Insurance ▼

All Clients  Active Clients  Select Clients

Clear Target Clients

Successfully copied auths

Main Menu   Copy Auths

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