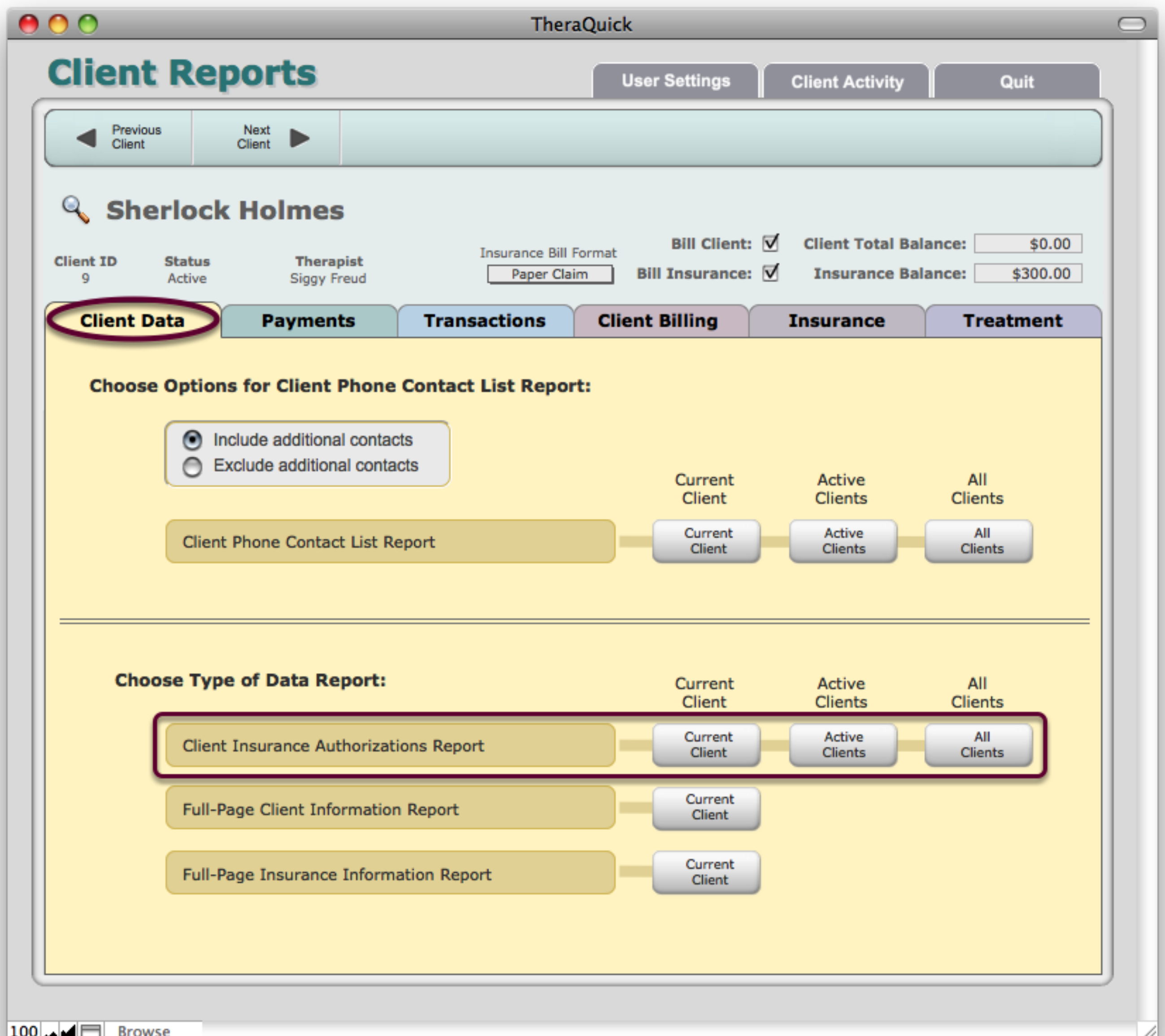
Creating a Client Insurance Authorizations Report

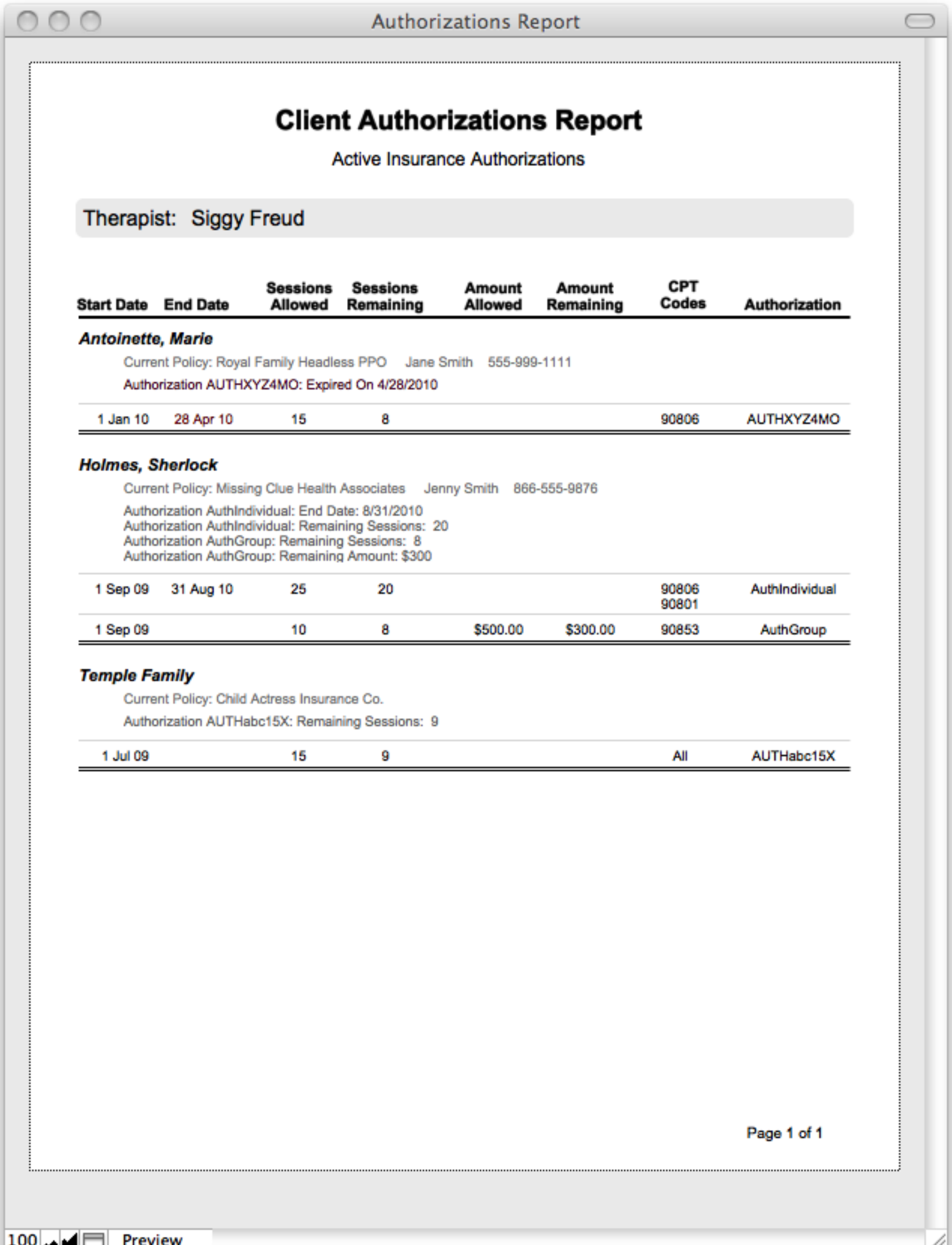
Using the Client Insurance Authorizations Report to prepare a list and review the status of all active insurance authorizations.

The Client Insurance Authorizations Reports is available on the Reports > Client Data tab



Navigate to the Reports > Cient Data tab. Click on any of the groups of clients shown for the Client Insurance Authorizations Report to display the list of active authorizations for that group of clients.

The Client Insurance Authorizations Report displays all of the information about authorizations marked as "Active."



Client Authorizations Report

Active Insurance Authorizations

Therapist: Siggy Freud

Start Date	End Date	Sessions Allowed	Sessions Remaining	Amount Allowed	Amount Remaining	CPT Codes	Authorization
Antoinette, Marie							
Current Policy: Royal Family Headless PPO Jane Smith 555-999-1111							
Authorization AUTHXYZ4MO: Expired On 4/28/2010							
1 Jan 10	28 Apr 10	15	8			90806	AUTHXYZ4MO
Holmes, Sherlock							
Current Policy: Missing Clue Health Associates Jenny Smith 866-555-9876							
Authorization AuthIndividual: End Date: 8/31/2010 Authorization AuthIndividual: Remaining Sessions: 20 Authorization AuthGroup: Remaining Sessions: 8 Authorization AuthGroup: Remaining Amount: $300							
1 Sep 09	31 Aug 10	25	20			90806 90801	AuthIndividual
1 Sep 09		10	8	$500.00	$300.00	90853	AuthGroup
Temple Family							
Current Policy: Child Actress Insurance Co.							
Authorization AUTHabc15X: Remaining Sessions: 9							
1 Jul 09		15	9			All	AUTHabc15X

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If limit warnings are active for an authorization, then the text descriptions of the status of the authorizations will also be displayed. Any limits that have been exceeded will be displayed in red.