

Billing / Prior Authorization

- Payor information comprises essential data on the entities responsible for covering healthcare costs by government programs like Medicare or Medicaid, or patients themselves.
- Prior authorization involves obtaining approval from insurance payors before providing specific medical services.

Adding Patient Payors

Healthcare payors play a crucial role in the healthcare system by providing financial coverage and helping individuals access necessary medical care.

The Payor details of the patient can be added in the system by using the option Billing / Authorization. Select the Patient Payor and update the required Payor Information and Click Save.

[Client](#) >> [List](#) >> [Select Patient from List](#) >> [Billing / Prior Authorization](#) >> [Payor](#)

Patient Details Documents **Billing/Prior Authorization** Care Plan Calendar Block Employees Internal Messaging Notes

Payor Prior Authorization

Patient Payors

Active

Payor Name	Start Date	End Date	Precedence	Beneficiary Type	Beneficiary Number	Is patient primary insured	Action
<input type="text" value="Payor Name"/>	<input type="text" value="mm/dd/yyyy"/> <input type="button" value="📅"/>	<input type="text" value="mm/dd/yyyy"/> <input type="button" value="📅"/>	All <input type="button" value="v"/>	Select <input type="button" value="v"/>	<input type="text" value="Beneficiary Number"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>

No records found.

Payor*

Start Date*

End Date*

Precedence*

Beneficiary Type*

Beneficiary Number*

Employers Name OR School Name

Insured's Policy Group OR FECA Number

Member ID

Are you the primary member on insurance?

Now, the Payor details has been added successfully in the system. We can also edit the payor information using the edit option.

Payor **Prior Authorization**

Patient Payors

Refresh Active ▾

Payor Name	Start Date	End Date	Precedence	Beneficiary Type	Beneficiary Number	Is patient primary insured	Action
<input type="text" value="Payor Name"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	All ▾	Select ▾	<input type="text" value="Beneficiary Number"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>
Atena	01/01/2023	12/31/2023	Primary	Medicaid	14587989898	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Showing 1 to 1 of 1 records

Editing Patient Payors

The Payor information of the patient can be edited by using the Edit option. Click the edit option, complete the required information and click Save.

Client >> List >> Select Patient from List >> Billing / Prior Authorization >> Payor

Payor **Prior Authorization**

Patient Payors

Refresh Active ▾

Payor Name	Start Date	End Date	Precedence	Beneficiary Type	Beneficiary Number	Is patient primary insured	Action
<input type="text" value="Payor Name"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	All ▾	Select ▾	<input type="text" value="Beneficiary Number"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>
Atena	01/01/2023	12/31/2023	Primary	Medicaid	14587989898	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Showing 1 to 1 of 1 records

Payor* **Start Date*** **End Date***

Precedence* **Beneficiary Type*** **Beneficiary Number***

Employers Name OR School Name **Insured's Policy Group OR FECA Number** **Member ID**

Are you the primary member on insurance?

Delete Patient Payors

Client >> List >> Select Patient from List >> Billing / Prior Authorization >> Payor

The Payor details can be deleted by using the option Delete on the right side of the payor under Action.

Patient Details Documents **Billing/Prior Authorization** Care Plan Calendar Block Employees Internal Messaging Notes

Payor Prior Authorization

Patient Payors

Refresh Active

Payor Name	Start Date	End Date	Precedence	Beneficiary Type	Beneficiary Number	Is patient primary insured	Action
<input type="text" value="Payor Name"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	All	Select	<input type="text" value="Beneficiary Number"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>
United Healthcare	01/01/2023	12/31/2029	Primary	Medicaid	2234234234	Yes	
Atena	01/01/2023	12/31/2023	Secondary	Medicaid	154878797979	Yes	

Showing 1 to 2 of 2 records

Now, the payor details gets deleted and we can view the payor under Deleted list.

Patient Details Documents **Billing/Prior Authorization** Care Plan Calendar Block Employees Internal Messaging Notes

Payor Prior Authorization

Patient Payors

Refresh Deleted

Payor Name	Start Date	End Date	Precedence	Beneficiary Type	Beneficiary Number	Is patient primary insured	Action
<input type="text" value="Payor Name"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	All	Select	<input type="text" value="Beneficiary Number"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>
Atena	01/01/2022	12/31/2029	Primary	Medicaid	12928392387	Yes	<input type="button" value="Active"/>
Atena	02/10/2022	03/01/2023	Secondary	Medicaid	5432425	Yes	<input type="button" value="Active"/>
Atena	01/01/2023	12/31/2023	Secondary	Medicaid	154878797979	Yes	<input type="button" value="Active"/>

The user can also Activate the deleted payor by using the option Active on the right side of the screen.

Patient Payors

Refresh Deleted

Payor Name	Start Date	End Date	Precedence	Beneficiary Type	Beneficiary Number	Is patient primary insured	Action
Payor Name	mm/dd/yyyy	mm/dd/yyyy	All	Select	Beneficiary Number		Search Reset
Atena	01/01/2022	12/31/2029	Primary	Medicaid	12928392387	Yes	Active
Atena	02/10/2022	03/01/2023	Secondary	Medicaid	5432425	Yes	Active
Atena	01/01/2023	12/31/2023	Secondary	Medicaid	154878797979	Yes	Active

Adding Prior Authorization

The Prior Authorization details of the patient can be added in the system by using the option Prior Authorization. Update the required information with Prior Authorization code and click Save. The user can also upload file regarding the Authorization details.

Client >> List >> Select Patient from List >> Billing / Prior Authorization >> Prior Authorization

CMS-1500 UB-04

Refresh Active

No records found.

Prior Authorization

Facility Code Home
Payor Atena | 01/01/2023 - 12/31/2023
Taxonomy Select
Unit Type Time
Rate (\$) 8.34
DXcode Z742
Max Unit Limit 1490
Attachment Upload File
Service Personal Care
Modifier Select
Start Date 02/02/2023
Pay Rate (\$) 0
Per Unit Value 15 Minute(s)
Unit Limit 40 per Week
Service Code T1019 - Comprehensive community support services, per dien
Authorization Code 36521458794
End Date 11/02/2023
Revenue Code Select
Round Up Minute(s) Round Up If >= Minute(s) 5
 Save Cancel

Editing Prior Authorization

The Prior Authorization information of the patient can be edited by using the Edit option. Click the edit option, complete the required information and click Save.

Client >> List >> Select Patient from List >> Billing / Prior Authorization >> Prior Authorization

Payor **Prior Authorization**

CMS-1500 UB-04

Refresh Active

Payor	Authorization Code	Service	Service Code	Start Date	End Date	Attachment	Action
Select	Authorization Code			Start Date	End Date		Search Reset
<input type="checkbox"/>	Atena	254874587 View more	Personal Care	T1019	02/02/2023	11/05/2023	Edit Delete Link

Showing 1 to 1 of 1 records

Prior Authorization

Facility Code [?](#) +
Home

Payor*
Atena | 01/01/2023 - 12/31/2023

Taxonomy
Select

Unit Type*
Time

Rate (\$) *
8.34

DXcode [?](#)
Z742

Max Unit Limit [?](#) *
1490

Attachment
[Upload File](#)

[Save](#) [Cancel](#)

Service*
Personal Care

Modifier
Select

Start Date*
02/02/2023

Pay Rate (\$) *
0

Per Unit Value [?](#) *
15 Minute(s)

Unit Limit [?](#) *
40 per Week

Service Code*
T1019 - Comprehensive community support services, per dien

Authorization Code*
254874587

End Date*
11/05/2023

Revenue Code [?](#) +
Select

Round Up Minute(s) [?](#) *
Round Up if >= Minute(s) | 5

Delete Prior Authorization

Client >> List >> Select Patient from List >> Billing / Prior Authorization >> Prior Authorization

Select the expired Prior Authorization by using the check box and click Delete or Disable Selected option on the screen.

Patient Details		Documents	Billing/Prior Authorization	Care Plan	Calendar	Block Employees	Internal Messaging	Notes
Payor		Prior Authorization						
CMS-1500		UB-04						
Refresh		Active		Disable Selected				
Payor	Authorization Code	Service	Service Code	Start Date	End Date	Attachment	Action	
<input type="checkbox"/> Select	<input type="text" value="Authorization Code"/>			<input type="text" value="Start Date"/>	<input type="text" value="End Date"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>	
<input checked="" type="checkbox"/> Atena	DY2101081719486 View more	Personal Care	T1019	04/25/2022	09/19/2023		<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Link"/>	
<input type="checkbox"/> Atena	7651 View more	Personal Care	T1005	07/06/2022	12/31/2023		<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Link"/>	
<input type="checkbox"/> Atena	091201983103821 View more	Personal Care	T1019	09/20/2023	01/24/2024		<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Link"/>	

Now, the Expired Prior Authorization details gets deleted and we can view the Authorization details under Deleted list.

Patient Details		Documents	Billing/Prior Authorization	Care Plan	Calendar	Block Employees	Internal Messaging	Notes
Payor		Prior Authorization						
CMS-1500		UB-04						
Refresh		Deleted						
Payor	Authorization Code	Service	Service Code	Start Date	End Date	Attachment	Action	
<input type="checkbox"/> Select	<input type="text" value="Authorization Code"/>			<input type="text" value="Start Date"/>	<input type="text" value="End Date"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>	
<input type="checkbox"/> Atena	DY2101081719486 View more	Personal Care	T1019	04/25/2022	09/19/2023		<input type="button" value="Edit"/> <input type="button" value="Active"/> <input type="button" value="Link"/>	
<input type="checkbox"/> Atena	545 View more	Personal Care	T1019	06/30/2022	08/06/2023		<input type="button" value="Edit"/> <input type="button" value="Active"/> <input type="button" value="Link"/>	

Link Option

The Link option is used to link the Authorization code with the schedules which is created without Prior Authorization.

If the user created the schedules without Prior Authorization for a patient and receives the Authorization details later, then the schedules without Authorization can be linked with the Authorization details added in the system for the past and future schedules.

Client >> List >> Select Patient from List >> Billing / Prior Authorization >> Prior Authorization

Click Link option on the right side of the Authorization details under Action.

Payor Prior Authorization

CMS-1500 UB-04

Refresh Active

Payor	Authorization Code	Service	Service Code	Start Date	End Date	Attachment	Action
<input type="checkbox"/> Select	Authorization Code			Start Date	End Date		Search Reset
<input type="checkbox"/> Atena	7651 View more	Personal Care	T1005	07/06/2022	12/31/2023		Edit Delete Link
<input type="checkbox"/> Atena	091201983103821 View more	Personal Care	T1019	09/20/2023	01/24/2024		Edit Delete Link
<input type="checkbox"/> United Healthcare	1548759866 View more	Respite Care	T1005	09/03/2023	12/31/2023		Edit Delete Link

The following screen appears in which the user can click link option to update the Authorization code for the past and future schedules. Click Link button on the visits to link the Authorization code.

Prior Authorization - Linkup

Link Schedules for Prior Authorization: 1548759866,T1005 0

Past Future

mm/dd/yyyy 10/31/2023 Search Reset

Caregiver	Start Date	Start Time	End Date	End Time	Payor	Authorization Code	Service	Action
irtaza waris	10/10/2023	08:00 AM	10/10/2023	01:00 PM	Atena	N/A	Respite Care	Link
William Garcia	10/23/2023	07:00 AM	10/23/2023	02:00 PM	Atena	N/A	Respite Care	Link
William Garcia	10/27/2023	07:00 AM	10/27/2023	02:00 PM	Atena	N/A	Respite Care	Link
William Garcia	10/27/2023	03:00 PM	10/27/2023	10:00 PM	Atena	N/A	Respite Care	Link
William Garcia	10/28/2023	07:00 AM	10/28/2023	02:00 PM	Atena	N/A	Respite Care	Link
James Smith	10/29/2023	07:00 AM	10/29/2023	02:00 PM	Atena	N/A	Respite Care	Link

Cancel

Revision #1

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