

# 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 DetailsDocumentsBilling/Prior AuthorizationCare PlanCalendarBlock EmployeesInternal MessagingNotes

PayorPrior Authorization

Patient Payors

RefreshActive

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		SearchReset

No records found.

Payor\*Atena

Start Date\*01/01/2023

End Date\*12/31/2023

Precedence\*Primary

Beneficiary Type\*Medicaid

Beneficiary Number\*14587989898

Employers Name OR School Name

Insured's Policy Group OR FECA Number

Member ID

☒ Are you the primary member on insurance?

SaveCancel

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
<div>Payor Name</div>	<div>mm/dd/yyyy</div>	<div>mm/dd/yyyy</div>	<div>All</div>	<div>Select</div>	<div>Beneficiary Number</div>		<div>Search</div> <div>Reset</div>
Atena	01/01/2023	12/31/2023	Primary	Medicaid	14587989898	Yes	<div></div> <div></div>

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
<div>Payor Name</div>	<div>mm/dd/yyyy</div>	<div>mm/dd/yyyy</div>	<div>All</div>	<div>Select</div>	<div>Beneficiary Number</div>		<div>Search</div> <div>Reset</div>
Atena	01/01/2023	12/31/2023	Primary	Medicaid	14587989898	Yes	<div></div> <div></div>

Showing 1 to 1 of 1 records

Payor\*

Atena

Start Date\*

01/01/2023

End Date\*

12/31/2023

Precedence\*

Primary

Beneficiary Type \*

Medicaid

Beneficiary Number \*

14587989898

Employers Name OR School Name

Insured's Policy Group OR FECA Number

Member ID

☒ Are you the primary member on insurance?

Save

Cancel

# 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 DetailsDocumentsBilling/Prior AuthorizationCare PlanCalendarBlock EmployeesInternal MessagingNotes

PayorPrior Authorization

Patient Payors

RefreshActive

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"/>	<input type="text" value="All"/>	<input type="text" value="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 DetailsDocumentsBilling/Prior AuthorizationCare PlanCalendarBlock EmployeesInternal MessagingNotes

PayorPrior Authorization

Patient Payors

RefreshDeleted

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"/>	<input type="text" value="All"/>	<input type="text" value="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.



# 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
<input type="checkbox"/> Select	<input type="text" value="Authorization Code"/>			<input type="text" value="Start Date"/>	<input type="text" value="End Date"/>		<div>Search</div> <div>Reset</div>
<input type="checkbox"/> Atena	254874587	<div>View more</div> Personal Care	T1019	02/02/2023	11/05/2023		<div>Edit</div> <div>Delete</div> <div>Link</div>

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

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

Save

Cancel

# 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"/>		Search Reset
<input checked="" type="checkbox"/> Atena	DY2101081719486 View more	Personal Care	T1019	04/25/2022	09/19/2023		Edit Delete Link
<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

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

Patient Details
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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"/>		Search Reset
<input type="checkbox"/> Atena	DY2101081719486 View more	Personal Care	T1019	04/25/2022	09/19/2023		Edit Active Link
<input type="checkbox"/> Atena	545 View more	Personal Care	T1019	06/30/2022	08/06/2023		Edit Active Link

# Link Past and Future Schedule

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		SearchReset
<input type="checkbox"/> Atena	7651 <a href="#">View more</a>	Personal Care	T1005	07/06/2022	12/31/2023		EditDeleteLink
<input type="checkbox"/> Atena	091201983103821 <a href="#">View more</a>	Personal Care	T1019	09/20/2023	01/24/2024		EditDeleteLink
<input type="checkbox"/> United Healthcare	1548759866 <a href="#">View more</a>	Respite Care	T1005	09/03/2023	12/31/2023		EditDeleteLink

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

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