

# 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.

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

## 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**

Payor

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

2742

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  |
|---------------------------------|---|------------------------------------|--------------|---|---------------------------------------|------------|---|
| <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
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"/> |            | 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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Revision #21

Created 12 October 2023 18:38:27 by Thamarai

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