

Table of Contents - *Jump to a section below*

[Mark Insurance as Requiring Prior Authorization](#)

[Manage Client Authorizations](#)

[Add a New Authorization](#)

[Copy Authorizations](#)

[Authorization Workflow](#)

[Delete or Discontinue Authorization](#)

Some insurance payers require that a client receive an Authorization for certain procedures. The client's insurance in the Billing Engine must be marked as requiring prior authorization. Next, the details of the client's Authorization are entered into the Authorization Tracker in NSS and then the Authorization can be used for procedures that are approved by the insurance payer.

Mark Insurance as Requiring Prior Authorization

Prior Authorization can be set at the insurance payer level which will auto-select the **Prior Authorization Required?** checkbox within the Client Insurance record for clients who have that insurance coverage. If this is not set at the insurance payer level, prior authorization can be set on a case-by-case basis within the Client Insurance record.

Client Insurance: Mark Individual Client as Requiring Prior Authorization

1. Within the Billing Engine, navigate to Client Insurance: **Navigation Form > Client Insurance**.
2. Click the **Search** button to search for the client.
3. Select the insurance and click the **Edit** Insurance button.
4. Click the **Page 2** tab if you are using Virtual Front Office (VFO) or **Page 3** if using the Virtual Private Office (VPO)
5. Click the **Edit** button.
6. Select the **Prior Authorization Required?** checkbox.
7. Click the **Save** button.

Insurance Payer: Mark Insurance Payer as Requiring Prior Authorization

1. Within the Billing Engine, navigate to the Master Insurance List: **Maintenance and Setup > Insurance > Insurance**.
2. Select the insurance and click the **Ok** button.
3. Click the **Edit** button.
4. Select the **Prior Authorization Required** checkbox on Page 1.

Note: Once this checkbox is selected, any new Client Insurance records entered for the Payer will have the **Prior Authorization Required?** checkbox auto-selected.

5. Click the **Save** button.

[Back to top](#)

Add a New Authorization

The Authorization Tracker, where you will enter the details for the approved Authorization, can be displayed on any kind of Note, the Face Sheet and Individualized Treatment Plan. The Authorization Tracker will be displayed for clients that have their insurance marked as requiring prior authorization.

1. Navigate to a **Note**, **Face Sheet**, or **ITP** that contains the Authorization Tracker.
2. Search for and select the **client** you want to add a new Authorization to.
3. The Authorization Tracker is displayed. To add the details, click **Add a New Authorization**.
4. Select the **Insurance** from the drop-down.
5. Enter the units of what is authorized:
 - **Auth Units:** Type the number of units of service that have been approved by the insurance payer.
 - **Auth Visits:** Type the number of visits that have been approved by the insurance payer.
6. In the **Effective Date** field, type the date the Authorization takes effect.
Note: You cannot use this Authorization unless the date is filled in.
7. In the **Expire Date** field, type the date the Authorization is effective until.
8. In the **Procedure** drop-down, select the procedure the client is authorized for.
Note: If multiple procedures are authorized, select the option for the relevant procedures. These options are set up by your administrator.
9. In the **Auth #** field, type the Authorization number provided by the insurance.
10. In the **Note** field, type any notes applicable to the Authorization.
11. Click **Save Auth**.
12. The Authorization details are displayed. To transmit the Authorization details to the Billing Engine, click the **+ sign** to expand and select **CONFIRM TO BILLING**.
Note: Users will need the permission **Confirm Auths** to complete this step.

[Back to top](#)

Authorization Workflow

Authorizations are applied to visits that match the procedure that was added in the Authorization Tracker.

1. Within a Note or Form, scroll down to the **Billing widget**.
2. Select the **Activity Code** for the Service provided from the drop-down.

Note: This must be the same Activity Code/Service as the one the client is authorized for.

3. The **Authorization** field will populate with the client's Authorization, based on the Activity Code selected.
4. If the Authorization is for an approved number of units of Service, enter the number in the **Units** field.
5. Complete any other necessary fields as you normally would.
6. When you return to the **Note, Face Sheet, or ITP**, the Authorization Tracker displays the Authorization that was used and the remaining Authorizations left.

[Back to top](#)

Manage Client Authorizations

1. Navigate to the Client Authorizations report: **Reports > Administrative Reports > Administration > Insurance Authorizations Management button.**
2. The report displays Authorizations that expire within 30 days as default. Change the **Effective Date on or After** and the **Expiration Date on or Before** drop-downs as necessary or select another radio button such as **Expires in 7 days** or **Expires in 14 days** to change the **Expiration Date on or Before** drop-down date.
3. *(Optional)* Click the **Current Primary Program** drop-down and select a Program.
4. *(Optional)* Click the **Current Location** drop-down and select a Location.
5. Select a date from the **Effective Date on or After** and the **Expiration Date on or Before** drop-downs.
6. *(Optional)* Filter the report by selecting the **Expires in 7 Days, Expires in 14 Days, or Expires in 30 Days** radio button.
7. Click the **Run Report** button.

Note: Click on the **Client Name** to be taken to the Misc Note where you can manage the client's Authorizations.

[Back to top](#)

Copy Authorizations

If your clients under a particular insurance payer get their Authorizations renewed on the same date, you can use the Copy Auths tool to copy the Authorizations in bulk. To use this feature, users must have the **Copy Auths** permission checked in Maintain Users.

1. Navigate to Copy Auths: **Admin Tools > Copy Auths.**
2. Search for and select a client to display their Authorizations.
3. Select an **insurance payer** from the drop-down.

4. Select the **All Clients**, **Active Clients**, or **Select Clients** radio button. To copy to select clients, type the client names into the yellow text box and select their name. The name is displayed in a list below the text field.
5. Click the **Copy Auths** button.
6. “Successfully copied auths” is displayed once the process is complete.

[Back to top](#)

Delete or Discontinue Authorization

1. Navigate to the **Note**, **Face Sheet**, or **ITP** that contains the Authorization Tracker.
 2. Search for and select a client.
 3. Click the **plus sign** next to the Authorization to expand the details.
 4. Select the **History** checkbox.
 5. Click **Save Only**. The Authorization is stored in history only and not available in the current view.
- Note:** Click **View Authorization History** to see all deleted/discontinued authorizations for the client.

[Back to top](#)