

How to Pull an Authorization

Background:

Insurances require providers to acquire a prior authorization from them before their patients may be seen for services at our office. This serves as a gateway to prevent a patient from taking advantage of services multiple times at different practices. If we see a patient without pulling their authorization first, the patient may not be eligible for services and we will not be able to bill for payment.

Authorization Expirations:

- **Medicaid** – All Medicaid authorizations expire at the end of the month in which they were pulled. For example, if you pull an authorization on October 1, it will expire October 31. If you pull an authorization for October 30, it will expire on October 31. Medicaid also goes by the term Centennial care or March Vision Care.
- **Davis Vision** – All Davis authorizations expire 21 days from the day you pull it. Patients who reschedule last minute often have to have their authorizations pulled again later due to the newly scheduled appointment going beyond the active authorization.
 - ****Davis Authorizations must be loaded to CrystalPM as 2 separate files due to the website producing 2 separate windows for the authorization****
- **VSP** – Most VSP authorizations expire 30 days from their pull date. This is not to be confused with VSP Centennial or VSP Medicaid as these forms of VSP fall under the Medicaid umbrella.
- **Eye Med** – does not require authorizations prior to services. Instead, Eye Med patient eligibility for services should be checked prior to their appointment to insure another office has not utilized those benefits. This must always be done within the month the patient is scheduled for.

Timing of the Authorization Pull

- As a general rule, you should never pull authorizations more than 14 days ahead of time, regardless of the insurance type. This insures that the authorization will not be expired on the date of service because of a clerical error from pulling authorizations too soon.
- As a general rule, all Medicaid authorizations should only be pulled for appointments within that same month. For example, do not pull an authorization for November 3rd on October 31; you must wait until November 1 to pull for a November 3 date of service.
- Authorizations for Medicare, BCBS, Presbyterian, UHC, Meritain, PHCS should be sent to Sheri Parker through Crystal PM Tasks. Include patient name, date of birth, and date of service in the task message.

Authorizations Procedure

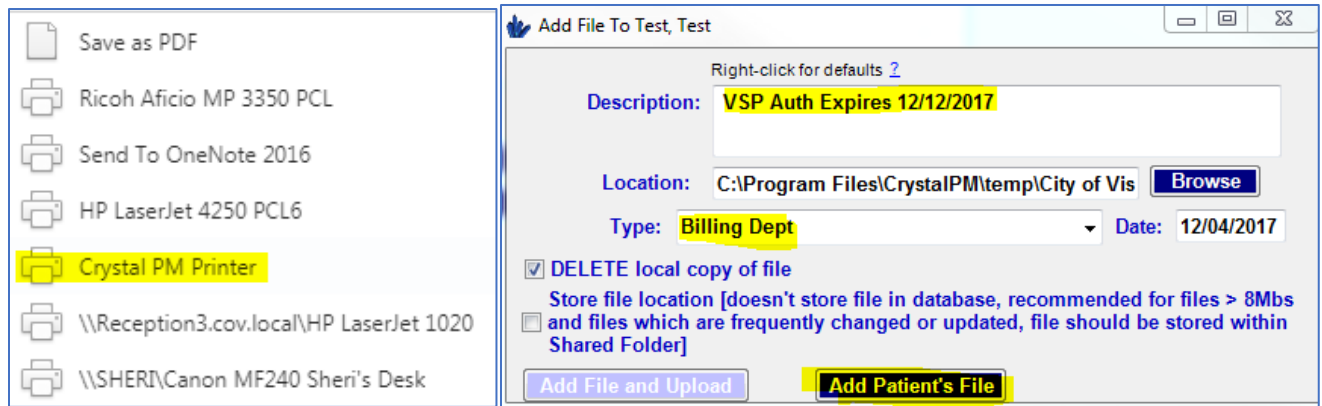
1. Include authorization information in the appointment. Select the “Need Auth” Flag and make notes in the alert on what insurance you need an authorization for

The screenshot shows an appointment form with the following details:

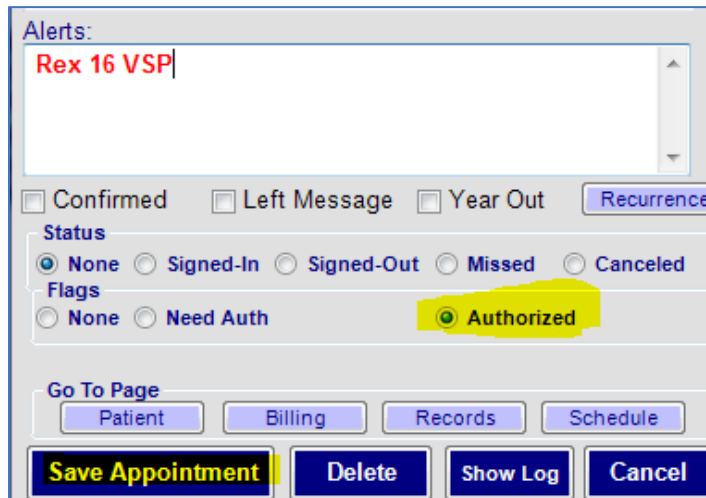
- Alerts:** Rex VSP 16
- Confirmation:** Confirmed, Left Message, Year Out,
- Status:** None, Signed-In, Signed-Out, Missed, Canceled
- Flags:** Need Auth, Authorized
- Go To Page:** Patient, Billing, Records, Schedule
- Buttons:** Save Appointment, Delete, Show Log, Cancel

2. Pull the authorization and send it to the patient account
 - a. Navigate to CrystalPM > Patient > Files
 - b. Pull authorization online
 - c. Print to “Crystal PM Printer”
 - d. Go to CrystalPM “Add File” that should automatically pop up
 - e. Description – “VSP Auth Expires 12/15/2017”
 - f. Type – Billing
 - g. Click Add Patient’s File

The screenshot shows the 'Files' tab in CrystalPM. The interface includes a navigation bar with tabs: Quick View, Patient Info, Additional Info, Insurance, Prescription, *Notes, Files (selected), and Status. Below the navigation bar is a table with the following columns: Date, Filename, Type, and Description. The table is currently empty. At the bottom of the interface, there is a legend: Red = stored location, and a checkbox for Display TreeView. A grid of buttons is located at the bottom, including: Add File, Add Printed, Add Scanned File, Print Address Label, Create CCD or CCR, Send Office Document, Show Patient Log, Print Billing Label, Show Tasks, Email Office Document, Online Portal (Add/Remove Files), Print Folder Label, Email Portal Access, Edit File Type, Edit Description, Edit Filename, Edit Date, and Remove File.



3. Update Appointment Flag to “Authorized”



4. When building charts for the next day’s appointments, navigate to CrystalPM>Patient>Files>Authorizations
 - a. If the authorization is not expired, print it.
 - b. If the authorization is expired, delete the expired authorization, void the old one on the insurance website, and generate a new one. Be sure to add the new authorization into CrystalPM before printing a physical copy.
5. After checking out, patient transactions are posted. The generated invoice is stapled to the authorization and sent to the billing department for final processing.