Bulk Add or Update Authorizations

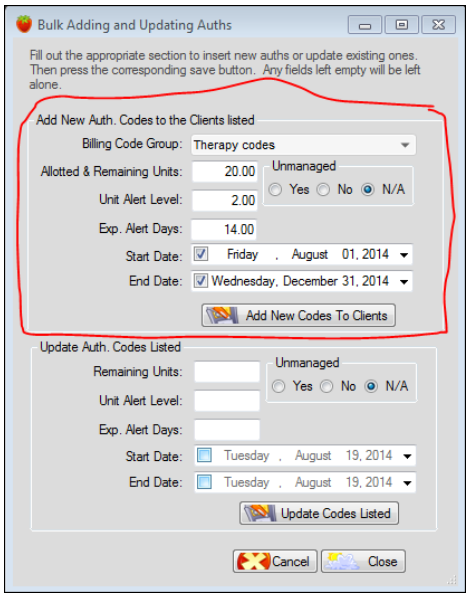
Summary:

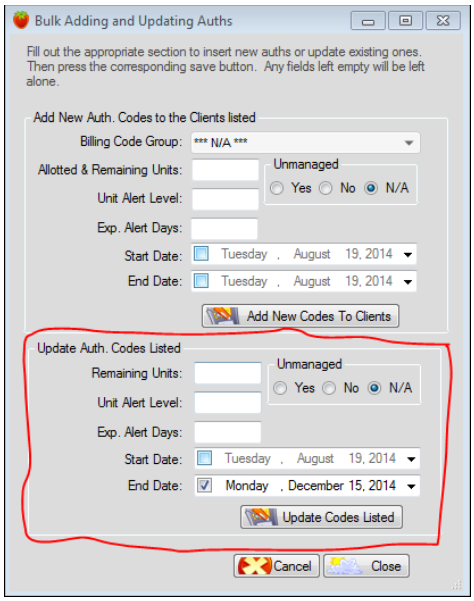
Using this feature, you can save time and effort by adding or updating authorizations on a group of clients at one time.

Fields & Instructions:

To add or update many billing code auths for one client at a time:

go to the Client's chart > **Authorizations** tab and click on **Bulk Add or Update** located in the upper right corner of the screen.





In the box that opens, complete everything in **Add New Auth Codes to the Clients listed** *(top part of page only)*.

The first selection is **Billing Code Group.** This is a drop-down selection you would have already created (see Billing Code Groups in Zendesk and where in manual?)

Allotted & Remaining Units will be the approved visits you have for the client *(these can be updated individually on the client)*.

Unit Alert Level will send an alert (this is a system setting) to the users with a profile rule that receives the alerts. When the units reach the level that you specify an alert will be sent to users whose profiles allow the alerts. *Example: if the client gets 12 visits and you want PIMSY to let you know when the patient has only two left, you will put 2 in this box.*

Expiration Alert Days select the number of days you want the system to alert you to the number of days before the client's approvals expire. Enter a start date and end date.

Unmanaged is for internal codes, not insurance codes, that do not require an expiration. Usually, this would be selected as **N/A**.

Once you have everything completed in the top box, click the **Add New Codes to Clients** button, then **Close**. All your bill codes are now in each client's chart.

Update Codes Listed will update all the auth codes that have been filtered for and are listed on the current authorization screen. This is useful for making a global change to a number of authorizations in a single step and is very useful when used appropriately.

Add only the applicable data you are updating or changing. *Example: In the box to the left, the end date for the auths listed is*

changed to December 15, 2014. No other information is updated and therefore those values are left blank.

Once the information is entered, click on **Update Codes Listed.** A box will pop up alerting you to the fact that you are changing all the codes that are listed on the screen and asking for confirmation of the action. Click **Yes** > **Ok.** You can now see that all the codes listed have been updated with the information you provided.

To Add or Update Auths for several clients at a time:

Go to the **Clients** menu and select **Authorizations**. This section provides a list of clients with active authorizations for you to filter for divisions, insurance company, client or user groups, etc., in order to bulk add or update their authorizations.

Follow the instructions above to add or update authorizations for the clients selected in the master authorizations list.

Use Case:

A staff member at ABC Therapeutic Group has determined there are several clients who have the same billing codes for their insurance. To save time, she creates a **Billing Code Group** to include all those same billing codes. She utilizes the **Bulk Add or Update** feature to enter all of the billing code authorizations to all of the clients at one time. She also adds alerts to staff and/or users, notifying the approaching expiration of those authorizations.