

Employee Health and Occupational Medicine Authorization Tracking Administration and User Guide, Version 11 May, 2021



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Overview

The software allows clients to enter an authorization, notify the user of how much of the authorization has been used, and alert the user when the authorization is nearly exhausted. An authorization is defined as the approved type of service with either a specific quantity of services allowed, and/or a specific period of time in which the client may provide services to an employee/patient.

Setup

Group Visit Categories

The application provides a way to group *Visit Categories* together when there is more than one *Visit Category* for a special skilled level. In some cases, a client will have multiple *Visit Categories* for *Physical Therapy* (PT initial, PT follow-up). For authorization tracking and reporting, there is a need to group these *Visit Categories* together. The software has been modified to allow a *Category Grouping code* to be defined and attach this code to the *Visit Category*.

From **Setup & Admin**, **Medical Codes**, a new option for *Visit Category Grouping Codes* has been added. Selecting the *Visit Category Grouping Codes* option presents the user with a window that displays all defined *Visit Category Grouping Codes* and will allow the user to select to *Add, Change, or Delete* codes.

Setup and Administration				
Medical Codes				
Medical Activities				
Medical Activity Templates	 Select V 	lisit Category Group		
Medical Conditions	Search		Include Inactives?	
Yisk Categories		Description	Code	
Visit Category Groups		Occupational Therapy	EAP 01	
Work Restrictions		Physical Therapy	PT	
ICD-9 / ICD-10 Codes				
ICD-9 / ICD-10 Report Groups				
CPT-4 / HCPCS Codes				
Declination Codes				
Assessment Questions				
Bespirator Models				
Billing Service Types				
Dote	🔶 Add	If ff (?) >>> >>>>>>>>>>>>>>>>>>>>>>>>>>>>>	E. Dirt 🔍	Close

When users select *Add* or *Change* a *Category Grouping Code* the following window will display. The code and description are required.





🔸 Enter Visit Cate	gory Group (Record will be Changed)
Code:	PT
Description:	Physical Therapy
Inactive?	V OK Cancel

🐈 Enter Visit Category	Code (New)
General Billing	
Category Code:	Internal ID: 35
Description:	
Entry Type:	•
Minutes Required:	
Standard Cost:	
Visit Type:	
Encounter Type:	
Security Level:	No Special Security
	Personal Health and Wellness Security
SNOMED CT:	
Category Group:	
Inactive?	V OK X Cancel

Once the Category Grouping has been defined, The *Visit Category Code* window will add a new data entry field for *Category Grouping* that will pull from the new table described above.





Define the Authorization Rules Template

The application allows the user to define *Authorization Rules Templates* and then attach those to the *Payers* that require *Authorizations* so that the system knows what *Category Groupings* require *Authorizations* and what the number of visits and days threshold is.

The Authorization Rules Template

Authorization Rules Template	×
	Include Inactives?
Template Description EAP 1-10 EAP 1-20 EAP 1-5 WorkCompSelf	
WorkCompState	
▲ <u>A</u> dd ▲ <u>C</u> hange ■ <u>D</u> elete	

The initial window lists all the currently defined templates. The user may *Change* an existing template or *Add* a new template. Editing is done by selecting the desired template and selecting the *Change* button.

To add, select the Add button.

🔸 Enter Author	ization Rules Template		83
Description:	WorkCompState		
- Require Author	ization for these Category Groups		
Category Gro	up	Visit Alert	Day Alert
Cccupational	apy Therapy	4	10
1444 7	• • • • • • • • • • • • • • • • • • •		
Inactive?		V 0	K X Cancel





Add or *Change* buttons will open the same window. This window allows the user to add a new *Category Grouping* and associated thresholds or change an existing *Category Grouping* and associated thresholds.

🔸 Enter Authorization Ru	les Template Group		— ×	
Category Group:	OT	P	Occupational Therapy	
Vis Alert Threshold:	4			
Day Alert Threshold:	10			
			V OK Cancel]





Attach the Template to the Carrier

Once all of the templates are defined, the next step is to attach that template to the *Carrier* (*Payer*). This is accomplished through a new tab called AUTHORIZATION. On this tab will be the *Authorization Required* checkbox (formerly on the RULES tab); if that checkbox is checked, the user may select a template.

5 Enter Insurance Carrier (Record will be Changed)	8
General Diganization Rules Authorization st Report	
General Diganization Required Authorization Phone: [814] 888-9993 Authorization Contact: Authorization Contact: Authorization Template: []] Authorization Numbers?	
Contacts Inactive VOK X Cancel	

To select a template, the user will click the icon which will launch the following window:

🔸 Authorization Rules Template	×
Template Description	
EAP 1-10	
EAP 1-20 EAP 1-5	
WorkCompSelf	
📥 Add 💦 🛆 Change 🗖 Delete	

Users may select from the list to attach the Authorization to a Carrier.





Parameters

The application has a parameter that allows the system to be setup to auto-generate *Authorization ID's,* accommodating clients that issue Authorizations to contracted providers.

Enter Insurance Carrier (Record will be Ch	nanged)
General Organization Rules Authorization	st Report
Authorization Required Authorization Phone: Authorization Contact: Authorization Template:	(814) 888-9999 Auth Contact On Carrier Auto Generate Authorization Numbers?
Contacts	Inactive

The software has an option on the [Enter Insurance Carrier] window that can be toggled off or on to control whether to auto-generate *Authorization Numbers*, when entering a new *Authorization*.





Admin	Ister Clinic System	Charlings	-	Desidente d'Octo		2
General	Visits / Encounter	Charting / Scheduling L	oding Drug lesting	Incidents / Safe	y Misc	
)efault Login Organi	zations				
	Main Cor	npany Identification:	Integritas Works-A	Lot Clinic		
	Main Clin	ic Identification:	Integritas Works-A-	Lot Clinic		
	emographics Identi	fication				
	Primary D	emographics Identifier:	System ID			
	Medical F	Record Number:	Unique to En	nployee		
	Patient II) used for Lookups:	Social Secu	rity 💌		
	Patient II) used for Reports:	Social Secu	rity 💌		
	Encounte	er Summary SS# Option:	Allow Print	•		
	Defai The minin order to s	ult Patient Lookups to View mum number of characters search the Patient list. (0 di	Across All Organizat , of the Patient's Last sables this requireme	ions Name, that a use nt)	r is required to enter in	1
	Enab	le Meaningful Use Demogr	aphic Data Requirem	ients?		
	Authorizations Authorization Nun	nber Seed:	Las	t Number Used:		
					🖌 ОК	🗙 Cancel

Authorization Number Seed - The system also allows the client to establish the next Authorization Number to assign. This is a system parameter. When generating the Authorization Number, the system will use the next available Authorization Number and will update the seed. This functionality is commonly used when a new client has been tracking Authorization Numbers prior to using the software and wants to continue with the established sequence.

Last Number Used – This field is "Display Only" and reflects the last authorization number assigned in Agility





Define External Sources

The software allows users to define external sources that issue Authorizations so that when recording the Authorization in the system the *External Source* is recorded as well.

To add an External Source:

Select Setup & Admin, Protocols/Profiles. Select a new entry of Authorization External Sources.

🔸 Select Exte	ernal Authorization Source		×
<u>S</u> earch:		Include Inactives?	
	Description	Code	
	K		
∔ <u>A</u> dd	▲ <u>C</u> hange ■ <u>D</u> elete	📇 <u>P</u> rint	Close

Users may Add, Change, or Delete an External Authorization Source code. For the Add or Change function, use the following window:

🔸 Enter External Au	ithoirzation Source (New)
Code:	
Description:	
Inactive?	V OK X Cancel





Authorization Entry

Enter the Authorized Number of Services and the Authorized Date Rang**e**

The software now allows users to enter the *Authorized Number of Services and the Authorized Date Range* so that the system may notify the user regarding *Authorization* usage and the alert the user when that usage is exhausted or near exhaustion so that the client is providing only services that are contracted.

Incident Entry Window

🔸 Enter Incident (Ben A	drill / Trash 'R' Us Waste Mgmt / 20	014-00002)	X
General Problem Media	al Billing OSHA Log Safety More	e Audit	* = Required
Incident Date:	7/29/2014 × 📻 Time of I		
Date Reported:	7/29/2014 × 🧰 Time Sta	arted Work:	<u>C</u> ase Mgt
Incident Type:	🖲 Injury 💿 Illness	Exposure	Charges
Nature of Inc:	1		Iime
Part of Body:			
			Charting
Case Physician:			Referrals
Other Clinician:	Ť		Bestrictions
Case Number:	2014-00002		
Claim Number:			Scheguling
Vorkers' Comp	Vork Related	Declined for Work Comp	Authorizations
OSHA Recordat	le	Auto Accident	Images
NIOSH Category:		•	E Forms
			😤 <u>R</u> eport
Correct Entity	View	Patient Chart	V OK

The *Authorization* button will display a window that lists all of the *Authorizations* for the selected employee/patient, for the selected company.





Authorization Window

	A she are stine #	Chabus	Cala ann Carun	Data Fran	Data Thur	ام ا ماند ر ۵	Deered	A il
iner	Autronzation #	Status	categoly cloup	Date Fium	Date miu	Aumo	necolu	Avali
44 ? > >> > >		1						

- The list box displayed on the window displays the **Authorization** rows for the selected employee/patient incident, for the selected company. The default sort order on the list box is by *Carrier, Category Grouping, Date From.* Users may re-order the rows in the list box by clicking on the *Column Header.*
- The first column in the list box displays the Carrier Description.
- Next column displays the Authorization ID.
- Next column displays the Authorization Status Description (not the code).
- Next column displays the **Category Grouping** description. If the **Category Grouping** is blank, the system will display a blank value in this column.
- Next column displays the Authorization From Date in MM/DD/YYYY format.
- Next column displays the Authorization Thru Date in MM/DD/YYYY format.
- Next column displays the Total Number of Authorized Services.
- Next column displays the Total Authorizations Recorded.
- Next column displays the **Total Number of Services Available**.
- The **Add** button is always enabled. Selecting the *Add* button will cause the [Enter Authorization] window to display.
- The **Change** button is only enabled when a row is selected in the list box. Selecting the *Change* button causes the [Enter Authorization] window to be displayed with the selected row visible and abled to be edited.
- The **Delete** button is only enabled when a row is selected in the list box. Selecting the *Delete* button will cause a *Delete Confirmation* window to be displayed and will force the user to confirm that they want to delete a particular *Authorization*. If the



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Delete is confirmed, the *Authorization* will be removed, and all scheduled appointments and visits will have the link to the *Authorization* removed.

Enter Authorization Window

To enter a new *Authorization*, users must select Add in the [Authorization] window and the [Enter Authorization] window will display.

To change an existing Authorization, users must select the row to change and then select *Change* on the [Authorization] window and the [Enter Authorization] window will display.

neral Notes Audit		* = Require
Carrier:	AETNA - 🙀 AETNA	
Authorization #:	123456578	
Status:	Authorized	
Authorized By (Internal):	MENNIS Mennis, Dennis T	r. D0
Authorized By (External):	(M)	
Issued/Recv/d Date:	7/28/2014	
Category Group:	OT Occupational Th	erapy
Category Group (Other):		
Date From:	6/01/2014 🔤 - Date Thru:	8/31/2017 💼 •
Total Authorized:	14 .	
Total Recorded:	0	
Total Used (Scheduled):	0	
Total Used (Visits):	0	
Total Remaining:	14	
]		

Note: the window bar contains the Patient Name, Company Name, and the Incident Number.

Enter Authorization - GENERAL tab

• **Carrier**– This field is required, and users may choose to select the *Carrier* from a lookup that contains all of the *Carriers* defined. If there is only one *Carrier* defined on the *Incident*, the software will default to that *Carrier*. Users may change the defaulted value.





- Authorization #: This field is a 20-character identifier for the Authorization. When users are adding an Authorization on this window, the system will auto-generate the Authorization Number based on a system parameter (described above) which is set to "on" and a Seed value that specifies the last used number. The user may NOT edit the auto-generated Authorization Number. This number does not need to be unique, and it is not required.
- Status this is a dropdown list that contains the following values: *Pending, Authorized, Withdrawn, Denied,* and *Locked*. Status is required. When editing this information on the window, if the user changes the status to *Withdrawn* or *Denied* and there are <u>appointments</u> assigned to this authorization, the system will display an alert to the user stating "Warning. Appointments are scheduled against this *Authorization. Appointments may need to be cancelled.*" If there are <u>visits</u> assigned to this *Authorization*, the system will display an alert to the user stating: "Warning. *Visits recorded against this Authorization. Visits will need to be reviewed.*" If there are <u>both appointments and visits</u> assigned to this *Authorization*, the system will display an alert to the user stating "Warning. Appointments are scheduled against this *Authorization. Appointments may need to be cancelled.* Also, visits recorded against this *Authorization. Visits will need to be cancelled.* Also, visits recorded against this *Authorization. Visits will need to be cancelled.* Also, visits recorded against this *Authorization. Visits will need to be reviewed.*" A status of *Locked* will cause the *Authorization* to "freeze". The software will not remove the *Authorization* from any appointments/visits that have this *Authorization* assigned to it.
- Authorized By (internal) This is a lookup associated with the *Provider* table which will allow the user to select a *Provider*. The user must enter either an *Authorized By Internal*, or an *Authorized By External* if the authorization status is not "*Pending*".
- Authorized By (external) This is a lookup associated with the *Provider* table which will allow the user to select a *Descriptor* of who provided the *Authorization*. This table needs to be constructed by the client and is described in the section **Define External Sources**. When selecting the table lookup icon, the following window will display showing the *Defined External Sources* and will allow the user to select from the list.





 Select External A 	uthorization Source		e
<u>S</u> earch:		Include Inactives?	
	Description	Code	
L			
			_
🕂 Add	▲ <u>C</u> hange	🚖 <u>P</u> rint	JA Close

The user must enter either an Authorized By Internal, or an Authorized By External if the authorization status is not "Pending".

- **Issued/Recv'd Date** This field represents the date when the *Authorization* was recorded. It will default to the current date and it is required.
- **Category Grouping** This field is the *Visit Category Grouping,* and it **is not required.** The user may click the lookup table icon to select the *Category Grouping.* To the right of the icon the description of the *Category Grouping* is displayed. The user must enter either a *Category Grouping* or must enter something in the *Category Group* (*Other*) field. When the *Category Grouping* is empty, the system will not record this *Authorization* to a visit, and therefore the *Total Used* (*Scheduled*) and the *Total Used* (*Visits*) fields will not be updated.
- **Category Group (Other)** This field is meant to describe *Authorizations* that are not related to a *Visit Category Grouping*. These types of *Authorizations* could be for tests (MRI), or a change to diagnosis. When the *Category Grouping* is empty, the system will not record this *Authorization* to a visit, and therefore the *Total Used (Scheduled)* and the *Total Used (Visits)* fields will not be updated. The user must enter either a *Category Grouping* or must enter something in the *Category Group (Other)* field.
- **Date From** –This field represents the date that the *Authorization* starts. The system does not default a value. The *Date From* must be a valid date and must be less than or equal to the *Date Thru* value. It is a required field.
- **Date Thru**-This is the date that the *Authorization* ends. The system does not default a value. The *Date Thru* must be a valid date and must be greater than or equal to the *Date From* value. It is a required field.
- **Total Authorized** This field is the *Number of Services* that are covered by this *Authorization.* Valid values are 1 999999. This field can be edited. It can be





increased or decreased. However, if there is an appointment or a visit associated with this authorization, then this number cannot be decreased. It is a required field.

- **Total Recorded** This field should only have a value entered when there are authorized visits occurring outside of the product, and the user wants to record that. This number will decrease the *Number of Services* that can be covered in the software with this *Authorization*. The number entered here cannot be greater than the *Total Remaining*. It is a not required field.
- **Total Used Sched'd** Users cannot enter/edit this value because it is calculated. This represents the *Number of Scheduled Appointments* that have not been completed that are covered by this *Authorization*.
- **Total Used Visits** Users cannot enter/edit this value because it is calculated. This represents the *Number of Completed Visits* that are covered by this *Authorization*.
- **Total Remaining** Users cannot enter/edit this value because it is calculated. This number can become negative if the Total Recorded authorizations is greater than the Total Authorized.





Enter Authorization - NOTES tab

ral Notes Audit		* = Requi
Date	Subject	
28/2014 La	I Un Mon 7728 Heg AddTAuth	
	🛉 Add 🔷 Change 🗖 Delete	
	🕇 Add 🔷 Change 🗖 Delete	
	🕇 Add 🔷 Change 🗖 Delete	
	🛉 Add 🔷 Change 🗖 Delete	
	🕇 Add 🔷 Change 🗖 Delete	
	🕂 Add 🔷 Change 🗖 Delete	
	🕂 Add 🔷 Change 🗖 Delete	

The NOTES tab is a list box that allows multiple notes to be attached to an *Authorization*. The list box will contain a column for *Date* (represents the date the note was entered), a column for *Subject* (entered by the user). It will list all attached notes in *Date* descending order.

- **The Preview Panel** at the bottom will display the complete message so that the user may review by selecting the *Note* in the top list box.
- Add button This button will allow the user to enter a new *Note* attached to the *authorization*. The [Enter Authorization Notes] window is displayed when a note is selected to be added and the user clicks *Add*.
- **Change button** This button is enabled only when a specific row in the list box is selected. The [Enter Authorization Notes] window is displayed when a note is selected to be updated and the user clicks *Change*.
- **Delete button** This button is enabled when a specific row in the list box is selected. Selecting the *Delete* button will cause a *Delete Confirmation* window to be displayed and will force the user to confirm that he wants to delete a particular *Authorization Comment*.





- **Details Button** This button will display a window which allows the user to view all of the schedules/visits that are covered by this *Authorization* (see [Manage Authorization Appointments and Visits] window). This button is enabled only when an *Authorization Note* is being updated.
- **Ok button** This button will validate the entered data and save it to the database, if no errors are found. When the user adds/updates/deletes an *Authorization*, the system updates appointments and visits that already exist in the database to either assign or unassign (in the case of a change or delete action) the *Authorization*. If the user changes the status of the *Authorization* to *Denied* or *Withdrawn* and there are appointments and/or visits assigned to this *Authorization*, the system will remove the *Authorization* from those appointments and visits.
- **Cancel button** This button closes the window and returns to the calling window.

NOTE:

- For edits involving an *Authorization* where the *Authorization* exists and has been assigned to schedules and/or visits, users may increase the *Number of Authorizations* but may not decrease them. Additionally, users may change the *Date Thru* to an extended period but may not change the *Date From*.
- If a visit or appointment is added and saved as a scheduled one, but not yet authorized, the system will determine if the visit falls within the criteria of the *Authorizations*. If it does, the software will automatically authorize the visit.
- If the Status of an appointment is changed to Canceled, No Show, or Walk Out, the Authorization is re-cycled, and the number remaining is increased by one.



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Manage Authorization Appointments and Visits

This window is initiated by the user selecting the *Details* button on the [**Enter Authorization**] window, NOTES tab. The list box on the top portion of the window will display all schedules (that are not linked to visits) and visits that have been assigned this *Authorization*. No changes can be made to the data on this window; it is for display purposes only. The list box on the bottom portion of the window will display all appointments/visits that have not been assigned an *Authorization* number, but fit the criteria of this authorization (*Incident, Category Grouping* and *Date*). Users will have the ability to remove *Authorizations* and assign *Authorization* (if the total remaining is greater than zero).

Removing the *Authorization* from an appointment or the visit does not mean that the software will not try to assign an *Authorization* to it in the future.

Removing an *Authorization* using this screen simply removes it from the selected appointment in the top list box; the *Authorization* is recycled and available to be used again, assuming the approved number is not exhausted, and the date range is valid.



NOTE: the window bar contains the *Patient Name*, *Company Name*, and the *Incident Number*.





- Payer This field displays the Payer selected on the Authorization
- Authorization # This field displays the Authorization number.
- Category Grouping This field displays the Category Grouping Description.
- Authorization Status This field displays the Status of this Authorization.

Upper List Box:

- The upper list box will show all schedules (that are not linked to visits) and visits that have been assigned this Authorization. Data is ordered by the *Visit Date* and *Start Time* of the visit.
- First column displays *x* of *y*, where *x* is a counter that starts with 1 and *y* is the *Total Authorized* count on the *Authorization*.
- **Type** This column displays if the item is a scheduled or actual visit.
- **Date** This column displays the *Date* of the scheduled/actual visit in MM/DD/YYYY format.
- **Time** This column displays the *Start Time* of the scheduled/actual visit in HH:MMxx format, where xx is either AM or PM.
- **Category** This column displays the *Category* on the scheduled/actual visit.
- **Purpose** This column displays the *Purpose* from the scheduled/actual visit
- **Provider** This column displays the name of the *Provider* on the scheduled/actual visit in First, MI, Last format.
- Status This column displays the Status of the scheduled/actual visit.
- **Remove Authorization** button This button allows the user to select a row from the top list box and remove the *Authorization*. This will cause the scheduled/actual visit to be removed from the top list box and to be placed in the lower list box. Also, the number of *Total Used* will be decreased by 1 and the number of *Total Remaining* will be increased by 1.





Lower List Box:

- The lower list box will display any schedules/appointments that have not been authorized which could be covered by this *Authorization*. "Covered by" in this context means visit falls within the defined *Date Range* and matches the *Incident* and *Visit Category Grouping*.
- Type This column displays if the item is a unauthorized scheduled or actual visit
- **Date** -This column displays the *Date* of the unauthorized scheduled/actual visit in MM/DD/YYYY format
- **Time** This column displays the *Start Time* of the unauthorized scheduled/actual visit in HH:MMxx format, where xx is either AM or PM.
- **Category** This column displays the *Category* on the unauthorized scheduled/actual visit.
- **Purpose** This column displays the *Purpose* from the unauthorized scheduled/actual visit.
- **Provider** This column displays the name of the *Provider* on the unauthorized scheduled/actual visit in First, MI, Last format.
- Status This column displays the Status of the unauthorized scheduled/actual visit
- Add to Authorization button This button allows the user to manage which scheduled/actual visit will be assigned an *Authorization* number. This is done by selecting the row and then selecting the scheduled/actual visit that should receive the *Authorization*. This will cause the scheduled/ actual visit to be removed from the bottom list box and be placed in the upper list box. Also, the number Total Used will increase by 1 and the Total Remaining to decrease by 1.
- **NOTE:** This number can become negative if the Total Recorded authorizations is greater than the Total Authorized.
- **Close** button This button will *Close* the window and pass control back to calling window.





Enter Authorization Note

🔸 Enter Au	thorization Note(Ben Adrill/Trash 'R' Us Waste N	/lgmt/2014-3)		X
Date:	7/30/2014			* = Required
Subject:		×		
Notes:		/		×
				∇
- - -			🗸 ОК 🛛	🗙 Cancel

Note: the window bar contains the *Patient Name*, *Company Name*, and the *Incident Number*.

This window is initiated by the user selecting the *Add* or *Change* button on the [**Enter Authorization**] window on the NOTES tab. If the user selects *Add*, the system will allow the entry of a new note. If the user selects *Change*, the system will allow the user to edit the subject and notes.

- **Date** This field cannot be changed; it is the *Date* that the note was added. It is displayed in MM/DD/YYYY format.
- **Subject** This field describes the *Subject* of the note and it is required. Users may enter up to 50 characters of text.
- **Note** This field allows users to enter the *Notes* that are pertinent to the *authorization.*
- **OK button** This button will validate that all required data is present and will save the data to the database, if no errors are found.
- **Cancel button** This button will discard any changes made to the data and will return control back to the calling window.





Authorization Notification

Notification of Authorization Usage when Entering New or Modifying Appointments /Visits

The software notifies the user of the *Authorization* usage when entering new appointments/visits or modifying appointments/visits. The system also alerts the user when the *Authorization* usage is exhausted or near exhaustion to ensure that the client is providing only services that are contracted. This affects all windows where an appointment can be scheduled and maintained and all windows where a visit can be scheduled and maintained.

- When users enter the information for a new visit or new appointment, as soon as they have entered a *Date, Time*, and a *Category*, the system will verify if an *Authorization* is required. If an *Authorization* is required, the system will then calculate to see if there is an *Authorization* that covers this visit/appointment. The calculation considers all *Authorizations* that are authorized for the *Date* of the visit, and for the *Category Grouping* of the visit.
- Authorizations that have a status of Withdrawn or Denied are ignored and are not assigned to the appointment/visit.
- When entering a new visit/appointment, the system ignores any *Authorizations* that have a *Status* of *Locked*. When editing a visit/appointment, if the currently assigned *Authorization* has a *Status* of *Locked*, the *Locked Authorization* will be examined further to verify if it still covers the edited visit/appointment. If the *Authorization* is still valid for the visit/appointment, then the *Authorization* will stay assigned. If it is no longer valid, the *Authorization* will be removed, and the software will look for another *Authorization* to cover it.
- Any Authorization (regardless of Status) that has a blank Category Grouping is ignored and is not assigned to the appointment/visit. For each of those Authorizations, the application will ensure that all scheduled/actual visits meet the definition of the Authorization. It is possible that there is a scheduled visit that could go from authorized to unauthorized when adding this visit.





Special Handling for Overlapping Authorizations

It is possible to have overlapping *Authorizations* (i.e. same *Payer*, same *Category Grouping*, overlapping dates). If the visit/appointment could be covered by multiple *Authorizations*, the system will use the *Authorization* with the earlier issued/received date.

For the Authorization Alert Checking, the system will review only the Authorization that the appointment/visit is associated with. The Visit x of y Counts will only be reflective of that one Authorization and not multiple Authorizations – that is, if the appointment/visit falls within overlapping Authorizations.

- Once it is known whether the visit/schedule will be authorized, the system will set the new Authorization button to RED if the visit requires an Authorization and one is not found, or one is found but has been exhausted (Authorization Count used up). If an Authorization is not required, the Authorization button will be invisible. For all other conditions, the button will appear as all other buttons. If the user selects the Authorization button, the Authorization window (shown above) will display and will allow the user to add/update/view the Authorizations that exist.
- If the visit/appointment does not require an *Authorization*, no message will be displayed, and the system will set the *Authorization* button invisible.
- If the visit/appointment does require an *Authorization* and one is found and is not exhausted, the system will determine if it is within the alert thresholds defined on the *Carrier*. The system will look at the Number of Remaining Visits. If the Number of Remaining Visits is less than or equal to the *Threshold Limits* on number of visits defined by the *Carrier* (factoring in *Effective Dates* and *Category*) an alert message must be displayed (see table below for details on the message).

The system will now consider the remaining days on the *Authorization*. If the difference between the *Current Date* and the Thru Date of the *Authorization* is less than or equal to the *Threshold Limits* on number of days defined by the *Carrier* (factoring in *Effective dates* and *Category*) an alert message will be displayed (see table below for details on the message).

If both conditions described above exist (over *Threshold Limits* for days and visits), an alert message will be displayed (see table below for details on the message).

If the visit/appointment requires an *Authorization* and one is found and the *Alert Checks* above were not met, the system will display a message that informs the user of the *Visit Number* and the *Total Number of Authorized Visits* (see table below for details on the message).





	Authorization		
Condition	Button	Alert Message	Alert Color
No Authorization Required	Invisible	No Message	N/A
Authorization Required, but no		NOT AUTHORIZED	
authorization found	Enabled - Red	(Red)	Red
Authorization required and			
authorization exists with a status			
of "Authorized" and authorized			
visits and remaining visits greater			
than defined visit alert and date			Green
difference between today and			
authorization thru date greater	Enabled Gray w/	Authorized - xxx of	
than defined days alert	black lettering	yyy (Green)	
Authorization required and			
authorization exists with a status			
of "Authorized" and with			
authorized visits and remaining			Ded
defined visit alort and data			Red
difference between today		Authorized xxx of	
authorization thru date less than	Enabled Gray w/	Authonized - XXX Or	
or equal to defined days alert	black lettering	days Remaining)	
Authorization required and	blacklettering	adys herhannig	
authorization exists with a status			
of "Authorized" and with			
authorized visits and remaining			
visits less than or equal to			Red
defined visit alert and data			
difference between today		Authorized - xxx of	
authorization thru date greater	Enabled Gray w/	yyy (9 visits	
than defined days alert	black lettering	Remaining)	
Authorization required and			
authorization exists with a status			
of "Authorized" and with			
authorized visits and remaining			
visits greater than defined visit			Red
alert and data difference		A set la set a set a ser a C	
between today authorization		Authorized - xxx of	
defined days alort	Enabled Gray W/	yyy (99 days Romaining)	
Authorization required and	DIACK IELLETTING	Reffiditing)	
authorization exists with a status			
of "Pending" and authorized			
visits and remaining visits greater		Pending	
than defined visit alert and date	Enabled Grav w/	Authorization - xxx	Green
difference between today and	black lettering	of yyy (Green)	





authorization thru date greater than defined days alert			
Authorization required and authorization exists with a status of "Pending" and with authorized visits and remaining visits less than or equal to defined visit alert and data difference between today authorization thru date less than or equal to defined days alert	Enabled Gray w/ black lettering	Pending Authorization - xxx of yyy (9 visits / 99 days Remaining)	Red
Authorization required and authorization exists with a status of "Pending" and with authorized visits and remaining visits less than or equal to defined visit alert and data difference between today authorization thru date greater than defined days alert	Enabled Gray w/ black lettering	Pending Authorization - xxx of yyy (9 visits Remaining)	Red
Authorization required and authorization exists with a status of "Pending" and with authorized visits and remaining visits greater than defined visit alert and data difference between today authorization thru date less than or equal to defined days alert	Enabled Gray w/ black lettering	Pending Authorization- xxx of yyy (99 days Remaining)	Red

NOTE: If the *Status* of an appointment is changed to *Canceled*, *No Show*, or *Walk Out*, the *Authorization* is re-cycled and the number remaining is increased.

Alert Messages, depending on the condition, will display at the bottom of the [Enter Visit] window and the [Enter Appointment] window.





Notification of Authorization Usage when Entering Follow-Up Appointments/Visits

The software will notify the user of the *Authorization* usage when entering a *Follow-Up Appointment* so that the system alerts the user when the *Authorization* usage is exhausted or near exhaustion. This is to ensure that the client is providing only services that are contracted.

- When users enter the information for a *Follow-up Appointment*, as soon as they have entered a *Date*, *Time*, and *Category*, the application will verify if an *Authorization* is required. If an Authorization is required, the system will then calculate to verify there is an *Authorization* that will cover this appointment.
- The calculation will need to consider all *Authorizations* that match on the expected *Payer* which are authorized for the *Date* of the visit, and for the *Category* of the visit. *Authorizations* that have a status of *Withdrawn* or *Denied* are ignored and are not assigned to the appointment/visit.
- Any Authorization (regardless of Status) that has a blank Category Grouping is ignored and is not assigned to the appointment/visit. For each of those Authorizations, the application will ensure that all schedules/visits meet the definition of the Authorization. It is possible that there is a schedule that could go from authorized to unauthorized when adding this visit.

Special Handling for Overlapping Authorizations

It is possible to have overlapping *Authorizations* (i.e. same *Payer*, same *Category Grouping*, overlapping dates). If the visit/appointment could be covered by multiple *Authorizations*, the system will use the *Authorization* with the earlier issued/received date.

For the Authorization Alert Checking, the system will review only the Authorization that the appointment/visit is associated with. The Visit x of y Counts will only be reflective of that one Authorization and not multiple Authorizations – that is, if the appointment/visit falls within overlapping Authorizations.

• Once it is known whether the actual visit/scheduled visit will be authorized, the system will set the new *Authorization* button to RED if the visit requires an *Authorization* and one is not found, or one is found but has been exhausted (*Authorization Count* used up). If an *Authorization* is not required, the *Authorization* button will be invisible. For all other conditions, the button will appear as all other





buttons. If the user selects the *Authorization* button, the *Authorization* window (shown above) will display and will allow the user to add/update/view the *Authorizations* that exist.

- If the visit/appointment does not require an *Authorization*, the system will display no messages and set the *Authorization* button invisible.
- If the visit/appointment does require an *Authorization* and one is found and is not exhausted, the system will determine if it is within the alert thresholds defined on the *Carrier*. The system will look at the number of remaining visits. If the *Number of Remaining Visits* is less than or equal to the *Threshold Limits* on *Number of Visits* defined by the *Carrier* (factoring in *Effective Dates* and *Category*) an alert message must be displayed (see table below for details on the message).

The system will now consider the remaining days on the *Authorization*. If the difference between the *Current Date* and the Thru Date of the *Authorization* is less than or equal to the *Threshold Limits* on number of days defined by the *Carrier* (factoring in *Effective dates* and *Category*) an alert message will be displayed (see table below for details on the message).

If both conditions described above exist (over *Threshold Limits* for days and visits), an alert message will be displayed (see table below for details on the message).

If the visit/appointment requires an *Authorization* and one is found and the *Alert Checks* above were not met, the system will display a message that informs the user of the *Visit Number* and the *Total Number of Authorized Visits* (see table below for details on the message).





	Authorization		
Condition	Button	Alert Message	Alert Color
No Authorization Bequired	Invisible	No Message	N/A
Authorization Required but no	IIIVISIDIE		
authorization found	Enabled - Red	(Red)	Red
Authorization required and		(ned)	heu
authorization exists with a status			
of "Authorized" and authorized			
visits and remaining visits greater			
than defined visit alert and date			Green
difference between today and			
authorization thru date greater	Enabled Gray w/	Authorized - xxx of	
than defined days alert	black lettering	vvv (Green)	
Authorization required and	Ŭ		
authorization exists with a status			
of "Authorized" and with			
authorized visits and remaining			
visits less than or equal to			Red
defined visit alert and data			
difference between today		Authorized - xxx of	
authorization thru date less than	Enabled Gray w/	yyy (9 visits / 99	
or equal to defined days alert	black lettering	days Remaining)	
Authorization required and			
authorization exists with a status			
of "Authorized" and with			
authorized visits and remaining			
visits less than or equal to			Red
defined visit alert and data			
difference between today		Authorized - xxx of	
authorization thru date greater	Enabled Gray w/	yyy (9 visits	
than defined days alert	black lettering	Remaining)	
Authorization required and			
authorization exists with a status			
of "Authorized" and with			
authorized visits and remaining			Ded
visits greater than defined visit			Red
between today authorization		Authorized www.of	
thru date less than or equal to	Enabled Grayw/	Authonized - XXX Or	
defined days alert	hlack lettering	Remaining)	
Authorization required and	black lettering	nemaining)	
authorization exists with a status			
of "Pending" and authorized			
visits and remaining visits greater			
than defined visit alert and date			Green
difference between today and		Pending	
authorization thru date greater	Enabled Grav w/	Authorization - xxx	
than defined days alert	black lettering	of yyy (Green)	
Authorization required and	Enabled Gray w/	Pending	
authorization exists with a status	black lettering	Authorization - xxx	





of "Pending" and with authorized		of yyy (9 visits / 99	
visits and remaining visits less		days Remaining)	
than or equal to defined visit			Red
alert and data difference			
between today authorization			
thru date less than or equal to			
defined days alert			
Authorization required and			
authorization exists with a status			
of "Pending" and with authorized			
visits and remaining visits less			
than or equal to defined visit			Red
alert and data difference		Pending	
between today authorization		Authorization - xxx	
thru date greater than defined	Enabled Gray w/	of yyy (9 visits	
days alert	black lettering	Remaining)	
Authorization required and			
authorization exists with a status			
of "Pending" and with authorized			
visits and remaining visits greater			
than defined visit alert and data		Pending	Red
difference between today		Authorization- xxx	
authorization thru date less than	Enabled Gray w/	of yyy (99 days	
or equal to defined days alert	black lettering	Remaining)	

NOTE: If the *Status* of an appointment is changed to *Canceled*, *No Show*, or *Walk Out*, the *Authorization* is re-cycled, and the number remaining is increased.

Alert Messages, depending on the condition, will display at the bottom of the [Follow-Up Schedule] window.





Remove Authorizations from Appointments

The software will remove *Authorizations* from appointments when the *Status* on an appointment is updated to *Canceled, No Show* or *Walk-Out* because services were not rendered. An *Authorization* will not be assigned when the *Status* of the appointment is any of those listed.

NOTE: If the *Status* of an appointment is changed to *Canceled*, *No Show*, or *Walk Out*, the *Authorization* is re-cycled, and the number remaining is increased.





Calendar view

The application has indicators on the Calendar view to show when a scheduled appointment requires an authorization and there isn't an authorization to cover it, and also when a scheduled appointment requires an authorization and there is an authorization to cover it.

In the screen display below:

- Example 1: Illustrates a scheduled appointment that requires an *Authorization,* yet an *Authorization* does not exist or one exists but has been exhausted. A red circle-X icon is shown to indicate no *Authorization* found
- Example 2: Illustrates a scheduled appointment that requires an Authorization, and an Authorization does exist to cover the appointment. A green check icon is shown to indicate an Authorization was found.
- Example 3: Illustrates a scheduled appointment that does not require an Authorization therefore no icon is displayed.
- Users may right-click on an appointment to select an option to create or edit an *Authorization*. When selected, the [**Authorization**] window is opened (previously shown). This will allow the user to add/update/view all the *Authorizations* for this patient.

NOTE: If the *Status* of an appointment is changed to *Canceled*, *No Show*, or *Walk Out*, the *Authorization* is re-cycled and the number remaining is increased.





🔶 Provid	ler Group Daily Appointme	nt Schee	duling (Integritas O	cc Med &	Urgent Ca	re)						×
	Bates, Christine A, MD 💌	Mennis	, Dennis T. DO 💌	Singer, Sa	mmy MD	•	Nancy Newman, RN	-	Trane, Thomas PT	-	Friday	Aug 8, 2014
8:00 am	Rusty Nail / Pending	2										
8:10						_						ment Details
8:20											Sandy Bea	ach / Scheduled
8:30											Trash 'R' WC Follor	Us Waste Mgmt
8:40	June Bugg / Scheduled	3	🔸 Rusty Nail	•	— X	- 4						, op
8:50			Log Visit									
9:00			Change Visit									
9:10	Sandy Beach / Schedule	1	Delete Visit									
9:20			Read Notes									
9:30			New Appointmer	ıt							Tod	ay's Visits
9:40			Change Any App	ointment							Check	In a Patient
9:50			New Reservation	ı								Indiducite
10:00			Log Walk-In Visit	:							Todaw	Cohoduling
10:10			New Visit from Se	chedule							Todays	socheduling
10.20			Change Any Visit								Schedule	an <u>A</u> ppointment
10:30			Cut Appointment								Prin	nt Today's
10:50			Paste Appointment	i It							Sci	heduling
11:00			Authorization									
11:10			Addition2ddorr	-		_					Vie <u>w</u> a Co	mpany Protocol
11:20											Change t	o another Clinic
11:30						_						
11:40												
11:50												
12:00 pm												
12:10												
* Color Key	x Private Practice	Employe	r Service/Occ Med	Worke	ers' Comp		Multiple Bookings	;	Blocked Times		₩ 1	J Close





Calendar Print

The software has the capability to print Authorization indicators on the 5-up and 1-up Calendar to show when a scheduled appointment requires an authorization and subsequently whether or not an authorization is available to cover the visit.

In the report example below:

- Example 1: Illustrates a scheduled appointment that requires an *Authorization,* yet an *Authorization* does not exist or one exists but has been exhausted. A red circle-X icon is shown to indicate no *Authorization* found
- Example 2: Illustrates a scheduled appointment that requires an Authorization, and an Authorization does exist to cover the appointment. A green check icon is shown to indicate an Authorization was found.
- Example 3: Illustrates a scheduled appointment that does not require an Authorization therefore no icon is displayed.

NOTE: If the *Status* of an appointment is changed to *Canceled*, *No Show*, or *Walk Out*, the *Authorization* is re-cycled and the number remaining is increased.

Date: 8/08	3/14	Integritas Practitio	Page: 1		
Times	Bates, Christine A, MD	Mennis, Dennis T. DO	Singer, Sammy MD	Nancy Newman, RN	Trane, Thomas PT
8:00AM	Rusty Nail Trash 'R' Us Waste Mgmt WC Follow Up/Pending	2			
8:10AM					
8:20AM					
8:30AM					
8:40AM	June Bugg Trash 'R' Us Waste Mgmt WC Follow Up/Scheduled	3			
8:50AM					
9:00AM					
9:10AM	Sandy Beach Trash 'R' Us Waste Mgmt WC Follow Up/Scheduled	1			





			Scheduled Appointments for Ba		
_	Time	Visit Category	Purpose or Description	Patient / Company	Status
•	8:00AM 10 Min	WC FOL	WC Follow Up	Rusty Nail Trash 'R' Us Waste Mgmt	Pending
	8:40AM 10 Min	WC FOL	WC Follow Up	June Bugg Trash 'R' Us Waste Mgmt	Scheduled
8	9:10AM 10 Min	WC FOL	WC Follow Up	Sandy Beach Trash 'R' Us Waste Mgmt	Scheduled





Authorization Assignment

When a visit is recorded, saved to the database, and it is priced out with the *Payer* established, the software assigns the *Authorization* to the visit so that if the *Payer* requires the *Authorization* to be included on the bill, it will be available.

Currently, on the [Enter Visit] window under the BILLING tab there are data entry fields for the *Authorization Number*, the *Authorized By*, the *Authorized Date* and the *Authorized Phone*.

Within the [Enter Visit] window, if an *Authorization* is found to cover the visit, the *Authorization #* field will populate with the correct *Authorization Number* and the field will become "Display Only". All other functionality remains the same. The *Authorized By*, *Authorized Date*, and the *Auth Phone* fields will be available for update.

🔸 Enter Visit (Ben Adrill / Trash 'R' Us Waste Mgmt / Integritas Works-A-Lot Clinic)	23
General Insurance Medical Results Billing Payments Audit	* = Required
Billing Status: Billable Visit Billing Type: Workers' Comp	
Calc Charges Visit Charge: \$0.00 Net Reimb: \$0.00	Company
No Charge Visit	Demographics
Payer Information	Encounter
Override Payer: <default> Payer Account:</default>	Authorization
Purchase Order:	Charting
Authorization	Charges
Authorization #:	Orders
Authorized By:	Prescriptions
Authorized Date: Auth Phone:	Beferrale
	Bashistiana
	Hestilicijuns
Hospital Account No: Medical Record No:	
	E Forms
	Report
Correct Entity View Patient Chart	🗙 Cancel





Reports

The software Reporting includes a report that shows all authorizations that are in a selected status.

The Authorization reports are located in the Report Launchpad under Provider Practice within the Case Management tab.

Case Management	Authorization Management	Company
<u>Potential Problem Cases</u>	Authorization Status Report	Clinic
Case Follow-up Delinguency	Authorization Alert Report	
Case <u>C</u> ost Analysis		
Case Cost Comparisons	L	-
Lost Time Analysis		
Lost Time Comparisons		
Did not Return Report		
		📇 Set Printer
		To Close

The report is called the Authorization Status Report

The report window to collect report options is displayed below:

🔸 Authorization Status Repo	t (All Companies)	23
Report Options		More Options
	Report By 1) Payer Selecting: Image: Compare the selection of the selection o	✓ All Companies Company
Select Auth Statu	: Pending	Urganigation
Report Title: S <u>u</u> btitle:	Authorization Status Report Status of Pending	CSV File
Memorize	V Preview Report	Cancel





Report Criteria:

- First Report By will include Payer and Patient Name
- Second Report By will include Payer, Patient Name and <None>
- Select Auth Status User selects the *Authorization Status* to filter the data contained within the report.
- Users may enter a *Report Title* and a *Report Subtitle*. The Report Subtitle will default to the selected *Authorization Status* in the window above.
- Selections of More Options:
 - o Companies,
 - Organizations,
 - Selection of.CSV File
- The *Memorize* button will store the report options for future use. If the client is using the Software Automations Service, the batched reports can then be automated as well.
- To create report and/or the .csv file, users may select the *Print* button.

Other report considerations:

- Users have the ability to Schedule report to run unattended.
- Users have the ability to *Preview* the Report.
- Users have the ability to direct the output to Print.
- Users may cancel the report without printing.
- The Authorization Status Report includes Security Filtering for (EAP, HIV); the same as other Incident reports.
- It also includes *Default Clinic and Company Filtering*. No clinic.
- There is no *Clinic* button on the Report Request as is the case with all *Incident/Case Based* Reports.

Sample of Report layout and data content:





Authorization Status Report Net Health Altoona Development Team Status of Authorized

Reporting as of Date: 1/19/2015 Reporting by Patient Name, Payer

Patient	DOI	Authorization #	Payer	Grouping	From Date	Thru Date	Authorized	Remaining
Adrill, Ben	7/18/2014		Liberty Mutual- Johnson	wc	7/28/2014	7/31/2014	999,999	999,999
Adrill, Ben	7/18/2014		Liberty Mutual- Johnson		7/28/2014	7/28/2014	5	5
Adrill, Ben	7/11/2014	10004	StayHealthy Group Health	PT	7/01/2014	7/27/2014	10	7
Borax, Robert	7/30/2014	10013	Liberty Mutual - Alabaster	WC	8/01/2014	8/31/2014	5	5
Day, Sonny	7/30/2014		Travelers		7/15/2014	7/31/2014	5	5
Grizzlewit, Gertrude	8/01/2014	123456	TPA Claims Management	WC	8/01/2014	8/31/2014	5	0
Kirk, James Tiberius	7/21/2014	123456	Liberty Mutual- Johnson	WC	7/01/2014	7/31/2014	5	4

The software Reporting includes a report that shows all scheduled appointments/visits that require an authorization, but there currently is not an authorization to cover it. The Authorization reports are located in the Report Launchpad under Provider Practice within the Case Management tab.

The report is called the Authorization Alert Report.

Authorization Alert Report (All Companies) x Report Options More Options Report From: 12/01/2014 <u>T</u>hru Date: 12/31/2014 P Report By 🗸 All Companies 1) Payer • Selecting: P Company 2) Patient Name • Organization Report Title: CSV File Authorization Alert Report Subtitle: <u>M</u>emorize V Preview Report 📇 Print 🗙 Cancel

The report window to collect report options is displayed below:

Report Criteria:

- *From/Thru* date range •
- First Report By will include Payer and Patient Name •
- Second Report By will include Payer, Patient Name and <None>
- Users may enter a Report Title and a Report Subtitle. •
- Selections of More Options:
 - o Companies,
 - Organizations, 0
 - Selection of.CSV File 0





- The *Memorize* button will store the report options for future use. If the client is using the software Automations Service, the batched reports can then be automated as well.
- To create report and/or the .csv file, users may select the Print button.

Other report considerations:

- Users have the ability to Schedule report to run unattended.
- Users have the ability to *Preview* the Report.
- Users have the ability to direct the output to Print.
- Users may cancel the report without printing.
- Because the Authorization Alert Report displays Appointment and Visit data related to Incidents, it includes Security Filtering for (EAP, Wellness) the same as other Visit and/or Scheduling reports.
- The Authorization Status Report includes Default and Company Filtering.
- There is no *Clinic* button on the Report Request as is the case with all *Incident/Case Based* Reports.
- The Authorization Alert Report is sorted according to the "Report By" drop down lists on the request window and then by Date/Time within the "Report By" sort.

Sample of Report layout and data content:





Authorization Alert Report Net Health Altoona Development Team

Reporting for the Period: 1/01/2014 Thru 12/31/2014 Reporting by Patient Name, Payer

Patient	DOI	Grouping	туре	Date	Time	Payer	Clinician
Adrill, Ben	07/11/2014	WC	Visit	07/10/2014	12:33PM	AETNA	
Adrill, Ben	07/11/2014	WC	Visit	07/11/2014	12:38PM	AETNA	
Adrill, Ben	07/11/2014	WC	Appt	07/25/2014	11:00AM	AETNA	
Adrill, Ben	09/10/2014	WC	Appt	09/10/2014	09:40AM	AETNA	
Adrill, Ben	09/10/2014	WC	Visit	09/10/2014	10:00AM	AETNA	Patty Porter, RN
Adrill, Ben	09/10/2014	WC	Visit	09/10/2014	11:00AM	AETNA	Patty Porter, RN
Adrill, Ben	09/16/2014	WC	Visit	09/16/2014	02:09PM	AETNA	Patty Porter, RN
Adrill, Ben	09/16/2014	WC	Visit	10/01/2014	12:26AM	AETNA	Patty Porter, RN
Agra, Vi	07/15/2014	WC	Visit	07/15/2014	05:13PM	AETNA	
Agra, Vi	07/15/2014	WC	Visit	07/15/2014	07:19PM	AETNA	
Agra, Vi	07/31/2014	WC	Visit	07/31/2014	12:22AM	AETNA	
Agra, Vi	07/31/2014	WC	Visit	07/31/2014	12:28AM	AETNA	
Agra, Vi	07/31/2014	WC	Visit	07/31/2014	07:02PM	AETNA	
Agra, Vi	07/31/2014	WC	Visit	08/14/2014	06:00PM	AETNA	
Almond, Candy	12/19/2014	WC	Visit	12/19/2014	07:37AM	Travelers	Patty Porter, RN
Drest, Natalie	10/20/2014	WC	Visit	10/20/2014	06:21PM	Travelers	Patty Porter, RN
Grizzlewit, Gertrude	08/01/2014	WC	Appt	08/01/2014	10:20AM	TPA Claims Management	
Kirk, James Tiberius	07/15/2014	WC	Visit	07/15/2014	10:00AM	Travelers	
Kirk, James Tiberius	07/15/2014	WC	Visit	07/21/2014	05:05PM	Travelers	





Summary

We hope that this guide has been helpful in setting up and utilizing Agility's Authorization Tracking feature. If you have questions or need assistance, please contact Net Health Support at: 844-464-9348, Option 3 or ehoccmed-support@nethealth.com

