

INSURANCE: THERAPY NOTES SCA AND EAP ENTER THE PREAUTH CODES



1. GO to BILLING SETTINGS (Tab at top below client name)

A screenshot of the TherapyNotes web application showing the Billing Settings page. The page is divided into several sections. The top section is "Policy Information" with fields for Copay, Deductible, Appointments, Payments Sent To, ID Number, Policy Group, Employer/School, and Plan Name. To the right is the "Insured Party" section with a "Relationship" dropdown menu. Below this is a "Secondary Insurance" section with a checkbox. The bottom section is "Pre-Authorizations" with a table for adding new entries. A blue arrow points from the "Policy Information" section to the "Insured Party" section. Another blue arrow points from the "Pre-Authorizations" section to the "+ Add Pre-Authorization" button. A third blue arrow points to the "Service Code" dropdown in the "Pre-Authorizations" table.

2. CLICK the **+Add Pre-Authorization** BLUE BOX to add the preauthorization. This is used for SCAs and EAPs.
3. You will also need to add the dates and the number of sessions authorized.

The insurance information should also be added in the top box, INCLUDING the ID number.

***REMEMBER: Don't forget to add the INSURED party is it is not the client. THIS IS VERY IMPORTANT! You will need the primary insured person's date of birth, address, and relationship to client.

***Remember: All EAP sessions must be **99404**, there is NO intake (90791) for an EAP

4. Click SAVE CHANGES (bottom left hand green button)