MESSA®

Provider Portal

User Guide

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Introduction

MESSA Provider Portal is a web-based collaboration portal that provides interdisciplinary team members with the ability to cooperatively and securely access real-time *Member* information, easily submit new *Authorization* and requests, and quickly check the status of previously submitted requests.

Audience

This document was created for the user of the **MESSA Provider Portal** application.

Purpose

This guide will introduce the user to basic navigation and the use of features within the **MESSA Provider Portal**.
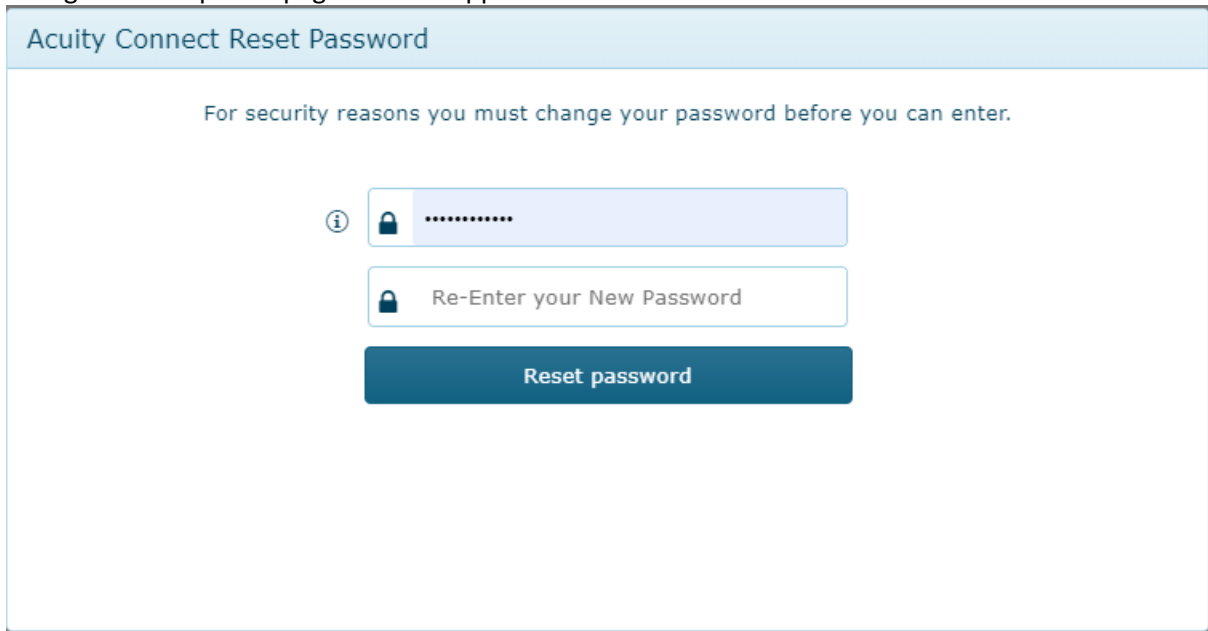
MESSA Provider Portal Login

Supported Browsers

The **MESSA Provider Portal** collaboration portal can only be used with the following web browser applications:

- *Google® Chrome™* – most recent version.

- *Microsoft Edge™* – most recent version.

Creating a Password

A new user setup email will be sent by MESSA once the **MESSA Provider Portal** login is configured. This email includes a link to create the password that will be used to log into the collaboration portal. Clicking this link opens a page that will appear similar to the screenshot below.

All fields on this screen must be filled out to create the password. The required *Login ID* and *First Name* are included within the new user setup email.

The password must adhere to the password policy outlined by the System Administrator. Browse the mouse cursor over the help text icon (ⓘ) next to the *Password* field to see all password requirements. Click the *Create Password* button once a password is entered to be directed to the log in page.

The following password policies are being enforced:

- It's OK to use dictionary words in your password.
- It's not allowed for your passwords to contain more than 3 consecutive characters of your Login ID.
- The maximum number of repeating, incrementing or decrementing numbers or letters that your password can contain is 4. (2222aaaaa, 8765432, etc)
- Your password must contain at least one of the different character types (upper case alpha, lower case alpha, numeric, symbols).
- Once a password has been used it can not be reused for 3 months
- Your password must contain at least 8 characters

Logging In

To log into **MESSA Provider Portal**, open one of the supported web browsers and enter the web address (URL) that is provided by MESSA administrator. If a password was just created via the *Create Your Password* screen, the web browser will be redirected to this login page.

Fill in the *Login ID*, enter the password that was created previously, and click the *Log In* button.

When logging in for the first time, two *Security Questions* must be selected and given answers. A forgotten or reset password can be reset by answering both questions correctly. Note that these answers are not case sensitive.

Use the drop-down boxes to select the desired question, type in the answer below, and then click the *Save Your Security Questions* button to proceed into the portal.

Forgot Password?

If the **MESSA Provider Portal** password is forgotten or needs to be reset, click on the *Forgot password?* link just below the *Log In* button.

Enter the *Login ID* for the account to be reset and click the *Send Instructions* button. An email will be sent to the email address associated with the *Login ID* with a link to reset the password.

If the *Login ID* is forgotten, please contact the MESSA at 800-336-0013.
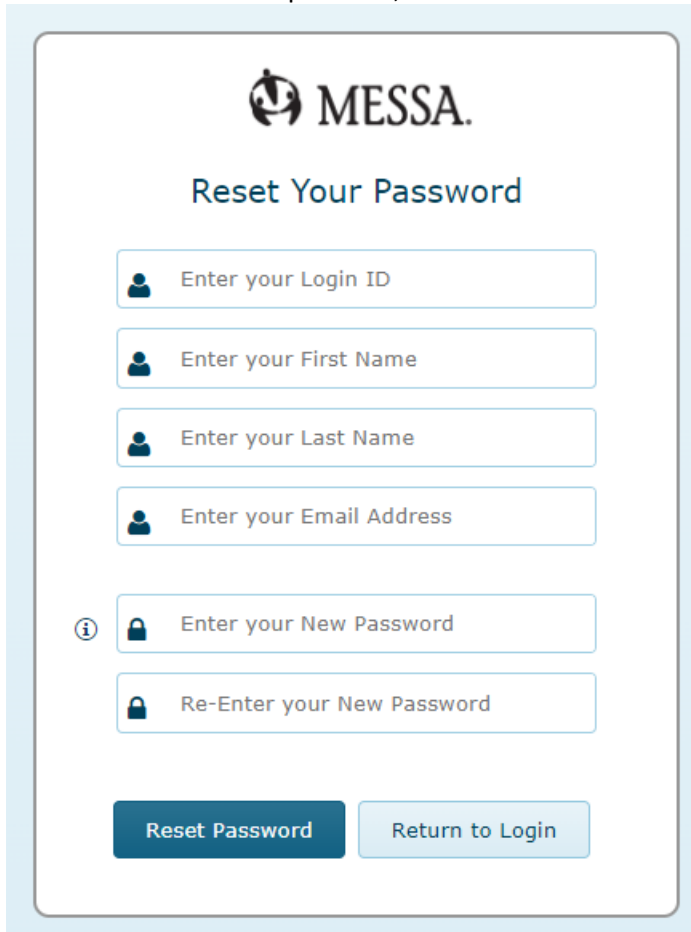
The email message will look something like this:
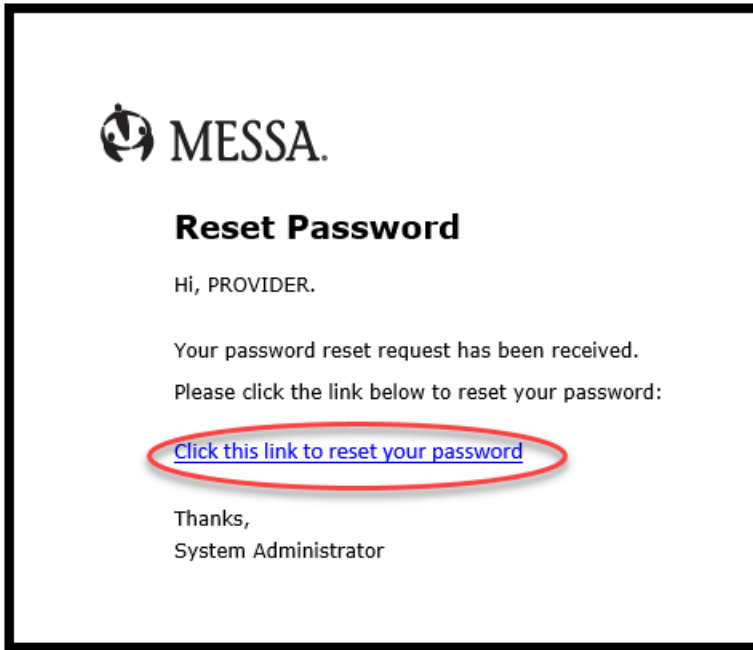
The link within the password reset email opens a page displaying the two *Security Questions* that were selected when the account was first used to login. These questions must be given the same answers as when they were first selected but <u>are not case sensitive</u>.

Once both answers are provided, click the *Reset Your Password* button.
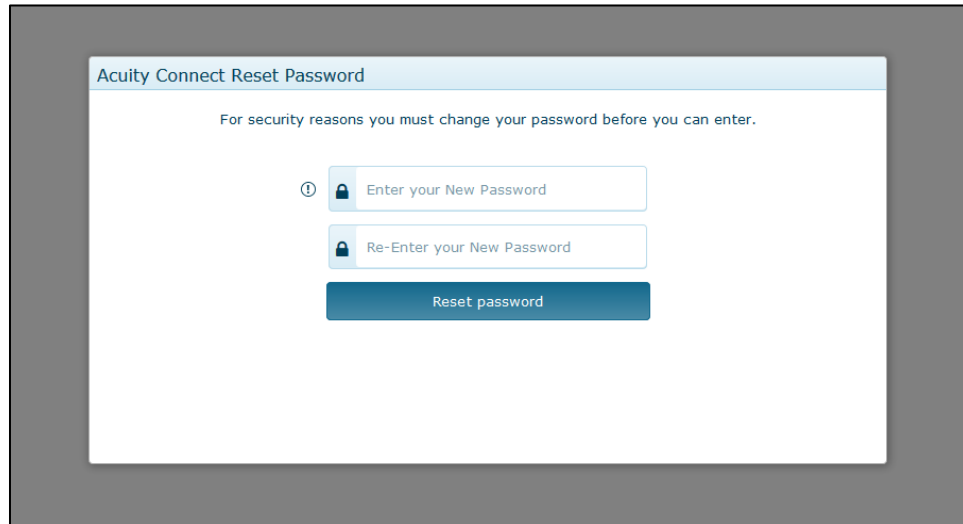
If the *Security Questions* were answered correctly, the *Reset Your Password* screen will appear. The *Login ID*, *First Name*, *Last Name*, and *Email Address* will need to be entered exactly in the same way as is on file with the **MESSA Provider Portal**.

Once all fields and the new password have been entered, click the *Reset Password* button to complete the change and log into the **MESSA Provider Portal** collaboration portal.

Password Reset by Administrator

The **MESSA Provider Portal** MESSA may require that a password be changed on a case-by-case basis or on a rotating schedule. In this situation, the following screen will appear after a successful login. *Security Questions* do not need to be answered in this case.
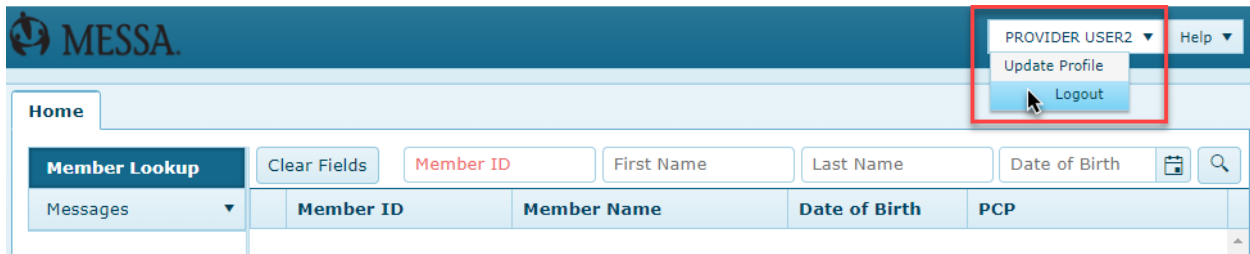
Enter the new password as desired and click the *Reset Password* button. Browse the mouse cursor over the help text icon (ⓘ) to verify the current password requirements.

Logging Out of MESSA Provider Portal

To log out of and exit **MESSA Provider Portal**, start by clicking the drop-down menu at the upper-right corner of the screen that lists the first and last name associated with this *Login ID*. Now click the *Logout* button.

In the example below, "MESSA Provider Portal" is the full name of the *User* listed on the drop-down menu.
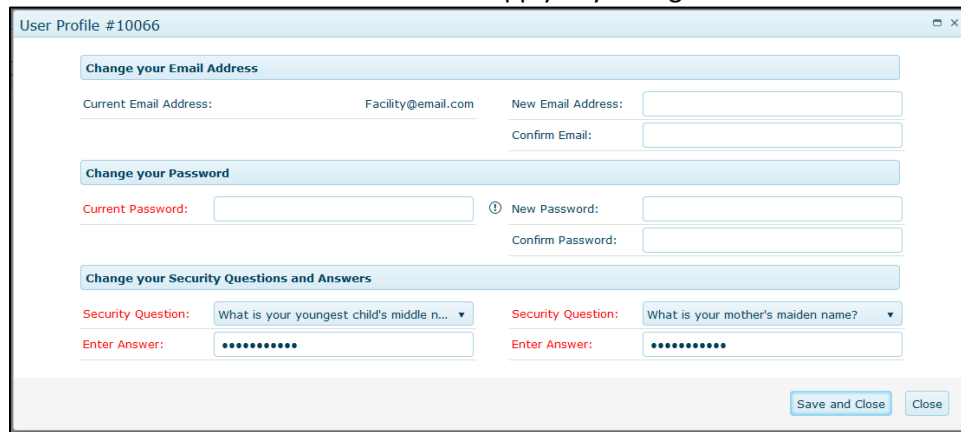
Updating the User Profile

The email address, password, *Security Questions*, and answers are all held within the *User Profile*. Any information in the *User Profile* can be changed once logged into the **MESSA Provider Portal**.

To update the *User Profile*, hover the mouse cursor over the drop-down menu next to *Help* in the upper-right corner of the screen. This drop-down will be named with the first and last name associated with this *Login ID*. Now click the *Update Profile* option.

Note that if any changes are made, the current password and the answers to the *Security Questions* must be filled in. Click the *Save and Close* button to apply any changes.

Help Menu

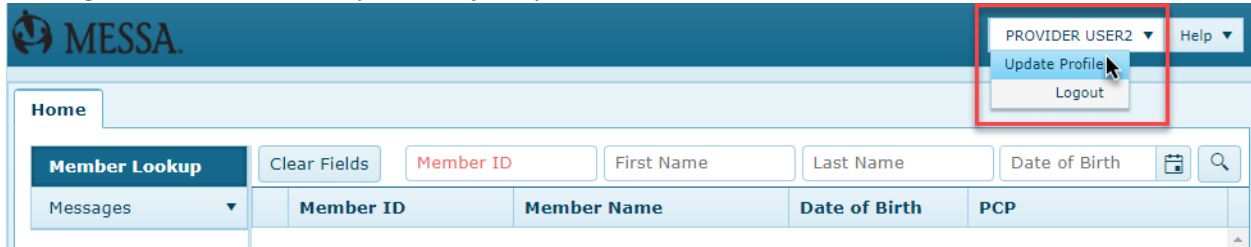The *Help* drop-down menu provides the following resources:
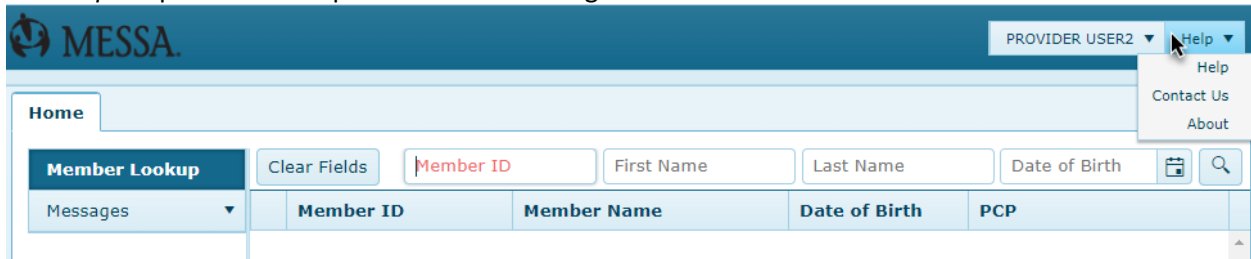
- **Help**: This option opens a PDF version of this user guide for reference.

- **Contact Us**: This option displays contact information for asking questions or reporting issues with the system. A *Message* box is provided for contacting MESSA.

- **About**: This option opens a window that displays the **MESSA Provider Portal** application versions.

Search and Data Entry Tools

The following search tools and aids can be used to help find the right records and speed up data entry within the collaboration portal.

MESSA Provider Portal follows best practices related to PHI by not displaying any records in *Browses* until some search criteria has been entered, either with the *Simple Search* feature or the *Advanced Search Filters*.

Simple Search

In the *Assessments*, *Messages,* and *Attachments* tabs, the *Simple Search* function checks to see if any words within the text of the record itself (*Detail*, *Assessment Description*, *Message,* or *File Name* columns) <u>contain</u> the search term. In the below example, the "view" text was used to find two *Messages* with "view" contained within the *Message* column. *Assessments*, *Messages,* and *Attachments* are referred to as "child records" throughout this document.
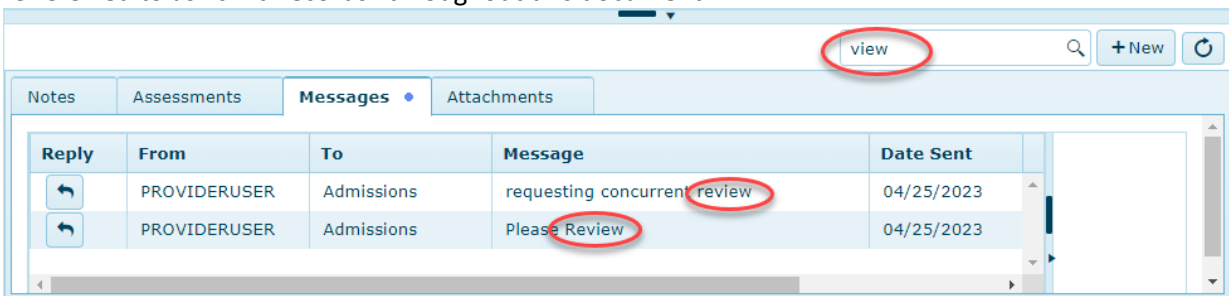
Drop-down Lists

MESSA Provider Portal fields use drop-down lists whenever multiple possible values can be selected. Two types of drop-down lists are found in the portal.

If a field has a drop-down arrow (⏷), click this arrow to show a list of <u>the first twenty</u> available options. Click on one of the options to select it. This type of drop-down field is used when only a single entry can be entered. For example, selecting "ELECTIVE" replaces the "EMERGENCY" entry.
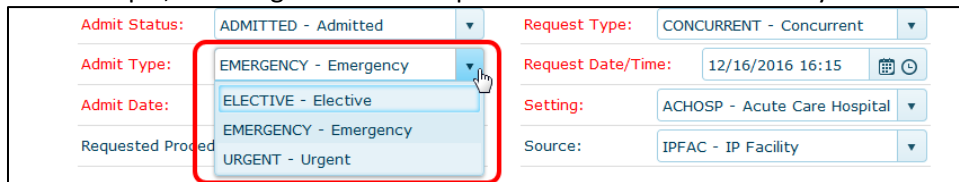
To find a specific option or an option not listed in the first twenty, click into the field and start typing. As each letter ("a," then "c," then "u," etc.) is entered, the list refreshes to show only options containing those letters. Select an option with the mouse or arrow keys and press *Enter* to confirm.
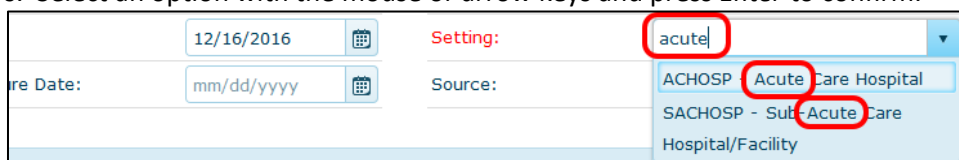
In addition, some text fields may also include a drop-down list when multiple possible values can be entered, such as the *Assessment Question* shown below. These fields are typically designated with the small grey text of "Select or type…"

Click the text field to show a list of the first twenty possible values. This type of drop-down list can be used to select multiple options for the same field. As each option is selected, they are added to the box.

Typing into the text box will also automatically refresh the drop-down list to show only options that contain the entered letters. Select an option with the mouse or arrow keys and press *Enter* to confirm.

Date and Time Fields

Many fields within **MESSA Provider Portal** require either a date, a time, or both. To make this process easier, click the date button (▦) to open a calendar drop-down for selecting the appropriate day and month. Once a day is selected, it will be formatted appropriately as "mm/dd/yyyy".

Some fields indicated with the date and time button (▦ ⊙), like the below *Request Date/Time* field, require a time stamp along with the date. If the date side of the button (▦) is clicked, a calendar will appear as noted above. If the time side of the button (⊙) is clicked, a drop-down list of times with 30-minute increments is displayed. Use both buttons to select the date and time desired.

Lookup Screens

While drop-down lists offer a quick and convenient way to choose from a short list of options, fields with larger or more complex sets of options also offer *Lookup* screens with a more robust set of search and filter options to help a user find an exact value.

If a field has a *Lookup* screen that can be used, such as the *Provider* and *Diagnosis* fields below, an ellipses button (…) will appear to the right of the field. To access the *Lookup* screen, click this button.

The below *Lookup* screen was opened from the *Diagnosis* field of an *Authorization* request. In this example, *Simple Search* was used to search for *Diagnosis Codes* involving "ketoacidosis." *Advanced Search Filters* are also available on every column.

Large Text Boxes

Text boxes that are intended for notes, comments, or a large amount of information will appear much larger than a normal text box to indicate that they can contain more than a single line of information.

These "large" text boxes support a large number of characters. To help manage this character limit, each large text box displays a live running count of the remaining characters available in the field.

Click and drag on the bottom right corner of the large text box to make the text area larger or smaller as needed. Click the flyout button (⬏) to open a larger pop-up text entry window.
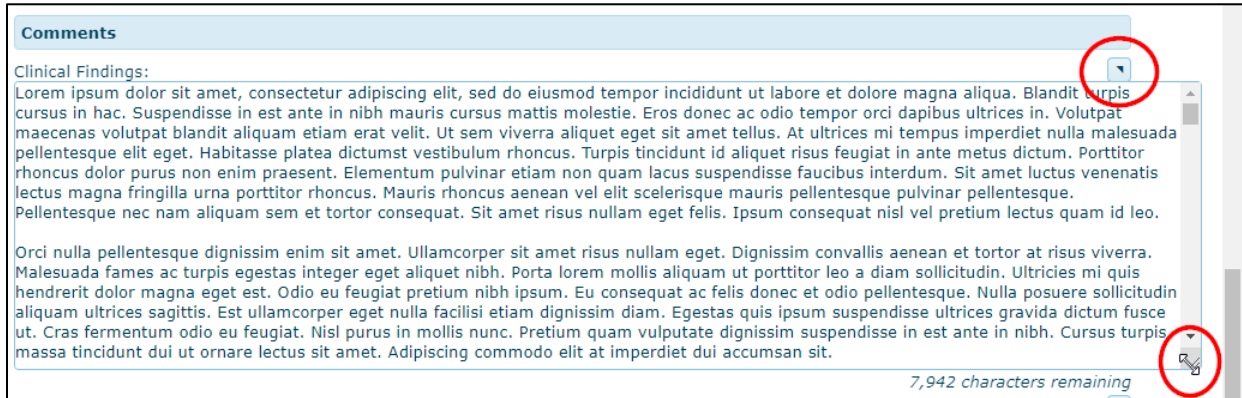
Comments

Clinical Findings:

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
Orci nulla pellentesque dignissim enim sit amet. Ullamcorper sit amet risus nullam eget. Dignissim convallis aenean et tortor at risus viverra. Malesuada fames ac turpis egestas integer eget aliquet nibh. Porta lorem mollis aliquam ut porttitor leo a diam sollicitudin. Ultricies mi quis hendrerit dolor magna eget est. Odio eu feugiat pretium nibh ipsum. Eu consequat ac felis donec et odio pellentesque. Nulla posuere sollicitudin aliquam ultrices sagittis. Est ullamcorper eget nulla facilisi etiam dignissim diam. Egestas quis ipsum suspendisse ultrices gravida dictum fusce ut. Cras fermentum odio eu feugiat. Nisl purus in mollis nunc. Pretium quam vulputate dignissim suspendisse in est ante in nibh. Cursus turpis massa tincidunt dui ut ornare lectus sit amet. Adipiscing commodo elit at imperdiet dui accumsan sit.

7,942 characters remaining

MESSA Provider Portal Icons and Buttons

The following table provides detailed descriptions of the icons found throughout the application.

| Icon	Description
Date	Opens a calendar drop-down box that can be used to select a specific date.
Date and Time	Opens a date drop-down box when clicking the calendar side (left). Opens a time drop-down box when clicking the clock side (right).
Delete	Removes a line of information that had been added to the record.
Drop-down Arrow	Opens a drop-down list of options that can be selected for the field.
Ellipses	Opens a lookup window that can be used to find a specific value to enter into the field.
PCP **Funnel/Advanced Search**	Opens *Advanced Search Filter* options that can be applied to the column.
Flyout Text	Opens a larger text box window.
Help Text	Displays the help text for a field when the mouse cursor is browsed over this icon.
P / S **Member Coverage**	Indicates a member's coverage status in the *Member Browses*. - The "P" letter represents *Primary* coverage. - The "S" letter represents *Secondary* coverage. - The green color represents *Active* coverage. - The red color represents *Termed* coverage.
Magnifying Glass	Starts a *Browse* search based on the text entered in the *Simple Search* box.
Admit Status: **Mandatory Fields**	Mandatory fields are indicated with red text. Data entry is required in all mandatory fields before saving a record.
PCP ▲ PCP ▼ **Column Headers**	Click to sort or change order. An up arrow indicates ascending order (A-Z or 1-99) and a down arrow indicates descending order (Z-A or 99-1).
Refresh	Updates the list of records in the *Browse* window to pull in any changes or new records.
Reply	Opens a new *Message* to reply to an existing *Message* and its original creator.
PDF Report	Creates a PDF summary of the current screen.

Browse Screens

After logging into **MESSA Provider Portal**, a *Browse* will be the first screen displayed in the portal. The *Browse* screens in **MESSA Provider Portal** are all primarily used to find *Members* and records.

When a *Browse* screen is first opened, a blank grid is displayed with "No items to display" text provided below. This is intended, as **MESSA Provider Portal** follows best practices related to PHI by hiding records until after search criteria has been entered. Records will only show after initiating a search within the *Member Lookup* *Browse*, or either using *Simple Search* or *Advanced Search Filters* in any other *Browse*.

All available *Browse* screens are listed on the left-side panel under the *home* tab. Click on any of the tabs on the left side to open that *Browse* screen. If a *Member* record is opened, click on the *Home* tab to return to the list of *Browses.*
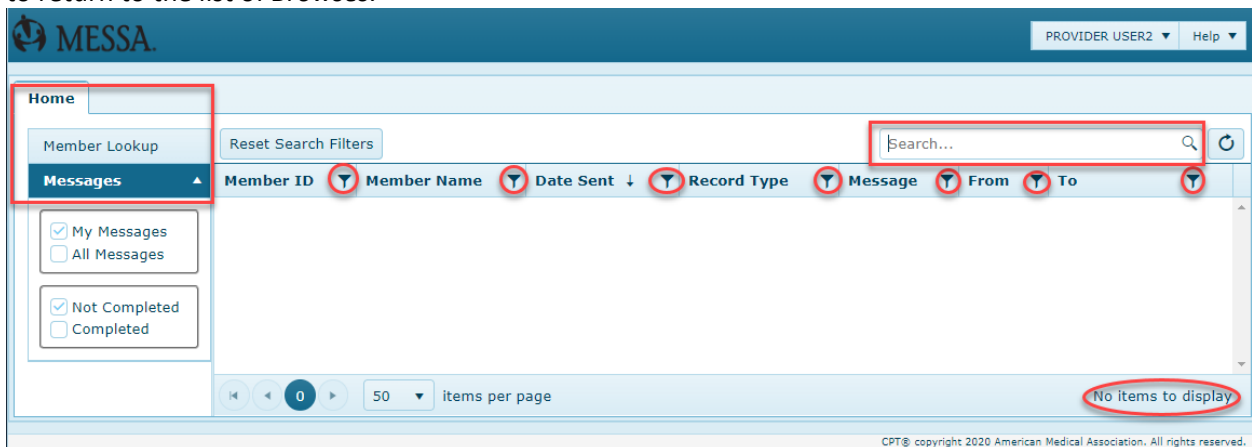

The *Browses*, functions, *Members*, and records available to each user will differ based on security and permissions setup provided by MESSA. As a result, some of the *Browses* and features described in the following may not be available. In addition, the *Members* and records that appear in a *Browse* search may be limited based on various criteria, such as if the record is connected to a particular *Provider* or if it involves behavioral health.

Member Lookup

Member Lookup is a simple *Browse* screen that can be used to access a single *Member* record at a time. This *Browse* screen is more restricted than most others, as it <u>does not include</u> the *Simple Search* box, any *Advanced Search Filters*, or the ability to export records.

To access a *Member* record, at least two fields need to be filled in:

1. *Member ID*
2. Either *First Name*, *Last Name*, or *Date of Birth*
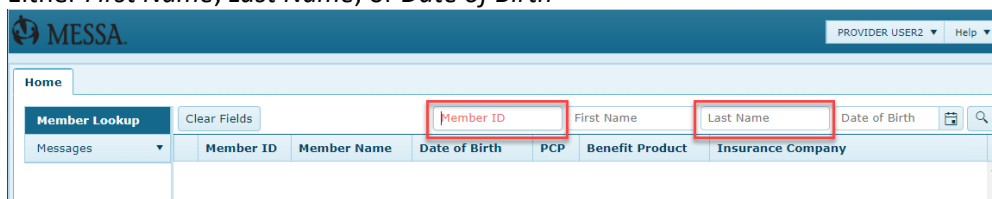
Messages Browse

Message records provide **MESSA Provider Portal** users with a method of communicating information or requests with other users or MESSA.

Messages displays all *Message* records that the user has access to. Any of the *Messages* displayed can be double clicked to navigate directly to the record the *Message* applies to.
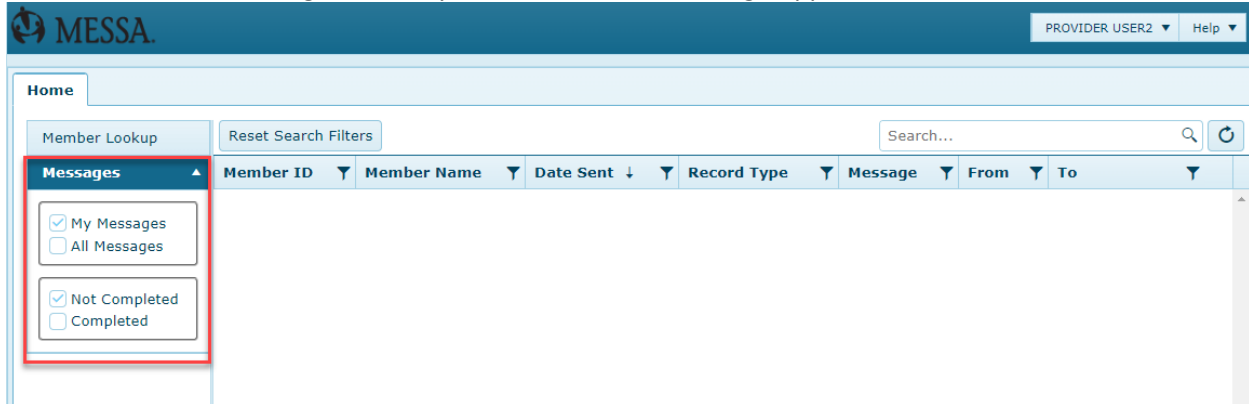
Use the back (◄) and forward (►) buttons to move through pages of *Messages*. The skip button (◄◄) returns to the first page. Use the drop-down list provided to set how many *Messages* are shown on a single page, such as "50" in the example above.

The following checkbox filters on the left side panel can be used to further filter search results:

- **My Messages**: This checkbox is marked by default and displays *Messages* assigned to this user.

- **All Messages**: If marked, this checkbox will display all *Messages* that the user has access to.

- **Not Completed**: This checkbox is marked by default and displays any *Messages* that have not been set to "Completed" Status. See the *Messages and Attachments Tabs* section.

- **Completed**: If marked, this checkbox displays all *Messages* that are set to "Completed" status.

Member Record

When a *Message*, *Member*, *Authorization* record is opened from a *Browse* screen, a new tab for that *Member* will open to the right side of *Home*. A maximum of five *Member* records can be opened at one time, each displayed in its own individual tab.

To switch between *Member* records, click on the named tab at the top. To close a tab, click on the "x" on the top-right corner. Clicking on the *Home* tab will return to the *Browse* screen choices.
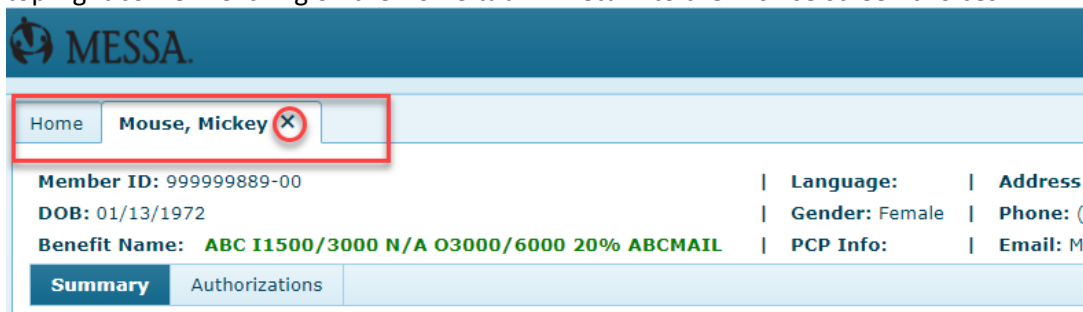
General demographic information is displayed in the top header of the *Member* record along with the *Member ID* and the assigned benefit package.

Three modules are presented below as separate tabs. The module (tab) selected by default will depend on which *Browse* was used to access this *Member* record (such as *Authorization*). Depending on the permissions and roles assigned, some of the following modules may not appear.

- **Summary**: This module contains a 360-degree summary of the *Member* record, including any allergies, coverage, *Providers*, and summaries of *Authorizations* and *Care Enrollments*.

- **Authorizations**: This module a provides detailed view of authorization requests for this *Member* as well as the ability to create new ones. Separate tabs within the module provide access to *Assessments* as well as *Messages* and *Attachments*. The records and features available may be limited by permissions and roles assigned.

Summary

The *Summary* module provides a 360-degree summary view of the *Member* record. If the *Member* record was opened from the *Member Browse*, this module is opened by default. All information is separated within several sections as detailed below.

The following sections of information are displayed on this screen:

- **Eligibility Information**: Lists all current and historical insurance plans that are associated with this member.

- **Authorizations**: Includes a general summary of all accessible authorization requests that have been submitted for this member.

Authorizations Module

The *Authorization* module provides a detailed view of authorization requests for the member. The records and features presented in the *Authorization* module may be limited by permissions and roles assigned by MESSA.

All accessible *Authorization* records are presented within a view similar to the *Authorization Browse* screen. Click the column headings to sort records or apply *Advanced Search Filters* to determine which specific records are displayed below.

Hover the mouse cursor over the *+ New Authorization* drop-down button to reveal all available *Authorization* record types that can be created by the user.

Assessments as well as *Messages* and *Attachments* for each *Authorization* are included in their own tabs within a child record panel on the bottom half of the screen. Use the sliding bar between both *Authorizations* and child record panels to increase or decrease the size of the panels.
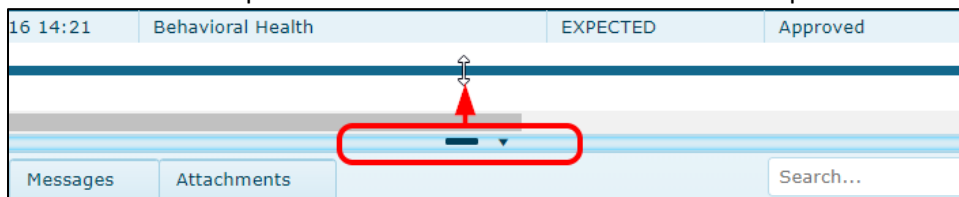
Double click on any existing *Authorization* record to open it in a read-only mode.

Creating a New Inpatient Authorization Request

To create a new *Inpatient Authorization* request record, proceed as follows:

1. Find the *Member* record within the *Member look up* and open the *Authorizations* module.

2. Hover the mouse cursor over the button labeled *+ New Authorization.*

3. Choose *Inpatient.*

4. Fields with a red label are mandatory. These fields must be filled in before saving an *Inpatient Authorization* record.

5. Click the drop-down list for *Request Type* and select one of the options. The options are "AS POST" if patient is already admitted, "PTS-STANDARD" or "PTS URGENT" if authorization is requested prior to inpatient admission.


6. Fill out or confirm that the following mandatory fields are filled out as desired: *Expected Admit Date* or *Admit Date*, *Request Date/Time*, *Setting*, and *Bed Level*.

7. Use the arrow buttons or type the number of days requested in the *Length of Stay* field.

8. Search for the *Servicing Provider*, *Servicing Facility*, and *Requesting Provider* by typing into the drop-down fields or clicking the ellipses buttons (⋯) to open *Lookup* screens. Click the add button (+) to document additional *Providers*.

9. Search for the applicable *Diagnosis,* or an optional *Procedure*, by typing into the dropdown field or using the ellipses button (⋯) to open a *Lookup* screen. Click the add button (+) to document additional codes.
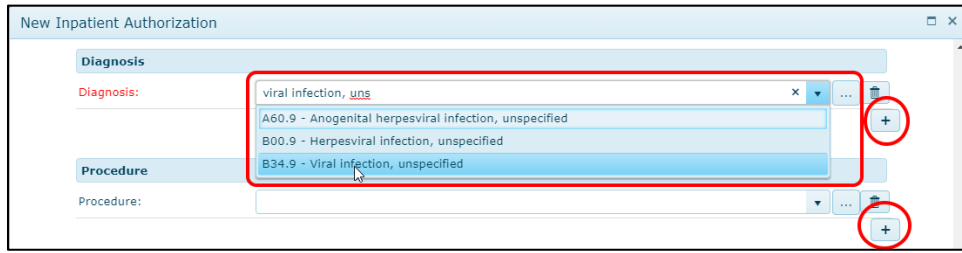
10. Type into the *Clinical Findings* field to enter comments. Click the flyout button (⬎) to open to a larger text entry window.
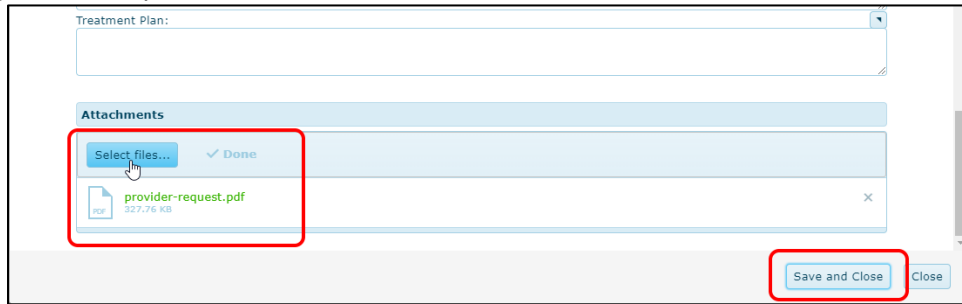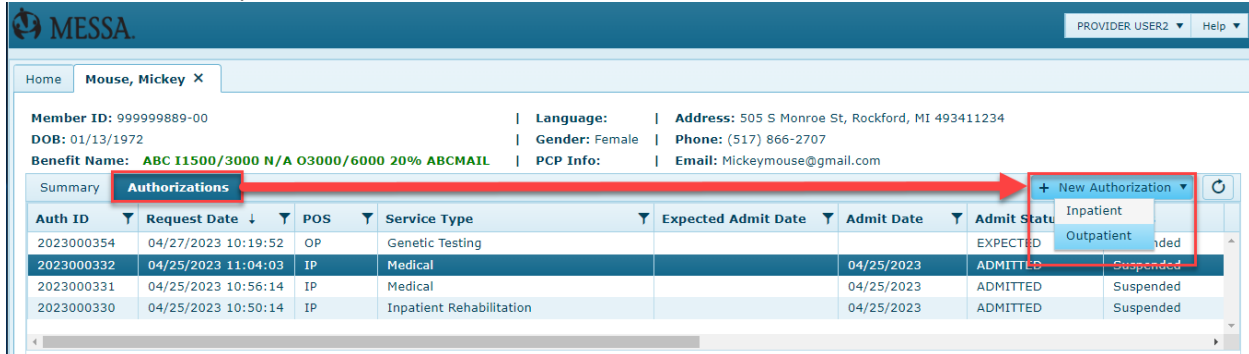

11. Add any relevant files, such as required clinical information, copy of license for verification or accredidation, by clicking the *Select Files…* button or by dragging the file into the box. The file displays as green if it is uploaded successfully.

12. Click the *Submit* button to complete the request. Note that the *Authorization* request <u>cannot be modified</u> in **MESSA Provider Portal** once it has been submitted.

13. The *Authorization* request is now submitted. An *Assessment* may be required before approval. Users should pay close attention to pop-up messaging in the system that will indicate when assessments are required. Users can review the status within the *Member* record or *Authorizations Browse*.

Creating a New Outpatient Authorization Request

To create a new *Outpatient Authorization* request record, proceed as follows:
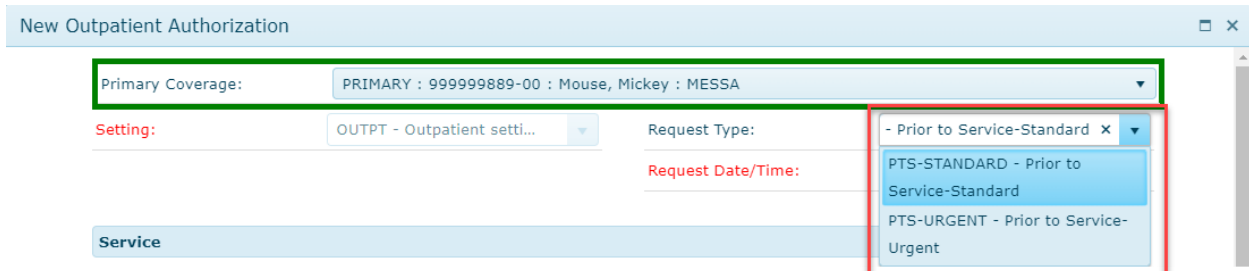
1. Find the *Member* record within the *Member look up* and open the *Authorizations* module.

2. Hover the mouse cursor over the button labeled *+ New Authorization.*

3. Choose *Outpatient*.

4. Fields with a red label are mandatory. These fields must be filled in before saving an *Outpatient Authorization*.

5. Choose request type of "PTS -STANDARD" or "PTS-URGENT". (Please note if selecting "PTS-URGENT" that request qualifies as an urgent prior authorization request.)

6. Search for the *Service Type* by typing into the drop-down field or click the ellipses buttons (…) to open a *Lookup* screen.

7. Fill in the mandatory *# of Services* field by typing up to four digits or clicking the arrow buttons. If authorization request is for private duty nursing please enter amount of hours per week in the *# of services* field.

8. The *Requested Start Date* is set to a default value. Use the date button (📅) to change it.

9. Search for the applicable *Procedure* by typing into the drop-down field or using the ellipses button (…) to open a *Lookup* screen.. Click the add button (+) to document additional codes.

10. Search for the *Servicing Provider*, *Servicing Facility*, and *Requesting Provider* by typing into the drop-down fields or clicking the ellipses buttons (…) to open *Lookup* screens. Click the add button (+) to document additional *Providers*.

11. A *Diagnosis* can be selected by typing into the drop-down field or using the ellipses button (⋯)
to open a *Lookup* screen. This field is only mandatory as long as there is no *Procedure Code*.
Click the add button (+) to document additional codes.

12. Type into the *Clinical Findings* to enter comments. Click the flyout button (◥) to open to a
larger text entry window.

13. Add any relevant files, such as an MRI scan, by clicking the *Select Files…* button or by dragging
the file into the box. The file displays as green if it is uploaded successfully.

14. Click the *Submit* button to complete the request. Note that the *Authorization* request <u>cannot be
modified</u> in **MESSA Provider Portal** once it has been submitted.

15. The *Authorization* request is now submitted.   An *Assessment* may be required before approval.
Users should pay close attention to pop-up messaging which will identify when assessments are
required. Users can review the status within the *Member* record or *Authorizations Browse*.

Assessments Tab

All accessible *Assessments* are collected within a child record tab under the associated *Authorization*. This tab can be used to conduct new *Assessments*, review prior *Assessments*, or compare responses from a member over time using the *Assessment Matrix*. If the tab contains any accessible *Assessments*, a blue dot (•) is displayed on the right side of the tab label.

Note that the assigned permissions and roles may limit the *Assessments* that are displayed within this tab, may limit the available functions, or may hide this tab completely.

Double click on one of the *Assessment* records shown to open it in a read-only view.

Conducting a New Assessment

Additional *Assessments* may be conducted and saved to an *Authorization* record by using prebuilt *Assessment Templates* provided by MESSA. An assessment is required for Private Duty Nursing, Substance Use Disorder and Mental Health providers. Any *Assessments* conducted in the portal can be accessed by MESSA. If an assessment is required for the prior authorization type being requested; a pop-up will come up on the screen:

To create a new *Assessment* record, proceed as follows:

1. Select the record that the *Assessment* will apply to. In the example below, a "Substance Use Disorder Residential" *Authorization* is selected.

2. Click the *Assessments* tab in the bottom half of the screen.

3. Click the *+ New* button.

4. Click the drop-down list to view and select one of the *Assessment Templates* that are available.

5. Conduct and fill out the *Assessment* per standard operating procedures.

6. Click the *Save and Close* button to complete the *Assessment*. An *Assessment* <u>cannot be modified</u> in **MESSA Provider Portal** after it is saved.
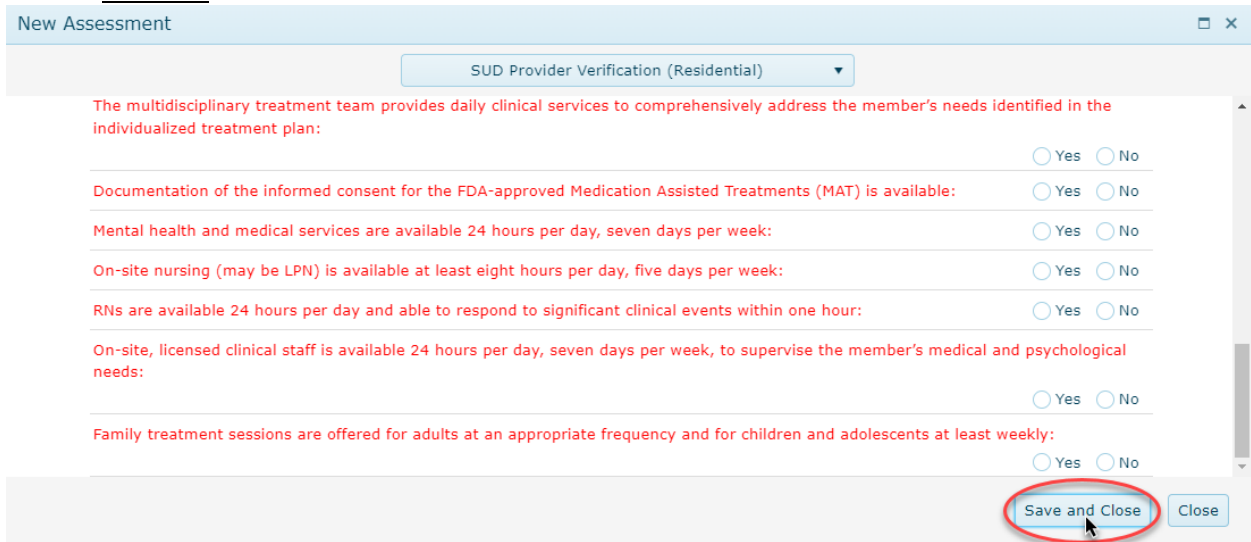
Messages Attachments Tabs

All accessible *Messages*, and *Attachments* are collected within child record tabs under the associated *Authorization* record. These tabs can be used to send or coordinate communications with MESSA or other team members. If one of these tabs contains any accessible records, a blue dot (•) is displayed on the right side of the tab label.

Note that the assigned permissions and roles may limit the child records that are displayed within these tabs, may limit the available functions, or may hide any of these tabs.

In the below example, the only *messages* shown apply to the *Authorization* record with the *Auth ID* "2023000332." Use *Simple Search* to search for specific records by the text in the *Detail*, *Message*, or *File Name* columns. Click the column headings to sort records in ascending or descending order.

Double click on one of the records shown to open it in a read-only view. Opening an *Attachment* record will send the attached file to the web browser's download queue.
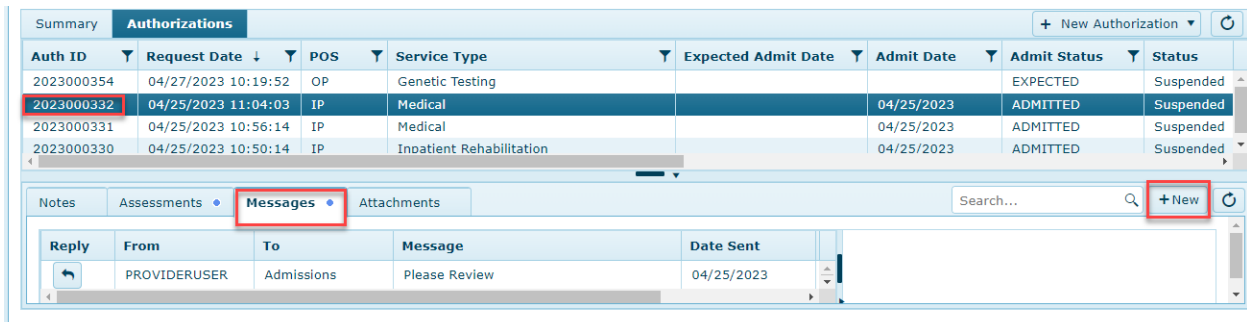
Adding a New Message

Messages can be created within any *Authorization* record to request concurrent review, ask questions, attach files, or provide information to MESSA. *Messages* are sent and assigned to a default intake team that is determined and set by MESSA. There is no limit to the number of *Messages* that can be added to a record.

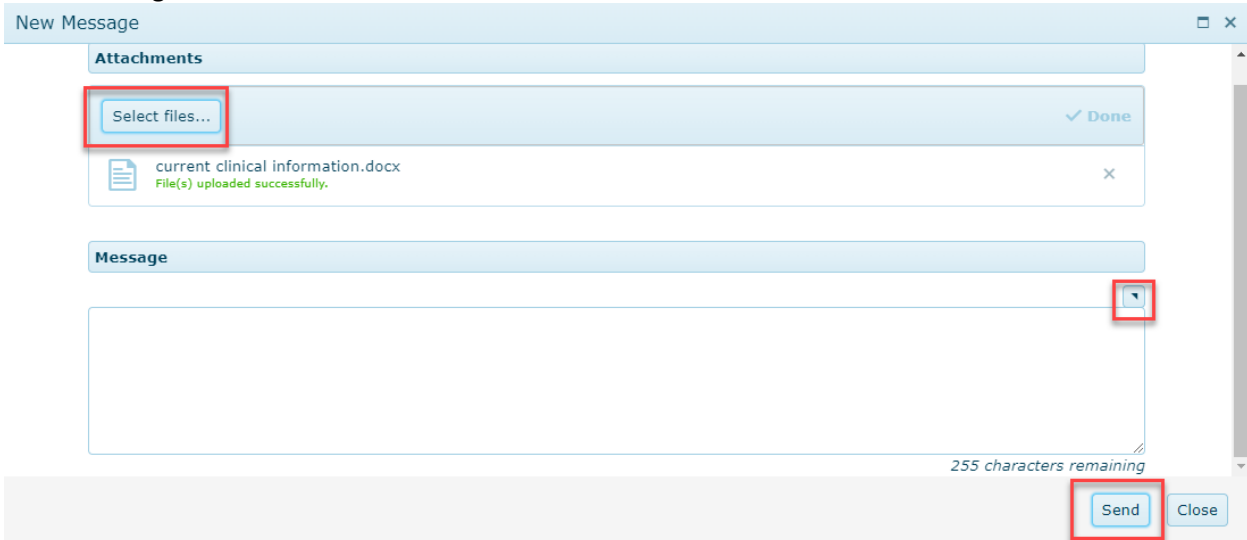To add a new *Message*, proceed as follows:

1. Select the *Authorization* record that the *Note* will apply to. In the example below, an *Authorization* with the Auth ID of "10001" is selected.

2. Click the Messages tab on the bottom half of the screen.

3. Click the *+ New* button.

4. Files can be attached along with the *Message* by clicking the *Select Files…* button or by dragging the file into the *drop files here to upload* box. When successfully uploaded, the file will appear below and highlighted in green.

5. Enter the desired text within the *Message* text box field. Click the flyout button (⬎) to open to a larger text window.

6. Click the *Send* button. A *Message* <u>cannot be modified</u> in the portal after it is saved. Any included files are added as *Attachment* records and can be found on the *Attachments* tab.
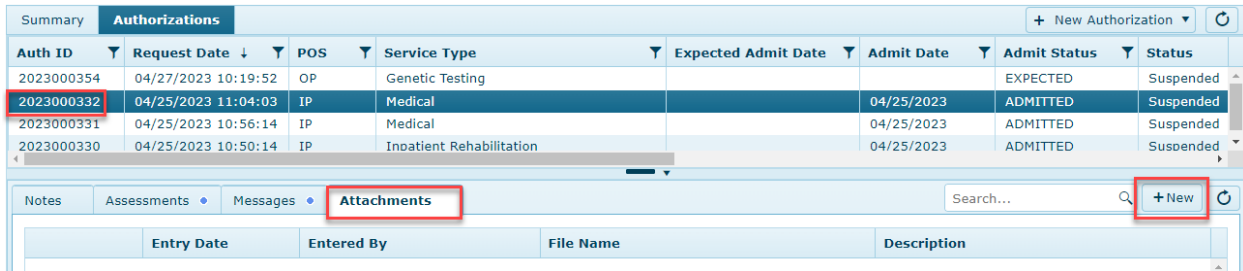
Adding an Attachment

Files can be added to any *Authorization* record as *Attachments* to provide additional information to MESSA or other team members.

Attachments may include required clinical documentation such as diagnostic reports, lab results, x-rays, or an MRI. Note that for security reasons, the portal will not accept files with the following extensions: .exe, .cpl, .csh, or .command.   There is no limit on the number of *Attachments* that can be added to a record.

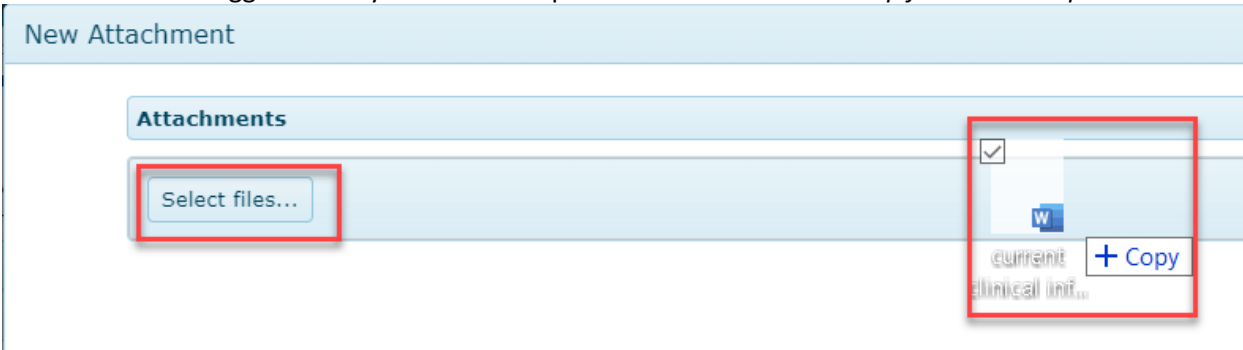To add a new *Attachment*, proceed as follows:

1. Select the *Authorization* record that the *Note* will apply to. In the below example, the *Authorization* record of *Auth ID* "10001" is selected.

2. Click the *Attachments* tab on the bottom half of the screen.

3. Click the *+ New* button.

Auth ID	Request Date ↓	POS	Service Type	Expected Admit Date	Admit Date	Admit Status	Status
2023000354	04/27/2023 10:19:52	OP	Genetic Testing			EXPECTED	Suspended
2023000332	04/25/2023 11:04:03	IP	Medical		04/25/2023	ADMITTED	Suspended
2023000331	04/25/2023 10:56:14	IP	Medical		04/25/2023	ADMITTED	Suspended
2023000330	04/25/2023 10:50:14	IP	Inpatient Rehabilitation		04/25/2023	ADMITTED	Suspended

Notes	Assessments ●	Messages ●	**Attachments**		Search...	+ New
	Entry Date	Entered By	File Name		Description	

4. Click the *Select files…* button to browse the computer for the file to be attached. The file may also be dragged directly from the computer to the box labeled *drop files here to upload*.

New Attachment

Attachments

Select files...

current clinical inf...   + Copy

5. Once the upload is successful, the file name is displayed below and highlighted in green. If the upload was not successful for any reason, the file name will be highlighted in red.

6. Click the *Save and Close* button. An *Attachment* <u>cannot be deleted</u> in **MESSA Provider Portal** after it has been uploaded and saved.

New Attachment

Attachments

Select files...   ✓ Done

current clinical information.docx
File(s) uploaded successfully.   ✕
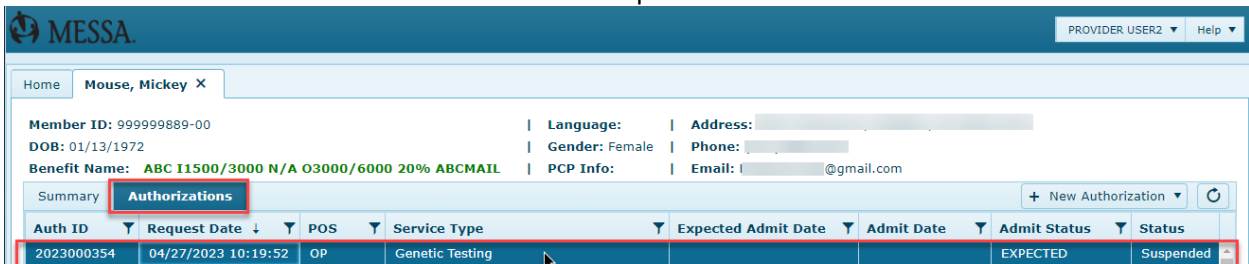
Save and Close   Close
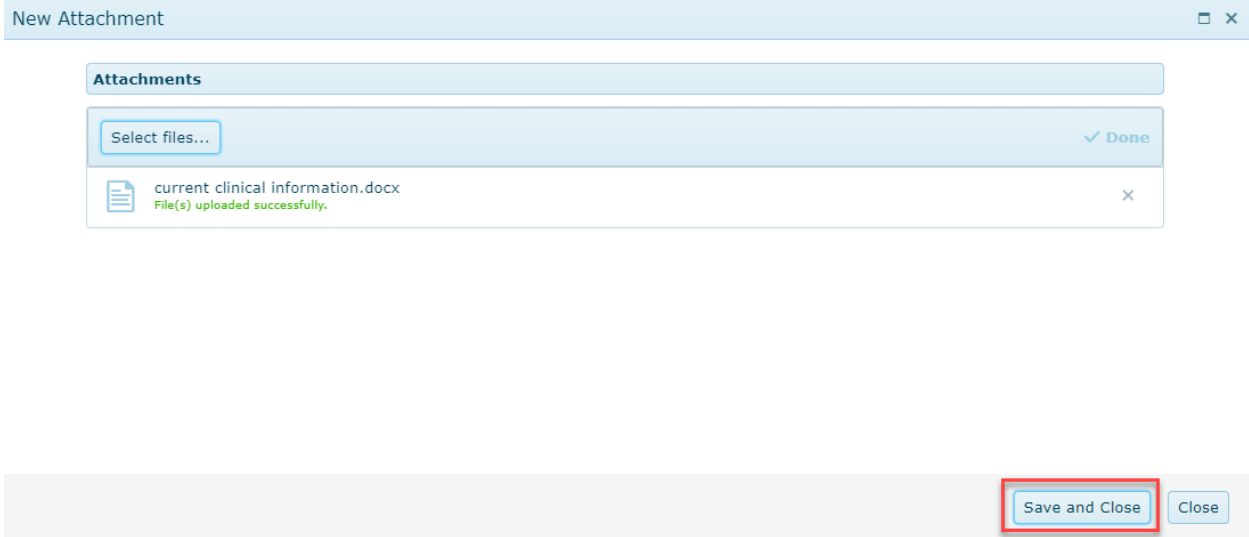
Reports

Several screens and record types within the MESSA provider portal include a red PDF button (📕) in the upper-right corner. This button can be used to export that screen or record to a downloadable PDF report. The following lists and describes the process for exporting each screen and record that supports this feature.

Authorization Record

To print a PDF copy of an *Authorization* record, proceed as follows:

1. Find and open the *Member* record by using one of the *Browse* screens available.

2. Click on the *Authorizations* module.

3. Double click on the *Authorization* record to open it.

MESSA   PROVIDER USER2 ▼   Help ▼

Home | Mouse, Mickey ✕

Member ID: 999999889-00 | Language: | Address:
DOB: 01/13/1972 | Gender: Female | Phone:
Benefit Name: ABC I1500/3000 N/A O3000/6000 20% ABCMAIL | PCP Info: | Email: _____@gmail.com

Summary | **Authorizations**   + New Authorization ▼   ↻

Auth ID	Request Date ↓	POS	Service Type	Expected Admit Date	Admit Date	Admit Status	Status
2023000354	04/27/2023 10:19:52	OP	Genetic Testing			EXPECTED	Suspended

4. Click on the red PDF icon (📕) in the top-right corner of the record as shown below.

5. A PDF report with the file name of "*Last, First Name* – Authorization Summary.pdf" will be generated and sent to the web browser for download.

6. The exported file will appear similar to the one shown below.