



INFINX  
Prior Authorization  
Software

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## Web Portal User Guide **4.0 Release**

## Table of Contents

Introduction .....	3
Overview .....	3
User Roles and Access .....	3
Login .....	4
Create a Case .....	4
Dashboard .....	6
List View .....	6
Progress Status (IPA 4.1 onwards) .....	7
View Case Summary .....	7
Filter .....	9
Sort .....	9
Search .....	10
Edit a Case .....	10
Cancel a Case .....	11
Completed Cases .....	11
Draft Cases .....	11
Account Management .....	12

## Introduction

The objective of this guide is to explain all features and functionalities of the Infinx Prior Authorization Software web portal. This product has been built to help you obtain your prior authorizations seamlessly and quickly.

## Overview

This software is an end-to-end prior authorization solution. Below is a list of all features that are detailed throughout this guide:

- Create a case for prior authorization
- Check on a submitted case's status
- Receive all case details
- Edit or Cancel an existing case
- Save drafts
- View/Sort/Filter all submitted cases
- Search for a specific case
- Manage accounts and users

## User Roles and Access

There are three roles that define a user's level of access.

### 1. Integrated User:

This role is for our customers who have their EMR, EHR, RIS, LIS, or PMS integrated with our Prior Authorization Software. This role allows access to view and track all cases and statuses. This user can create and edit cases within their own system but will not be able to create or edit cases within the web portal to preserve the consistency of data. Any follow-up action that this user might need to take (i.e., attach additional Clinicals) will be allowed.

### 2. Standard User:

This user will have access to all features related to obtaining a prior authorization within the web portal, including creating a case, editing a case, canceling a case, and checking case status.

### 3. Supervisor/Manager:

This role will have the same access as the Standard User with additional account management access. This user will be able to create and edit users.

## Login

You will be provided with a URL and credentials to log into your web portal.

Check the "Remember me" box for the product to save your login credentials.

If you forget your password or wish to reset, click on the "Forgot Password" link. An email will be sent to your inbox with instructions to reset.



The screenshot shows a login form titled "INFINX Patient Access". It includes fields for "Username" and "Password", a "Log In" button, and a "Remember me" checkbox. A link for "Forgot Password" is also present.

## Create a Case

Once you login to your web portal, you will be able to create your prior authorization cases.

<b>INFINX</b>		Current	Completed	Draft	Prior-Authorization/Insurance Verification ▾		Product
<b>List of Current Cases</b>		Showing 10 ▾ cases per List		+ New Case	Case Id/Appointment No./Patient Name		
Filters:	Status ▾	Facility ▾	Insurance ▾	Date Of Service ▾	View Filters		Reset Filters
Case ID	Appointment Number	Patient Name	Date of Birth	Date of Service	Facility	Insurance Company	Notifications
demo-240	1232134321	Test 1	03/22/1980	09/02/2020 12:00:00 AM	Carle Clinic	Cigna	0

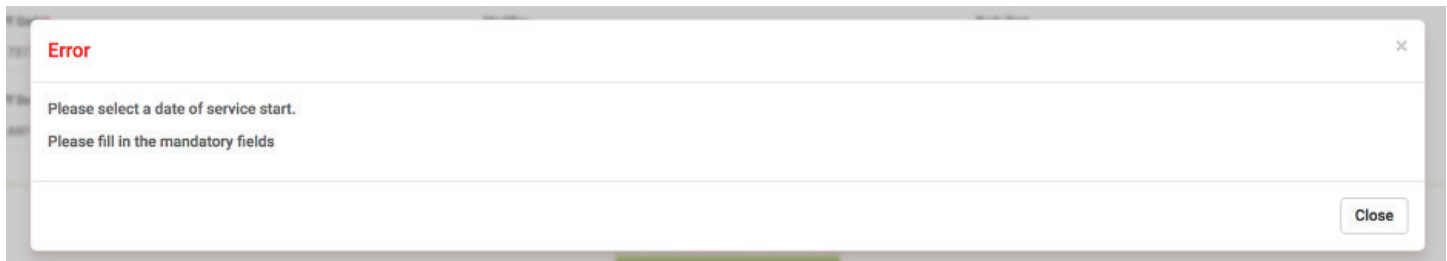
The green "New Case" button will allow you to create and submit a new prior authorization case to Infinx. Once you click on the "New Case" button, you will be taken to the prior authorization form. Below is a list of fields needed with their requirement level:

Field Name	Requirement
Physician First Name	Mandatory
Physician Last Name	Mandatory
Physician NPI	Mandatory
Physician Phone Number	Optional
Physician External ID	Optional
Physician Address	Mandatory
Patient First Name	Mandatory
Patient Middle Name	Optional
Patient Last Name	Mandatory
Patient Gender	Mandatory
Patient ID	Mandatory
Patient Date of Birth	Mandatory
Patient Phone Number	Mandatory
Patient Address	Optional
Patient Notes	Optional
Date of Service Start	Mandatory
Date of Service End	Optional
Appointment ID	Mandatory
Facility Name	Mandatory

Field Name	Requirement
Facility NPI	Mandatory
Admission Type	Optional
Patient Class	Optional
Insurance Type	Mandatory
Group Number	Mandatory
Group Name	Optional
Insurance Name	Mandatory
Insurance Phone Number	Mandatory
Member ID	Mandatory
Policy Number	Optional
CPT Code	Mandatory
Modifier	Optional
Body Part	Optional
CPT Description	Optional
ICD Code	Mandatory
ICD Description	Optional
Clinicals	Optional

All mandatory fields are required to submit a prior authorization case. If any of these fields are missing and you hit "Create Case," the page will display a validation error and notify which fields are missing.

For example, if the Date of Service is missing, you will see the following notification:



Press the "X" to return to the previous screen and enter in the missing data.

**Service Information**

**Date of Service Start\***

If details for some of the fields are not available at the time of case creation, you can save the case as a draft and complete it later. Once all mandatory fields are complete, you can create the case. You will see a confirmation appear with the assigned Case ID.

## Dashboard

### List View

The dashboard consists of all your cases received to date. There are many filtering options to help you identify a specific case: Case ID, Appointment Number, Patient Name, Date of Birth, Date of Service, Procedures, Notifications, Insurance Company, Case Status, and Options.

- The "Procedures" column displays the number of exams within a case that requires a prior authorization.
- "Notifications" display the number of total messages from the Infinx team for that specific case.
- "Options" allows you to "Open" or "Cancel" a case.

## Progress Status (IPA 4.1 onwards)

"Progress Status" allows you to track the lifecycle of a case while it is being processed by Infix. There are three "Case Status" notifications:

### 1. In-Progress:

This status informs you that the case is currently being processed by Infix.

### 2. Action Required:

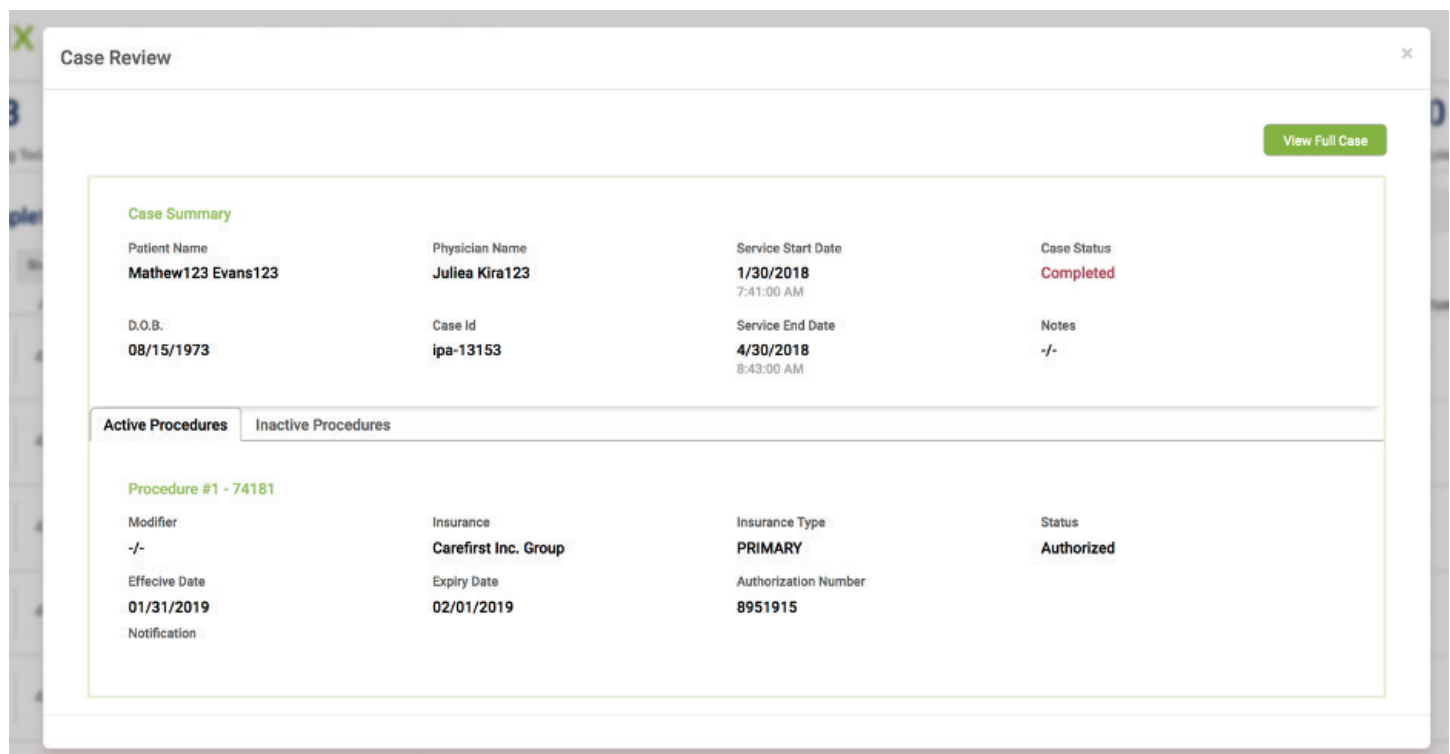
This status is assigned to cases when a specific action is required from the provider. Typically, this case status is the result of payers requiring additional information. Easily see what actions are required by clicking on the case and viewing the "Notifications." You can then click on the "Edit Case" button and perform the necessary actions, such as attach additional clinicals.

### 3. Finalized:

This is the status of a case when Infix has finished working on a case.

## View Case Summary

Click on a specific case to view the case summary.



**Case Review** ×

[View Full Case](#)

**Case Summary**

<b>Patient Name</b> Mathew123 Evans123	<b>Physician Name</b> Juliea Kira123	<b>Service Start Date</b> 1/30/2018 7:41:00 AM	<b>Case Status</b> Completed
<b>D.O.B.</b> 08/15/1973	<b>Case Id</b> ipa-13153	<b>Service End Date</b> 4/30/2018 8:43:00 AM	<b>Notes</b> -/-

**Active Procedures** **Inactive Procedures**

**Procedure #1 - 74181**

<b>Modifier</b> -/-	<b>Insurance</b> Carefirst Inc. Group	<b>Insurance Type</b> PRIMARY	<b>Status</b> Authorized
<b>Effective Date</b> 01/31/2019	<b>Expiry Date</b> 02/01/2019	<b>Authorization Number</b> 8951915	
<b>Notification</b>			

When viewing “Case Review,” you will see the Patient Name, Physician Name, Date of Service, Patient Date of Birth, Case ID, and the Case Status.

The “Procedures” section will display the various procedures within the case and their associated details, including the Procedure Status. The Procedure Status will give you a more granular insight on the prior authorization.

There are nine statuses:

**1. New Job:**

This is the status when a case is created.

**2. In Determination:**

This status communicates that the Prior Authorization Software is determining if a prior authorization is required for the case.

**3. In Progress:**

This status signifies that the case is being processed for initiation.

**4. Payer Review:**

This status means that the case has been initiated with the benefits manager or home plan.

**5. Pending Information:**

A procedure receives this status when the payer requests additional information. For example, when additional clinicals are required.

**6. Peer-to-Peer Review Required:**

When a payer requires a peer-to-peer review, you will receive this notification.

**7. Authorized:**

This is the status that signifies a prior authorization has been obtained.

**8. Denied:**

When the prior authorization is denied, this is the displayed status.

**9. No Authorization Required:**

When a prior authorization is not required, this is the displayed status.

When a procedure is authorized, you will see the prior authorization approval information under the “Procedure” section.

This information includes:

- Authorization Number
- Effective Date
- Expiry Date
- Case Reference Number



## Filter

You are able to filter the following:

### 1. Date of Service: :

Select a "From" and a "To" date and click on filter. The list will now only display cases within your selected Date of Service range.

### 2. Status

Check the granular procedure statuses you wish to see, and the list will filter down to the selected statuses.

### 3. Progress (IPA 4.1 onwards):

Check the case progress at the appointment level.

### 4. Facility:

Filter the specific rendering facility where the service is being performed.

### 5. Insurance:

Filter by the primary insurance used for a case.

The filter functionality is useful in helping you address your current needs. You may only want to look at cases with a specific Date of Service or status.

## Sort

The sort functionality helps you order cases in a way that you prefer to see them.

The following columns are sortable:

1. Case ID
2. Patient Name
3. Date of Birth
4. Date of Service

## Search

Use the search bar to search for a specific case.

You can search using any of the following parameters:

1. Patient Name
2. Case ID
3. Appointment Number



This search is local to the section of the web portal. If you are in “Current Cases” you will be shown search results from “Current Cases” only.

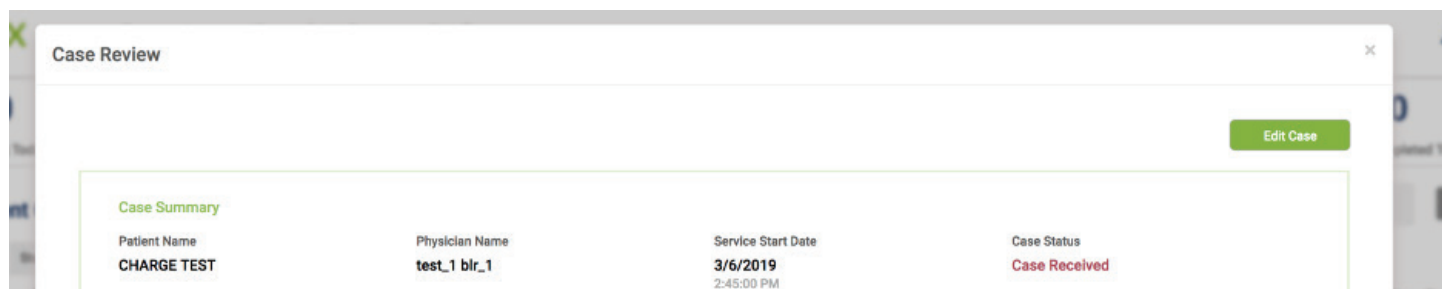
If you cannot find a searched case, try switching to “Completed Cases” and searching again.

## Edit a Case

There are many factors that will require you to edit a case. Typically, updates are changed because of Date of Service, addition of a CPT code, etc. The Infinx Prior Authorization Software allows you to edit any case field.

The process to “Edit a Case” is as follows:

1. On the dashboard, click on the case, which opens up the summary view.
2. Click on the green “Edit Case” button on the top right. This will open up the case in the following form view:



The screenshot shows a web form titled "Case Review" with a close button (X) in the top right corner. In the top right of the form area, there is a green button labeled "Edit Case". Below this, the form is divided into a "Case Summary" section. This section contains four fields arranged in a 2x2 grid:

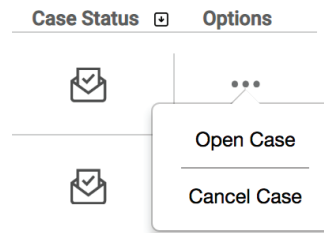
Patient Name	Physician Name	Service Start Date	Case Status
CHARGE TEST	test_1 blr_1	3/6/2019 2:45:00 PM	Case Received

3. You can now modify/append any field within the case.
4. Click on “Update Case”.

The edits will be automatically updated, and you will be shown a confirmation message.

## Cancel a Case

If you wish to cancel an existing case for any reason, you can do so via the dashboard. Identify the appropriate case and click on the “Options” button. Then click on “Cancel Case”.

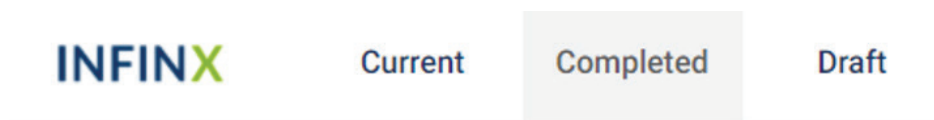


Note that canceling a case means that Infinx will stop processing the case for a prior authorization. Infinx does not delete the data from its system, which is in compliance with HIPAA regulations.

## Completed Cases

The dashboard defaults to viewing “Current” cases. These are cases that are actively being processed by Infinx. To view “Completed” cases, you will have to click on the “Completed” tab at the top of your screen.

The selected section is highlighted:



In the “Completed” tab, you will be able to view all cases **acknowledged by you** as authorized, denied, no authorization required, canceled, or a combination of these.

## Draft Cases

At the time of case creation, if you need to complete the form later or do not have all the required data, you can click on “Save as Draft” instead of “Create Case.” This will save the case as a draft until you’re ready to complete.

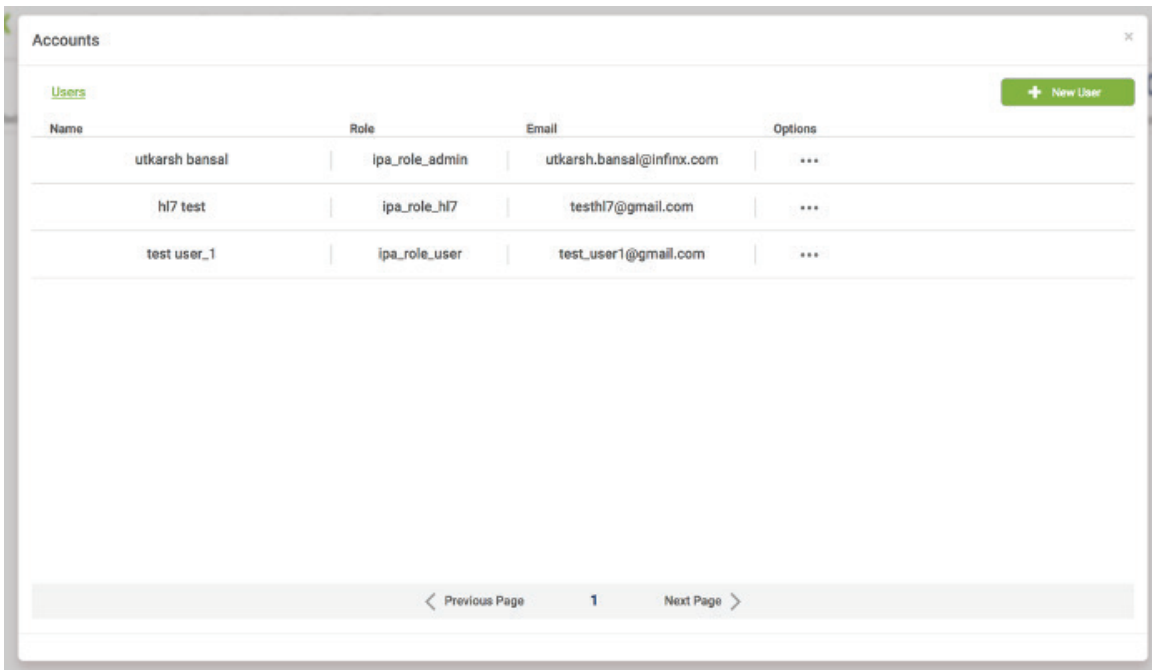
You can view these drafts cases in the “Draft” tab. You can select the “Draft” section on the top of your screen located to the right of the “Completed” section. You can open a draft case, click edit draft, complete the rest of the form, and then submit.

Click on “Create Case,” and the draft will be created as a case and moved into the “Current” tab.

## Account Management

Account Management lets you view and manage product users and roles based on your access level.

Click on the human icon on the top right of your screen to view and edit:



Name	Role	Email	Options
utkarsh bansal	ipa_role_admin	utkarsh.bansal@infinx.com	...
hl7 test	ipa_role_hl7	testhl7@gmail.com	...
test user_1	ipa_role_user	test_user1@gmail.com	...

You will see the Name, Role, Email of every user that has access to your web portal. With the “Supervisor/Manager” user access, you have the option to edit user’s information.

You can add a new user by clicking on the “New User” button.

**For further assistance, contact our Infinx Prior Authorization Software support staff at [support@infinx.com](mailto:support@infinx.com).**