Create Authorization

For Service Providers

How to Create an Authorization

Description: An entry in DCI representing an allotment of dollars/units from a funding source to provide a service to a client. An authorization is for one service code and one client.

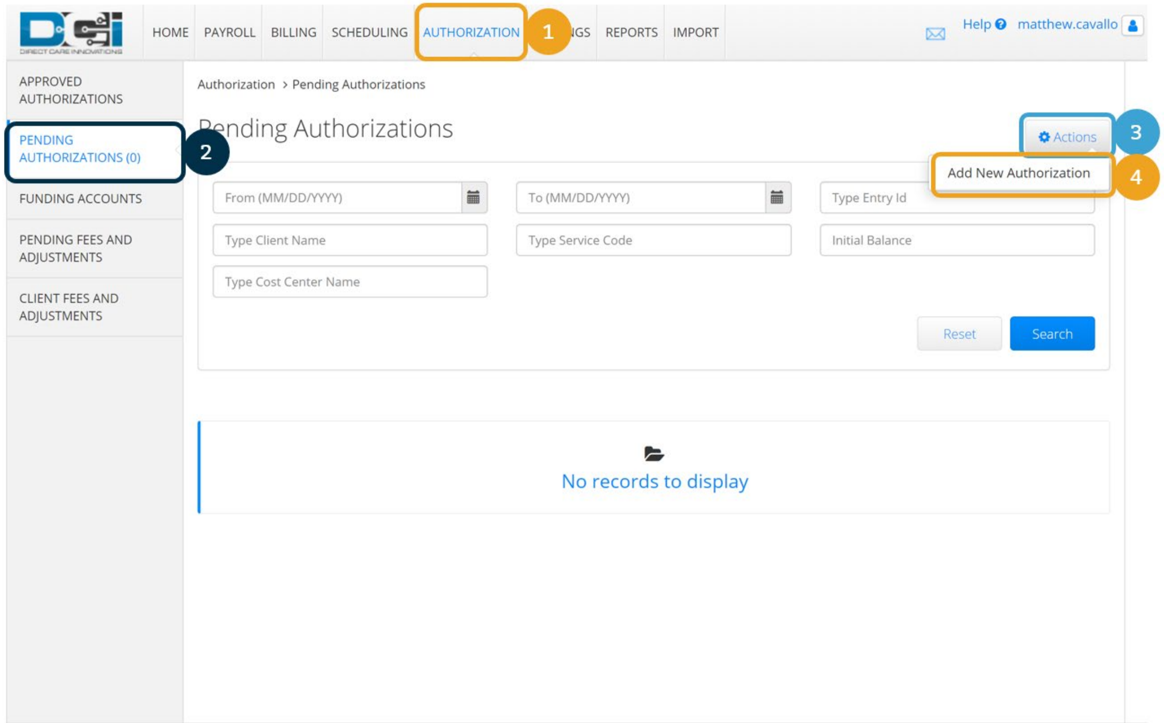
Security Access: SuperUser user, Billing Role, Authorization Role, or Authorization Admin Permission

Prerequisites

- Cost Center
- Funding Source
- Funding Account
- Service Code
- Client Profile

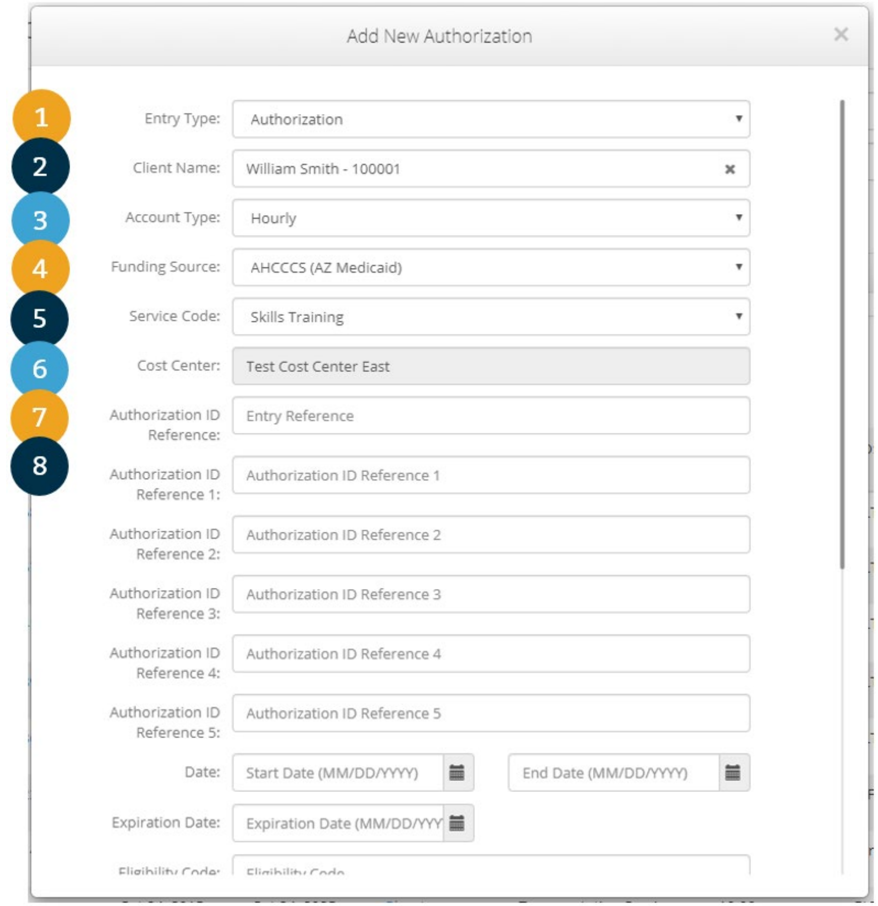
Steps to Create:

1. Select Authorization Tab
2. Select Pending Authorizations
3. Select Action
4. Select Add New Authorization



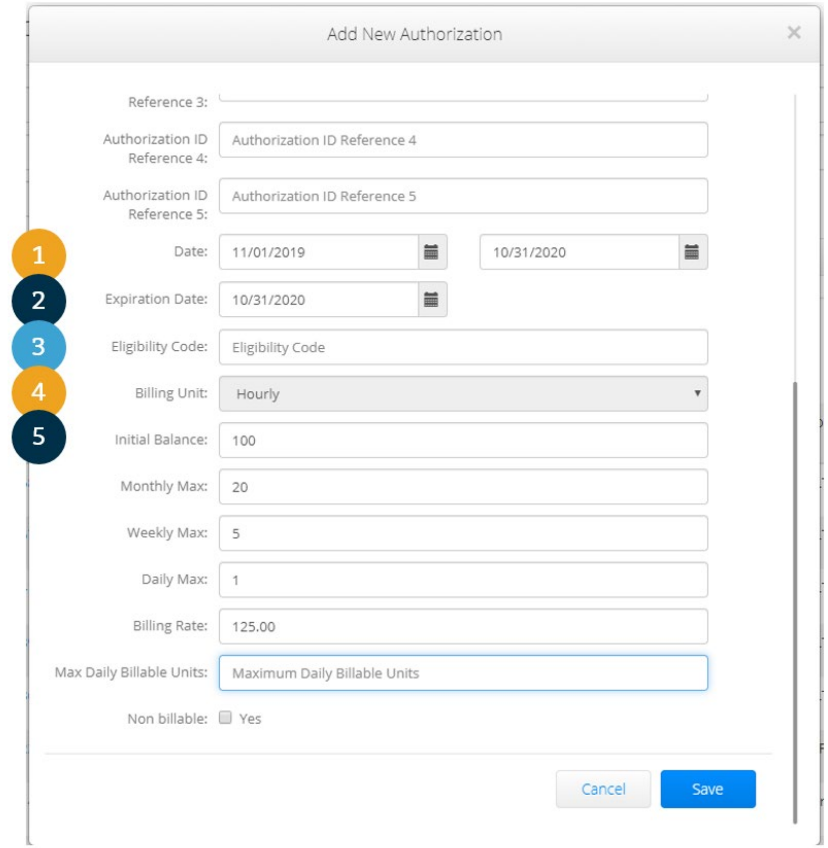
Complete Add New Authorization Form

1. Entry Type (required): prepopulated with Authorization, no action required
2. Client Name (required): Enter Client name
3. Account Type (required): Select the account type associated with the appropriate service code
4. Funding Source: Select from drop down
5. Service Code: Select from the drop down.
6. Cost Center: System auto-fills this field with the cost center on the associated funding account.
7. Authorization ID Reference (optional): Use as an optional storage field for items that need to show up on the Billing file
8. Authorization ID Reference 1-5 (optional, see definition above)



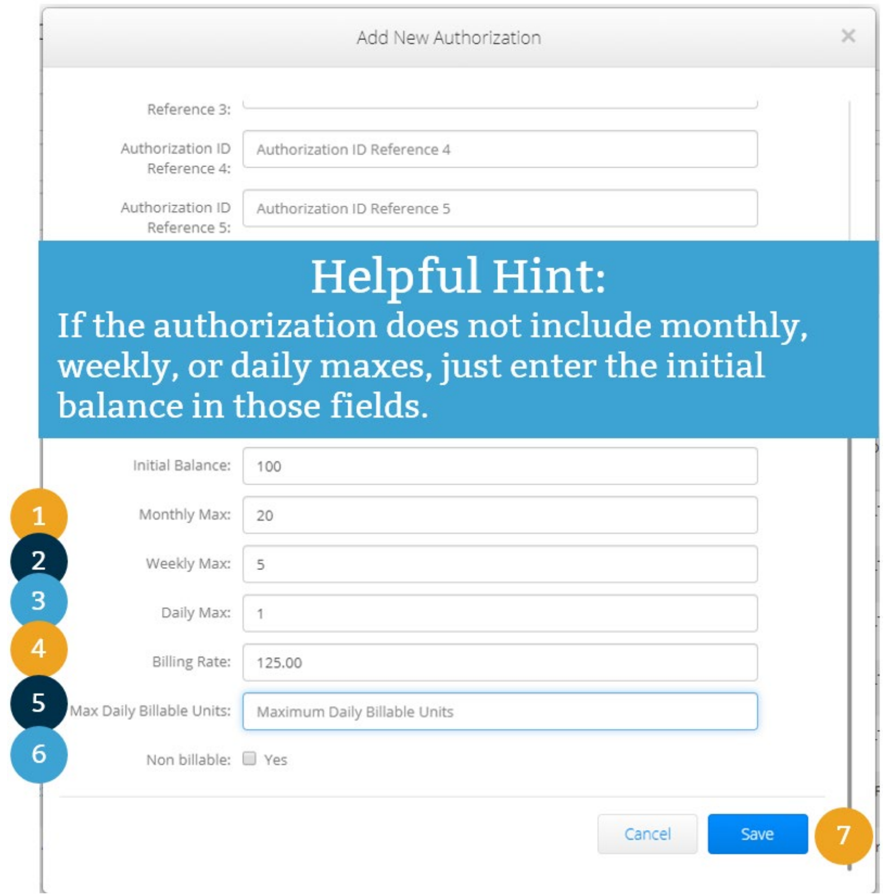
Complete Add New Authorization Form Cont.

1. Date (required): Enter the start and end date during which time the service can be provided under this authorization.
2. Expiration Date (required): Enter the date the authorization expires and a new authorization must be obtained in order to continue providing this service
   a. This is the date after which entries with dates of service within the start and end date can no longer be entered against this authorization.
3. Eligibility Code (optional): Code that denotes the client's eligibility for this service
4. Billing Unit (required): System auto-fills this field based on the service code
   a. If the service code is non-billable, this does not auto fill and the user can select from dropdown options
5. Initial Balance (required): The total units of service you can provide under this authorization



Complete Add New Authorization Form Cont.

1. Monthly Max (required): The maximum units of service you can provide per month
2. Weekly Max (required): The maximum units of service you can provide per week
3. Daily Max (required): The maximum units of service you can provide per day
4. Billing Rate (required): The rate per unit of service you are authorized to bill for as determined by the funding source
5. Max Daily Billable Units (optional): If an amount is entered in this field, another field is displayed called Daily Rate
    a. The rate will be pulled from this field, not the service code
6. Non billable (optional): If Yes is checked, no billing entries will be generated
7. Select Save



Helpful Hint:

If the authorization does not include monthly, weekly, or daily maxes, just enter the initial balance in those fields.

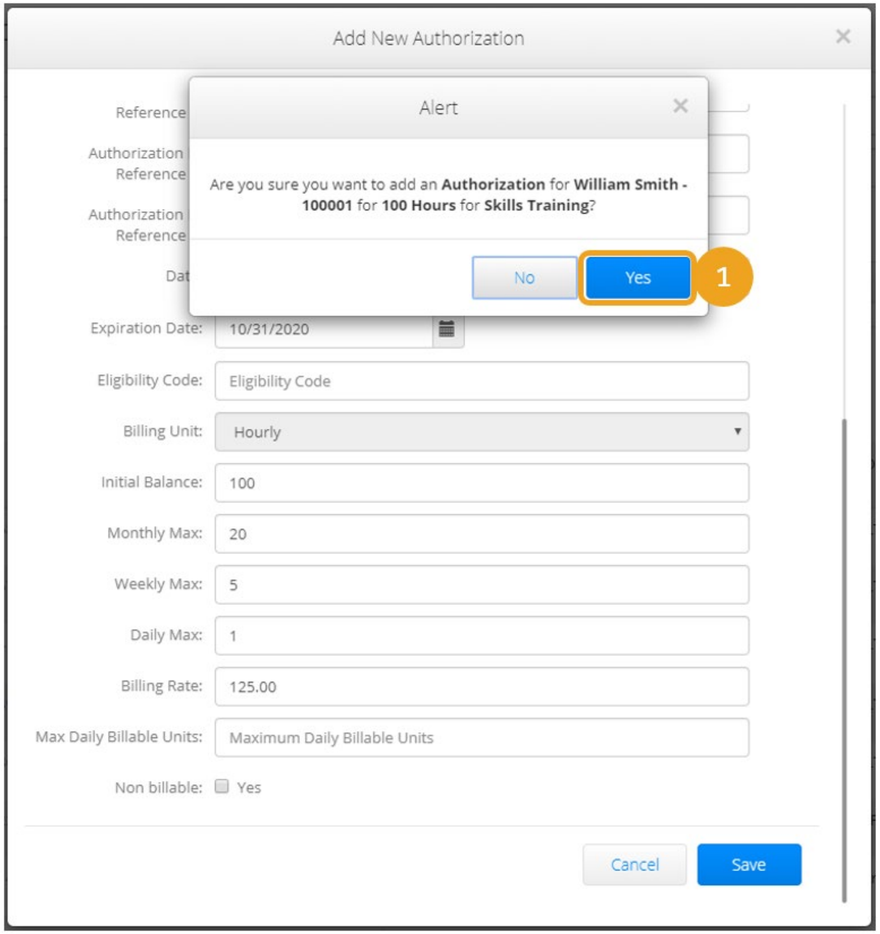
Confirm Add Authorization

1. Select Yes to confirm the new Authorization entry

Note:

Once added to DCI, Authorizations cannot be deleted. Inactivate the authorization when no longer in use.

To add multiple Authorizations, repeat the previous steps.



Approve/Reject Authorization

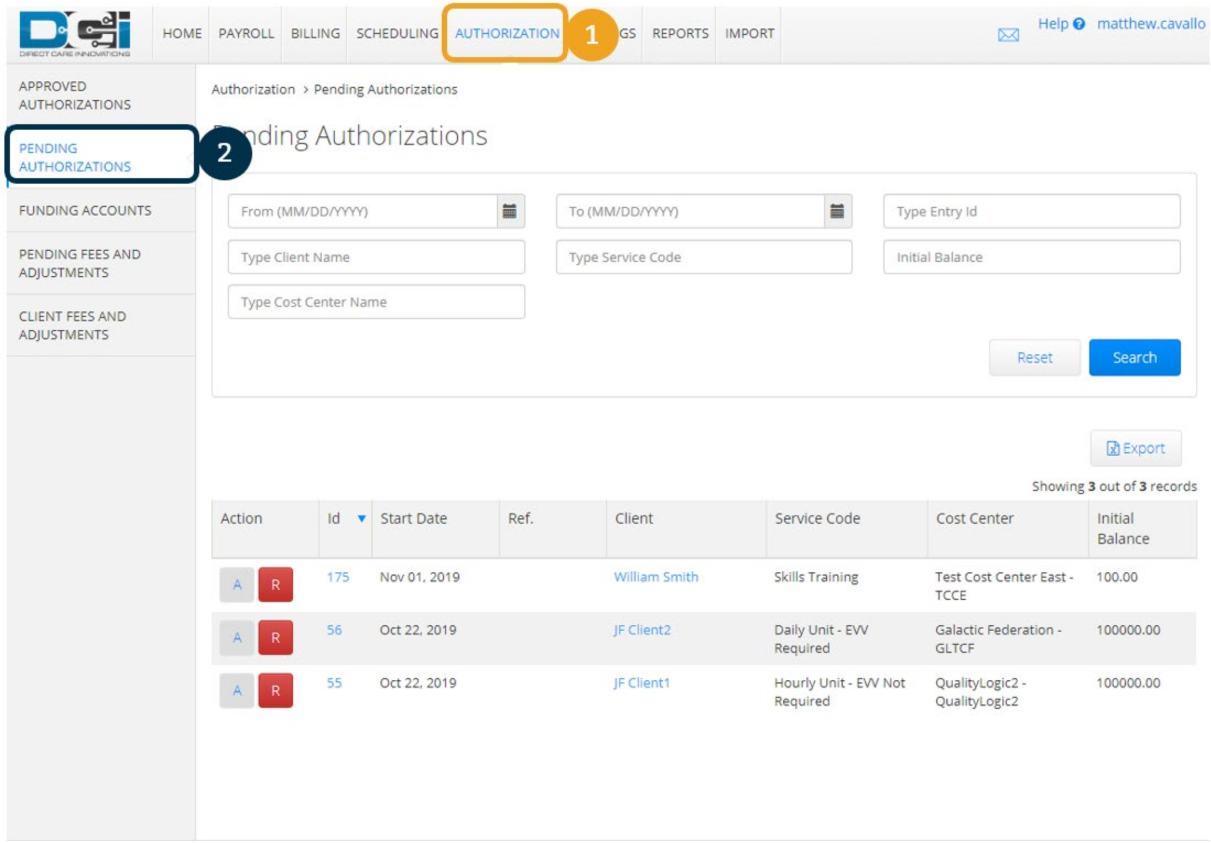
How to Approve/Reject an Authorization

To located Pending Authorizations:

1. Select the Authorization Tab
2. Select the Pending Authorization Tab

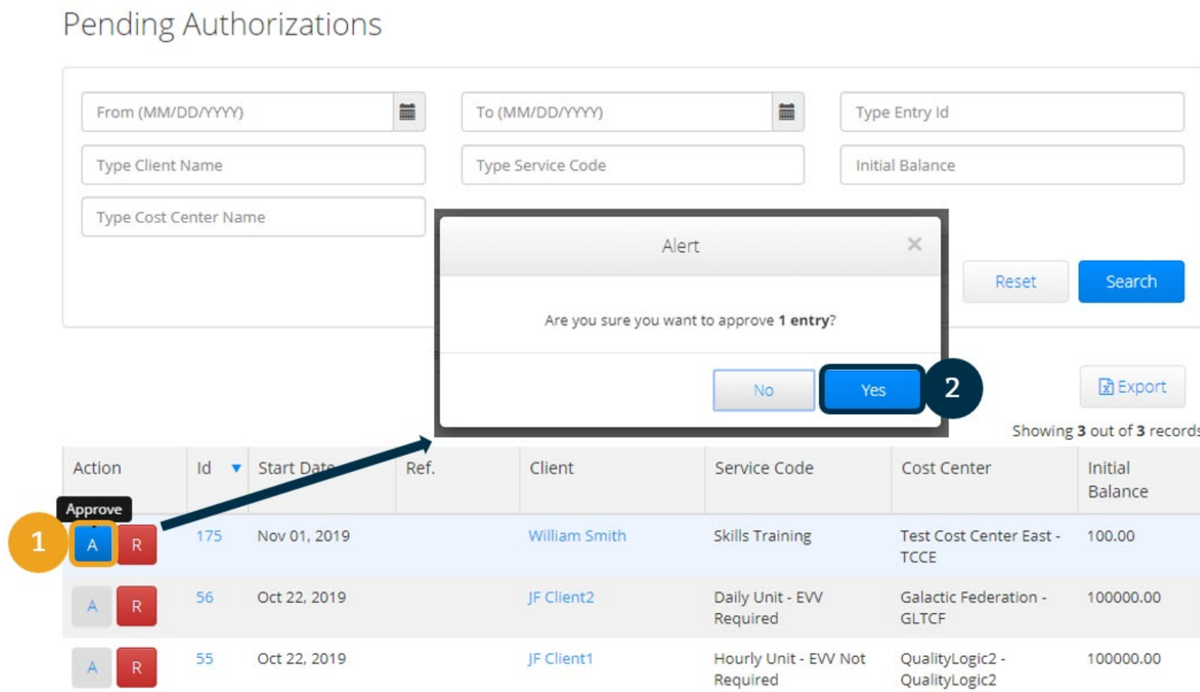
The Pending Authorization Tab displays all authorizations that are in a pending state.

Select the authorization to approve/reject from the list displayed below.



Select Authorization to Approve

1. Select A to approve authorization
   a. To reject an authorization, simply select R instead of A
2. Select Yes, when Alert opens, to confirm authorization approval

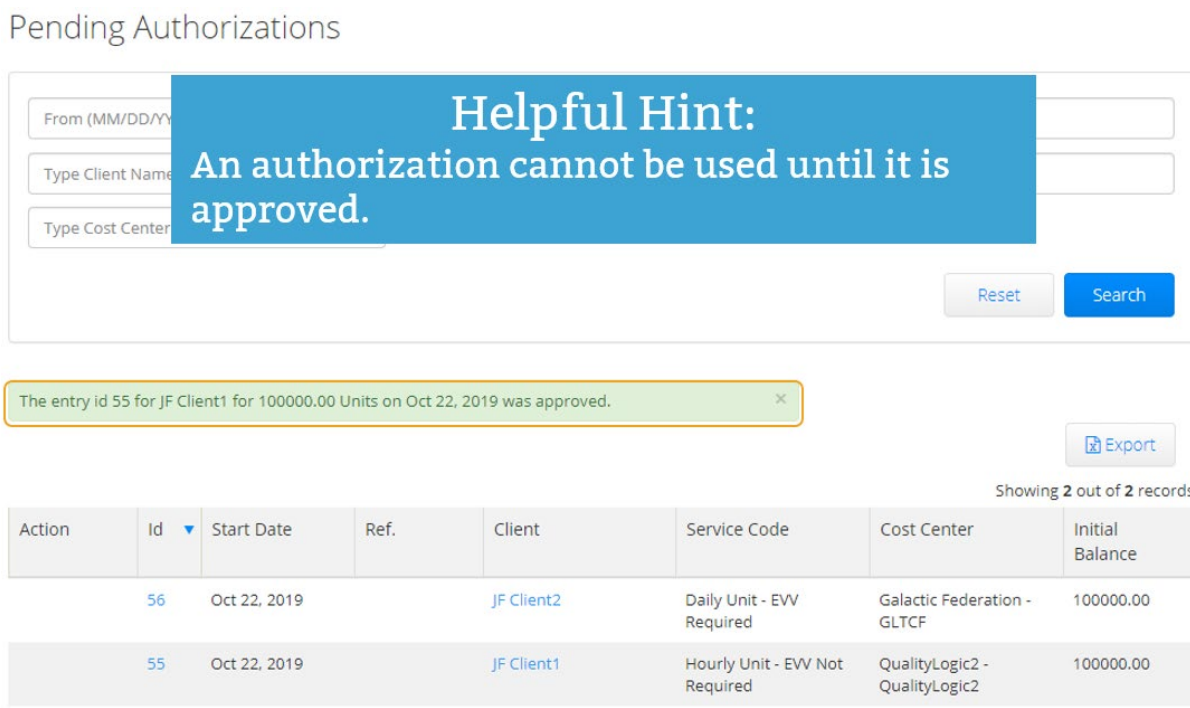


Approved Authorization Notification

When an authorization in approved, a green bar is displayed to notify the end-user of approval.

When an authorization is rejected, a red notification is displayed.

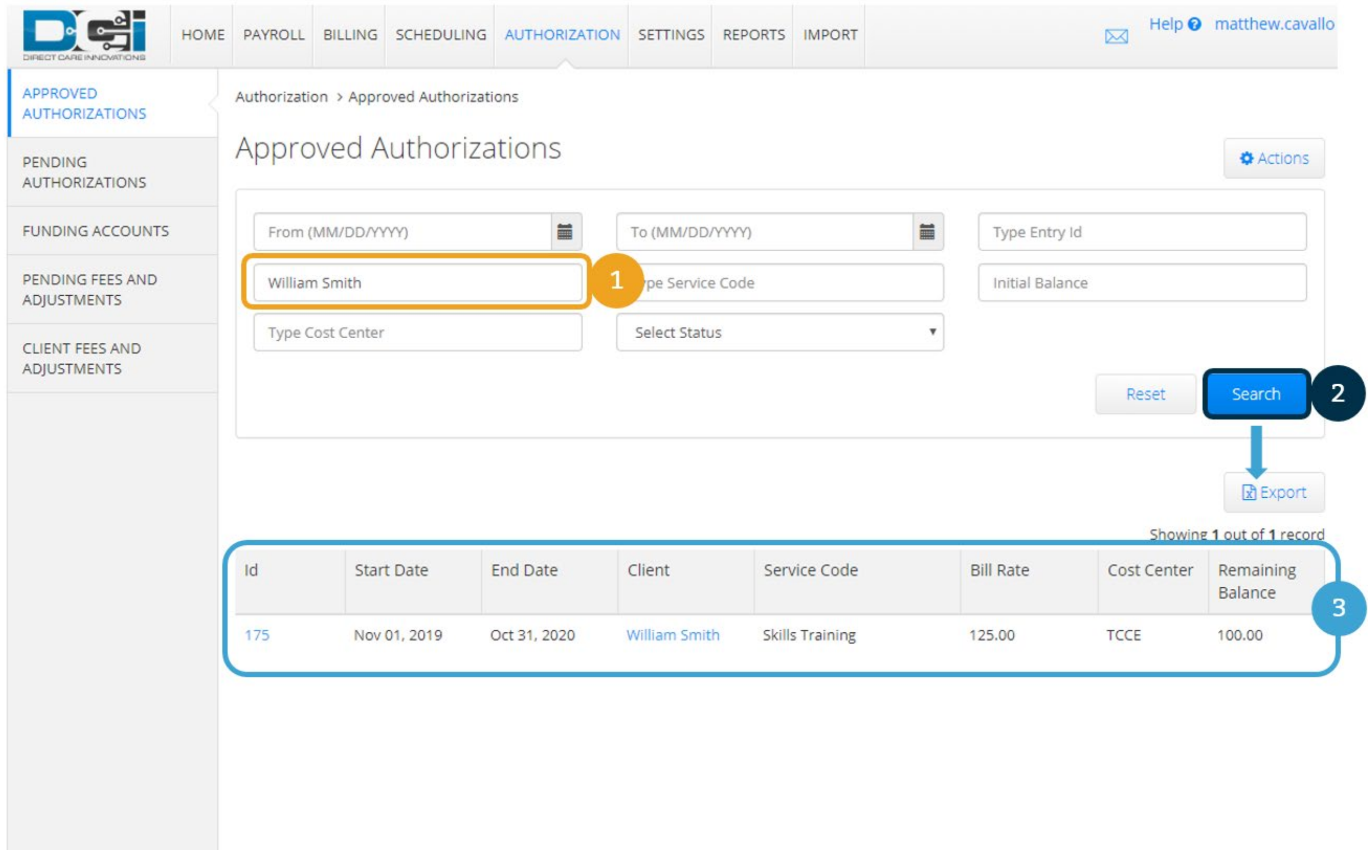
Approved and rejected authorizations will disappear from the list once they have been addressed.



Helpful Hint:
An authorization cannot be used until it is approved.

Authorization Approved

Once approved, the authorization is now available and ready to use.



Thank you!

Visit the DCI Help Center to learn more at:
https://directcareinnovations.zendesk.com/hc/en-us