



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

The screenshot displays the DCI web application interface. The top navigation bar includes tabs for HOME, PAYROLL, BILLING, SCHEDULING, AUTHORIZATION (1), SETTINGS, REPORTS, and IMPORT. The user profile 'matthew.cavallo' is visible in the top right. The main content area is titled 'Authorization > Pending Authorizations'. On the left sidebar, 'PENDING AUTHORIZATIONS (0)' (2) is selected. The 'Actions' menu (3) contains 'Add New Authorization' (4). The form below includes fields for 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Client Name', 'Type Service Code', 'Type Cost Center Name', 'Type Entry Id', and 'Initial Balance'. 'Reset' and 'Search' buttons are at the bottom right of the form. A message 'No records to display' is shown in a box below the form.

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)

The screenshot shows a web form titled "Add New Authorization" with a close button (X) in the top right corner. The form contains the following fields:

- 1. Entry Type: A dropdown menu with "Authorization" selected.
- 2. Client Name: A text input field containing "William Smith - 100001" and a clear button (X).
- 3. Account Type: A dropdown menu with "Hourly" selected.
- 4. Funding Source: A dropdown menu with "AHCCCS (AZ Medicaid)" selected.
- 5. Service Code: A dropdown menu with "Skills Training" selected.
- 6. Cost Center: A text input field containing "Test Cost Center East".
- 7. Authorization ID Reference: A text input field containing "Entry Reference".
- 8. Authorization ID Reference 1: A text input field containing "Authorization ID Reference 1".
- Authorization ID Reference 2: A text input field containing "Authorization ID Reference 2".
- Authorization ID Reference 3: A text input field containing "Authorization ID Reference 3".
- Authorization ID Reference 4: A text input field containing "Authorization ID Reference 4".
- Authorization ID Reference 5: A text input field containing "Authorization ID Reference 5".
- Date: Two date pickers for "Start Date (MM/DD/YYYY)" and "End Date (MM/DD/YYYY)".
- Expiration Date: A date picker for "Expiration Date (MM/DD/YYYY)".
- Eligibility Code: A text input field containing "Eligibility Code".

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

The screenshot shows a web form titled "Add New Authorization" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Reference 3:
- Authorization ID Reference 4:
- Authorization ID Reference 5:
- Date: (with calendar icons)
- Expiration Date: (with calendar icon)
- Eligibility Code:
- Billing Unit: (dropdown menu)
- Initial Balance:
- Monthly Max:
- Weekly Max:
- Daily Max:
- Billing Rate:
- Max Daily Billable Units:
- Non billable: Yes

At the bottom right, there are "Cancel" and "Save" buttons. A vertical column of five numbered circles (1-5) is overlaid on the left side of the form, corresponding to the list items on the left.

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**

The screenshot shows a web form titled "Add New Authorization" with a close button (X) in the top right corner. The form contains several input fields:

- Reference 3: [Empty text box]
- Authorization ID Reference 4: [Text box containing "Authorization ID Reference 4"]
- Reference 4: [Empty text box]
- Authorization ID Reference 5: [Text box containing "Authorization ID Reference 5"]
- Reference 5: [Empty text box]

A blue overlay with white text reads: **Helpful Hint:** If the authorization does not include monthly, weekly, or daily maxes, just enter the initial balance in those fields.

Below the hint, the form continues with:

- Initial Balance: [Text box containing "100"]
- Monthly Max: [Text box containing "20"]
- Weekly Max: [Text box containing "5"]
- Daily Max: [Text box containing "1"]
- Billing Rate: [Text box containing "125.00"]
- Max Daily Billable Units: [Text box containing "Maximum Daily Billable Units"]
- Non billable: Yes

At the bottom right, there are "Cancel" and "Save" buttons. A vertical column of seven numbered circles (1-7) is overlaid on the left side of the form, with circle 7 positioned over the "Save" button.

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.

The screenshot shows a web application window titled "Add New Authorization". An "Alert" dialog box is open in the foreground, asking for confirmation to add an authorization for "William Smith - 100001" for "100 Hours for Skills Training". The "Yes" button in the alert is highlighted with a yellow circle and the number "1".

The background form contains the following fields:

- Reference: [Empty]
- Authorization Reference: [Empty]
- Authorization Reference: [Empty]
- Date: [Empty]
- Expiration Date: 10/31/2020
- Eligibility Code: Eligibility Code
- Billing Unit: Hourly
- Initial Balance: 100
- Monthly Max: 20
- Weekly Max: 5
- Daily Max: 1
- Billing Rate: 125.00
- Max Daily Billable Units: Maximum Daily Billable Units
- Non billable: Yes

Buttons: Cancel, Save

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.

APPROVED AUTHORIZATIONS

PENDING AUTHORIZATIONS

FUNDING ACCOUNTS

PENDING FEES AND ADJUSTMENTS

CLIENT FEES AND ADJUSTMENTS

Authorization > Pending Authorizations

From (MM/DD/YYYY) To (MM/DD/YYYY) Type Entry id

Type Client Name Type Service Code Initial Balance

Type Cost Center Name

Reset Search

Export

Showing 3 out of 3 records

Action	Id	Start Date	Ref.	Client	Service Code	Cost Center	Initial Balance
A R	175	Nov 01, 2019		William Smith	Skills Training	Test Cost Center East - TCCE	100.00
A R	56	Oct 22, 2019		JF Client2	Daily Unit - EVV Required	Galactic Federation - GLTCF	100000.00
A R	55	Oct 22, 2019		JF Client1	Hourly Unit - EVV Not Required	QualityLogic2 - QualityLogic2	100000.00

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

Pending Authorizations

From (MM/DD/YYYY) To (MM/DD/YYYY) Type Entry Id
Type Client Name Type Service Code Initial Balance
Type Cost Center Name

Alert

Are you sure you want to approve 1 entry?

No Yes

Reset Search Export

Showing 3 out of 3 records

Action	Id	Start Date	Ref.	Client	Service Code	Cost Center	Initial Balance
Approve A R	175	Nov 01, 2019		William Smith	Skills Training	Test Cost Center East - TCCE	100.00
A R	56	Oct 22, 2019		JF Client2	Daily Unit - EVV Required	Galactic Federation - GLTCF	100000.00
A R	55	Oct 22, 2019		JF Client1	Hourly Unit - EVV Not Required	QualityLogic2 - QualityLogic2	100000.00

Approved Authorization Notification

When an authorization is 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.

Pending Authorizations

From (MM/DD/YYYY)

Type Client Name

Type Cost Center

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

The entry id 55 for JF Client1 for 100000.00 Units on Oct 22, 2019 was approved. ×

[Export](#)

Showing 2 out of 2 records

Action	Id	Start Date	Ref.	Client	Service Code	Cost Center	Initial Balance
	56	Oct 22, 2019		JF Client2	Daily Unit - EW Required	Galactic Federation - GLTCF	100000.00
	55	Oct 22, 2019		JF Client1	Hourly Unit - EW Not Required	QualityLogic2 - QualityLogic2	100000.00

Authorization Approved

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

The screenshot displays the 'Approved Authorizations' page in the DCSI system. The navigation menu at the top includes HOME, PAYROLL, BILLING, SCHEDULING, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. The user is logged in as matthew.cavallo. The left sidebar shows options for APPROVED AUTHORIZATIONS, PENDING AUTHORIZATIONS, FUNDING ACCOUNTS, PENDING FEES AND ADJUSTMENTS, and CLIENT FEES AND ADJUSTMENTS. The main content area shows the 'Approved Authorizations' section with a search filter for 'William Smith' (highlighted with a yellow box and a '1' in a blue circle). The search results show one record with the following details:

Id	Start Date	End Date	Client	Service Code	Bill Rate	Cost Center	Remaining Balance
175	Nov 01, 2019	Oct 31, 2020	William Smith	Skills Training	125.00	TCCE	100.00

The table is highlighted with a blue box and a '3' in a blue circle. The search bar also includes a 'Search' button (highlighted with a blue box and a '2' in a blue circle) and an 'Export' button. The text 'Showing 1 out of 1 record' is displayed below the table.

Thank you!

Visit the DCI Help Center to learn more at:

<https://directcareinnovations.zendesk.com/hc/en-us>