



Create Funding Source

How to Create a Funding Source

Description: Entity that pays the organization to provide the service, defines specifications for those services, and issues authorizations for clients to receive said services.

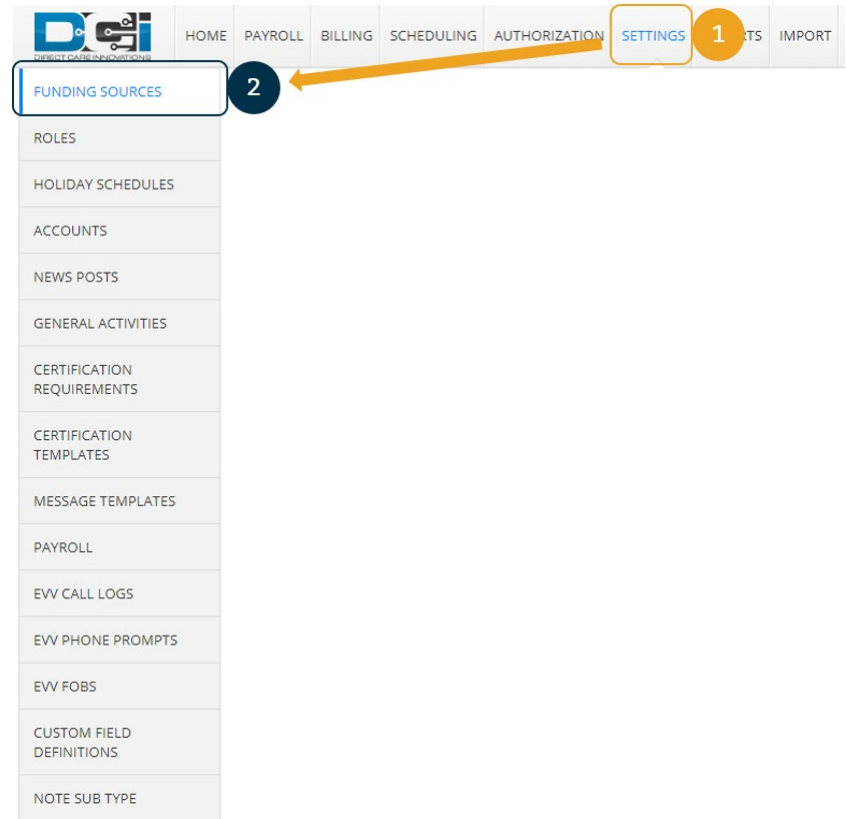
Security Access: SuperUser user or Funding Source Admin Permission

Prerequisite:

- Cost Center must be created prior to creation of a Funding Source

Steps to Create:

1. Select the Settings Tab
2. Select the Funding Sources Tab



Add New Funding Source

Once the Funding Source Tab has been opened:

1. Select Actions
2. Select New Funding Source

Note:

Existing Funding Sources display below. To open an existing Funding Source, simply select the Cost Center Name.

Settings > Funding Sources

Funding Sources

Type Funding Source Name Select State Select Type

Select Time Zone Select Status

Reset Search

Export

Showing 8 out of 8 records

Name	State	Type	Time Zone	Total Service Codes	Total Accounts	Status
Infernum	ID	Government	MT (UTC-07)	23	24	Active
KJ Funding	ID	Private	MT (UTC-07)	0	0	Active
La Banque	ID	Government	MT (UTC-07)	21	42	Active
QualityLogic1	ID	Government	MT (UTC-07)	0	0	Active
QualityLogic2	ID	Government	MT (UTC-07)	23	26	Active
Teri Funding Source	AZ	Government	MT (UTC-07)	5	7	Active
Test Private Pay	AZ	Government	MT (UTC-07)	1	1	Active
Zebes	ID	Government	MT (UTC-07)	22	29	Active

Enter New Funding Source

Enter the following **Required Fields** then select Save:

1. Name
2. Type – Select from drop down
3. Address
4. Time zone – Validate correct time zone
5. Cost Center
6. Phone
7. Email

Optional Fields

1. Supports Automated Authorization Download: Currently only available in Oregon and Arizona for government funding sources.
2. Sleep Shift Start and End (optional): Enter if the funding source authorizes a defined sleep shift.
3. Provider Id (optional)
4. Profile Reference (optional)
5. Status: Defaults to active. Select inactive when this is no longer a valid funding source.
6. Exclude From Auto Approval: Default is No. Select Yes to exclude funding source from auto approval

The screenshot shows a web form titled "Add New Funding Source". The form contains the following fields and values:

- Name: Oregon Health Plan
- Type: Government (dropdown)
- Address: McKenzie Center
- Address Line 2: (empty)
- 2885 Chad Drive (text) OR (dropdown) 97408 (text)
- USA (dropdown)
- Time Zone: PT (UTC-8) (dropdown)
- Cost Center: OR 20 Sabrina Ionescu - OR20 (dropdown)
- Phone: (541) 686-7878
- Alternate Phone: xxx-xxx-xxxx
- Supports Automated Authorization Download: No (radio button selected)
- Email: matthewc+50@dcisoftware.com
- Sleep Shift Start: HH:MM PM (clock icon)
- End: HH:MM PM (clock icon)
- Provider Id: Provider Id
- Profile Reference: Profile Reference
- Status: Active (dropdown)
- Exclude From Auto Approval: No (dropdown)

Buttons: Cancel, Save

Confirm New Funding Source

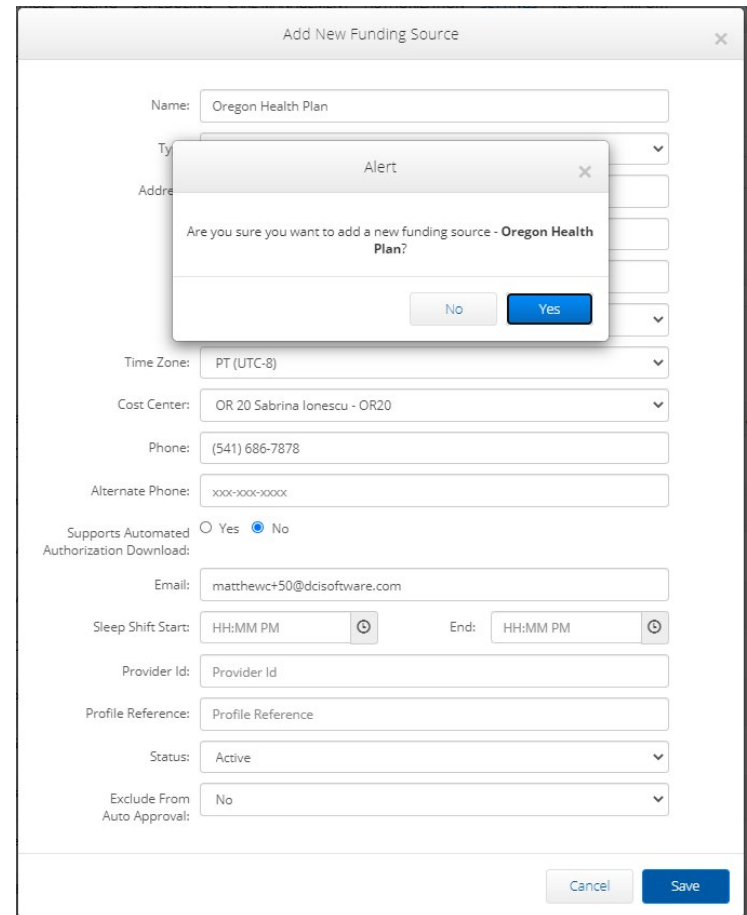
1. Select Save and then select Yes to confirm the new Funding Source entry.

A new Funding Source is now added and is available for use. This completes the Create Funding Source guide.

Note:

Once added to DCI, Funding Sources cannot be deleted. Inactivate the Funding Source when no longer in use.

To add multiple funding sources, repeat the previous steps.



The screenshot shows a web form titled "Add New Funding Source" with a close button (X) in the top right corner. The form contains several input fields and dropdown menus. An "Alert" dialog box is overlaid on the form, asking "Are you sure you want to add a new funding source - Oregon Health Plan?" with "No" and "Yes" buttons. The form fields are as follows:

- Name: Oregon Health Plan
- Type: [Dropdown]
- Address: [Text]
- Time Zone: PT (UTC-8)
- Cost Center: OR 20 Sabrina Ionescu - OR20
- Phone: (541) 686-7878
- Alternate Phone: xxx-xxx-xxxx
- Supports Automated Authorization Download: Yes No
- Email: matthewc+50@dcisoftware.com
- Sleep Shift Start: HH:MM PM [Clock icon]
- End: HH:MM PM [Clock icon]
- Provider Id: [Text]
- Profile Reference: [Text]
- Status: Active
- Exclude From Auto Approval: No

At the bottom right of the form are "Cancel" and "Save" buttons.

Thank you!