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.

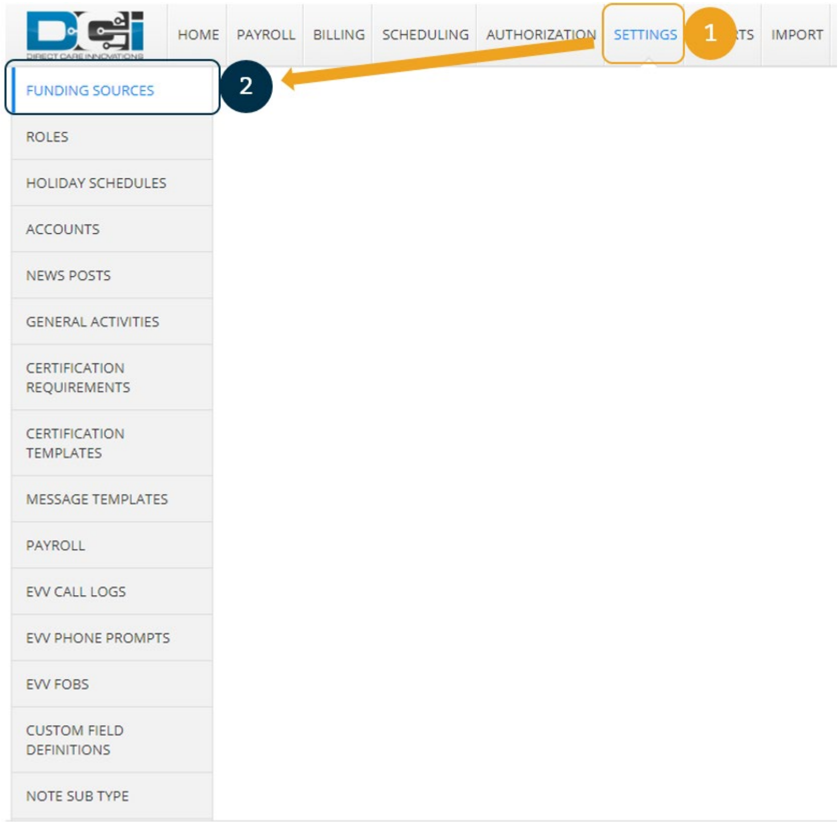
Security Access: SuperUser user or Funding Source Admin Permission

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



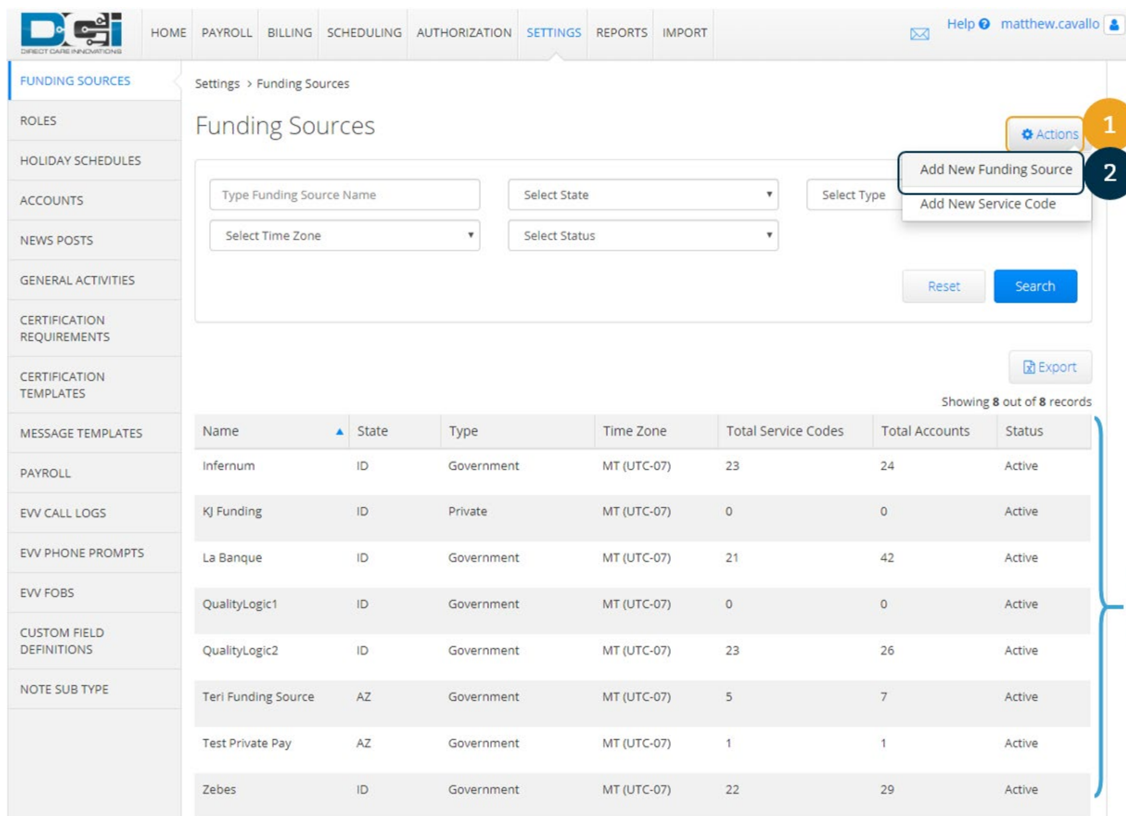
Add New Funding Source

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.



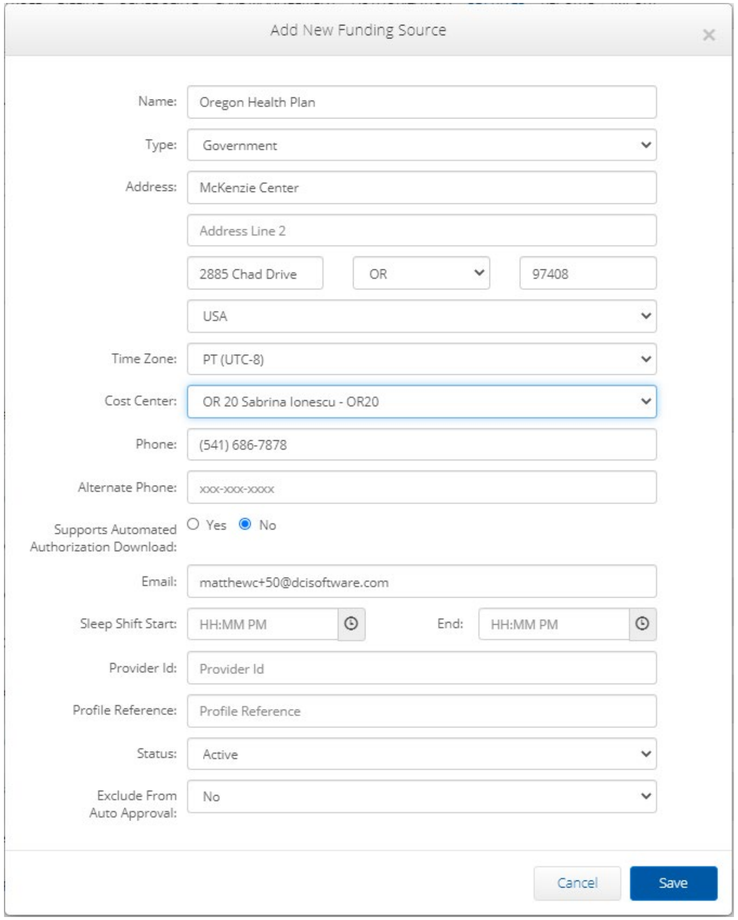
Enter New Funding Source

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



Confirm New Funding Source

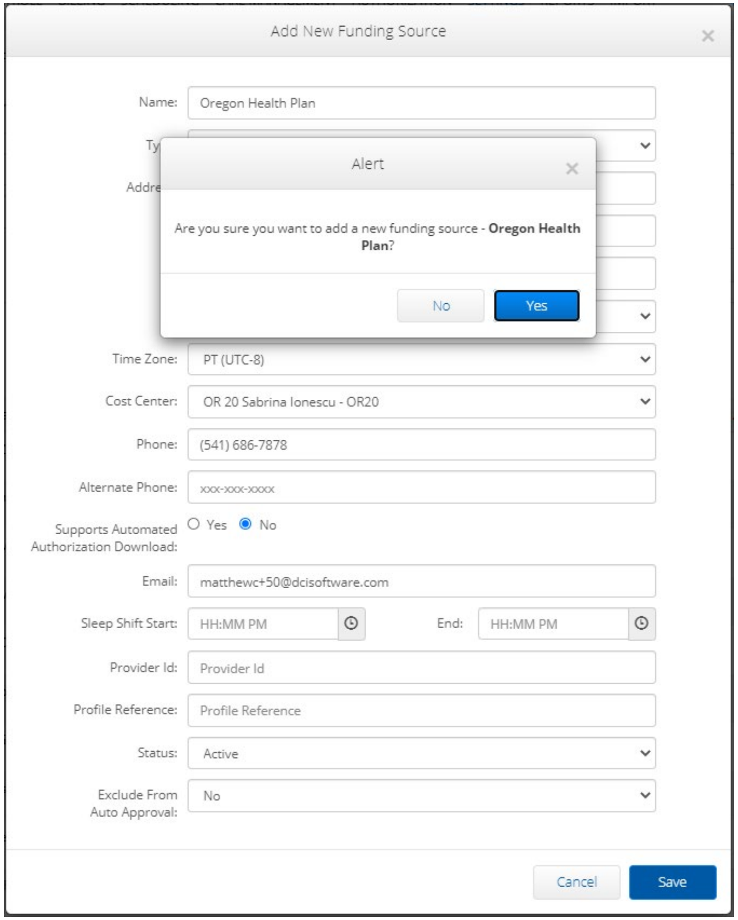
1. Select Save and then select Yes to confirm the new Funding Source entry.

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.



Thank you!