

**Purpose:** This shows step-by-step instructions on how to update an authorization.

**Outcome:** Staff know when and how to update authorizations.

An authorization will need to be updated in OR PTC DCI, when there is a change in the:

- Hours
- Miles
- End dates

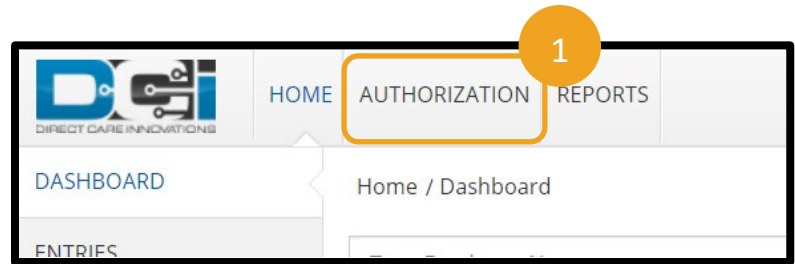
Common Scenarios for Updating an Authorization:

- Permanent provider(s) switches during a pay period.
- There is a one-time switch for a provider during a pay period.
- There is a change in authorized hours for a provider due to their weekly cap being increased.
- A consumer has multiple providers with varying hours.

**Anytime you void and reissue a voucher in Mainframe, you must update the corresponding authorization(s) in OR PTC DCI, including the voucher number (Authorization ID Reference) and both hourly and mileage (if applicable).**

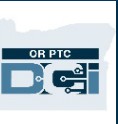
To update an authorization, after voiding and reissuing in Mainframe:

1. Click Authorization to open the Authorization tab.
2. From the Authorization tab, enter the voided voucher number starting with 20 in the authorization reference Id field.
3. Click Search.



This screenshot shows the 'Authorizations' search form. The form includes several input fields: 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Entry Id', 'Carol Brady', 'Type Service Code', 'Initial Balance', 'Type Cost Center', and 'Select Status'. A circled '2' highlights the 'Type Authorization ID Reference' field, and a circled '3' highlights the 'Search' button.

4. This should pull up the authorization(s) that you need to update.
  - a. Verify individually that the following are accurate for the hourly and mileage authorization(s):
    - i. Consumer name



- ii. Service code
- iii. Pay period
- iv. Voucher number

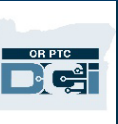
**Note:** If you are unable to locate the authorization(s) that need updating via the above method, follow the alternate path described at the end of this Quick Reference Guide (QRG) in the section titled Alternate Path for Finding an Authorization.

5. Right click on the Id in the far-left column for the authorization you need to update. If this consumer and provider pairing has both hours and miles, there will be two separate authorizations. Right click on both the hourly and mileage authorization Ids to open each in a separate tab because both need to be updated.

Showing 6 out of 6 records										
Id	Start Date	End Date	Client	Service Code	Funding Type	Bill Rate	Cost Center	Remaining Balance	Holds	Authorization ID Reference
1450	Sep 12, 2021	Sep 25, 2021	Carol Brady	Mileage-10	Units	0.00	3311-EU	8.00	0.00	2021462561
1449	Sep 12, 2021	Sep 25, 2021	Carol Brady	Hourly ADL/IAD L-10	Units	0.00	3311-EU	10.00	0.00	2021462561

6. Open Mainframe in a separate window.
7. From the HINQ screen, view the provider's vouchers.
8. Locate the voucher in "10" status that was voided for the pay period being updated. In other words, locate the voucher you just voided resulting in the authorization needing to be updated.
9. Locate the new voucher in "30" status that was just created, for the pay period being updated. In other words, locate the voucher you just created resulting in the authorization needing to be updated.

HINQ P, 222000 In-home Service Claim List 10/04/2021										
VCH NMBR	PRCS TRANS	PRIM ID	RECIP NAME	PROV NMBR	PROV NAME	SERV BEG	SERV END	CHK DATE	EFT REJ	PAID
21566296	30	CB100C1B	BRADY	222000	BRADY	211010	211023	000000		.00
21567821	30	CB100C1B	BRADY	222000	BRADY	210923	211009	000000		.00
21490077	30	CB100C1B	BRADY	222000	BRADY	210912	210925	000000		.00
21462561	10	CB100C1B	BRADY	222000	BRADY	210912	210925	000000		.83
21582676	36	CB100C1B	BRADY	222000	BRADY	210829	210911	210927		.00



10. In OR PTC DCI, review the Authorization Detail page. Compare the Start and End dates, Initial Balance, Monthly Max, Weekly Max, Daily Max, Authorization ID Reference field (voucher number), and Authorization ID Reference 1 field (provider number) with the voided voucher in “10” status in Mainframe. These should match. In the below example, you will see these fields highlighted for both the hourly and mileage authorizations.

Authorization / Authorizations / 1449

## Authorization Detail - Carol Brady/ Hourly/ 1449

Actions

Authorization Details

Start Date: Sep 12, 2021  
 End Date: Sep 25, 2021  
 Expiration Date: Sep 29, 2021  
 Initial Balance: 20.00  
 Remaining Balance: 20.00  
 Pre Authorizations: 0.00  
 Holds:  
 Monthly Max: 20.00  
 Weekly Max: 20.00  
 Daily Max: 20.00  
 Billing Rate: 0.00  
 Billing Unit: Hourly  
 Authorization ID: 2021462561  
 Reference:  
 Authorization ID: 222000  
 Reference 1:  
 Non Billable: No

Account Details/ Service Account

Authorization Detail - Carol Brady/ Client Transportation/ 1450

Authorization Details

Start Date: Sep 12, 2021  
 End Date: Sep 25, 2021  
 Expiration Date: Sep 29, 2021  
 Initial Balance: 8.00  
 Remaining Balance: 8.00  
 Pre Authorizations: 0.00  
 Holds:  
 Monthly Max: 8.00  
 Weekly Max: 8.00  
 Daily Max: 8.00  
 Billing Rate: 0.00  
 Billing Unit: Miles  
 Authorization ID: 2021462561  
 Reference:  
 Authorization ID: 222000  
 Reference 1:

Account Details/ Service Account

Account Id: [1385](#)  
 Account Type: Client Transportat  
 Client: [Carol Brady](#)  
 Service Code: [Mileage-10](#)  
 Portal Signoff: FALSE  
 Funding Type: Units  
 Funding Source: [APD - Mileage](#)  
 Cost Center: [The Dalles APD-EL](#)  
 Unit Type: Miles  
 Status: Active

11. From the Authorization Detail page, click Actions.
12. Click Edit Authorization.

Authorization Detail - Carol Brady/ Hourly/ 1449

Actions

Account Details/ Service Account

Account Id: [1383](#)  
 Account Type: Hourly  
 Client: [Carol Brady](#)  
 Service Code: [Hourly ADL/IADL-1](#)  
 Portal Signoff: TRUE  
 Funding Type: Units  
 Funding Source: [APD](#)  
 Cost Center: [The Dalles APD-FL](#)

New Note  
 New Attachment  
 Renew Authorization  
 Rate Change  
 Reject Authorization  
 Edit Authorization  
 Edit Custom Field Values



13. In Mainframe, open the voucher in “30” status. Verify it is for the correct consumer, provider, and service period.

**Note:** The voucher number, hours and/or mileage will be different.

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HINV    P 222000             In-home Service Claim Detail             10/04/2021
Upd 08/31/2021 RACF         Not on file                               Wkr Id
Cre 08/31/2021 RACF         Not on file                               Msg
Vch Nubr 21490077          Prcs Trans 30 Msg VCHR IN AUTHORIZATION STATUS
Vch Xref 00000000          Chk Date 00/00/00 Chk Nubr 00000000 RA Nubr 00000000

ICN 00000000000000          Pay Ref 00/00/00 Vch Adj N                EOB 000
X Ref (ICN) 00000000000000 BF 3311          Prnt 598B 21/08/31 Mail Br N
Prim Id  CB100C1B           Prov Nubr 222000
Recip Name BRADY, CAROL     Prov Name BRADY, PETER
Days Work Per Wk           Prov Addr
Svc Cat APD                Prov Str 200 BRADY STREET
Lst Work 00/00/00          Prov City/ST SALEM, OR
                              Compl Zip 97301-0000

Authorized                      Adjudicated
Beg 21/09/12 End 21/09/25      Beg 00/00/00 End 00/00/00
Proc Desc          Units Rate Total          Units Rate Total
OC111 Hourly ADL/IADL 10.00 15.7700 $157.70 | 0.00 .0000 $0.00
OT111 Mileage/Pub Trans 8.00 .4850 $3.88 | 0.00 .0000 $0.00
  
```

14. Update the voucher number in the Authorization ID Reference field to match the new voucher number in Mainframe.

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15. If the start or end date of the voucher was changed, update the start and end date.
16. Update the hours/miles listed in the Initial Balance, Weekly Max, Monthly Max, and Daily Max to match the new authorized hours/miles.
17. Click Save.
18. An Alert will display, “Are you sure you want to Update Authorization for...”, click Yes.
19. Repeat steps 10 through 18 for the mileage authorization if there is one.

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Edit Authorization

Reference 5: \_\_\_\_\_

15 Date: 09/12/2021 09/25/2021

Expiration Date: 09/29/2021

Eligibility Code: Eligibility Code

Billing Unit: Hourly

16 Initial Balance: 10

Monthly Max: 10

Weekly Max: 10

Daily Max: 10

Billing Rate: 0.00

Max Daily Billable Units: Maximum Daily Billable Units

Non billable:  Yes

Hide Initial Balance:  Yes

Billing Hold:  Yes  No

17 Cancel Save

20. Click on the Authorization tab that was opened in step 8. Click Search once more to refresh the page. The results will display the updated authorizations. Verify the Authorization ID Reference has the new voucher number you updated for both the hourly and mileage service code and verify it reflects any updates to hours or miles.

AUTHORIZATIONS

Authorization / Authorizations

Authorizations

20

From (MM/DD/YYYY)

To (MM/DD/YYYY)

Type Entry Id

Carol Brady

Type Service Code

Initial Balance

Type Cost Center

Select Status

Type Authorization ID Reference

Reset
Search

Export

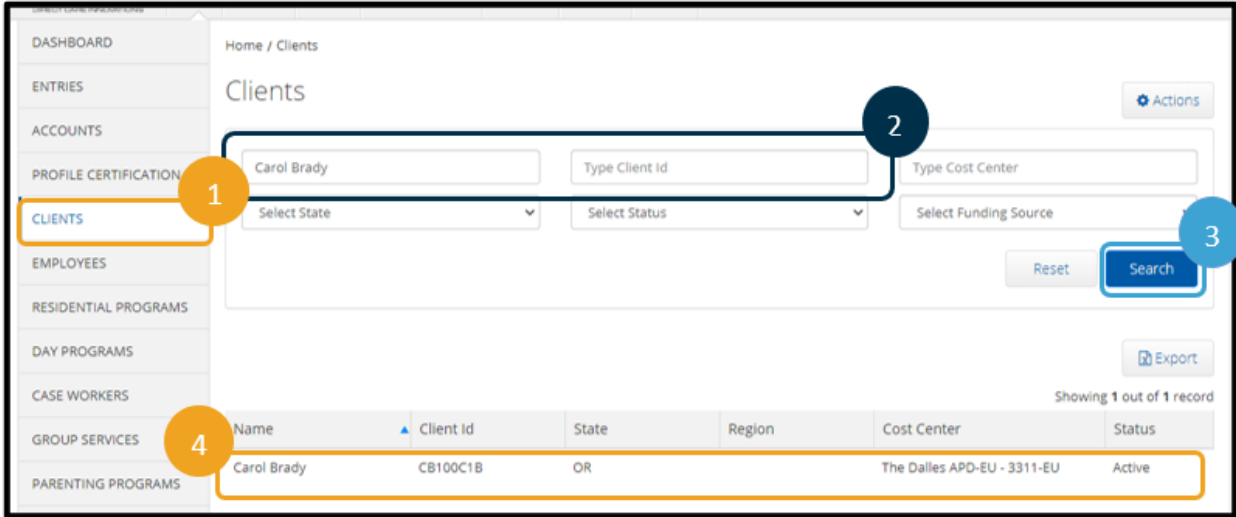
Showing 6 out of 6 records

Id	Start Date	End Date	Client	Service Code	Funding Type	Bill Rate	Cost Center	Remaining Balance	Holds	Authorization ID Reference
1450	Sep 12, 2021	Sep 25, 2021	Carol Brady	Mileage-10	Units	0.00	3311-EU	8.00	0.00	2021490077
1449	Sep 12, 2021	Sep 25, 2021	Carol Brady	Hourly ADL/IAD L-10	Units	0.00	3311-EU	10.00	0.00	2021490077
910	Aug 01, 2021	Sep 11, 2021	Carol Brady	Mileage-11	Units	0.00	3311-EU	10.00	0.00	vouchernumber1214

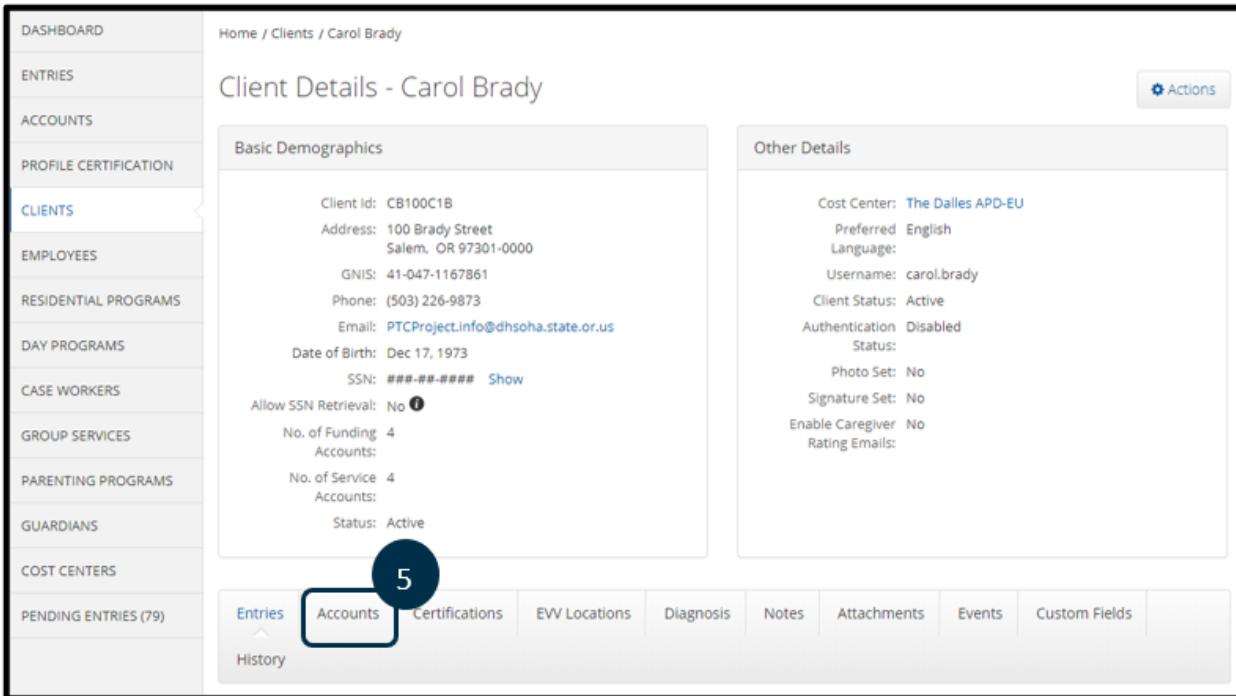
## Alternate Path for Finding an Authorization

If you were unable to find the authorization(s) that need to be updated via searching for the voucher number, try this method:

1. Right click Clients and open a new tab.
2. Enter the consumer's name or prime number to search for the consumer.
3. Click Search.



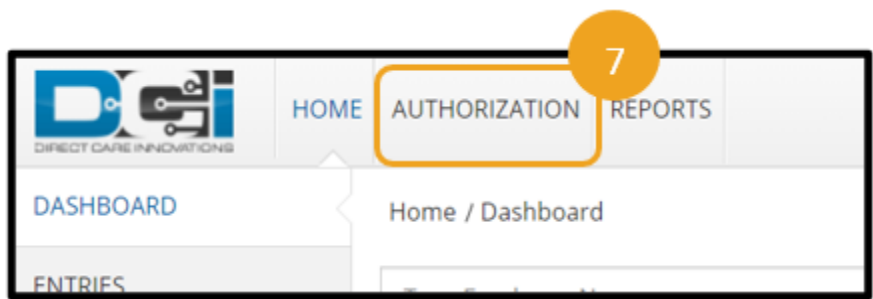
4. Click the consumer from the search results list.
5. From the Client Details page, click Accounts. This is below the consumer's demographic information.



- From Accounts, match the provider for the authorization you need to update to the service code. Note the exact service code and number following it.
  - Pro Tip:** If a consumer has more than one provider, it is critical that the staff member updating the authorization match the provider's name with the service code. In some rare cases the service code for hourly and mileage are not the same. Please do not edit this! Simply match the provider and service code and make note, as you will need this when searching for the authorization.

Account Type	Profile Type	Cost Center	Funding Source	Service Code	Employee/ Client/ Program Name/ Vendor Name	Unit	Status
Client Funding	Client	The Dalles APD-EU - 3311-EU	APD - Mileage	Mileage-11	Carol Brady	Miles	Active
Client Funding	Client	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-11	Carol Brady	Hourly	Active
Client Funding	Client	The Dalles APD-EU - 3311-EU	APD - Mileage	Mileage-10	Carol Brady	Miles	Active
Client Funding	Client	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-10	Carol Brady	Hourly	Active
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD - Mileage	Mileage-11	Joe Schmoie	Miles	Active
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-11	Joe Schmoie	Hourly	Active
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD - Mileage	Mileage-10	Peter Brady	Miles	Active
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-10	Peter Brady	Hourly	Active

- Return to Authorization tab.



- From the Authorization page, enter the consumer's name in the search field. To further narrow your search, you can also enter your branch in the cost center search field and any other relevant criteria.
- Click Search.
- You may want to click the Start Date to arrange the authorizations from newest to oldest.



11. Identify the authorization you need to update using the Service Code, Authorization ID Reference, and Start and End Dates. These should match the service code correlating with the provider, voucher number of the voided voucher, and start and end dates of the voided voucher respectively.

Id	Start Date	End Date	Client	Service Code	Funding Type	Bill Rate	Cost Center	Remaining Balance	Holds	Authorization ID Reference
1450	Sep 12, 2021	Sep 25, 2021	Carol Brady	Mileage-10	Units	0.00	3311-EU	8.00	0.00	2021462561

12. Right click on the Id in the far-left column for the authorization you need to update. If this consumer and provider pairing has both hours and miles, there will be two separate authorizations. Right click on both the hourly and mileage authorization Ids to open each in a separate tab because both need to be updated.
13. Continue with the process described above, beginning with step 5.

**When a provider stops working for a consumer in the middle of a pay period**, staff will void the original voucher in Mainframe. Staff will then issue a new voucher in Mainframe with an updated end date as the last day worked and will prorate any needed hours/miles. Staff will follow steps 1 through 20 above to locate the correct authorizations. Then from the Edit Authorization screen:

1. Change the end date to the last date worked.
2. Click Save.
3. An Alert will display “Are you sure you want to Update Authorization for...”, click Yes.
4. Repeat these steps if there is also a mileage authorization.

**Note:** Do not change the Expiration Date.

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Edit Authorization

Reference 5: \_\_\_\_\_

Date: 09/12/2021 | 09/22/2021

Expiration Date: 09/29/2021

Eligibility Code: Eligibility Code

Billing Unit: Hourly

Initial Balance: 10

Monthly Max: 10

Weekly Max: 10

Daily Max: 10

Billing Rate: 0.00

Max Daily Billable Units: Maximum Daily Billable Units

Non billable:  Yes

Hide Initial Balance:  Yes

Billing Hold:  Yes  No

Cancel Save

5. Click on the Authorization tab once more. Verify the End Date listed for the authorization(s) match the last date worked.