

Authorizations Widget

The authorizations widget feature displays all authorization details for clients and is located on the dashboard.

***Previously** - The authorizations widget only allowed the user to view approved and current authorizations by using the client filter search function. The user profiles - client, guardian, supervisor, employer, caseworker, and super user had the authorizations widget available on the dashboard.

***New** - The authorizations widget will now allow the user to view approved authorizations in the past, present, or future for clients, based on user profile type. Users will search by using the client filter (required) and optionally the date filter. The date filter allows the user to search by service date in the past, present, or future, and will return approved authorizations.

The user profiles client, guardian, supervisor, employer, caseworker, and super user profiles will maintain authorizations widget access with no further action required.

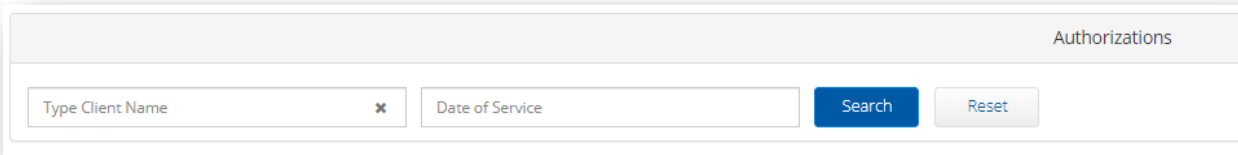
The feature is now also available for the employee (base user) role, with setting "display auth widget" enabled on an active service account. The display auth widget setting is only available for the account types hourly and client transportation. The authorizations widget will display all approved hourly and client transportation authorizations for associated clients, for which the user has an active service account, and the setting "display auth widget" is enabled.

Role Required: Client, Guardian, Supervisor, Employer, Super User, Caseworker, Employee (base user) with setting enabled

Permission Required: N/A

1. Log in to DCI
2. Navigate to the **Dashboard**
 - a. Click **Home** on the main menu
 - b. Click **Dashboard** on the sub menu

3. View the Authorizations widget



4. Enter the **Client Name** in the filter (**Required**)
5. Select the **client name** from list generated
6. Enter the **Date of Service** in the filter (Optional) – past, present, or future service date
7. Click **Search**
 - a. The authorizations widget will display approved authorizations based on the following profile types:
 - i. Client - View all their approved authorizations
 - ii. Guardian - View all approved authorizations for clients linked to the guardian on the client profile.
 - iii. Supervisor – View approved authorizations for clients where the cost center listed on the client profile, employee service account, or client funding account matches the cost center for which the user has the supervisor role.
 - iv. Employer - View approved authorizations for clients where the cost center listed on the client profile, employee service account, or client funding account matches the cost center for which the user has the employer role.
 - v. Caseworker - View all approved authorizations for clients and service codes the caseworker is linked to by either the funding source or funding account.
 - vi. Super User – View all approved authorization for all clients.
 - vii. Employee (base user) - View all approved authorizations for clients that have an active service account and the setting “display auth widget” is enabled. Only account types hourly and client transportation will be viewable.
 - b. The authorizations widget displays the following details from the authorization:
 - i. Service Code
 - ii. Start Date
 - iii. End Date
 - iv. Initial Balance
 - v. Remaining Balance
 - vi. Pre Authorizations Holds
 - vii. Current Available Balance
 - viii. Monthly Max
 - ix. Weekly Max
 - x. Daily Max
8. Click **Reset**, to clear filters and the authorizations widget
9. Repeat steps for each client as needed