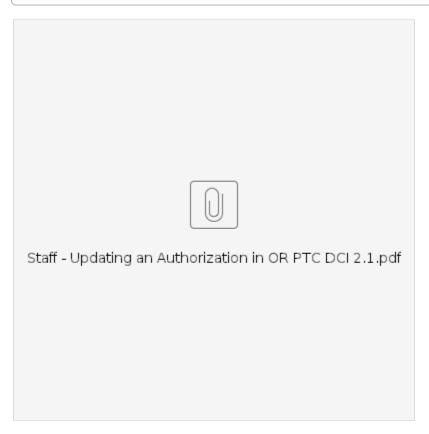# QRG - Updating an Authorization

> **Purpose:** This shows step-by-step instructions on how to update an authorization.
>
> **Outcome:** Staff know when and how to update authorizations.

Staff - Updating an Authorization in OR PTC DCI 2.1.pdf

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.
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
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.
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.
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.
11. From the Authorization Detail page, click Actions.
12. Click Edit Authorization.
13. In Mainframe, open the voucher in "30" status. Verify it is for the correct consumer, provider, and service period.
14. Update the voucher number in the Authorization ID Reference field to match the new voucher number in Mainframe.
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.
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.

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.
6. 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.
7. Return to Authorization tab.
8. 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.
9. Click Search.
10. 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.
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.
5. Click on the Authorization tab once more. Verify the End Date listed for the authorization(s) match the last date worked.

Related articles

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