

Add Reason Codes

Description: In this topic, the user will learn how to create reason codes for a funding source. A reason code is a code selected by an employee to explain why an entry was created in the web portal (instead of in real-time in the mobile app) or edited. Reason codes are optional settings that become required when added to a funding source.

Role Required: Super User

Permission Required: Funding Source Admin

Add a Reason Code to a Funding Source

1. Log in to DCI with personal profile
2. Select **Settings** from the main menu
3. Select **Funding Sources** from the submenu
4. Enter the funding source name in the filter and click **Search**
5. **Click anywhere in the funding source row** to open the details page
6. Click **Actions**
7. Select **New Reason Code** from the drop-down menu
8. Complete the form wizard
 - a. Name: Give the reason code a user-friendly name. This is what the employee sees when they select the reason code.
 - b. Code: The code provided by the funding source
 - c. Description: A description of the reason code
 - d. Status: Active or Inactive. Defaults to Active.
 - e. Requires Free Text Note: Yes or No. Defaults to No.
 - f. Monthly Usage Maximum Lower Bound: Numeric field, default is 0. Number of occurrences of usage of this reason for this client which when reached will result in the end user seeing an alert when attempting to save changes to an existing punch.
 - g. Monthly Usage Maximum Upper Bound: Numeric field, default is 0. Maximum monthly allowed number of occurrences of use of this reason code for this client in a calendar month which when reached will result in the end user seeing an alert when attempting to save changes to an existing punch.
 - i. Reason codes can have optional upper and lower bounds meaning that the system will prevent or alert a user from using a reason code a predefined number of times. For example, "Employee forgot mobile device" was a reason code with a lower bound of 3 and an upper bound of 5. On the third occurrence that this reason code is used, the system will warn the employee that they have used this reason a couple of times before, but still allow them to enter time. On the **fifth** occurrence that this reason code is used, the system will not accept the reason code when the employee is trying to save **their** time. Bounds are optional.
9. Click **Save** and **Yes** to confirm

Related articles

- [System Set-Up - Admin Guide](#)
- [November 2023 Release Notes](#)
- [Employee - Enter or Edit a Punch with a Reason Code in the Web Portal](#)
- [Case Worker Profile - Create & Link to Funding Source or Funding Account, View, Edit, or Deactivate](#)
- [Why is cost center not required on an authorization?](#)