Enabling Authorizations Widget for Employees

Description: In this topic, the user will learn how to enable the authorizations widget for employees (base user). The authorizations widget is located on the dashboard and allows the user to search by client (required filter) to view approved authorizations in the past, present, or future. Optionally, use both the client and date filter in conjunction to search for approved authorizations. The date filter allows the user to search by service date in the past, present, or future and will return approved authorizations.

*Please note: Employees (base users) will only be able to view the authorizations widget on their dashboard when one or more active service account(s) has the setting "display auth widget enabled." The authorizations widget will display all approved authorizations for associated clients, for which the user has an active service account, and the setting "display auth widget" is enabled. The display auth widget setting is only available for the account types hourly and client transportation.

Role Required: Super User, Supervisor

Permission Required: N/A

Authorizations Widget Displays the Following Details from the Authorization:

- Service Code
- Start Date
- End Date
- Initial Balance
- Remaining Balance
- Pre Authorizations Holds
- Current Available Balance
- Monthly Max
- Weekly Max
- Daily Max

Enable Authorizations Widget on New Service Account

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Search for the employee by typing the name in the **Type Employee Name** filter and selecting the name when it appears
5. Click **Search**
6. Select the employee from the table by clicking anywhere in the row
7. The Employee Details page will open
8. Click the **Actions** button
9. Select **New Service Account** from the actions drop-down
10. Complete the **form wizard**
    a. **Display Auth Widget** field - Select the **checkbox** to enable (a blue checkmark will display if the setting is enabled)
        i. The setting is only available for account types hourly and client transportation
11. Click **Save** and **Yes** to confirm

Enable Authorizations Widget on Active Service Account

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Search for the employee by typing the name in the **Type Employee Name** filter and selecting the name when it appears
5. Click **Search**
6. Select the employee from the table by clicking anywhere in the row
7. The Employee Details page will open
8. Scroll down and click on the **Accounts** tab
9. Select the account by clicking anywhere in the row
10. The Accounts Details page will open and display account details
11. Click the **Actions** button
12. Select **Edit Account** from the actions drop-down
13. Edit Service Account form wizard will open
    a. Edit **Display Auth Widget** field - Select the **checkbox** to enable (a blue checkmark will display if the setting is enabled)
        i. The setting is only available for account types hourly and client transportation
14. Click **Save** and **Yes** to confirm

View Display Auth Widget Setting on Service Account

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Search for the employee by typing the name in **Type Employee Name** and selecting the name when it appears
5. Click **Search**
6. Select the employee from the table by clicking anywhere in the row
7. The Employee Details page will open
8. Scroll down and click on the **Accounts** tab
9. Select the account by clicking anywhere in the row

10. The Accounts Details page will open and display account details
11. In the Account Details widget view the setting Display Auth Widget
    a. Yes = Authorizations Widget is enabled
    b. No = Authorizations Widget is disabled

Related articles

- Authorizations Widget
- Authorizations - Overview
- Roles Overview
- Group Service - Supervisor Guide
- Business Rule List