# Authorizations Widget

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

The Authorizations Widget can now display in units or time. The default view is in units. Submit a DCI support ticket to update the instance level setting default view to time. Use the '**Display as Time**' or '**Display as Units**' button to view the authorizations by the measure of time or units. Authorizations measured in miles and dollars are excluded from time conversion. Conversion to time is based on funding type, billing unit, and billing multiplier. If minutes are a decimal, the system will always round down to the whole minute.

*Please note: Employees (base users) can only 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 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. The display auth widget setting is only available for the account types hourly and client transportation.

**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. Click **Home** on the main menu
3. Click **Dashboard** on the submenu
4. View the **Authorizations widget**
5. Enter the **Client Name** in the filter (**required**)
6. Select the **client name** from the list
7. Enter the **Date of Service** in the filter (optional) - Past, present, or future service date.
8. Click **Search**
9. Click the **Display as Time** button to view the authorizations in hours and minutes, days, or months; or click the **Display as Units** button to view the authorizations in units.
    a. The Authorizations Widget default display is in units. Submit a DCI support ticket to update the instance level setting default view to time.
    b. Miles and dollars are excluded from time conversion
    c. Conversion to time is based on funding type, billing unit, and billing multiplier. If minutes are a decimal, the system will always round down to the whole minute.
10. The authorizations widget displays approved authorizations based on the following profile types:
    a. Client - View all their approved authorizations
    b. Guardian - View all approved authorizations for clients linked to the guardian, on the client profile.
    c. 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.
    d. 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.
    e. Caseworker - View all approved authorizations for clients and service codes the caseworker is linked to by either the funding source or funding account
    f. Super User - View all approved authorizations for all clients
    g. 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.
11. The authorizations widget displays the following details from the authorization based on the default setting or display selected (Display as Time or Display as Units button).*Please note: Miles and dollars are excluded from time conversion. If minutes are a decimal, the system will always round down to the whole minute.
    a. Service Code - Service(s) the client is eligible to receive
    b. Start Date - Day authorization begins
    c. End Date - Day authorization ends
    d. Initial Balance - Total amount of authorized units, dollars, miles, or time
    e. Remaining Balance - Amount remaining (units, dollars, miles, or time) after pre-authorization holds have been processed for billing and payment
    f. Pre-Authorization Holds - Amount (units, dollars, miles, or time) deducted from the authorization that has not yet been processed for billing and payment
    g. Current Available Balance - The total of the remaining balance in units, dollars, miles, or time minus any pre-authorization holds
    h. Monthly Max - Max units, dollars, miles, or time available for the authorization per service per client per month
        i. Click the hyperlink to view the authorization summary pop-up with the following details: *Please note: This feature is an instance-level setting. To enable the hyperlink to the authorization summary pop-up, please submit a DCI support ticket.
            1. Month/Year - Use the black arrow to toggle and view authorization monthly max data for other months
            2. Monthly Max
            3. Monthly Used
            4. Monthly Remaining
            5. Billing Unit
            6. Billing Multiplier - This field only displays if the billing unit is set to hourly
    i. Weekly Max - Max units, dollars, miles, or time available for the authorization per service per client per week
        i. Click the hyperlink to view the authorization summary pop-up with the following details: *Please note: This feature is an instance-level setting. To enable the hyperlink to the authorization summary pop-up, please submit a DCI support ticket.
            1. XX/XX/XXXX-XX/XX/XXXX - Defaults to current week. Use the black arrow to toggle and view authorization weekly max data for other weeks.
            2. Weekly Max
            3. Weekly Used
            4. Weekly Remaining
            5. Billing Unit
            6. Billing Multiplier - This field only displays if the billing unit is set to hourly

j. Daily Max - Max units, dollars, miles, or time available for the authorization per service per client per day

12. Click **Reset** to clear the filters and the authorizations widget
13. Repeat for each client as needed

## Related articles

- September 2023 Release Notes
- Authorizations Widget