

# Funding Source - Create, View, Edit, or Deactivate

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**Description:** In this topic, the user will learn how to create, view, edit, or deactivate the funding source.

\*Please note: Cost Center must be created before Funding Source.

**Role Required:** Super User

**Permission Required:** Funding Source Admin

## Create Funding Source

1. Log in to DCI with personal profile
2. Click **Settings** on the main menu
3. Click **Funding Sources** on the submenu
4. Click **Actions**
5. Select **Add New Funding Source** from the drop-down menu
6. Complete the form wizard
  - a. Name **(required)**
  - b. Type **(required)**
  - c. Address **(required)**
  - d. Time Zone (optional): Select from drop-down
  - e. Cost Center **(required)**: Administrative or overhead cost center
  - f. Phone **(required)**
  - g. \*Alternate Phone (optional)
  - h. Authorization Automation Integration (optional): Auto updates authorization from the state
    - i. Supports Automated Authorization Download: Currently only available in Oregon and Arizona for government funding sources.
    - ii. See Screen Scaping Guide for more details
  - i. EDI (optional – **required if using EDI**):
    - i. Enable EDI: Yes or no options, defaults to no.
    - ii. Enable EDI Transmission: Field becomes available if selected yes in enable EDI. Yes or no options default to no.
    - iii. EDI Sender ID: Unique id provided by DCI
    - iv. EDI Receiver ID: Unique id provided by DCI
  - j. EVV (optional – client attestation): Click the blue **plus (+)** icon to enable EVV options. These options all have a yes or no option. Selecting yes will turn this option on and the employee will be able to select this EVV method when prompted:
    - i. Allow Signature EVV Verification
    - ii. Allow Password EVV Verification
    - iii. Allow Pin EVV Verification
    - iv. Allow Picture EVV Verification
      1. If Yes, the following field appears:
        - a. Perform Picture Facial Recognition
          - i. If yes, the following field appears:
            1. Picture Facial Recognition Threshold: Enter the minimum accuracy threshold
    - v. Allow Voice Recording EVV Verification
    - vi. Allow FOB EVV Verification
    - vii. Allow Mobile App Client Signoff Verification
  - k. Approve Unverified EVV (optional): Yes or no options. If yes is selected, auto approval will have the ability to approve the following:
    - i. Picture
    - ii. Signature
    - iii. Voice Recording
  - l. Allow Offline Mobile App (instance level setting): If enabled for the instance, there are yes or no options. The default is no. If yes is selected, offline mode will be enabled for this funding source.
  - m. Email **(required)**
  - n. Sleep Shift Start and End (optional): Enter if the funding source authorizes a defined sleep shift.
  - o. \*\*Provider Id (optional)
  - p. \*\*Profile Reference (optional)
  - q. Status: Defaults to active. Select inactive when this is no longer a valid funding source.
  - r. Exclude from Auto Approval: Yes or no options, default is no. Select yes to exclude entries from this funding source from being processed for auto-approval.
  - s. Schedule Compare Logic **(required)**: Select default or duration
  - t. Require Reason Codes for Late Entries: Yes or no options, default is no. Select this to require a reason code for historical entries.
  - u. Require Reason Codes for Manual Entries: Yes or no options, default is no. Select this to require a reason code for manual entries.
7. Click **Save** and **Yes** to confirm

## View, Edit, or Deactivate Funding Source

1. Log in to DCI with personal profile
2. Click **Settings** on the main menu
3. Click **Funding Sources** on 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 Funding Source Details page
6. Click **Actions**
7. Select **Edit Funding Source** from the drop-down menu
8. View and make edits in the Funding Source form wizard
  - a. To deactivate the funding source, change the status to **Inactive**.
9. Click **Save** and **Yes** to confirm

## Related articles

- [What is the difference between Service Provider \(SP\) mode and Fiscal Intermediary \(FI\) mode?](#)
- [System Set-Up - Admin Guide](#)
- [Employer Profile - Create, View, Edit, or Deactivate - FI Mode Only](#)
- [Case Worker Profile - Create & Link to Funding Source or Funding Account, View, Edit, or Deactivate](#)
- [Mobile App - Employer - Dashboard & Menu Navigation - FI Mode Only](#)