Authorization - Monthly Budget

Description: In this topic, the user will learn how to add monthly budgets to authorizations. A monthly budget is derived from an authorization, but it is not the same as the Monthly Max. Monthly budgets are based on an algorithm and may allow a client to exceed 100% of their monthly budget. To enable Monthly Budgets fields on an authorization, custom fields for Monthly Budgets must be created in the Custom Field Definitions Setting. To use the monthly budget fields after creating, add a new authorization. When completing the form wizard, the newly created budget fields will be visible. For steps on how to create a new authorization, see the article Authorizations - Create, Approve, Reject, Edit, View, or Deactivate.

Role Required: Super User, Billing Team, Authorization

OR

Permission Required: Authorization Admin

Add Monthly Budget Fields to an Authorization

1. Log in to DCI
2. Select **Settings** on the main menu
3. Select **Custom Field Definitions** on the submenu
4. Click **Actions**
5. Select **Add New Custom Field** from the drop-down menu
6. Complete the Add New Custom Field form wizard
    a. Item Type **(required)**: Select **Authorization**
    b. Name **(required)**: Type the name without spaces. Choose a name that describes what the custom field is such as Month1Budget.
    c. Label **(required)**: The label is what users will see in DCI as the field name
    d. Description: Add a description of the custom field
    e. Help Text: Add optional text to help users understand what the field means. This will appear as a tooltip (i icon) next to the custom field on the authorization. Users will hover over it to view the help text message.
    f. Input Type **(required)**: Select **Numeric**
    g. RegEx: Optional field
    h. Default Value: Add an optional default value. Users may still enter numbers other than the default value.
    i. EDI **(required)**: Select Yes or No
    j. Required **(required)**: Is this a required field? Select Yes or No.
    k. Status **(required)**: Select Active or Inactive
7. Click **Save**
8. Repeat steps 4-7 for each month (i.e., Month 2 Budget, Month 3 Budget, etc.)

Related articles

- Business Rule List
- Billing Quick Reference
- Authorizations - Overview
- System Set-Up - Admin Guide
- Billing Module - Admin Guide