

# Authorizations - Overview

**Description:** In this topic, the user will learn about authorizations. An authorization is an entry in DCI that represents an allotment of dollars or units from a funding source to provide a service to a client. An authorization is for one service code and one client. Authorizations cannot be deleted or inactivated. To make the authorization unusable, change the start date, end date, and expiration date to past dates, and/or set the Initial Balance and Monthly, Weekly, and Daily Max to 0.

The user profiles client, guardian, supervisor, employer, caseworker, auditor, and super user can view the authorizations widget for accounts to which they are linked. The employee (base user) profile can only view the authorizations widget for associated clients on their dashboard when one or more active service account(s) has the setting "display auth widget enabled." Enter the client's name in the search box on the authorizations widget and click **Search** to return authorization results:

- Service Code: Service the client is eligible to receive. A client may have multiple service codes.
- State Date: Day the authorization starts
- End Date: Day the authorization ends
- Initial Balance: Total amount of authorized units or dollars
- Remaining Balance: Amount deducted from the authorization after pre-authorization holds have been processed for billing and payment
  - Remaining balance should always validate against **available balance** when there are pre-authorization holds
- Pre-Authorization Holds: Amount deducted from the authorization that has not yet been processed for billing and payment
- Current Available Balance: Total of the remaining balance minus any pre-authorization holds
- Monthly Max: Maximum units or dollars available for the authorization per service per client per month
- Weekly Max: Maximum units or dollars available for the authorization per service per client per week
- Daily Max: Maximum units or dollars available for the authorization per service per client per day

As employees clock in and clock out, their time will be deducted from the authorization and placed into a pre-authorization hold. Time is deducted in either units or dollars based on how the authorization is set up. Units or dollars in a pre-authorization hold remain in that status until billing and payroll has been processed. After payroll and billing completion, the units and dollars that were previously in a pre-authorization hold status will be deducted from the remaining balance and an updated remaining balance will be displayed.

**Role Required:** Super User, Supervisor, Employer, Client, Guardian, Auditor, or Case Worker. Employee (base user) with "display auth widget enabled" setting enabled.

OR

**Permission Required:** Authorization Admin

## Authorizations Widget located on the Dashboard

Authorizations						
Steph Client4 - 75    Date of Service <button>Search</button> <button>Reset</button>						
Authorization for Client: <b>Steph Client4</b>						
Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorizations Holds	Current Available Balance
Dollar	06/01/2023	06/30/2024	10000.00	10000.00	0.00	10000.00
RESPIRE (Hourly)	06/01/2023	06/30/2024	10000.00	9998.00	0.00	9998.00

Scroll down and to the right to view all authorization data associated with the client

Authorizations						
Steph Client4 - 75    Date of Service <button>Search</button> <button>Reset</button>						
	Remaining Balance	Pre Authorizations Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
	10000.00	0.00	10000.00	500.00	40.00	24.00
	9998.00	0.00	9998.00	500.00	40.00	24.00

## Related articles

- [Business Rule List](#)
- [Authorizations Widget](#)
- [Authorizations - Overview](#)
- [Roles Overview](#)
- [What is a pre-authorization hold?](#)

