Authorizations - Create, Approve, Reject, View, or Edit

Description: In this topic, the user will learn how to create (add a new) an authorization, approve or reject the pending authorization, and edit, view, or reject an authorization. An authorization is an entry 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.

Role Required: Super User, Billing Team, Authorization

Permission Required: Authorization Admin

Create (Add New) Authorization

1. Log in to profile
2. Select **Authorization** from the main menu
3. Select **Pending Authorizations** from the submenu
4. Click **Actions**
5. Select **Add New Authorization** from the drop-down menu
6. Complete the Add New Authorization form wizard
7. Click **Save** and **Yes** to confirm

Approve or Reject a Pending Authorization

The authorization must be approved before it can be used.

1. Log in to profile
2. Select **Authorization** from the main menu
3. Select **Pending Authorizations** from the submenu
4. View the pending authorization results or use the filters to refine then click **Search**
5. Click **A to approve** the authorization or the **red R to reject**
6. Click **Yes** to confirm

Edit, View, or Reject an Authorization

1. Log in to profile
2. Select **Authorization** from the main menu
3. Select **Authorizations** from the submenu
4. Use the filters to refine and click **Search**
5. **Click anywhere in the authorization row** to open the authorization detail page
6. Click **Actions**
7. Select **Edit Authorization** from the drop-down menu
8. Update or edit the form wizard as needed
9. To reject an authorization that has a balance (does not have a zero balance):
    a. Select **Reject Authorization** from the drop-down menu
        i. A red error message will populate if the authorization has punch entries entered against it and the system will not allow the rejection
10. Click **Yes** to confirm

Related articles

- Authorizations Widget
- Authorizations - Overview
- Roles Overview
- Business Rule List
- Billing Quick Reference