Funding Account - Create, View, Edit or Deactivate

Description: In this topic, users will learn how to create, view, edit, or deactivate funding accounts. A client funding account is a ledger where client authorizations, attendance, employee service and billing entries are placed. A client must have an active funding account in order to have service accounts created for that particular service. The different types of funding accounts are:

- Hourly (Units or Dollars)
- Residential Program
- Day Program
- Group Service
- Parenting Program
- Transportation (for Day Program)
- Client Transportation (for employees who are eligible for client transportation mileage reimbursement)
- Vendor

Role Required: Super User, Billing Team, Authorization

Permission Required: Authorization Admin

Create Funding Account

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

View, Edit, or Deactivate Funding Account

1. Log in to profile
2. Select **Authorization** from the main menu
3. Select **Funding Accounts** from the submenu
4. Use the filters to refine and click **Search**
5. **Click anywhere in the funding account row** to open the account details
6. Click **Actions**
7. Select **Edit Account** from the drop-down menu
8. View or make edits in the Edit Account form wizard
    a. To deactivate the funding account, 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
- Mobile App - Employer - Dashboard & Menu Navigation - FI Mode Only
- Create Other Payment Entries - Employer - FI Mode Only