

Authorization Remaining Balances as Time in the Mobile App

Description: The new setting, Remaining Balance Details, has options that allow authorizations to be *displayed in time* by total, monthly, weekly, and/or daily balances in the mobile app for employees. The Remaining Balance Details Settings must be updated on the service code.

*Please note: For dollars-based service codes, the remaining balances are **estimates** as they can be impacted by several factors such as overtime, changes in employee pay rates, or having multiple employees with different pay rates working for the same client.

Role Required: Super User

Permission Required: Funding Source Admin

***Previously:**

- The setting listed on the service code was Hide Remaining Balance
 - No = Authorization Remaining Balance appears when employees create a punch
- The only option available was to display the **total** authorization remaining balance in billing units for the employee (provider)


***New:**

- Hourly service codes have the option to display total, monthly, weekly, and/or daily authorization remaining balances to employees (providers) **in time** when clocking in on the mobile app
 - Hourly billing units display as hours and minutes
 - Daily billing units display as days
 - Monthly billing units display as months
- The Remaining Balance Details settings below are updated on the service code:
- The account type hourly (funding types of units and dollars) may optionally use any of the four Remaining Balance Details settings listed below:
 - Show Remaining Balance - If yes, the remaining authorization balance displays in units or dollars in the web portal and mobile app and total available time when an employee creates a punch in the mobile app.
 - Show Monthly Balance - If yes, the remaining monthly balance displays as time when employees create a punch in the mobile app.
 - Show Weekly Balance - If yes, the remaining weekly balance displays as time when employees create a punch in the mobile app.
 - Show Daily Balance - If yes, the remaining daily balance displays as time when employees create a punch in the mobile app.
- The account type client transportation can only use the show remaining balance setting

Edit Remaining Balance Setting on the Service Code

1. Log in to DCI
2. Select **Settings** from the main menu
3. Select **Funding Sources** from the submenu
4. Use filters to search for the funding source and click **Search**
5. **Click anywhere in the funding source row** to open it
6. Scroll down the page and select the **Service Codes** tab
7. **Click anywhere in the row of the service code** to be viewed, edited, or deactivated.
8. Click **Actions**
9. Select **Edit Service Code** from the drop-down menu
10. Edit the Remaining Balance Details Settings in the Service Code form wizard listed below:
 - a. Show Remaining Balance: Defaults to no. If yes, the remaining authorization balance displays in units and total available time when an employee creates a punch.
 - b. Remaining Balance Details: Click the blue **plus sign (+)** to expand the section
 - i. Show Monthly Balance: If yes, displays the remaining monthly balance as time when employees create a punch in the mobile app.
 - ii. Show Weekly Balance: If yes, displays the remaining weekly balance as time when employees create a punch in the mobile app.
 - iii. Show Daily Balance: If yes, displays the remaining daily balance as time when employees create a punch in the mobile app.
11. Click **Save** and **Yes** to confirm

View the Remaining Balance Settings in the Service Code Details widget.



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FUNDING SOURCES

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SUPER USERS

HOLIDAY SCHEDULES

ACCOUNTS

NEWS POSTS

CUSTOM DROP DOWN

TRAINING

MESSAGE TEMPLATES

PAYROLL

Settings / Funding Sources / KZ Funding Source / Attendant Care

Service Code Details - Attendant Care

Service Code Details

Service Code Name:

Attendant Care

Account Type:

Hourly

Funding Type:

Units

Billing Details:

+

Payroll Details:

+

Remaining Balance Details

-

Show Remaining Balance:

Yes

Show Monthly Balance:

Yes

Show Weekly Balance:

Yes

Show Daily Balance:

Yes

Web Portal Remaining Balance Enabled Setting on the Service Code and Corresponding Employee View on the Mobile App at Clock In

9:48

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Clock In

Clock In Time: 09:48 AM (MT)

EVV Location

Home

Confirm Clock In

Client Name: KZ Client

Service Code: Attendant Care

Auth Remaining Balance: 9700

Available Authorized Time

Total Available Time: 2425 hours, 0 minutes.

Available Today: 247 hours, 15 minutes.

Available This Week: 240 hours, 0 minutes.

Available This Month: 227 hours, 30 minutes.

Show Remaining Balance: ☒ Yes ☐ No

Remaining Balance Details:

Show Monthly Balance: ☒ Yes ☐ No

Show Weekly Balance: ☒ Yes ☐ No

Show Daily Balance: ☒ Yes ☐ No

If the **Show Remaining Balance** setting on the service code is set to Yes, the **Remaining Authorization Balance** displays in units or dollars in the first box beneath the Confirm Clock In button. **Total Available Time** also displays in the second box beneath the Confirm Clock In button when an employee creates a punch in the mobile app. If the settings **Show Monthly Balance**, **Show Weekly Balance**, or **Show Daily Balance** are set to Yes, the mobile app will display the amount of time **Available This Month**, **Available This Week**, and/or **Available Today** when an employee creates a punch.

Conversion to Time Calculations

The DCI system auto-converts dollar and/or unit authorizations into time when the remaining balance setting on the service code is enabled.

Conversion to time is based on funding type, billing unit, and billing multiplier.

These fields are located on the service code. To find your service code, click on Settings on the main menu, Funding Sources on the submenu, search and select your funding source, select your service code on the service codes tab, and view the service code details widget.

Conversion to time is based on:

Funding Type

Billing Unit

Billing Multiplier

Service Code Details - Hourly EVV

Service Code Details	
Service Code Name:	Hourly EVV
Account Type:	Hourly
Funding Type:	Units
Billing Details:	<input checked="" type="radio"/>
Bill Code:	Hourly EVV
Billable:	Yes
Billing Unit:	Hourly
Billing Multiplier:	Quarter Hourly
Rounding Increment:	None
Billing Rollup Type:	None
Crossing Midnight Entries generate only one Bill Unit:	No
Payroll Details:	<input checked="" type="radio"/>
Hide Remaining Balance:	No
Allow Diagnosis Code:	No
Allow Accrued Time Entries:	No

The following service code setting combination examples in DCI are conversions to time from units and/or dollars.

Scenario 1:

Funding Type = Units

Billing Unit = Hourly

Billing Multiplier = Hourly

Process:

- Available Balance = Hours as a decimal
- Value to the left of the decimal = Hours
- (Value to the right of the decimal) x (60) = Minutes
- If minutes are a decimal, always truncate (round down).

Example:

- Available Balance = 34.24
- Hours = 34
- Minutes = 14.4
- Final Display = 34 hours, 14 minutes

Scenario 2:

Funding Type = Units

Billing Unit = Hourly

Billing Multiplier = Half Hourly

Process:

- (Available Balance) / (2) = Hours as a decimal
- Value to the left of the decimal = Hours
- (Value to the right of the decimal) x (60) = Minutes
- If minutes are a decimal, always truncate (round down).

Example:

- Available Balance = 445.62
- Hours as decimal = 222.81
- Hours = 222

- Minutes = 48.6
- Final Display = 222 hours, 48 minutes

Scenario 3:

Funding Type = Units

Billing Unit = Hourly

Billing Multiplier = Quarter Hourly

Process:

- (Available Balance) / (4) = Hours as a decimal
- Value to the left of the decimal = Hours
- (Value to the right of the decimal) x (60) = Minutes
- If minutes are a decimal, always truncate (round down).

Example:

- Available Balance = 878.67
- Hours as decimal = 219.67
- Hours = 219
- Minutes = 40.2
- Final Display = 219 hours, 40 minutes

Scenario 4:

Funding Type = Units

Billing Unit = Daily

Billing Multiplier = N/A

Process:

- Available Balance = Days

Example:

- Available Balance = 13
- Final Display = 13 days

Scenario 5:

Funding Type = Units

Billing Unit = Monthly

Billing Multiplier = N/A

Process:

- Balance = Months

Example:

- Available Balance = 5
- Final Display = 5 months

Scenario 6:

Funding Type = Dollars

Billing Unit = Dollar

Billing Multiplier = N/A

*Please note: For dollars-based service codes, the remaining balances are **estimates** as they can be impacted by several factors such as overtime, changes in employee pay rates, or having multiple employees with different pay rates working for the same client.

Process:

- (Available Balance) / (Pay Rate) x (1+Burden Multiplier) = Hours as a decimal
 - Pay Rate = Current active pay rate listed on the employee service account in the account details widget

- If overlapping pay rates are enabled on the employee service account, the system uses the rate the employee selected at the time of the clock in for the punch entry to calculate the balance in time.
 - Burden Multiplier = Listed on the employee service account in the account details widget
- Value to the left of the decimal = Hours
- (Value to the right of the decimal) x (60) = Minutes
- If minutes are a decimal, always truncate (round down).

Example:

- Available Balance = 546.23
- Pay Rate = 13.25
- Burden Multiplier = 0.1
- Hours as decimal = 37.48
- Hours = 37
- Minutes = 28
- Final Display = 37 hours, 28 minutes

Related articles

- [Authorization Remaining Balances as Time in the Mobile App](#)
- [October 2023 Release Notes](#)
- [July 2023 Release Notes](#)