

Funding Source - Create, View, Edit, or Deactivate

Description: In this topic, the user will learn how to create, view, edit, or deactivate the funding source.

*Please note: Cost Center must be created before Funding Source.

Role Required: Super User

Permission Required: Funding Source Admin

Create Funding Source

1. Log in to DCI with personal profile
2. Click **Settings** on the main menu
3. Click **Funding Sources** on the submenu
4. Click **Actions**
5. Select **Add New Funding Source** from the drop-down menu
6. Complete the form wizard
 - a. Name **(required)**
 - b. Type **(required)**
 - c. Address **(required)**
 - d. Time Zone (optional): Select from drop-down
 - e. Cost Center **(required)**: Administrative or overhead cost center
 - f. Phone **(required)**
 - g. *Alternate Phone (optional)
 - h. Authorization Automation Integration (optional): Auto updates authorization from the state
 - i. Supports Automated Authorization Download: Currently only available in Oregon and Arizona for government funding sources.
 - ii. See Screen Scaping Guide for more details
 - i. EDI (optional – **required if using EDI**):
 - i. Enable EDI: Yes or no options, defaults to no.
 - ii. Enable EDI Transmission: Field becomes available if selected yes in enable EDI. Yes or no options default to no.
 - iii. EDI Sender ID: Unique id provided by DCI
 - iv. EDI Receiver ID: Unique id provided by DCI
 - j. EVV (optional – client attestation): Click the blue **plus (+)** icon to enable EVV options. These options all have a yes or no option. Selecting yes will turn this option on and the employee will be able to select this EVV method when prompted:
 - i. Allow Signature EVV Verification
 - ii. Allow Password EVV Verification
 - iii. Allow Pin EVV Verification
 - iv. Allow Picture EVV Verification
 1. If Yes, the following field appears:
 - a. Perform Picture Facial Recognition
 - i. If yes, the following field appears:
 1. Picture Facial Recognition Threshold: Enter the minimum accuracy threshold
 - v. Allow Voice Recording EVV Verification
 - vi. Allow FOB EVV Verification
 - vii. Allow Mobile App Client Signoff Verification
 - k. Approve Unverified EVV (optional): Yes or no options. If yes is selected, auto approval will have the ability to approve the following:
 - i. Picture
 - ii. Signature
 - iii. Voice Recording
 - l. Allow Offline Mobile App (instance level setting): If enabled for the instance, there are yes or no options. The default is no. If yes is selected, offline mode will be enabled for this funding source.
 - m. Email **(required)**
 - n. Sleep Shift Start and End (optional): Enter if the funding source authorizes a defined sleep shift.
 - o. **Provider Id (optional)
 - p. **Profile Reference (optional)
 - q. Status: Defaults to active. Select inactive when this is no longer a valid funding source.
 - r. Exclude from Auto Approval: Yes or no options, default is no. Select yes to exclude entries from this funding source from being processed for auto-approval.
 - s. Schedule Compare Logic **(required)**: Select default or duration
 - t. Require Reason Codes for Late Entries: Yes or no options, default is no. Select this to require a reason code for historical entries.
 - u. Require Reason Codes for Manual Entries: Yes or no options, default is no. Select this to require a reason code for manual entries.
7. Click **Save** and **Yes** to confirm

View, Edit, or Deactivate Funding Source

1. Log in to DCI with personal profile
2. Click **Settings** on the main menu
3. Click **Funding Sources** on the submenu
4. Enter the funding source name in the filter and click **Search**
5. Click **anywhere in the funding source row** to open the Funding Source Details page
6. Click **Actions**
7. Select **Edit Funding Source** from the drop-down menu
8. View and make edits in the Funding Source form wizard
 - a. To deactivate the funding source, change the status to **Inactive**.
9. Click **Save** and **Yes** to confirm

Related articles

- [Create a Vendor Payment Entry - Employer & Client - FI Mode Only](#)
- [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](#)
- [Case Worker Profile - Create & Link to Funding Source or Funding Account, View, Edit, or Deactivate](#)