

# Staff – Phase 2A – Authorizations Widget Guide



**Purpose:** The purpose of this guide is to demonstrate how to use the authorizations widget to view the authorizations and hours assigned in OR PTC DCI for a consumer and their providers.

**Outcome:** Staff will be able to use the authorizations widget to find authorization information.

## Using the Authorizations Widget

After Phase 2A goes live, staff will not be able to access the authorizations in OR PTC DCI directly. However, the authorizations widget shows most of the same information. To use the authorizations widget:

1. Log into OR PTC DCI and click OK on any News Posts. You are now on the OR PTC DCI dashboard.
2. Scroll down, and under the Authorizations header, begin to type the consumer's name in the Client Name field. After typing the first three letters of the consumer's first or last name, a list of consumers who have those three letters in their name will appear in a dropdown menu with their prime number. You must click the name of the correct consumer to select it.

A screenshot of the "Authorizations" widget in the OR PTC DCI system. The widget has a header "Authorizations" and a search bar containing "pau". Below the search bar is a dropdown menu with three options: "Paul Perfect - CD55668E", "Paul Thegreat - Primenumber001", and "Sir Paul McCartney - PAUL4EVA". A red arrow points to the third option. To the right of the search bar are fields for "Date of Service" with a calendar icon, a blue "Search" button, a "Reset" button, and a "Display as Units" button. Below the search bar is a section titled "Expiring Certifications".

3. In the Date of Service field, enter any date within the pay period in question. The widget will pull up the authorization information for that pay period. If this field is left blank, the widget will pull up information for the current pay period.
4. Click Search. All the hourly and mileage authorizations for the consumer and applicable pay period will appear. If multiple providers are authorized to work for the consumer in a certain pay period, multiple rows with multiple service codes will appear.

**Note:** The authorizations widget does not display provider names. To find out which service code is assigned to a provider, navigate to the consumer's Client Details page, and click on the Accounts tab. For the Employee Service account type, the Employee Name will display next to the service codes they are associated with.

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Accounts Showing 6 out of 6 records

Account Type	Profile Type	Cost Center	Funding Source	Service Code	Employee/ Client/ Program Name/ Vendor Name	Unit	Status
Employee Service	Employee	Oregon City APD-EU - 0311-EU	APD - Mileage	Mileage-3	John Lennon	Miles	Active
Employee Service	Employee	Oregon City APD-EU - 0311-EU	APD	Hourly ADL/IADL-3	John Lennon	Hourly	Active
Employee Service	Employee	Oregon City APD-EU - 0311-EU	APD - Mileage	Mileage-2	Ringo Starr	Miles	Active
Employee Service	Employee	Oregon City APD-EU - 0311-EU	APD	Hourly ADL/IADL-2	Ringo Starr	Hourly	Active

5. The information will display in hours and minutes by default. If you would like to see the information displayed in units, click the Display as Units button.

## Information that Displays on the Authorizations Widget

Authorizations

Sir Paul McCartney - PAUL4E  Date of Service

Authorization for Client **Paul McCartney**

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance
Mileage-2	02/11/2024	02/24/2024	15 Miles	15 Miles	8 Miles	7 Miles
Mileage-1	02/11/2024	02/24/2024	10 Miles	10 Miles	5 Miles	5 Miles
Hourly ADL/IADL-2	02/11/2024	02/24/2024	18 Hours, 0 Minutes	18 Hours, 0 Minutes	0 Hours, 4 Minutes	17 Hours, 55 Minutes
Hourly ADL/IADL-1	02/11/2024	02/24/2024	21 Hours, 0 Minutes	20 Hours, 58 Minutes	0 Hours, 0 Minutes	20 Hours, 58 Minutes

- A. **Service Code** – Connects the consumer and provider with type of service and a sequence number.
- B. **Start Date** and **End Date** – The first and last day of the pay period.
- C. **Initial Balance** – The number of hours or miles the authorization started with.
- D. **Remaining Balance** – The number of hours or miles remaining, not taking into account any pending time or miles.
- E. **Pre Authorization Holds** – The number of hours or miles in a pending status.

**Remaining Balance**  
**– Pre Authorization Holds**  
**= Current Available**  
**Balance**

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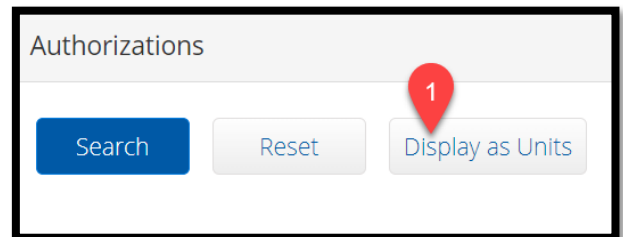


- F. **Current Available Balance** –The most accurate remaining balance, taking into account any pending time or miles. This is the current amount OR PTC DCI will allow the provider to claim on the authorization.
- G. **Monthly Max, Weekly Max, and Daily Max** – Our Agency does not use these fields in the way the system is designed to use them. The number in these fields will always match the Initial Balance.

## A Note About Rounding

There are times the authorizations widget rounds down to the nearest minute. If there is any doubt about if the number of minutes displayed on the widget is correct, take the following steps:

1. Click the Display as Units button to view the amounts on the widget in decimal format.
2. Use the [Time Conversion Chart](#) to figure out the number of minutes that corresponds with the decimal hour.



For example, if the authorizations widget shows 3.52 hours in the Current Available Balance column, the provider has 3 hours and 31 minutes remaining on their authorization.

Minutes	Decimal Hours
31	.52
32	.53

## Practical Application

Here is a practical example of how to use the authorizations widget: As a staff member, you need to figure out how many hours provider George Harrison has left for pay period 2/11-2/24/24.

1. You begin by entering the name of his consumer, Paul McCartney, in the client name field of the authorizations widget.
2. In the date field, you enter 2/16/24. **Remember:** you can enter any date in the date field, and it will pull the authorization information for the pay period containing that date. The following information displays:

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Sir Paul McCartney - PAUL4E ✕    02/16/2024    Search    Reset    Display as Units

Authorization for Client: **Sir Paul McCartney** ⓘ

Service Code	Start Date	End Date	Initially authorized hours	Remaining Balance	Pending entries	Current Available Balance
Mileage-2	02/11/2024	02/24/2024	15 Miles	7 Miles	3 Miles	4 Miles
Mileage-1	02/11/2024	02/24/2024	20 Miles	15 Miles	0 Miles	15 Miles
Hourly ADL/IADL-2	02/11/2024	02/24/2024	26 Hours, 0 Minutes	25 Hours, 55 Minutes	6 Hours, 31 Minutes	19 Hours, 24 Minutes
Hourly ADL/IADL-1	02/11/2024	02/24/2024	26 Hours, 0 Minutes	25 Hours, 58 Minutes	4 Hours, 4 Minutes	21 Hours, 54 Minutes

Remaining Balance - Pre Authorization Holds = Current Available Balance

- You are unsure which service code belongs to the provider. You go to the consumer’s Client Details page, click on Accounts, and see that George Harrison’s hourly service code is Hourly ADL/IADL-1. (See Note on page 1 for instructions.)
- Looking at the authorizations widget, you see the Hourly ADL/IADL-1 service code has a Current Available Balance of 21 hours and 54 minutes.

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance
Hourly ADL/IADL-1	02/11/2024	02/24/2024	26 Hours, 0 Minutes	25 Hours, 58 Minutes	4 Hours, 4 Minutes	21 Hours, 54 Minutes

## References

[Time Conversion Chart](#) – A chart that lists minutes and their decimal equivalents in OR PTC DCI.

[Time Entry Management Guide](#) - Guide on pending time entries management, adjustments, over/underpayments, and historical entries.

[Over Authorized Hours Errors](#) – A guide for providers on how to avoid going over the authorized hours and how to use the authorizations widget from the provider’s perspective.