

View & Manage Budgets via Authorizations Widget in the Web Portal - <https://acumenfiscalagent.zendesk.com/hc/en-us/articles/23654435329293-View-Manage-Budgets-via-Authorizations-Widget>

The authorizations widget located on the web portal dashboard. Search by client (required) and/or date (optional) to view approved authorizations in the past, present, or future.

As employees clock in and clock out, their time will be deducted from the authorization and placed into a pre-authorization hold. Time is deducted in either units or dollars based on how the authorization is set up. Units or dollars in a pre-authorization hold remain in that status until billing and payroll has been processed. After payroll and billing completion, the units and dollars that were previously in a pre-authorization hold status will be deducted from the remaining balance and an updated remaining balance will be displayed.

1. Log in to DCI web portal at acumen.dcisoftware.com
2. Click **Home** on the main menu
3. Click **Dashboard** on the submenu
4. View the **Authorizations widget**
5. Enter the **Client Name** in the filter (**required**)
6. Select the **client name** from the list
7. Enter the **Date of Service** in the filter (optional) - Past, present, or future service date.
8. Click **Search**
9. Click the **Display as Time** button to view the authorizations in hours and minutes, days, or months; or click the **Display as Units** button to view the authorizations in units.
 - a. The Authorizations Widget default display is in units
 - b. Miles and dollars are excluded from time conversion
 - c. Conversion to time is based on funding type, billing unit, and billing multiplier. If minutes are a decimal, the system will always round down to the whole minute.
10. The authorizations widget displays the following details from the authorization based on the default setting or display selected (Display as Time or Display as Units button). *Please note: Miles and dollars are excluded from time conversion. If minutes are a decimal, the system will always round down to the whole minute.
 - a. Service Code - Service(s) the client is eligible to receive
 - b. Start Date - Day authorization begins
 - c. End Date - Day authorization ends
 - d. Initial Balance - Total amount of authorized units, dollars, miles, or time
 - e. Remaining Balance - Amount remaining (units, dollars, miles, or time) after pre-authorization holds have been processed for billing and payment
 - f. Pre-Authorization Holds - Amount (units, dollars, miles, or time) deducted from the authorization that has not yet been processed for billing and payment
 - g. Current Available Balance - The total of the remaining balance in units, dollars, miles, or time minus any pre-authorization holds
 - h. Monthly Max - Max units, dollars, miles, or time available for the authorization per service per client per month
 - i. Weekly Max - Max units, dollars, miles, or time available for the authorization per service per client per week
 - j. Daily Max - Max units, dollars, miles, or time available for the authorization per service per client per day
11. Click **Reset** to clear the filters and the authorizations widget
12. Repeat for each client as needed