

Running a Service Authorization Summary Report

The **Service Authorization Summary Report** provides summary information on a variety of searchable SACWIS information. Depending on the filter criteria selected, the report can be used to:

- View service authorizations with a **Pending** status
- View service authorizations with cost reviews that are coming due or are overdue
- Determine costs approved for a particular service description or type
- View costs approved for one or more contracts

1. On the SACWIS **Home** page, click the **Financial** tab.
2. Click the **Services** tab.
3. Click the **Service Authorization** link in the **Navigation** menu.



The **Service Authorizations Filter Criteria** screen appears.

4. Type the filter criteria into the fields, as needed.
5. Click the **Search** button.

A screenshot of the 'Service Authorizations Filter Criteria' screen. The screen is divided into several sections. At the top, there is a dropdown menu for 'Agency *'. Below this are several input fields: 'Service Auth ID:', 'Person ID:', 'Provider ID:', 'Status:' (with a dropdown menu set to 'Pending'), 'From Begin Date:', 'From Cost Review Date:', 'Approved By (Login ID):', 'To Begin Date:', and 'To Cost Review Date:'. There are also dropdown menus for 'Service Auth Type:', 'Service Category:', and 'Service Type:'. Below these are radio buttons for 'Created In Error:' with options 'Exclude' and 'Include'. At the bottom, there is a section for 'Contracts Search Criteria' with a 'Sort By:' dropdown menu set to 'Begin Date (Descending)'. At the very bottom, there are two buttons: 'Search' and 'Clear Form'. The 'Search' button is circled in red.

The **Service Authorizations** section appears at the bottom of the screen displaying all service authorizations that meet the selected criteria.

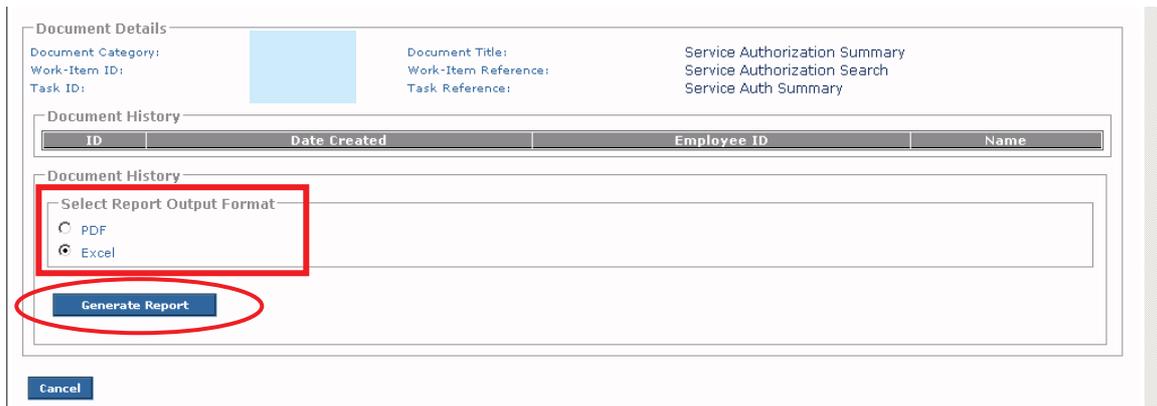
Running a Service Authorization Summary Report

6. Click the **Generate Report** button at the bottom of the screen.



The **Document Details** screen appears.

7. In the **Select Report Output Format** section, click the **PDF** or **Excel** radio button.
8. Click the **Generate Report** button.

A screenshot of the 'Document Details' screen. The top section contains document information: Document Category, Work-Item ID, Task ID, Document Title, Work-Item Reference, and Task Reference. Below this is a 'Document History' table with columns for ID, Date Created, Employee ID, and Name. Underneath the table is a 'Select Report Output Format' section with two radio buttons: 'PDF' and 'Excel'. The 'Excel' radio button is selected. Below the format selection is a blue button labeled 'Generate Report', which is circled in red. At the bottom left, there is a 'Cancel' button.

A screen appears stating that the report is being created.



Running a Service Authorization Summary Report

Report Example

The **Service Authorization Summary Report** appears in an Excel spreadsheet as shown below.

Service Auth ID	Status	Service Auth Approved By	Service Auth Approval Date	Last Name	First Name	Person ID	Contract ID
11 Total Record(s)							

9. View or save the report.

Report Column Names and Descriptions

Report Column Name	Description
Service Auth ID	The ID number assigned to that Service Authorization
Status	Displays the current status of the service authorization. The status will be Approved, Pending, or Denied
Service Auth Approved By	Displays the person's name who final approved the service authorization, if applicable
Service Auth Approval Date	Displays the date the service authorization was final approved, if applicable
Last Name	Displays the child's last name associated to the service authorization from a placement setting or case service
First Name	Displays the child's first name associated to the service authorization from a placement setting or case service

Running a Service Authorization Summary Report

Report Column Name	Description
Person ID	Displays the person id associated to service authorization from a placement setting or case service
Contract ID	Displays the SACWIS generated contract ID associated to the contract cost linked to the service authorization, if applicable
County Contract Number	Displays the user entered county contract number associated to the contract cost linked to the service authorization, if applicable
Contracted Provider	Displays the contracted provider name associated to the contract linked to the service authorization, if applicable
Service / Payment Provider ID	Displays service or payment provider ID number
Service / Payment Provider Name	Displays the service or payment provider of the placement setting or case service
Service Auth Type	Displays the type of service authorization
Placement / Case Service Begin Date	Displays the begin date of the placement setting or case service, whichever is applicable
Placement / Case Service End Date	Displays the end date of the placement setting or case service, whichever is applicable
Service Auth Begin Date	Displays the begin date of the service authorization
Service Auth End Date	Displays the end date of the service authorization
Cost Type	Displays the calculations as Standardized, Contract, and User Defined
Service Type	Displays the service type
Service Description	Displays the service description
Cost Review Date	Displays the cost review date from the service authorization, if applicable