March 2021 Release Notes

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This guide provides details of the feature enhancements for the DCI Release. The table of contents is hyperlinked. Select any of the topics below to jump to that feature.
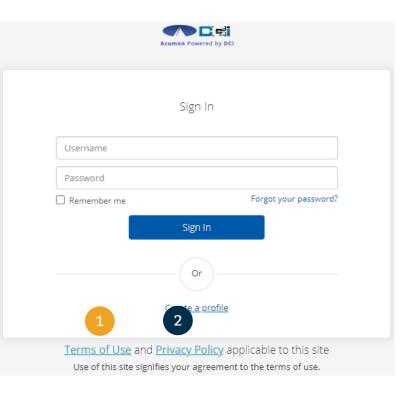
Terms of Use & Privacy Policy

Terms of Use & Privacy Policy

- A new footer section can be added to the DCI Sign In screen to include Terms of Service and Privacy Policy
- The words "Terms of Use" is a hyperlink, which opens in a separate tab
- The words "Privacy Policy" is a hyperlink, which opens in a separate tab
- This feature requires an instance level setting change, so you would need to contact your DCI representative to learn more about this feature
  - You would provide DCI the text for your organization's Terms of Use and Privacy Policy
  - DCI would then approve and upload your Terms of Use and Privacy Policy
  - Once uploaded, a user could click on Terms of Use and Privacy Policy and be able to read the information you provided about your organization

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1   **2**

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DIRECT CARE INNOVATIONS

Business Rules

Authorization Expiration Date

The purpose of this business rule is to validate that the date this punch is being created is not beyond the authorization expiration date

- **Phase 1**

- **Parameter 1 –**Required, Represents mode
    - **Mode 1** – Reject punch (Default)
    - **Mode 2** – Allow with warning

- **Data Set** – The entry being created

- **Logic** – If total being created exceeds the authorization this rule will fail

- **Failure Message Mode 2** – "Punch created date is beyond authorization expiration date" and will be displayed as Punch Details > Business Rules tab > Business Rule Result Description

- **Message Template** – A new message template called the Authorization Expiration Date template will be linked to the newly created Authorization Expiration Date Violation event

Max Hours Per Week Per Employee Enhancement

The purpose is to validate that employees do not exceed max weekly hours allowed as configured on their employee profile for pay week as specified in instance setting

- **Phase 2**

- **Parameter 1** – Required, Represents mode

    - Mode 1 – Reject punch

    - Mode 2 – Allow with warning

- **Current state** – Currently the Auto Approval (AA)/Import Mass Approve is skipping entries that fail the Max Hours Per Week Per Employee entirely and there is nothing recorded on the Punch Details > Auto Approval tab or on the Auto Approval Report

- **Future State** – The system shall be enhanced so that the AA functionality evaluates the Max Hours Per Week Per Employee Business Rule

    - AA should still not approve an entry that fails the Max Hours Per Week Per Employee in Mode = 2, but AA it will now record that it did not approve the entry on both the Punch Details > Auto Approval tab and on the Auto Approval Report

PIN and Password Expiration

PIN Expiration

- A new instance level setting can be enabled to control how often a PIN should expire
- In enabled, the organization would inform DCI of the number of days that a PIN should remain active before expiring
- This feature requires an instance level setting change, so you would need to contact your DCI representative to learn more about this feature

Password Expiration

- The system shall support that in the mobile app, mobile web and the web portal, that when the change password screen is displayed as a result of password expiration, it will include a field for the user to enter the current password:

- Current Password
- New Password
- Confirm Password

Fiscal Intermediary(FI) Specific Features

Supervisor/Auditor/View Only Scheduling > Parenting Programs

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see information in the Scheduling Module > Parenting Programs
- Parenting Program Name filter is restricted to only Parenting Programs they are related to via profile default cost center
- Cost Center filter is restricted to only Cost Centers they have a role for
- Regardless of any filter values the results listed in the Parenting Programs table are restricted to only Parenting Programs they are related to via profile default cost center

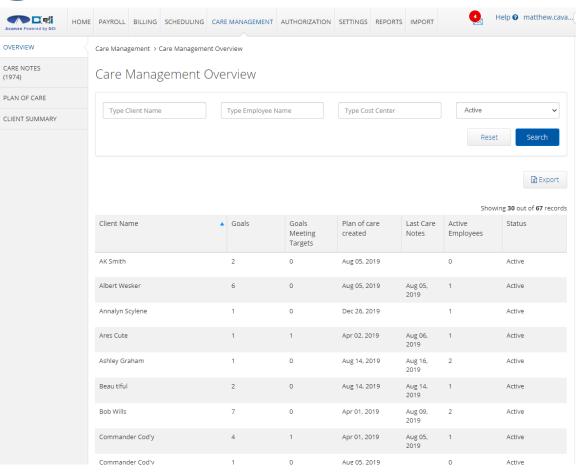# Supervisor/Auditor/View Only Scheduling > Group Services

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see information in the Scheduling Module > Group Services
- Group Services Name filter is restricted to only Group Services they are related to via profile default cost center
- Cost Center filter is restricted to only Cost Centers they have a role for
- Regardless of any filter values the results listed in the Group Services table are restricted to only Group Services they are related to via profile default cost center

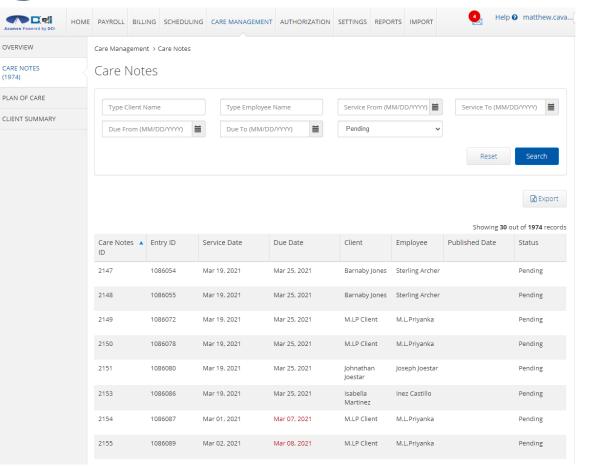# Supervisor/Auditor/View Only Care Management > Overview

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see information in the Care Management > Overview
- Client Name filter is restricted to only Clients they are related to via profile default cost center or service account cost center
- Employee Name filter is restricted to only Employees they are related to via profile default cost center or service account cost center
- Cost Center filter is restricted to only Cost Centers they have a role for
- Regardless of any filter values the results listed in the Overview table are restricted to only Clients they are related to via profile default cost center or service account cost center

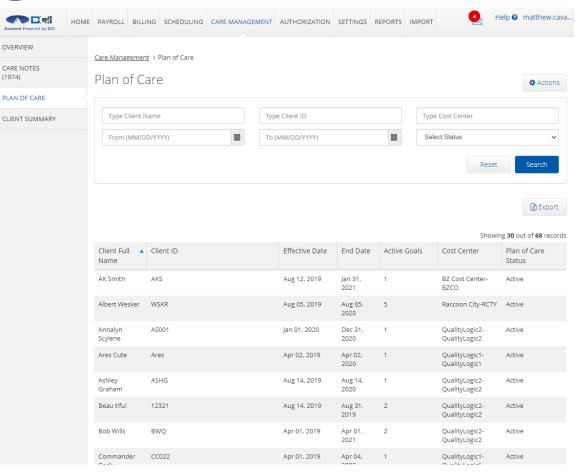# Supervisor/Auditor/View Only Care Management > Care Notes

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see information in the Care Management > Care Notes
- Client Name filter is restricted to only Clients they are related to via profile default cost center or service account cost center
- Employee Name filter is restricted to only Employees they are related to via profile default cost center or service account cost center
- Regardless of any filter values the results listed in the Care Notes table are restricted to only Clients they are related to via profile default cost center or service account cost center

Supervisor/Auditor/View Only Care Management > Plan of Care

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see information in the Care Management > Plan of Care
- Client Name filter is restricted to only Clients they are related to via profile default cost center or service account cost center
- Employee Name filter is restricted to only Employees they are related to via profile default cost center or service account cost center
- Regardless of any filter values the results listed in the Care Notes table are restricted to only Clients they are related to via profile default cost center or service account cost center

Thank you!