



## **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.

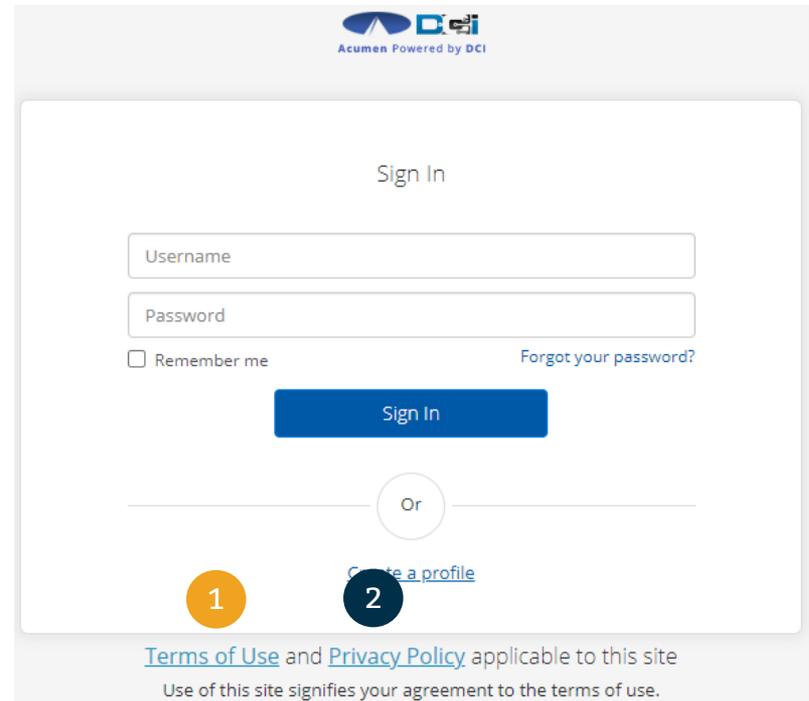
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# Terms of Use & Privacy Policy

# 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



The screenshot shows the DCI Sign In interface. At the top, the DCI logo is displayed with the tagline "Acumen Powered by DCI". Below the logo, the text "Sign In" is centered. There are two input fields: "Username" and "Password". Below the "Password" field, there is a checkbox labeled "Remember me" and a link "Forgot your password?". A blue "Sign In" button is positioned below the input fields. A horizontal line with a circle containing the word "Or" is centered below the button. Below this line, there are two circular callouts: a yellow circle with the number "1" pointing to the "Terms of Use" link, and a dark blue circle with the number "2" pointing to the "Create a profile" link. At the bottom of the screen, there is a footer section with the text "Terms of Use and Privacy Policy applicable to this site" and "Use of this site signifies your agreement to the terms of use."

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# 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

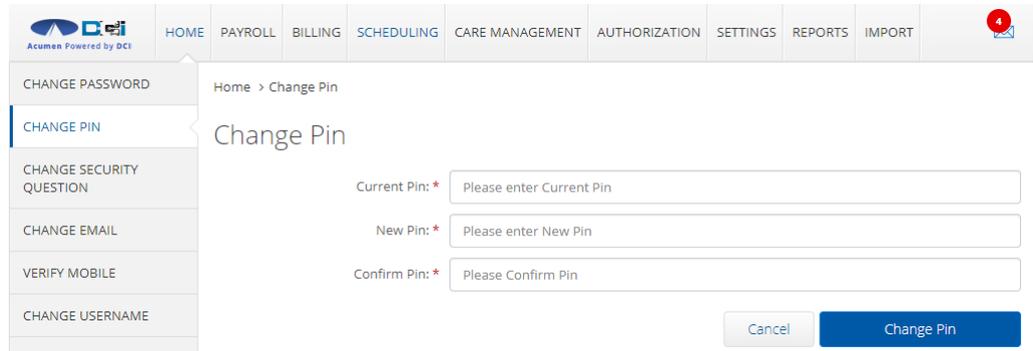
- **Phase 2**
- **Parameter 1** – Required, Represents mode
  - Mode 1 – Reject punch
  - Mode 2 – Allow with warning
- **Current state** – Currently the Auto Approval (AA)/Import Mass Approve is skipping entries that fail the Max Hours Per Week Per Employee entirely and there is nothing recorded on 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

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# **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



The screenshot displays the Acumen Powered by DCI user interface. The top navigation bar includes links for HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. A dropdown menu is open, showing options: CHANGE PASSWORD, CHANGE PIN (highlighted), CHANGE SECURITY QUESTION, CHANGE EMAIL, VERIFY MOBILE, and CHANGE USERNAME. The main content area is titled 'Change Pin' and contains three input fields: 'Current Pin: \*' with the placeholder 'Please enter Current Pin', 'New Pin: \*' with the placeholder 'Please enter New Pin', and 'Confirm Pin: \*' with the placeholder 'Please Confirm Pin'. At the bottom right, there are two buttons: 'Cancel' and 'Change Pin'.

# 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:

The screenshot displays a web portal interface for changing a password. The top navigation bar includes 'HOME', 'PAYROLL', 'BILLING', 'SCHEDULING', 'CARE MANAGEMENT', 'AUTHORIZATION', 'SETTINGS', 'REPORTS', and 'IMPORT'. A 'Help' icon is visible in the top right. The left sidebar menu lists options: 'CHANGE PASSWORD', 'CHANGE PIN', 'CHANGE SECURITY QUESTION', 'CHANGE EMAIL', 'VERIFY MOBILE', and 'CHANGE USERNAME'. The main content area is titled 'Change Password' and contains three input fields: 'Current Password: \*', 'New Password: \*', and 'Confirm Password: \*'. The 'New Password' field has a strength indicator showing 'Strength: Too Short' with three bars. There are 'Cancel' and 'Change Password' buttons at the bottom right.

- Current Password
- New Password
- Confirm Password

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# **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

Scheduling > Parenting Programs

Parenting Programs

Type Parenting Program Name    Type Cost Center    City

Select Status

Reset    Search

Export

Showing 23 out of 23 records

Name	Cost Center	City	Total Clients	Status
Training Parenting Program 2	QualityLogic2 - QualityLogic2	Boise	2	Active
Training Parenting Program	QualityLogic2 - QualityLogic2	Boise	2	Active
Ted Parenting	QualityLogic2 - QualityLogic2	Boise	1	Active
QualityLogic2 Parenting Program	QualityLogic2 - QualityLogic2	Boise	18	Active
Pillarmen Parenting	Jojo's Bizarre Cost Center - JJBCC	Boise	1	Active
ParProg ROCK	Max's CC - MCC	Newport	1	Active
OneBCGParentnih	Default Cost Center - 00-000	Buffalo	1	Active
OneBCGParenthtj	Default Cost Center - 00-000	Buffalo	1	Active
MFCA Parenting	MC Cost - MCCCC	Boise	1	Active

# 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

Scheduling > Group Services

Group Services

Type Group Service Name    Type Cost Center    City

Select Status

Reset    Search

Export

Showing 30 out of 84 records

Name	Cost Center	City	Total Employees	Total Clients	Status
AA & NA	QualityLogic2 - QualityLogic2	Boise	0	1	Active
Alpha Group	MDM Cost Center - MDMCC	Boise	1	1	Active
Ashley Group Service 1:1 - PA	Ashley Cost Center - Ashley Cost Center	Philadelphia	1	1	Active
BZ Group	BZ Cost Center - BZCO	Boise	0	0	Active
Class 1A	JB Cost Center - JB Cost Center	Boise	3	3	Active
CM Group Service	CM Cost Center 1 - CMCC01	Meridian	3	3	Active
Dave's Group Service	Dave's Cost Center - DCC001	Boise	2	1	Active
dci GS	A&B Cost Center - A&BCC	Athens	1	2	Active
fgroupservice	QualityLogic2 - QualityLogic2	Boise	3	3	Active

# 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

Care Management > Care Management Overview

Care Management Overview

Type Client Name    Type Employee Name    Type Cost Center    Active

Reset    Search

Export

Showing 30 out of 67 records

Client Name	Goals	Goals Meeting Targets	Plan of care created	Last Care Notes	Active Employees	Status
AK Smith	2	0	Aug 05, 2019		0	Active
Albert Wesker	6	0	Aug 05, 2019	Aug 05, 2019	1	Active
Annalyn Scylene	1	0	Dec 26, 2019		1	Active
Ares Cute	1	1	Apr 02, 2019	Aug 06, 2019	1	Active
Ashley Graham	1	0	Aug 14, 2019	Aug 16, 2019	2	Active
Beau tiful	2	0	Aug 14, 2019	Aug 14, 2019	1	Active
Bob Wills	7	0	Apr 01, 2019	Aug 09, 2019	2	Active
Commander Cod'y	4	1	Apr 01, 2019	Aug 05, 2019	1	Active
Commander Cod'v	1	0	Aug 05, 2019		0	Active

# 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

The screenshot shows the Acumen Care Management system interface. The top navigation bar includes links for HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT (selected), AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. The user is logged in as matthew.cava... with a notification icon.

The main content area is titled "Care Management > Care Notes". On the left, there is a sidebar menu with "OVERVIEW", "CARE NOTES (1974)", "PLAN OF CARE", and "CLIENT SUMMARY".

The "Care Notes" section features a search filter with the following fields:
 

- Type Client Name
- Type Employee Name
- Service From (MM/DD/YYYY)
- Service To (MM/DD/YYYY)
- Due From (MM/DD/YYYY)
- Due To (MM/DD/YYYY)
- Status: Pending

 There are "Reset" and "Search" buttons, and an "Export" button below the filters.

Below the filters, it says "Showing 30 out of 1974 records". The table below shows the following data:

Care Notes ID	Entry ID	Service Date	Due Date	Client	Employee	Published Date	Status
2147	1086054	Mar 19, 2021	Mar 25, 2021	Barnaby Jones	Sterling Archer		Pending
2148	1086055	Mar 19, 2021	Mar 25, 2021	Barnaby Jones	Sterling Archer		Pending
2149	1086072	Mar 19, 2021	Mar 25, 2021	M.LP Client	M.L.Priyanka		Pending
2150	1086078	Mar 19, 2021	Mar 25, 2021	M.LP Client	M.L.Priyanka		Pending
2151	1086080	Mar 19, 2021	Mar 25, 2021	Johnathan Joestar	Joseph Joestar		Pending
2153	1086086	Mar 19, 2021	Mar 25, 2021	Isabella Martinez	Inez Castillo		Pending
2154	1086087	Mar 01, 2021	Mar 07, 2021	M.LP Client	M.L.Priyanka		Pending
2155	1086089	Mar 02, 2021	Mar 08, 2021	M.LP Client	M.L.Priyanka		Pending

# 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

The screenshot shows the Acumen Care Management system interface. The top navigation bar includes: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT (selected), AUTHORIZATION, SETTINGS, REPORTS, IMPORT, and a user profile for matthew.cava... The sidebar on the left has 'PLAN OF CARE' selected. The main content area is titled 'Plan of Care' and contains search filters for Client Name, Client ID, Cost Center, and dates. Below the filters is a table with 30 records out of 68 total. The table columns are: Client Full Name, Client ID, Effective Date, End Date, Active Goals, Cost Center, and Plan of Care Status.

Client Full Name	Client ID	Effective Date	End Date	Active Goals	Cost Center	Plan of Care Status
AK Smith	AKS	Aug 12, 2019	Jan 31, 2021	1	BZ Cost Center-BZCO	Active
Albert Wesker	WSKR	Aug 05, 2019	Aug 05, 2020	5	Raccoon City-RCTY	Active
Annalyn Scylene	A5001	Jan 01, 2020	Dec 31, 2020	1	QualityLogic2-QualityLogic2	Active
Ares Cute	Ares	Apr 02, 2019	Apr 02, 2020	1	QualityLogic1-QualityLogic1	Active
Ashley Graham	ASHG	Aug 14, 2019	Aug 14, 2020	1	QualityLogic2-QualityLogic2	Active
Beau tiful	12321	Aug 14, 2019	Aug 31, 2019	2	QualityLogic2-QualityLogic2	Active
Bob Wills	BWQ	Apr 01, 2019	Apr 01, 2021	2	QualityLogic2-QualityLogic2	Active
Commander	CC022	Apr 01, 2019	Apr 04, 2020	1	QualityLogic1-QualityLogic1	Active

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# Thank you!