October 2020 Release Notes

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

Batching Mixed Units

Create Batch: Units Dropdown Removed

The Units dropdown was removed from the Create Batch screen to allow for the addition of the Entry Type dropdown

Create Batch: Mixed Units

DCI can now create batches with multiple unit types

The Entry Type dropdown allows a user to select multiple entry types when creating a batch

The default is set to All Entry Types

Simply click on the checkbox to deselect a unit type that you do not want to include in a batch

Punch Entries Unit Dropdown Removed

The Units dropdown was removed from the Punch Entries Payroll screen to allow for the addition of the Entry Type dropdown

Punch Entries: Mixed Units

DCI can now create batches with multiple unit types

The Entry Type dropdown allows a user to select multiple entry types when creating a batch

The default is set to All Entry Types

Simply click on the checkbox to deselect a unit type that you do not want to include in a batch

SSN

Retain SSN

- **As part of the rollout of EVV across the country some states are electing to require that providers (e.g. our customers) aggregate SSNs for employees/clients or both**

- **DCI now can store a short SSN of the last 5 characters of a client or employee SSN as plain text**

- **DCI will display only the last 4 characters of a client or employee SSN in the following format: ###-##-XXXX**

- **SSN information is encrypted and protected in DCI**

Employee Profiles Import

The following has been added or changed in the Employee Profile Import:

- Date of Hire
- PIN
- Profile Status
- Retain SSN

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HOME | PAYROLL | BILLING | SCHEDULING | CARE MANAGEMENT | AUTHORIZATION | SETTINGS | REPORTS | IMPORT

DASHBOARD
SETTINGS
PROFILES

Import > Employees Profile

Required columns list:
FirstName, LastName, FullName, Address, Address2, City, State, PostalCode, CountryCode, Phone, AltPhone, MobilePhone, Email, TimeZone, CostCenterId, DOB, Username, Password, ProfileReference, EmployeeType, EmployeeNumber, SSN, ProfessionalId1, ProfessionalId2, PayrollId, WeeklyHours, HolidayScheduleId, TemplateId, DomesticWorker, OneDayRestIn7Exemption, PreferredDayOfRest, RetainSSN, HireDate, Pin, ProfileStatus

Client Profiles Import

The following has been added or changed in the Client Profile Import:

- PIN
- Profile Status
- Retain SSN

Update Employee Profile - Import

Current State:
- Employee profiles can be updated by going to the Import Module and selecting "Update Employee Profile" from the side menu.

Future State:
- ✓ Employee profiles can be updated by going to the import module, then to Profiles, and then selecting Update Employee Profile.

Allow SSN Retrieval On Setup Wizards

Current State:
No option to Allow SSN Retrieval on client and employee wizards

Future State:
Radio button to Allow SSN Retrieval will be added to the client and employee wizards

SSN Changes Reflected in History

SSN changes will be reflected in the Data Change History on profiles

| Entries | Accounts | Certifications | EVV Locations | Notes | Attachments | Events | Custom Fields | History |

From (MM/DD/YYYY)   To (MM/DD/YYYY)   Type Username

Reset   Search

Export

History

Showing **1** out of **1** record

Modified Date ▼	Field Name	Changed By	
Oct 16, 2020 01:26:27 PM	SSN , Short SSN , Allow SSN Retrieval	DCI DEV	✓

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Update Employee Profile Element Import

An import will be added to update specific elements of the employee's profile, such as SSN, EmployeeNumber, RetainSSN, Profile Reference, and Authentication Status

This import is located in the Imports > Profile Menu

Update Employee Client Element Import

An import will be added to update specific elements of the client's profile, such as SSN, Client Number, RetainSSN, Profile Reference, Authentication Status, Enable Caregiver Rating Emails, Enable Care Management, Enable Vendor Payments, and Enable Employer Reimbursements

This import is located in the Imports > Profile Menu

Reason Codes

Funding Source: Reason Code Required for Manual Entries

- Require Reason Code for Manual entries is a new field for adding or editing Funding Sources.
- If Yes is selected, the system will display the Reason Code dropdown when manual Hourly or Client Transportation entries are made after the fact via the Web Portal or Mobile Web.
- The default is set to No.
- Select Yes to enable this setting at the Funding Source level.
- This functionality will apply for all:
  - Employees entering late punches
  - Supervisor/Superuser/Employer entering a punch on the employees behalf

Add or Edit Entry: Reason Code Required for Manual Entries

- With the Reason Code enabled at the Funding Source level, that Reasons dropdown is added to the Add New Entry screen on the Web Portal and the Mobile Web

To Add a Reason Code to an Entry

1. Select Plus to expand the Add Reason Code dropdown
2. Select an approved Reason Code from the list
3. Press Plus to add Reason Code to the Entry
4. If a Reason Code requires a note, the Add Note field will appear
5. Repeat steps 2 to 4 to add multiple Reason Codes

Hourly and Client Transportation Imports

- One Reason Code can be added to imported Employee Hourly and Client Transportation entries.

- ReasonCodeID and ReasonCodeText columns are optional columns in the import file for Employee Entries
    - However, this field becomes required if the Reason Code is required at the funding source level

- Reason Code does not need to be added to EVV Fob Entries import as those are not considered manual because the FOB token verifies date/time and location

Employee Entries

Required columns list:
AccountId, Amount, EntryReference, StartDate, EndDate, DiagnosticCode, PayRate, CannedStatementId, ReasonCodeId, ReasonCodeText

Invalid file format. Number of columns mismatch ❶   ✕

Choose File: ⬙ Upload tab delimited TXT file

Cancel   Save
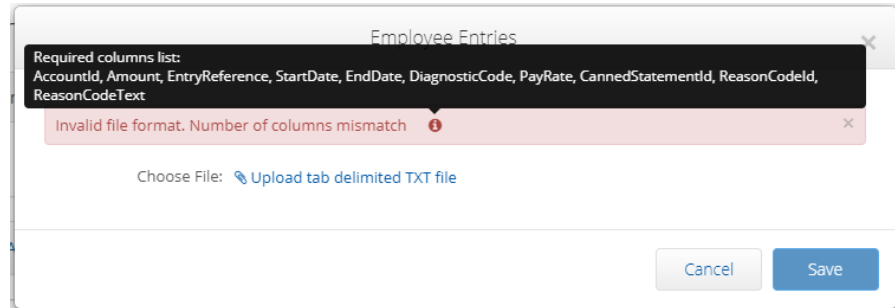
Reason Code Monthly Usage

- Monthly Usage Maximum Lower Bound added with a default of zero
  - Tooltip: "# of occurrences of usage of this reason for this Client which when reached will result in the end user seeing an alert when attempting to save changes to an existing punch"
- Monthly Usage Maximum Upper Bound added with a default of zero
  - Tooltip: "Maximum monthly allowed # occurrences of use of this reason code for this Client in a calendar month which when reached will result in the end user seeing an alert when attempting to save changes to an existing punch"

Add New Reason Code   ✕

Name: Reason Code Name

Code: Reason Code

Description: Add Description

Status: Active

Requires Free Text Note: ○ Yes   ● No

Monthly Usage Maximum Lower Bound: 0   ⓘ

Monthly Usage Maximum Upper Bound: 0   ⓘ

> Maximum monthly allowed # occurences of use of this reason code for this Client in a calendar month which when reached will result in the end user seeing an alert when attempting to save changes to an existing punch

Cancel   Save

Reason Code Monthly Max Alert

Business Rule Details - Reason Code Monthly Max Alert   ⚙ Actions

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Business Rule Details

Business Rule Name :	Reason Code Monthly Max Alert
Description :	The purpose of this rule is to check if a user is nearing or has exceeded the allowed number of uses of a particular reason code within the current month.
Enabled :	No
Phase :	Phase1
Parameter 1 :	
Parameter 2 :	

- The purpose of this rule is to alert a user if they have reached the threshold or the max for use of a reason code within a month
- Lower Bound Alert -> "The following Reason Codes usage is approaching the maximum allowed monthly usage limit. Reason Codes are: [reason code 1], [reason code 2], [etc]"
- Upper Bound Alert > " "The following Reason Codes usage exceeds the maximum allowed monthly usage limit. Reason Codes are: [reason code 1], [reason code 2], [etc]""
- Since a user is able to select more than one Reason Code, the alert will be displayed in a table format that displays the reason code, times used and lower and upper bounds

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Billing Batch Reason Code Report

Billing Batch Reason Codes Report

Type Batch ID	Type Cost Center	Type Client Name
Type Service Code		

Reset   Search

- This report will be to provide an easy way for a customer to retrieve all of the reason codes that are associated with entries in a target billing batch.

Columns:
- CFA Punch ID
- ESA Punch ID
- Billing Entry ID
- Reason Code ID
- Reason Code Name
- Reason Code Code
- Reason Code Description

- This report should pull entries that have reason codes linked
- If the entry has an Entry.Reason then only Reason Code ID and Name column will be populated and Name should be the text displayed in the Reason Code drop down when it was selected

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Reason Code Details

- Description field added to Reason Codes in Punch Entry Details screen

Punch Entry Details: ScheduleEntryId

- The purpose of this data element will be store the ScheduleEntryId that this punch was determined to be related to when the Schedule Comparison process executed.

Texas Reports

EVV Reason Code Usage and Free Text Report

- Marked as a external 3rd party web service report

- The form wizard includes:

    - Client Name (required)

    - Year (required)

    - Month (required)

    - Payer name (optional) values include: AET, AGP, BCB, CFC, CHS, CKC, CMC, DRC, HHSC, LTC, MOL, SHP, TXC and UHC

    - Report Output Format (required) Excel and PDF options

- If the requester is an Employer or Case Worker then the Client Name drop down will only display clients that are linked to those accounts

EVV Reason Code Usage and Free Text Report ✕

Client Name: * [Type Client Name]

Year: * [Type Year (YYYY)]

Month: * [Select Month ▾]

Payer Name: [Select Payer Name ▾]

Report Output Format: * [Select Report Output Format ▾]

[Cancel] [Submit]

Regions

Client Profile: Regions Dropdown

- The Client Profile Regions free text field will be updated to be a dropdown field linked to Funding Sources

- Simply start typing the Region and then a list of Funding Source regions will populate

- Select the Region from the list to apply to the Client profile

- This field is optional

Note

- For those who use the DCI Care Management Module the following page also has the updates Regions dropdown field functionality:
  - Care Management > Client Summary > Client Summary Details Page> Edit Client Details

Client Profile Import

The following fields have been added as optional to the Client Profile import as an optional field

- RegionID

Import > Client Profile

Im...

Required columns list:
FirstName, LastName, FullName, Address, Address2, City, State, PostalCode, CountryCode, Phone, AltPhone, MobilePhone, Email, TimeZone, CostCenterId, DOB, Username, Password, ProfileReference, ClientNumber, MedicaidNumber, InsuranceNumber, InsurancePlan, InsuranceGroup, InsurancePayerId, ClientCode, RegionId, SSN, TemplateId, Fee, DiagnosisCode, CostShare, EnableCaregiverRatingEmails, ReceivedDate, RetainSSN, Pin, ProfileStatus

Invalid file format. Number of columns mismatch ⓘ   ✕

Choose File: ✎ Upload tab delimited TXT file

Cancel   Save

Client Report: Regions

- Regions filter was added to the Client Report
- Funding Source filter was added to the Client Report

No Account ID Imports

Employee Entries No Account ID Import

The purpose of this import is to provide an import that is based on information in a CRM and/or HRIS where those systems know unique identifiers for Clients and Employees but they do not know DCI Account IDs. This import should contain the following columns:

- EmployeeNumber
- ClientNumber
- ServiceCodeDesc
- Amount
- EntryReference
- StartDate
- EndDate
- DiagnosticCode
- CannedStatementId
- PayRate

A instance level setting must be enabled to access this import, contact your DCI Account Rep

Import › Employee Entries - No Account ID

Employee Entries - No Account ID

Required columns list:
EmployeeNumber, ClientNumber, ServiceCodeDesc, Amount, EntryReference, StartDate, EndDate, DiagnosticCode, CannedStatementId, PayRate, ReasonCodeId, ReasonCodeText

Invalid file format. Number of columns mismatch ⓘ

Choose File: ✎ Upload tab delimited TXT file

Cancel   Save

Client Transportation Entries No Account ID Import

The purpose of this import is to provide an import that is based on information in a CRM and/or HRIS where those systems know unique identifiers for Clients and Employees but they do not know DCI Account IDs. This import should contain the following columns:

- EmployeeNumber
- ClientNumber
- ServiceCodeDesc
- Amount
- EntryReference
- StartOdometer
- EndOdometer
- ServiceDate

A instance level setting must be enabled to access this import, contact your DCI Account Rep
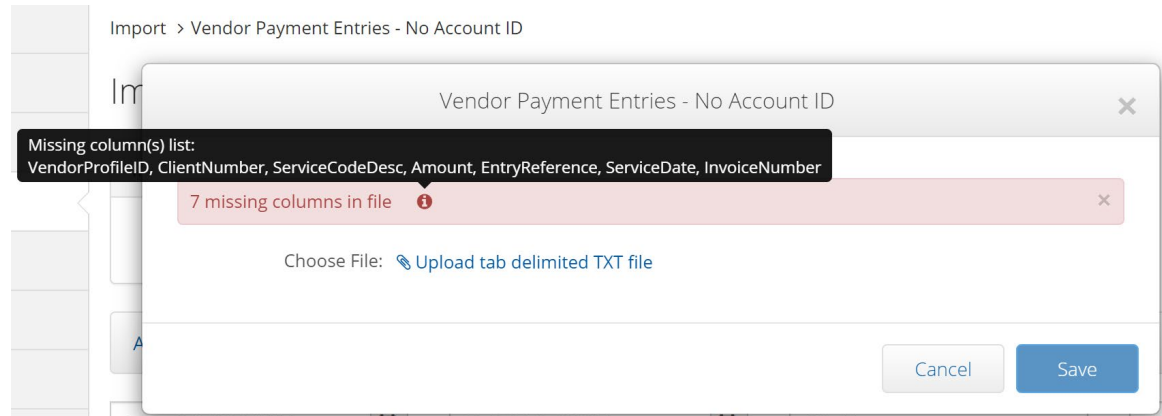
Import > Vendor Payment Entries - No Account ID

Im

Vendor Payment Entries - No Account ID   ✕

Missing column(s) list:
VendorProfileID, ClientNumber, ServiceCodeDesc, Amount, EntryReference, ServiceDate, InvoiceNumber

7 missing columns in file   ℹ   ✕

Choose File: 🔗 Upload tab delimited TXT file

Cancel   Save

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Vendor Payment Entries No Account ID Import

The purpose of this import is to provide an import that is based on information in a CRM and/or HRIS where those systems know unique identifiers for Clients and Employees but they do not know DCI Account IDs. This import should contain the following columns:

- VendorProfileID
- ClientNumber
- ServiceCodeDesc
- Amount
- EntryReference
- ServiceDate
- InvoiceNumber

A instance level setting must be enabled to access this import, contact your DCI Account Rep

Import > Vendor Payment Entries - No Account ID

Im

Vendor Payment Entries - No Account ID   ✕

Missing column(s) list:
VendorProfileID, ClientNumber, ServiceCodeDesc, Amount, EntryReference, ServiceDate, InvoiceNumber

7 missing columns in file   ⓘ   ✕

A   Choose File: 🔗 Upload tab delimited TXT file

Cancel   Save
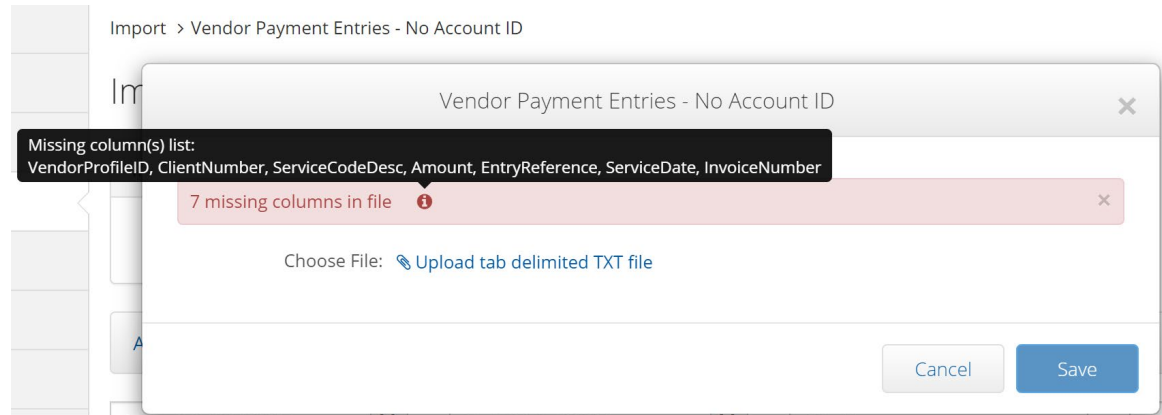
Misc. Feature Requests

Superuser Punch Verification

If a Superuser creates a punch on behalf of another user, the Superuser can now verify that punch, as long as it is not on their own profile

Client Status: Suspended

Suspended status has been added to the Client Status dropdown

Use this status for a client who has temporarily left the program and intends to return

If you try to punch on a client with a suspended status, you will get the following error:

"You are attempting to enter a punch for a date of service that is beyond the clients suspend date. Please contact your supervisor."

To edit client status

- Open the client details
- Select
- the Client Information tab
- Select the Client Status dropdown

Summary Report

- **Caseworker field removed as a required field from Summary Report**

Reports > Summary Report

Reports - Summary Report

| Service Start Date (MM/DD/YYYY) 📅 | Service End Date (MM/DD/YYYY) 📅 | Type Client Name |

Type Service Code

☐ Ended Authorizations

Reset   Search

Multiple Reimbursements

Add Reimbursement Pay Code

DCI users can now add additional reimbursement pay codes

This feature is an instance level and requires Superuser access, so contact your DCI rep today if you would like to learn more

Once enable, the action button appears on the Settings > Payroll > Pay Codes screen

To Create a new Reimbursement Pay Code

1. Select Actions
2. Select Add New Reimbursement Pay Code

Complete Add Reimbursement Pay Code Form

1. Name: enter a name
2. Code: enter a unique code
3. Enter the description
4. Select Save and then Yes when prompted to save the new reimbursement code

Note

Reimbursements are the only Pay Code that can be added

The Reimbursement Code Y/N toggle is set to Yes and is not editable

Settings › Payroll › Pay Codes

Pa...

Add New Reimbursement Pay Code ✕

1 Name: Reimbursement D

2 Code: REIM-D

3 Description: Reimbursement D

Reimbursement Code: ● Yes ○ No

Cancel | Save **4**

Na...

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Add Multiple Reimbursement Pay Codes to an Entry

The new reimbursement codes allow a user to submit multiple reimbursements per entry

Naming new reimbursement codes Reimbursement A, Reimbursement C, etc, give the end user an easy way to track multiple reimbursements

To Add Multiple Reimbursements

1. Add the dollar amount for the total amount of the multiple reimbursements
2. Add the dates when the reimbursements occurred
3. Select the appropriate new reimbursement pay code from the list
4. Select Save and then Yes when prompted to submit the reimbursements

Add Multiple Reimbursement Pay Codes to an Entry cont.

The confirmation screen for multiple reimbursements shows the dates that each reimbursement occurs

It also shows the total for both invoices

Reimbursement Pay Code: Payroll Entries Pay Code Name

When processing an Employer Reimbursement entry in the Payroll module that the Pay Code Name displays the new Reimbursement Code names

Reimbursement Pay Code: Imports

AssignedPayCode has been added to the Reimbursement Entries import as an optional field

Import > Reimbursement Entries

Im

Reimbursement Entries ✕

Missing column(s) list:
AccountId, Amount, EntryReference, ServiceDate, AssignedPayCode

5 missing columns in file ⓘ ✕

Choose File: 📎 Upload tab delimited TXT file

Cancel   Save

Vendor Updates

Vendor Service Account: Account Reference

The Account Reference field was added to the Vendor Service Account to link the DCI Payroll Engine Employer Account ID to the Vendor information in the DCI Portal

This is an instance level setting that needs to be enabled

Once the instance level setting is enabled, the field becomes required

Contact your DCI representative to learn more

Add New Service Account	✕
Vendor Name:	AZ Swim Lessons
Account Type:	Vendor
Client:	April Ludgate - CO21001 ✕
Service Code:	Vendor
Funding Source:	CDASS Demo
Cost Center:	Colorado Cost Center - Colorado Cost Center ✕
Account Reference:	7118
Default:	
VSA Custom Field:	
VenServAcctEDI1:	
VenServAcctEDI2:	
Status:	Active

Cancel   Save

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Vendor Payment Entry

The Vendor Payment Entry screen has been updated with many new features:

1. Account Reference: when enabled, the account reference links the DCI Payroll Engine Employer ID
2. Invoice Number: DCI now allows for spaces and alpha numeric characters
   a. Special characters are not allowed because they can affect payroll output files
3. Vendor Payment Reference 1 – 5 were added

Add New Vendor Payment Entry ✕

Client: April Ludgate - CO21001 ✕

Service Code: Vendor

1 Account Reference: 7118   Payroll Engine Employer Account ID ⓘ

Dollar Amount: 200

2 Invoice Number: Invoice 1

3 Vendor Payment Reference 1: Enter Vendor Payment Reference 1

Vendor Payment Reference 2: Enter Vendor Payment Reference 2

Cancel   Save

Vendor Payment Entry cont.

1. The 30 day restriction has been removed so vendor payments can go back to any date that is valid within the authorization
   a. If you try to enter a date that is not within the authorization date, the system will display a warning that there is no active authorization for this date

Vendor Payment: Canned Statements

- Canned Statements can now be added to a Vendor Payment

- To add a Canned Statement to a Vendor Payment, the service code type must be hourly and Yes must be selected for the Allow Vendor Payments radio button

- Canned Statements will propagate from "Parent" to "Child" entries

- This functionality is currently only available for Hourly Service Codes that allow Vendor Payments

- Canned Statements will not display for a Vendor account type service code

Vendor Payment: Canned Statements cont.

- Once canned statements have been created, they are available to be selected when editing or creating other services codes

- Simply check or deselect the Canned Statements you would like to use or create new ones

Vendor Payment Entry Import

The following fields have been added as optional to the Vendor Payment Entries import

- CannedStatementID
- VendorPaymentReference1
- VendorPaymentReference2
- VendorPaymentReference3
- VendorPaymentReference4
- VendorPaymentReference5

Import > Vendor Payment Entries

Im

Vendor Payment Entries

Required columns list:
AccountId, Amount, EntryReference, ServiceDate, InvoiceNumber, CannedStatementId, VendorPaymentReference1, VendorPaymentReference2, VendorPaymentReference3, VendorPaymentReference4, VendorPaymentReference5

Invalid file format. Number of columns mismatch ⓘ

Choose File: ✎ Upload tab delimited TXT file

Cancel   Save

Thank you!