



June 2020 Release Notes

For Service Providers

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This guide contains updates or enhancements to the following functionality:

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508 Compliance

DCI Achieves 508 Compliance

- Section 508 of the Rehabilitation Act of 1973 requires that when U.S. Federal government agencies develop, procure, or maintain, information and communication technology (ICT), that it is accessible to persons with disabilities
- On January 18, 2017, revised ICT standards and guidelines bring harmonization with international standards, most notably the Web Content Accessibility Guidelines 2.0 (WCAG 2.0)
- This means WCAG 2.0 conformance requirements are used to measure compliance of documents, web content, and software (when applicable) for Section 508
- DCI is now Level AA of the World Wide Web Consortium Accessibility Guideline (WCAG) 2.1 compliant
- This ensures DCI is accessible for all!



508 Compliance Best Practices

DCI actively works to increase the accessibility and usability to enhance the user experience by adopting WCAG 2.1 best practices including:

- The use appropriate headings, paragraphs, and lists for keyboard or screen reader navigation to aid in page comprehension
- All pages have page titles and title tags written for easy comprehension of the page content
- Links include unique and descriptive text that help describe the link destination
- All links and buttons can be accessed with a keyboard in a logical tab order
- Text and alternative elements have a color contrast ratio of at least 4:5:1
- All content is readable to assistive technologies in the correct order
- Alternative text attributes are included for all images

4:5:1 Color Contrast Ratio

- ✓ **Future State:**
DCI colors
scheme and
text have a
color contrast
of at 4:5:1

The screenshot displays the DCI Acumen web application dashboard. The top navigation bar includes links for HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. A user profile for 'matthew.cava...' is visible in the top right corner. The main content area is titled 'Home > Dashboard' and features a search bar for 'Type Employee Name' with 'Search' and 'Reset' buttons, and an 'Add Entry' button. Below this, a section for 'Matthew Cavallo' shows an 'Overtime Gauge' for the period '05/17/2020 to 05/23/2020'. The gauge has three segments: green for '0 to 30', yellow for '30 to 40', and red for '40+'. The text 'No entry in current week' is displayed in the center. To the right, a 'Total Hours' table for the same period shows: Approved Hours: 0.00, Pending Hours: 0.00, Unverified Hours: 0.00 (highlighted in red), and Total Hours: 0.00. Below the gauge is an 'Authorizations' section with a search bar for 'Type Client Name' and 'Search' and 'Reset' buttons. At the bottom, an 'Overdue Care Notes Widget' table has columns for 'Employee Name' and 'Number of Care Notes Past Due'.

Calendar Changes

- ✓ **Current State:** Calendar icon does not open a calendar widget
- ✓ **Future State:** Selecting the calendar icon will open the calendar widget

The screenshot shows the 'Add New Entry' form with the following fields:

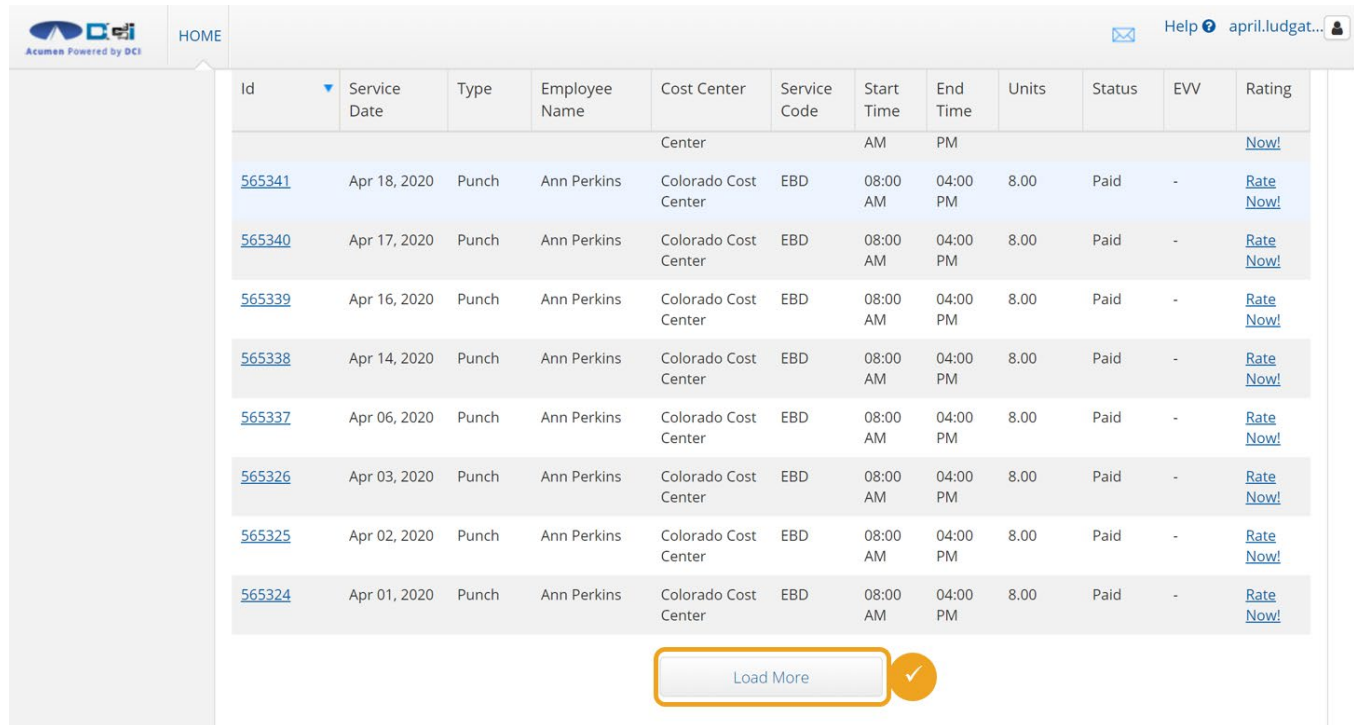
- Entry Type: Punch
- Employee Name: Ann Perkins
- Account Type: Hourly
- Client: April Ludgate - CO21001
- Service Code: EBD
- Service Date: 05/01/2020
- Check In:

May 2020						
Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6
- Pay Rate Name:
- EVV Method:
- Clock In EVV Location:
- Clock Out EVV Location: Home
- Check Out Date: Check Out Date
- Diagnostic Code: Diagnostic Code
- Notes: Add Notes for Punch
- Attachment: Add Attachment

An orange callout box highlights a calendar icon and a 'Select date ...' button. A checkmark icon is also present next to the callout box.

Lazy Load

- ✓ **Current State:** Lazy load happens without user control
- ✓ **Future State:** Load More button has been added, which allows the user to add 30 records at a time



The screenshot shows a software interface with a table of punch records. The table has columns for Id, Service Date, Type, Employee Name, Cost Center, Service Code, Start Time, End Time, Units, Status, EVV, and Rating. The records are for Ann Perkins at the Colorado Cost Center, with service dates from April 01, 2020, to April 18, 2020. A 'Load More' button is highlighted with an orange border and a checkmark icon.

Id	Service Date	Type	Employee Name	Cost Center	Service Code	Start Time	End Time	Units	Status	EVV	Rating
				Center		AM	PM				Now!
565341	Apr 18, 2020	Punch	Ann Perkins	Colorado Cost Center	EBD	08:00 AM	04:00 PM	8.00	Paid	-	Rate Now!
565340	Apr 17, 2020	Punch	Ann Perkins	Colorado Cost Center	EBD	08:00 AM	04:00 PM	8.00	Paid	-	Rate Now!
565339	Apr 16, 2020	Punch	Ann Perkins	Colorado Cost Center	EBD	08:00 AM	04:00 PM	8.00	Paid	-	Rate Now!
565338	Apr 14, 2020	Punch	Ann Perkins	Colorado Cost Center	EBD	08:00 AM	04:00 PM	8.00	Paid	-	Rate Now!
565337	Apr 06, 2020	Punch	Ann Perkins	Colorado Cost Center	EBD	08:00 AM	04:00 PM	8.00	Paid	-	Rate Now!
565326	Apr 03, 2020	Punch	Ann Perkins	Colorado Cost Center	EBD	08:00 AM	04:00 PM	8.00	Paid	-	Rate Now!
565325	Apr 02, 2020	Punch	Ann Perkins	Colorado Cost Center	EBD	08:00 AM	04:00 PM	8.00	Paid	-	Rate Now!
565324	Apr 01, 2020	Punch	Ann Perkins	Colorado Cost Center	EBD	08:00 AM	04:00 PM	8.00	Paid	-	Rate Now!

Client Sign Off

- ✓ **Current State:**
User can not sign off or reject entry from Entry ID line
- ✓ **Future State:**
When a punch is selected, a user can sign off or reject an entry from the Entry ID line

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HOME

Help april.ludgat...

DASHBOARD

ENTRIES REQUIRING SIGN OFF

ENTRIES

SCHEDULES

Home > Entries Requiring Sign Off

Entries Requiring Sign Off

From (MM/DD/YYYY) To (MM/DD/YYYY) Type Service Code

Type Employee Select Unit

Reset Search

Select All Sign Off Reject

Export

Showing 1 out of 1 record

Id	Service Date	Type	Employee	Service Code	Start Time	End Time	EVV Locations	Units	Status	EVV	Action
<input checked="" type="checkbox"/> 565588	May 21, 2020	Punch	Ann Perkins	EBD	08:00 AM	04:00 PM	Clock In: Clock Out:	8.00	Pending	-	S R

Archive and Delete

- ✓ **Current State:** User can not archive or delete from the message line
- ✓ **Future State:** When a message is selected, the user can archive or delete a message

The screenshot shows an email inbox interface. On the left is a sidebar with folders: INBOX, SENT, ARCHIVE, DRAFT, and TRASH. The main area is titled 'Messages > Inbox' and 'Inbox'. It features search filters for 'From', 'Subject', and 'From (MM/DD/YYYY)', along with a 'To (MM/DD/YYYY)' filter. There are 'Reset' and 'Search' buttons. Below the filters are 'Archive' and 'Delete' buttons, and an 'Export' button. A table shows 3 records. The second record is selected, and its 'Archive' and 'Delete' icons are highlighted with a red box and a yellow checkmark.

Showing 3 out of 3 records

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>			April Ludgate	Test 3	04:53 PM	
<input checked="" type="checkbox"/>			April Ludgate	Test 2	04:52 PM	✓
<input type="checkbox"/>			April Ludgate	Test 1	04:52 PM	

Schedule

- ✓ **Current State:**
Schedule does not have a list view

- ✓ **Future State:**
Schedule has new list view toggle button which displays an easy to read schedule in list format

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HOME CARE MANAGEMENT EMPLOYER

Help ron.swanson

Your Schedule

TODAY MY OFFERED SHIFTS OFFERED SHIFTS

May 24, 2020 - May 30, 2020

S	M	T	W	T	F	S
24	25	26	27	28	29	30

Tuesday, May 26, 2020

08:00 AM - 04:00 PM
Andy Dwyer, Hourly
EBD
8

Wednesday, May 27, 2020

08:00 AM - 04:00 PM
Andy Dwyer, Hourly
EBD
8

Thursday, May 28, 2020

08:00 AM - 04:00 PM
Andy Dwyer, Hourly
EBD
8

Monthly Budgets

Authorization Enhancements

- ✓ Hide Initial Balance – if selected the initial balance will not display on widgets or reports
 - Used from Accrued Time Payments (FI Only)
- ✓ Monthly Budget Fields – a monthly budget is derived from an Authorization, but it is not the same thing as the Monthly Max
 - Monthly budgets are calculated based on an algorithm and allow a client to exceed 100% of their monthly budget
 - For example, Colorado has a program that allows a client to spend 129.99% of their Monthly Budget
 - In this example, the client will run out of units/dollars earlier than the end of the year but it is allowed so the Authorization Monthly Max is set to 129.99% Monthly Budget
- ✓ The fields are labeled MonthBudget1 through MonthBudget12

The screenshot shows a web form titled "Add New Authorization". At the top right is a close button (X). Below the title is a checkbox labeled "Hide Initial Balance:" which is checked and has a yellow checkmark icon to its right. A tooltip next to the checkbox reads "Yes=Initial Balance will not display on reports or widgets". Below this is a text input field labeled "Authorization_Test_Data_O". The main part of the form consists of 12 rows, each with a label "Month X Budget:" and a text input field containing the value "2083.33". A blue checkmark icon is positioned to the right of the "Month 6 Budget" field. To the right of each input field is an information icon (i) and a help icon (?). At the bottom right are "Cancel" and "Save" buttons. At the bottom left, there is a label "Authorization#" followed by a blank input field.

Monthly Budget Custom Fields

- ✓ To enable Monthly Budgets fields on an authorization the custom fields must be created in the Custom Field Definitions

The screenshot displays the 'Custom Field - MonthBudget1' configuration page in the Acumen system. The left sidebar contains a navigation menu with items such as FUNDING SOURCES, ROLES, HOLIDAY SCHEDULES, ACCOUNTS, NEWS POSTS, CUSTOM DROP DOWN, CERTIFICATION REQUIREMENTS, CERTIFICATION TEMPLATES, MESSAGE TEMPLATES, PAYROLL, EVV CALL LOGS, EVV PHONE PROMPTS, TASK QUESTION, CUSTOM FIELD DEFINITIONS (highlighted), and DIAGNOSIS CODE. The top navigation bar includes tabs for HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS (active), REPORTS, and IMPORT, along with a user profile icon for 'matthew.cava...'. The main content area shows the 'Settings > Custom Field Definitions > MonthBudget1' breadcrumb and an 'Actions' button. The 'Custom Field Details' section lists the following information: ID: 32, Item Type: Authorization, Name: MonthBudget1, Label: Month 1 Budget, Description: Monthly Budget for Month 1, Help Text: Must be a positive number. This field is used for reporting purpose only, Input Type: Numeric, RegEx: `^(0*[1-9][0-9]*(\,[0-9]+)?|0+\,[0-9]*[1-9][0-9]*|\,[0-9]*[1-9][0-9]*)$`, Default Value: EDI: No, and Status: Active. Below this, there are tabs for Notes, Attachments, Events, and History. The 'Notes' tab is active, showing fields for 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Subject', and 'Type Added By', along with dropdown menus for 'Select Type' and 'Select Sub Type'.

Service Code Monthly Budget Link

- ✓ Selecting the “Display Monthly Budget Link” on the service code will allow the user to click on a hyperlink on the authorization to display the monthly budget
 - Tooltip instructs users to click service code to see Monthly Budget Summary
- ✓ This feature will allow users of the following profiles access to this information:
 - Clients
 - Case Workers
 - Guardians

Add New Service Code

Has Daily Rate: Yes No

Default Auth Specs:

Reference Fields:

GL Code:

Description:

Status:

Canned Statements:

Default CPT Code:

Default HCPCS Code:

Certification Template:

Display Monthly Budget Link:

Service_code_One_BCG_Da

Authorizations

Showing 1 out of 1 record

	Start Date	End Date	Bill Rate	Initial Balance	Holds	Remaining Balance	Status
Click link to see Monthly Budget Summary	EBD	2020	Jan 31, 2021		0.00	24029.87	Approved

Monthly Budget Summary

- ✓ Selecting the authorization hyperlink opens the Monthly Budget Summary in a new window
- ✓ There is a Print button displayed above the report (not pictured)

Monthly Budget Summary for April Ludgate							
Authorization Information							
Service Code	Start Date	End Date	Initial Balance	Utilization	Hold Amount	Remaining Balance	Available
EBD	01/01/2020	12/31/2020	25000.00	6189.21	94.24	18810.79	18716.55
Monthly Budget							
Date	Monthly Budget		Expenditure		Percentage Of Budget Used		
01/01/2020	2083.33		1347.63		64.69%		
02/01/2020	2083.33		1124.99		54.00%		
03/01/2020	2083.33		801.04		38.45%		
04/01/2020	2083.33		1643.31		78.88%		
05/01/2020	2083.33		1272.24		61.07%		
06/01/2020	2083.33		0.00		0.00%		
07/01/2020	2083.33		0.00		0.00%		
08/01/2020	2083.33		0.00		0.00%		
09/01/2020	2083.33		0.00		0.00%		
10/01/2020	2083.33		0.00		0.00%		
11/01/2020	2083.33		0.00		0.00%		
12/31/2020	2083.33		0.00		0.00%		

Caseworker Profile

Case Worker Profile - Current

Current State:

- ✓ Authorization tab displayed
- ✓ Entries tab displayed
- ✓ No Client tab
- ✓ No Search Functionality

The screenshot displays the Direct Care Innovations (DCI) Case Worker Profile interface. The navigation menu on the left includes 'DASHBOARD', 'AUTHORIZATION', and 'ENTRIES'. The 'AUTHORIZATION' tab is highlighted with a yellow border and a checkmark icon. The main content area shows a list of news posts under the heading 'News Posts'. The posts are:

- 514 case**
BZ case
May 14, 2020 09:12:04 AM hailing zhai
- News Post Case Worker (SMS)**
News Post Case Worker
May 05, 2020 04:00:18 PM keith jones
- NewsTest10**
NewsTest10
May 05, 2020 03:04:14 PM mason menges
- Case Worker News Post!!**
This will be my final New Post for today. I am done :)
Apr 09, 2020 01:52:34 PM keith jones

The interface also shows a 'Showing 8 out of 8 records' indicator.

Case Worker Profile - Future

Future State:

- ✓ Client tab added
- ✓ Authorization search added
- ✓ Monthly Budget Summary linked to service code when enabled
- ✓ News Posts display on posts targeted to Case Workers
- Authorizations tab removed
- Entries tab removed

The goal of the new Case Worker profile is to be focused on the client

The screenshot displays a web application interface with a navigation menu at the top including 'HOME', 'CARE MANAGEMENT', and 'REPORTS'. The 'CLIENTS' tab is selected and highlighted with a checkmark. Below the navigation, there is a search bar for 'Type Client Name' and a 'Search' button. The main content area shows an 'Authorizations' table for the client 'MattC Testclient - 54321'. The table has the following data:

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorizations Holds	Current Available Balance
PTO	05/01/2020	04/30/2021		32.00	1.00	31.00
Bonus Test	05/01/2020	04/30/2021	10000.00	9965.00	127.55	9837.45
Hourly EVV	05/01/2020	04/30/2021	10000.00	10000.00	0.00	10000.00

A callout box points to the 'Hourly EVV' link in the table, stating: 'Hourly Service Code hyperlinked to monthly budget view when enabled'. Below the table, there is a 'News Posts' section with a post titled 'case worker - new'. The interface also shows a 'Showing 3 out of 3 records' indicator.

Case Worker Profile - Clients

Future State:

- ✓ Client Name search filter and Client Table results only display Clients linked to the Case Worker
 - For standard Case Workers this link is via the funding accounts
 - For funding source level Case Workers will see all Clients that have an active funding account for a service code linked to their Funding Source
- ✓ State/Funding Source/Cost Center removed from search options

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HOME CARE MANAGEMENT REPORTS Help Leslie.knope

DASHBOARD Home > Clients

CLIENTS Clients

Type Client Name Type Client Id Select Status

Reset Search

Export

Showing 3 out of 3 records

Name	Client Id	State	Region	Cost Center	Status
Andy Dwyer	CO12345	AZ		Colorado Cost Center - Colorado Cost Center	Active
April Ludgate	CO21001	AZ		Colorado Cost Center - Colorado Cost Center	Active
Jerry Gergich	CO54321	AZ		Colorado Cost Center - Colorado Cost Center	Active

Case Worker Profile - Clients

Future State:

- ✓ Client tab displays basic demographics and authorizations
- ✓ Monthly Budget Summary report can be linked to a service code

The screenshot displays a web application interface for client management. The top navigation bar includes 'HOME', 'CARE MANAGEMENT', and 'REPORTS'. The user is logged in as 'leslie.knope'. The main content area is titled 'Client Details - April Ludgate' and is divided into several sections:

- Basic Demographics:** A form containing the following information:
 - Client Id: CO21001
 - Address: 5416 E Baseline Rd, Mesa, AZ 85206
 - GNIS: 04-013-7890
 - Region:
 - Phone: (480) 616-2385
 - Alternate Phone:
 - Mobile Number:
 - Email: matthewc+203@dcisofware.com
 - Date of Birth: Jul 15, 1976
 - SSN: ###-##-####
 - Profile Reference:
 - Training System Reference:
 - No. of Funding: 2
 - Accounts:
 - No. of Service: 7
 - Accounts:
 - Status: Inactive
 - Photo:
- Authorizations:** A form with search criteria:
 - From (MM/DD/YYYY): [calendar icon]
 - To (MM/DD/YYYY): [calendar icon]
 - Type Entry Id: [text input]
 - Type Service Code: [text input]
 - Initial Balance: [text input]
 - Select Status: [dropdown menu]
 - Buttons: Reset, Search
- Authorizations Table:** A table showing one record:

Service Code	Start Date	End Date	Bill Rate	Initial Balance	Holds	Remaining Balance	Status
EBD	Jan 01, 2020	Dec 31, 2020			424.08	23887.97	Approved

Case Worker Profile – Summary Report

Future State:

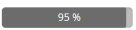
- ✓ Summary Report grouped by Client/Employee/Authorization
- ✓ Employee Name added to heading
- ✓ Summary Report sorted by Date of Service
- ✓ Total line added at the end of every Client/Employee/Authorization table

Spending Summary as of: 05/25/2020

Client Name: Andy Dwyer	
Participant Number CO12345	Case Manager Leslie Knope
Phone: (999) 999-9999	

Colorado CDASS

Auth	Start 02/01/2020	End 01/31/2021	% Time Elapsed 31	
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Dollars (Dollar Based Programs)					
Authorization Name	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
EBD	\$25000.00	\$1132.01	\$0.00	\$23867.99	 95 %

Client Name: Andy Dwyer / Employee Name: Ann Perkins Authorization Name : EBD (ID : 448047) : From 02/01/2020 To 01/31/2021								
Service Code	Cost Center	Entry ID	Entry Type	Account Type	Employee / Program Name	Date of Service	Amount	Bill Rate
EBD	Colorado Cost Center	448495	Punch	Hourly	Ann Perkins	02/16/2020	-161.88	
EBD	Colorado Cost Center	448152	Punch	Hourly	Ann Perkins	02/07/2020	-86.72	
EBD	Colorado Cost Center	448154	Punch	Hourly	Ann Perkins	02/05/2020	-138.76	
EBD	Colorado Cost Center	448156	Punch	Hourly	Ann Perkins	02/03/2020	-138.76	
EBD	Colorado Cost Center	448157	Punch	Hourly	Ann Perkins	02/02/2020	-161.88	
Total							-688.00	

Pay Rates

Create Pay Rates

- ✓ Pay Rate dropdown created in Custom Drop Down Field
- ✓ Pay rates can be selected by the end user
- ✓ Pay rates can be imported
 - Will require a change to the Employee Service Account and Employee Entries import formats

The screenshot displays the Acumen system interface with the 'SETTINGS' menu open to 'CUSTOM DROP DOWN'. A modal window titled 'Add New Custom Drop Down Item' is active, showing the following configuration:

- Item Type: Pay Rate
- Pay Rate Name: NightWknd
- Item Status: Active

A yellow checkmark icon is visible next to the 'Pay Rate Name' field. Below the modal, a table shows the configuration for the 'Pay Rate' item:

Item	Pay Rate	Standard	Active
1			

Employee Service Account

- ✓ Select Allows Overlapping Pay Rates located on Employee Service Account to enable the end user to select multiple rates

Pay Rate Name: Standard

Pay Rate: 10

Effective Date: 05/16/2020

Daily Pay Max: 0

Daily Rate: 0

Min Units Per Punch: Min Units Per Punch

Max Units Per Punch: Max Units Per Punch


Start Date: 01/01/2020

End Date: End Date(MM/DD/YYYY)

Payroll Modifier: Payroll Modifier

Account Reference: Account Reference



Grace Period: Enabled Disabled

Allows Overlapping Pay Rates: 

EVV Frequency Type: Clock In and Out

Status: Active

DEFAULT: DEault TEXT HERE

Add New Rate

- ✓ Multiple pay rates can be added to an employee service account

The screenshot displays the Acumen HR system interface. The top navigation bar includes 'HOME', 'PAYROLL', 'BILLING', 'SCHEDULING', 'CARE MANAGEMENT', 'AUTHORIZATION', 'SETTINGS', 'REPORTS', and 'IMPORT'. The user is logged in as 'matthew.cava...'. The breadcrumb trail is 'Home > Employees > Ann Perkins > Ann Perkins/ April Ludgate/ Hourly'. The main content area is titled 'Account Details - Ann Perkins/ April Ludgate/ Hourly'. It is divided into two columns: 'Account Details' and 'Employee Details'. The 'Account Details' column lists: Account Type: Employee Service, Client: April Ludgate, Relationship Type: None, Service Code: EBD, Funding Source: Colorado CDASS, Funding Type: Dollars, Burden Multiplier: 0.1780, Cost Center: Colorado Cost Center, and Employee: Ann Perkins. The 'Employee Details' column lists: Name: Ann Perkins, Type: Hourly Non Exem, Employee No: CO2233, Holiday Schedule: Default Holiday S, Cost Center: Colorado Cost Ce, Hire Date, and Status: Active. An 'Actions' dropdown menu is open, showing options: New Note, New Attachment, New Entry, Edit Account, Edit Custom Field Values, and Add New Rate. The 'Add New Rate' option is highlighted with a yellow border and a checkmark icon.

Select the Rate to Add

- ✓ Select the Rate to Add
 - The rates that are created in the custom dropdown field are visible
- ✓ Complete the Rate Wizard
 - Enter Rate
 - Effective Date
 - End Date

The screenshot shows a dialog box titled "Add New Rate" with a close button (X) in the top right corner. The dialog contains several fields and a dropdown menu:

- Pay Rate Name:** A dropdown menu with the text "Select Pay Rate Name" and a downward arrow.
- Rate:** A dropdown menu with the text "Select Pay Rate Name" and a downward arrow.
- Effective Date:** A dropdown menu with the text "Standard" and a downward arrow. The "Night/Wknd" option is highlighted in blue, and a yellow checkmark icon is positioned to its right.
- End Date:** A dropdown menu with the text "Emergency" and a downward arrow.
- Primary:** A dropdown menu with the text "Holiday" and a downward arrow.

At the bottom right of the dialog, there are two buttons: "Cancel" (light gray) and "Save" (dark blue).

Define Primary Pay Rate

- ✓ Select Primary button to define the rate that will display in the dropdown for the user
 - Edit Standard Rate and select Primary
 - This will save the user from selecting a rate for each punch
 - The user will only change the rate when necessary for the shift

Dialog Box: Edit Rate

Pay Rate Name: Standard

Rate: 10.00

Effective Date: 05/16/2020

End Date: End Date(MM/DD/YYYY)

Primary:

Buttons: Cancel, Save

Employee Service Account Details

The Employee Service Account details page displays all the rates added to the account

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HOME PAYROLL BILLING SCHEDULING CARE MANAGEMENT AUTHORIZATION SETTINGS REPORTS IMPORT Help matthew.cava...

Home > Employees > Ann Perkins > Ann Perkins/ April Ludgate/ Hourly > Rate

Rate Details - Ann Perkins/ April Ludgate/ Hourly

Actions

Rate Details	Account Details
<p>Pay Rate Name: Standard Primary: Yes Rate: 10.00 Effective Date: Jan 01, 2020 End date: Created By: Matthew Cavallo Created Date: May 16, 2020</p>	<p>Account Type: Employee Service Client: April Ludgate Service Code: EBD Funding Source: Colorado CDASS Funding Type: Dollars Burden Multiplier: 0.1780 Cost Center: Colorado Cost Center Employee: Ann Perkins Balance: 0.00 Unit: Hourly Daily Pay Max: 0.00 Daily Rate: 0.00 Min Units Per Punch: Max Units Per Punch: Start Date: Jan 01, 2020 End Date: Pay Rates: Pay Rate Name: Standard Pay Rate: 10.00 Pay Rate Effective Date: Jan 01, 2020 Pay Rate Name: Night/Wknd Pay Rate: 15.00 Pay Rate Effective Date: Jan 01, 2020 Pay Rate Name: Emergency Pay Rate: 20.00 Pay Rate Effective Date: Jan 01, 2020 Pay Rate Name: Holiday Pay Rate: 18.00 Pay Rate Effective Date: Jan 01, 2020 Pay Rate Name: Training Pay Rate: 12.00 Pay Rate Effective Date: Jan 01, 2020 Status: Active Profile Type: Client Payroll Modifier: N/A</p>

Rates Tab

The Rates Tab displays all rate information

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HOME PAYROLL BILLING SCHEDULING CARE MANAGEMENT AUTHORIZATION SETTINGS REPORTS IMPORT

Help matthew.cava...

Entries Rates Notes Attachments Events Custom Fields History

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

Reset Search

Export

Rates Showing 5 out of 5 records

Pay Rate Name	Primary	Rate	Effective Date	End Date	Added By
Training	No	12.00	01 Jan 2020		Matthew Cavallo
Standard	Yes	10.00	01 Jan 2020		Matthew Cavallo
Night/Wknd	No	15.00	01 Jan 2020		Matthew Cavallo
Holiday	No	18.00	01 Jan 2020		Matthew Cavallo
Emergency	No	20.00	01 Jan 2020		Matthew Cavallo

Rate Selection

- ✓ The Primary Rate Displays in the Pay Rate Name Field
- ✓ The user can select an rate from the Pay Rate Name field:
 - If the user selects any rate other than the standard rate, there will be a Red Eye review notification in the Pending Entries screen
 - The Tooltip will read “Non primary Pay Rate selected”
 - This will not stop auto approval
- ✓ Rates can be edited
 - If a user edits the Pay Rate the system will create a compensating entry
 - Reject the original and create a new linked entry
- ✓ Edit reasons include:
 - Employee selected incorrect pay rate
 - Employee selected incorrect EVV location
 - Other

The screenshot shows a form titled "Add New Entry" with the following fields and values:

- Entry Type: Punch
- Employee Name: Ann Perkins
- Account Type: Hourly
- Client: April Ludgate - CO21001
- Service Code: EBD
- Service Date: 04/04/2020
- Check In: 8:00 AM
- Check Out: 4:00 PM
- Pay Rate Name: Standard (highlighted with a yellow border and a checkmark icon)
- EVV Method: Select Pay Rate Name
- Clock In EVV Location: Night/Wknd (highlighted with a blue border and a checkmark icon)
- Clock Out EVV Location: Emergency
- Check Out Date: Holiday
- Diagnostic Code: Training
- Diagnostic Code: Diagnostic Code
- Notes: Add Notes for Punch
- Attachment: Add Attachment

Punch Details

Punch Details display pay rate name

Punch Details	Account Details/ Service Account
Entry Id: 565687	Account Id: 5214
Machine Details: 72.208.141.34	Account Type: Hourly
Service Date: May 20, 2020	Client/ Program: MT (UTC-07)
Check In: 08:00 AM	Time Zone:
Check Out: 04:00 PM	Employee: Ann Perkins
Hour(s): 0:08:00	Employee Time: MT (UTC-07)
Amount: 8.00	Zone:
General Activity:	Service Code: EBD
Employee Time: MT (UTC-7)	Client Signoff: TRUE
Zone:	Funding Type: Dollars
Client/ Program: MT (UTC-7)	Funding Source: Colorado CDASS
Time Zone:	Cost Center: Colorado Cost Center
Payroll Modifier: N/A	Unit Type: Hourly
Diagnostic Code: N/A	Balance: 16.00
GL Code: CO - 070	Status: Active
Location Code:	
Authorization Entry 448047	
Id:	
Pay Rate Name: Standard	
Pay Rate: 15.00	
Status: Approved	
Approved By: System Process	
Approved Date: 5/26/2020 10:15:01 AM	
Created By: Ann Perkins	
Created: May 26, 2020	
Input Method Type: Web Portal	

Pay Rate Report

The report is to pull all Pay Rates defined for Employee that match the search criteria

Location:

- Reports > Management Function > Employee Pay Rates Report

The screenshot shows the Acumen software interface. The top navigation bar includes: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, **REPORTS**, IMPORT, Help, and matthew.cava. The left sidebar lists various report categories, with **MANAGEMENT REPORTS** selected. The main content area features a search form with the following fields: From Date (MM/DD/YYYY), To Date (MM/DD/YYYY), Ann Perkins - 1832 (Employee ID), Type Client/Program Name, Type Cost Center, and Select State. There are 'Reset' and 'Search' buttons. Below the search form, there are 'Download To CSV' and 'Download To PDF' buttons. The results section shows 'Showing 13 out of 13 records' and a table with the following data:

Employee Name	Employee State	Cost Center	Pay Rate Name	Pay Rate	Start Date
Ann Perkins	AZ	Colorado Cost Center	Emergency	30	01/01/2020
Ann Perkins	AZ	Colorado Cost Center	Night/Wknd	20	01/01/2020
Ann Perkins	AZ	Colorado Cost Center	Standard	15	05/21/2020
Ann Perkins	AZ	Colorado Cost Center	Emergency	20	01/01/2020
Ann Perkins	AZ	Colorado Cost Center	Holiday	18	01/01/2020
Ann Perkins	AZ	Colorado Cost Center	Night/Wknd	15	01/01/2020
Ann Perkins	AZ	Colorado Cost Center	Standard	10	01/01/2020
Ann Perkins	AZ	Colorado Cost Center	Training	12	01/01/2020
Ann Perkins	AZ	Colorado Cost Center	Emergency	25	02/01/2020
Ann Perkins	AZ	Colorado Cost Center	Holiday	30	02/01/2020
Ann Perkins	AZ	Colorado Cost Center	Night/Wknd	17.5	02/01/2020
Ann Perkins	AZ	Colorado Cost Center	Standard	15	02/01/2020
Ann Perkins	AZ	Colorado Cost Center	Training	14	02/01/2020

Pay Rate Report Enhancements

Pay rate fields has been added to the following reports:

- Punch Entries Report
- Punch Entry Details Report
- No Pay Rate Filter was added

 Download To CSV

 Download To PDF

Showing **62** out of **62** records

..	Approved IP...	Input Metho...	Payroll Batc...	Payroll Batc...	Entry Type	Pay Rate	Pay Rate N...
4...	184.179.24.3	Web Portal	Colorado Test	2640	Punch	15.00	Standard
4...	184.179.24.3	Web Portal	Colorado Test	2640	Punch	15.00	Standard
0...	:	Web Portal			Punch	15.00	Standard
0...	:	Web Portal			Punch	15.00	Standard
4...	184.179.24.3	Web Portal	Colorado Test	2640	Punch	17.50	Night/Wknd
5...	72.208.141.34	Web Portal	Ann Perkins	2760	Punch	17.50	Night/Wknd
4...	184.179.24.3	Web Portal	Colorado Test	2640	Punch	25.00	Emergency
7...	:	Web Portal	Ann Perkins	2760	Punch	10.00	Standard
7...	:	Web Portal	Ann Perkins	2760	Punch	10.00	Standard
4...	:	Web Portal	Ann Perkins	2760	Punch	10.00	Standard
4...	:	Web Portal	Colorado Test	2661	Punch	10.00	Standard

Pay Codes

Pay Codes Menu

Payroll Fly-Out Menu has been updated:

- ✓ Pay Type Codes is now Pay Codes
- ✓ Overtime Settings added

Acumen Powered by DCI

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

FUNDING SOURCES

ROLES

HOLIDAY SCHEDULES

ACCOUNTS

NEWS POSTS

CUSTOM DROP DOWN

CERTIFICATION REQUIREMENTS

CERTIFICATION TEMPLATES

MESSAGE TEMPLATES

PAYROLL

EW CALL LOGS

EW PHONE PROMPTS

TASK QUESTION

CUSTOM FIELD DEFINITIONS

DIAGNOSIS CODE

enuat.dcisoftware.com/Payroll/PayCodes

PAY CODES

PAYROLL BATCH VALIDATIONS

OVERTIME SETTINGS

Pay Codes

- Pay Code names have been standardized across FI and SP modes, with the exception of Vendor Payment and Reimbursement (FI only)
- Double Overtime Default and Custom have been added
- Sick and PTO salary and hourly added
- Sleep Overtime and Sleep Holiday added
- Holiday OT added
 - Allows customers to track holiday overtime specifically
 - Holiday OT custom and default to be added
- Default vs Custom Pay Codes
 - Default means that the service account **does not** have a pay rate on it and will use rate in the payroll engine
 - Custom means that the service account **does** have a pay rate on it and the payroll engine will use the rate in DCI

Name	Code	Overtime Related Code
Bonus	BON	No
Double Overtime Custom	2O	Yes
Double Overtime Default	2OT	Yes
Holiday OT Custom	HLOTC	Yes
Holiday OT Default	HLOTD	Yes
Holiday Worked Custom	HC	No
Holiday Worked Default	HD	No
Mileage	MIL	No
Overtime Custom	O	Yes
Overtime Default	OT	Yes
Paid Holiday	PH	No
Paid Time Off Hourly	PTO	No
Paid Time Off Salary	PTO1	No
Regular Custom	R	No
Regular Default	REG	No
Reimbursement	REIM	No
Sick Hourly	S	No
Sick Salary	SSH	No
Sleep	SLP	No
Sleep Holiday	SLH	No
Sleep Overtime	SLO	Yes
Vacation Hourly	V	No
Vacation Salary	VAS	No
Vendor Payment	VP	No



Pay Code Details

- ✓ Overtime related code is either yes or no
- ✓ Pay Rate Multiplier is multiplied by the Pay Rate Multiplier to calculated OT Calculate OT Rate is either yes or no and depends on the payroll engine settings
- ✓ Blend Pay Rate is a yes or no setting for an employee with multiple pay rates the system will look at the gross pay for the week divided by the number of hours worked and that is the rate that the system considers OT or 2OT
- ✓ Pay Rate Multiplier and Blend Pay Rate are not editable through the UI, but can be changed through your DCI account manager

Pay Code Details - Double Overtime Default

Pay Code Details

Pay Code Name: Double Overtime Default

Pay Code: 2OT

Overtime Related Yes ✓
Code:

Pay Rate Multiplier: 2.00 ✓

Calculate OT Rate: Yes ⓘ ✓

Blend Pay Rate: No ⓘ ✓

Description: Overtime worked and paid default pay rate plus 2x multiplier

Payroll Entries Detail

- ✓ Column name updated to "Pay Code Name"

Acumen Powered by DCI

HOME PAYROLL BILLING SCHEDULING CARE MANAGEMENT AUTHORIZATION SETTINGS REPORTS IMPORT Help matthew.cavallo

BATCHES

PUNCH ENTRIES

PAYROLL ENTRIES

PREVIOUSLY PAID ENTRIES

EMPLOYEES

RECONCILE

Payroll > Payroll Entries

Payroll Entries

From (MM/DD/YYYY) To (MM/DD/YYYY) Type Punch Id

Employee Number Type Cost Center Code Type Employee/Vendor Name

Pay Rate Payroll Ref Check Id Select Unit

Select Status

Reset Search

Export

Showing 30 out of 3100 records

Id	Date of Service	Ref.	Employee/Vendor Name	Employee Number	Cost Center Code	Unit Type	Units	Pay Rate	Pay Code Name	Payroll Ref Check Id	Status
56428	01/21/2020	56426	Anna Indie	7BOI2	LAB	Miles	-49.00	10.00	Mileage	25931	Paid
56097	01/17/2020	56092	EE5 Smith	EE5	QualityLogic2	Dollar	-1.00	10.00	Regular Custom	1568	Paid
56096	01/09/2020	51700	EE2 Smith	EE2	QualityLogic2	Dollar	-8.00		Reimbursement	1568	Paid
56082	01/17/2020	55848	EE2 Smith	EE2	QualityLogic2	Dollar	-0.02	10.00	Regular Custom	1567	Paid
55784	01/16/2020	55586	David Hill	DH1040	KJCC	Hourly	-0.17	10.00	Regular Custom	6115	Paid
55783	01/11/2020	55750	Kurt Hill	KH1039	KJCC	Hourly	-0.17	10.00	Regular Custom	6115	Paid

Payroll Entry Details

- ✓ Pay Rate Override is the rate that the employee is getting as a result of the overtime entry
- ✓ History Tab added
 - History is populated only when Pay Rate Override is edited

Acumen Powered by DCI

HOME PAYROLL BILLING SCHEDULING CARE MANAGEMENT AUTHORIZATION SETTINGS REPORTS IMPORT Help matthew.cava..

BATCHES
PUNCH ENTRIES
PAYROLL ENTRIES
PREVIOUSLY PAID ENTRIES
EMPLOYEES
RECONCILE

Payroll > Payroll Entries > 446558

Payroll Entry Detail - CM Employee3/ CM Client3

Payroll Entry Details

Entry Id: 446558
Machine Details: 67.41.41.152
Pay Code Name: Overtime Custom
Pay Code: O
Service Date: Jan 31, 2020
Pay Week: 5
Pay Rate Name:
Pay Rate: 10.00
Pay Rate Override: 15.00
Payroll Modifier: N/A
Payroll Ref Check Id:
Payroll Burden:
Estimated Payroll 105.00
Burden:
Pay Units: -7.00
Status: Approved
Batch Name: CM FR 24.56.24 - 2558
Ref Entry: 446535
GL Code:
Location Code: 16-001-396879
Created: Apr 30, 2020

Account Details/ Service Account

Account Id: 5038
Account Type: Hourly
Client/ Program: CM Client3
Employee: CM Employee3
Service Code: Unit - Hourly - ENR
Client Signoff: FALSE
Funding Type: Units
Funding Source: RCPD2
Cost Center: QualityLogic2
Unit Type: Hourly
Balance: 0.00
Status: Active

Reference Entries Notes Attachments Events EVV Verifications Map History

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

Reset Search

Overtime Engine

Overtime Settings

- New Fly out Menu for Overtime Settings
- Overtime Container Client means that it is looking at overtime on a per client basis
 - FI Mode Only
- Overtime Container Instance means that all of the hours worked are applied, not just per client
 - FI or SP Mode
- Overtime settings are not editable
 - Any changes to overtime settings must be submitted as a ticket

The screenshot shows the 'Overtime Settings' page in the DCI software. The top navigation bar includes 'HOME', 'PAYROLL', 'BILLING', 'SCHEDULING', 'CARE MANAGEMENT', 'AUTHORIZATION', 'SETTINGS', 'REPORTS', and 'IMPORT'. The 'SETTINGS' tab is active. The left sidebar contains a menu with options like 'FUNDING SOURCES', 'ROLES', 'HOLIDAY SCHEDULES', 'ACCOUNTS', 'NEWS POSTS', 'CUSTOM DROP DOWN', 'CERTIFICATION REQUIREMENTS', 'CERTIFICATION TEMPLATES', 'MESSAGE TEMPLATES', 'PAYROLL', 'EVV CALL LOGS', 'EVV PHONE PROMPTS', 'TASK QUESTION', 'CUSTOM FIELD DEFINITIONS', and 'DIAGNOSIS CODE'. The 'PAYROLL' menu is expanded, showing 'PAY CODES', 'PAYROLL BATCH VALIDATIONS', and 'OVERTIME SETTINGS'. The main content area is titled 'Overtime Settings' and contains two panels: 'Overtime Container' and 'Overtime Settings Explanation'. The 'Overtime Container' panel shows 'Overtime Container: Client' and a description: 'For Overtime Container, a value of Instance means that all of an employee's punches count towards the OT calculation regardless of which client the employee works with. This is the standard for an instance running in Service Provider security mode. A value of Client means that an employee's punches are grouped by client and then evaluated for OT. This is only available for instances running in Fiscal Intermediary security mode.' The 'Overtime Settings Explanation' panel provides a detailed explanation of the OT rules. Below the panels, there is a search bar with a dropdown menu for 'Type Funding Source Name' and a 'Select State' dropdown. There are 'Reset' and 'Search' buttons. At the bottom right, there is an 'Export' button and a status message: 'Showing 30 out of 88 records'.

Rule Type

1. Company Rule
2. State Relationship
3. State Rule

Rule Id	Rule Type	Payout Potential Score	State Code	Funding Source Id	Funding Source Name	Relationship Type	Has Weekly OT	Weekly OT Limit	Weekly O Multiplier
1	Company	1	AZ				True	40	1.50
2	Company	1	CA				True	40	1.50
3	State	1	AL				True	40	1.50
4	State	2	AK				True	40	1.50
5	State	1	AZ				True	40	1.50
6	State	1	AR				True	40	1.50
7	State	5	CA				True	40	1.50
8	State Relationship	2	CA			LiveInCaregiver	True	40	1.50
9	State	2	CO				True	40	1.50
10	State	1	CT				True	40	1.50
11	State	1	DE				True	40	1.50

Overtime Settings

- Has Weekly OT is the Federal 40
- Scroll to the right to see all of the available overtime settings
- For more information on overtime settings, please consult your DCI account representative

Rule Id	Rule Type	Payout Potential Score	State Code	Funding Source Id	Funding Source Name	Relationship Type	Has Weekly OT	Weekly OT Limit	Weekly O Multiplier
1	Company	1	AZ				True	40	1.50
2	Company	1	CA				True	40	1.50
3	State	1	AL				True	40	1.50
4	State	2	AK				True	40	1.50
5	State	1	AZ				True	40	1.50
6	State	1	AR				True	40	1.50
7	State	5	CA				True	40	1.50
8	State Relationship	2	CA			LiveInCaregiver	True	40	1.50
9	State	2	CO				True	40	1.50
10	State	1	CT				True	40	1.50
11	State	1	DE				True	40	1.50

Overtime Batches

- If a batch has overtime in it, there is a new attachment called Overtime Rule Results (pictured below)
- This file includes the OT Rule Type and which sub-rule was triggered for each overtime entry

The screenshot shows the 'Attachments' section of the software. It includes search filters for 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'File Name', and 'Select Type'. Below the filters is a table of attachments:

Date	File Name	File Type	File Size	Added by	Download	Status
Apr 30, 2020	RawPayrollDump_20200430222851_2558.csv	CSV	4.00 KB	CM Payroll	Download	Active
Apr 30, 2020	20200430222851_TransmitToPayrollExcel_2558.csv	CSV	0.55 KB	CM Payroll	Download	Active
Apr 30, 2020	PayrollBatchID[2558]_OvertimeRulesResults_20200430222851.csv	CSV	0.47 KB	CM Payroll	Download	Active

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Payroll Ent	Ref Entry ID	Pay Code	Payroll Bat	Payroll Bat	Employee F	Employee M	Employee F	Employee L	OTRule ID	OTRule Typ	State	OT Sub Rule	Triggered
2	598398	83798	O	2851	62VPtest3	1496	gnome	Svirf	Neblin	2	Company	CA	DailyOT1	
3	598400	83125	O	2851	62VPtest3	1480	euro	Frenchy	German	2	Company	CA	DailyOT1	
4	598402	83133	O	2851	62VPtest3	1480	euro	Frenchy	German	2	Company	CA	DailyOT1	

Service Code

- ✓ Overtime Exempt now applied to all levels of overtime
 - Previously just applied to weekly overtime

Add New Service Code

Billing Rollup Type: ⓘ

Payroll Details: -

Payable: Yes No ⓘ

Overtime Exempt: Yes No ✓ ⓘ

Default Pay Rate: ⓘ

Has Max Pay Rate: Yes No ⓘ

Max PayRate: ⓘ

Hide Remaining Balance: Yes No ⓘ

Allow Diagnosis Code: Yes No ⓘ

Allow Accrued Time Entries: Yes No ⓘ

EVV Required: Yes No ⓘ

Enable Geofencing: Yes No ⓘ

Has Daily Rate: + Yes No ⓘ

Default Auth Specs: -

Employee Details

A new overtime type is for Domestic Worker. A domestic worker is someone who lives in the residence and provides care, but is not related to the client.

The Domestic Work Preferred Day of Rest allows the domestic worker to designate a day where they are not supposed to work.

If a domestic worker chooses to work on the day of rest, then they are entitled to overtime.

If enabled this is tied to the setting in the OT Table labeled OneDayRestin7 for states in which this type of overtime is enforced.

The screenshot shows the 'Add New Employee' form with the 'Employee Information' tab selected. The form includes the following fields and options:

- Type: Hourly Non Exempt
- Domestic Worker: Yes No
- Domestic Worker 7 Day Exemption: Yes No
- Domestic Worker Preferred Day of Rest: Sunday (dropdown menu is open, showing Sunday selected)
- Employee Number: Monday
- Weekly Hours Available: Tuesday
- Professional Id1: Wednesday
- Professional Id2: Thursday
- Payroll Id: Friday
- Certification Template: Select Certification Template
- Holiday Schedule: Select Holiday Schedule
- Cost Center: Select Cost Center

Reports

Profile Reports

- Employees Report
- Clients Report
- Residential Programs Report
- Day Programs Report
- Group Services Report
- Parenting Programs Report
- Guardians Report (new report)
- Case Workers Report (new report)
- Vendors Report (new report FI-Mode Only)

The screenshot shows a software interface with a top navigation bar containing the following items: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. The REPORTS menu is currently selected and expanded, showing a list of report categories. The 'PROFILE REPORTS' category is highlighted, and its sub-menu is displayed, listing various reports including Employees Report, Clients Report, Residential Programs Report, Day Programs Report, Parenting Programs Report, Guardians Report, Case Workers Report, and Vendors Report.

Category	Report
DASHBOARD	Reports > Dashboard
COA REPORTS	Dashboard
AUTHORIZATION REPORTS	
MANAGEMENT REPORTS	
PAYROLL REPORTS	
BILLING REPORTS	
PROFILE REPORTS	EMPLOYEES REPORT
FUNDING ACCOUNT REPORTS	CLIENTS REPORT
SETTINGS REPORTS	RESIDENTIAL PROGRAMS REPORT
EVV REPORTS	DAY PROGRAMS REPORT
CARE MANAGEMENT REPORTS	PARENTING PROGRAMS REPORT
SCHEDULING REPORTS	GROUP SERVICES REPORT
TRAINING REPORTS	GUARDIANS REPORT
AUDITING SYSTEM ACTIVITY REPORTS	CASE WORKERS REPORT
BUSINESS RULES REPORTS	VENDORS REPORT

Setting Reports

- Funding Sources Report (new report)
- Service Codes Report
- Service Code Groups Report (new report)
- Regions Report

The screenshot shows a navigation menu for a software application. At the top, there is a header with the Acumen logo and the text 'Acumen Powered by DCI'. Below the logo is a horizontal navigation bar with the following items: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. The 'REPORTS' item is highlighted with a blue underline. A dropdown menu is open under 'REPORTS', showing a list of report categories. The 'DASHBOARD' category is selected, and its sub-items are listed on the right side of the dropdown. The 'SETTINGS REPORTS' category is also visible, with its sub-items listed on the right side of the dropdown.

Category	Sub-item
DASHBOARD	FUNDING SOURCES REPORT
DASHBOARD	SERVICE CODES REPORT
DASHBOARD	SERVICE CODE GROUPS REPORT
DASHBOARD	REGIONS REPORT
SETTINGS REPORTS	
EVV REPORTS	
CARE MANAGEMENT REPORTS	
SCHEDULING REPORTS	
TRAINING REPORTS	
AUDITING SYSTEM ACTIVITY REPORTS	
BUSINESS RULES REPORTS	

Report Modifications

Profile ID and Master Program Account ID will be added to the following reports:

- COA Reports
 - Residential Programs Report
 - Day Programs Report
 - Group Services Report
 - Parenting Programs Report
- Profile Id should be added as the first column
- Master Program Account ID should be added as the second column

Holiday Modes

Holiday Modes

For holidays, DCI currently creates the appropriate holiday punch based on whether or not another punch is already present. If a punch already exists for 8 hour or more then no holiday punch should be created. If a punch already exists for less than 8 hours then a holiday punch should be created to give the employee 8 total hours.

DCI has create a new mode to let customers manage how holiday pay is processed:

- Mode 0 – This is the current behavior where the system first checks to see if the Employee already has punches on that day totaling less than 8 hours and if so creates an entry in the employees holiday account for the difference. For example, if an employee works 4 hours on a holiday, DCI will create a holiday punch of 4 hours for a total of 8 hours.
- Mode 1 – This is the new behavior. When set to 1 the system should skip looking for other entries and always create an entry in the Employees holiday account for 8 hours, meaning that an employee will get 8 hours for the holiday plus the hours worked

Certification Requirements

Create Expired Certifications

Certification can be created in the past (eg the Certification Date and Expiration Date are both in the past):

- ✓ Certification is created in Expired status
- ✓ Punches that are entered late but fall in the date range will pass business rules

EMPLOYEE NUMBER: 1001

An Expired Certification can be rejected:

- No impact on punches that are already in the system
- No impact on notifications that may have been sent for the certification
- Recorded in the History for the Certification

Certifications

Showing 1 out of 1 records

Id	Certification Name	Certification Date	Certification Expiration Date	Expiration Reminder Start	Last Reminder Sent Date	Status
102	First Aid	05/01/2017	05/01/2019	01/31/2019		Expired

Business Rules

Max Hours Per Day Per Employee Per Client Per Funding Source

The purpose is to validate that an employee has not violated the max allowed hours per day for a specific client under a funding source

- **Phase 2**
- **Parameter 1** – Required, Max allowed daily hours
- **Parameter 1 Validation Logic** – Must be a decimal number between 1.0 - 23.9
- **Parameter 1 Validation Error** – “You have entered invalid daily max number of hours. Must be decimal number between 1 - 23.9”
- **Parameter 2** – N/A
- **Data Set** – All punches (excluding Rejected and Cancelled) by this employee for the same calendar day and for the same Client and for the same Funding Source as the punch being validated
- **Logic** – Total up the hours worked in the data set and compare to value provided in parameter 1. If hours worked are greater than business rule fails
- **End user punch failure message** – Since this is a Phase 2 Business Rule, there is no failure notification to the end user

Max Hours Per Day Per Client Per Funding Source

The purpose is to validate that a client has not violated the max allowed hours per day under a funding source

- **Phase 2**
- **Parameter 1** – Required, Max allowed daily hours
- **Parameter 1 Validation Logic** – Must be a decimal number between 1.0 - 23.9
- **Parameter 1 Validation Error** – “You have entered invalid daily max number of hours. Must be decimal number between 1 - 23.9”
- **Parameter 2** – N/A
- **Data Set** – All punches (excluding Rejected and Cancelled) for this Client for the same calendar day and for the same Funding Source as the punch being validated
- **Logic** – Total up the hours worked in the data set and compare to value provided in parameter 1. If hours worked are greater then business rule fails
- **End user punch failure message** – Since this is a Phase 2 Business Rule, there is no failure notification to the end user
- Similar to Max Hours Per Week Per Client Per Funding Source except its for a *day* not a *week*

Max Hours Per Day Per Employee Per Cost Center

The purpose is to validate that an employee has not violated the max allowed hours per day for a specific cost center

- **Phase 2**
- **Parameter 1** – Required, Max allowed daily hours
- **Parameter 1 Validation Logic** – Must be a decimal number between 1.0 - 23.9
- **Parameter 1 Validation Error** – “You have entered invalid daily max number of hours. Must be decimal number between 1 - 23.9”
- **Parameter 2** – N/A
- **Data Set** - All punches (excluding Rejected and Cancelled) by this employee for the same calendar day and for the same Cost Center as the punch being validated
- **Logic** – Total up the hours worked in the data set and compare to value provided in parameter 1. If hours worked are greater then business rule fails
- **End user punch failure message** – Since this is a Phase 2 Business Rule, there is no failure notification to the end user
- Similar to Max Hours Per Week Per Employee Per Cost except it's for a *day* not a *week*

Thank you!