DIRECT CARE INNOVATIONS

February 2020 Release Notes

Version B10A

Table of Contents

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

Introduction

The February release is a comprehensive release that focuses on end-user efficiency and analytics. There was an emphasis in this release on ensuring that the feature functionality was ordered in a logical way to help the end user locate items and increase user efficiency in completing forms.

Some of the features introduced in this release are visible to the end user, but will not be turned on until the next release. These are features relating to overtime. 64 Bug fixes are deployed in this release. A separate document will be sent out containing the bug fixes. There is also important information about sun-setting support for some versions of the mobile app.

This release is tentatively scheduled for February 10, 2020. The contents within this guide pertain to the updates in this release. Remember to use the DCI Help Center for any questions you may have. From all of us on the DCI team, we thank you for all you do.

Authorizations

Authorization Enhancements

Current State:
- Users cannot see a Pending Authorizations count

Future State:
- ✓ Pending Authorizations now displays a count of authorizations in pending status

Current State:
- Add new authorization on Approved Authorization tab

Future State:

- ✓ The Action Button has been moved from the Approved tab to Pending

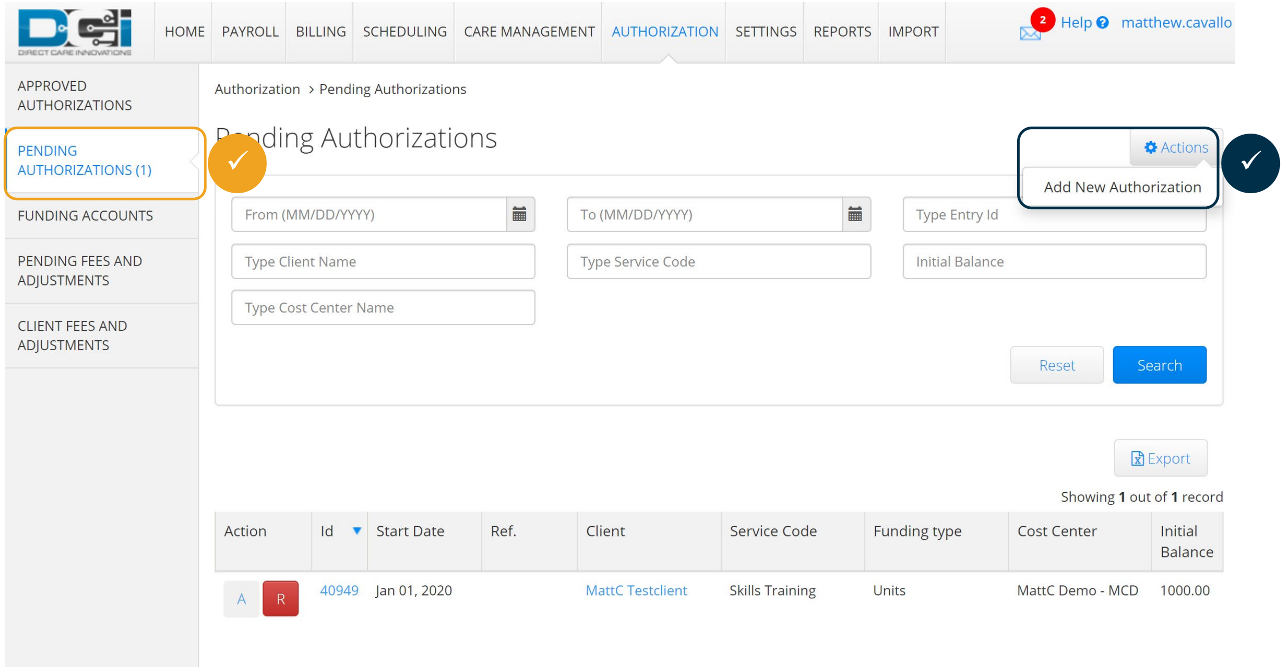


Chart of Accounts (CoA)

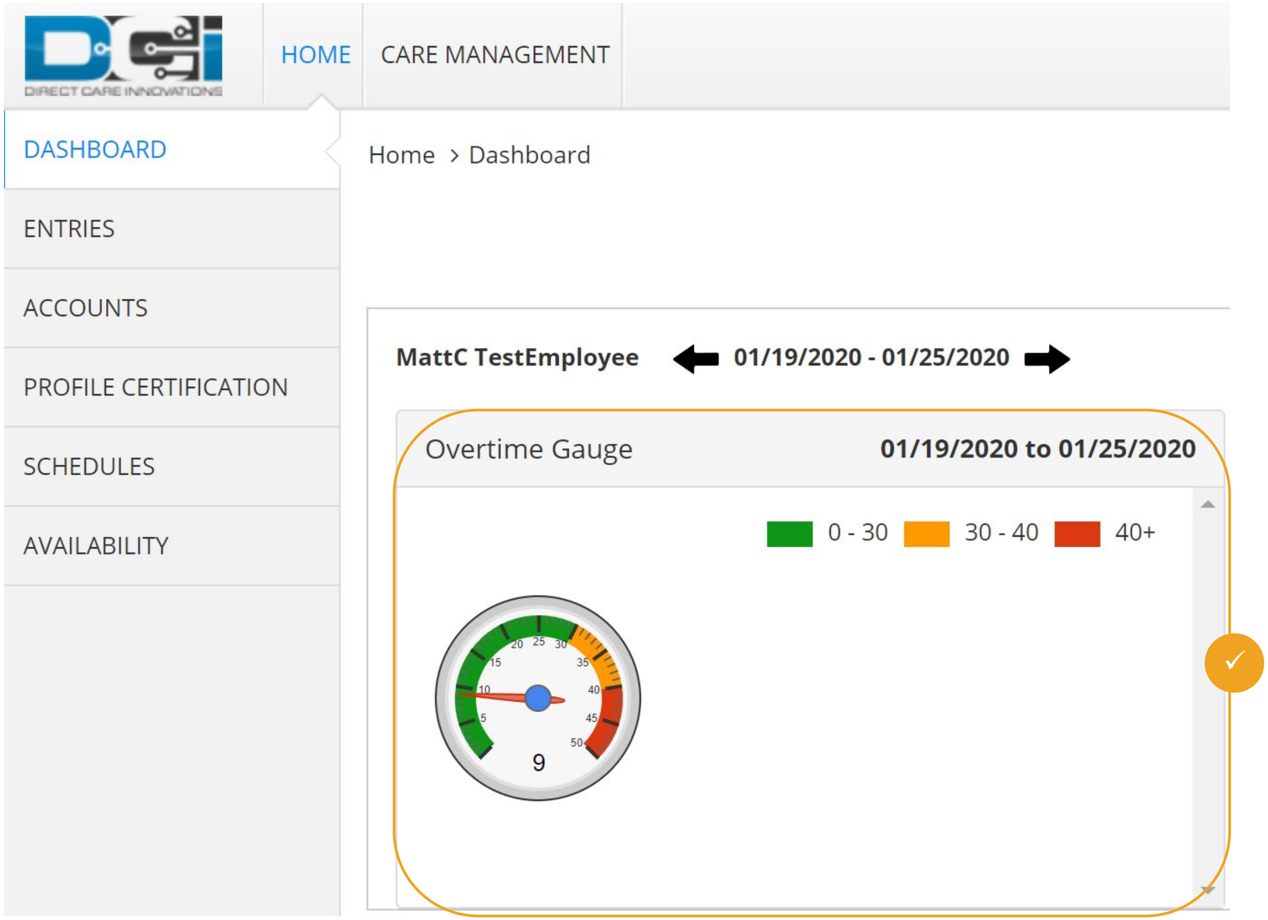
Dashboard

Current State:

- Currently if an employee enters time against a Service Code that is OT exempt, those hours still appear on the OT gauge.

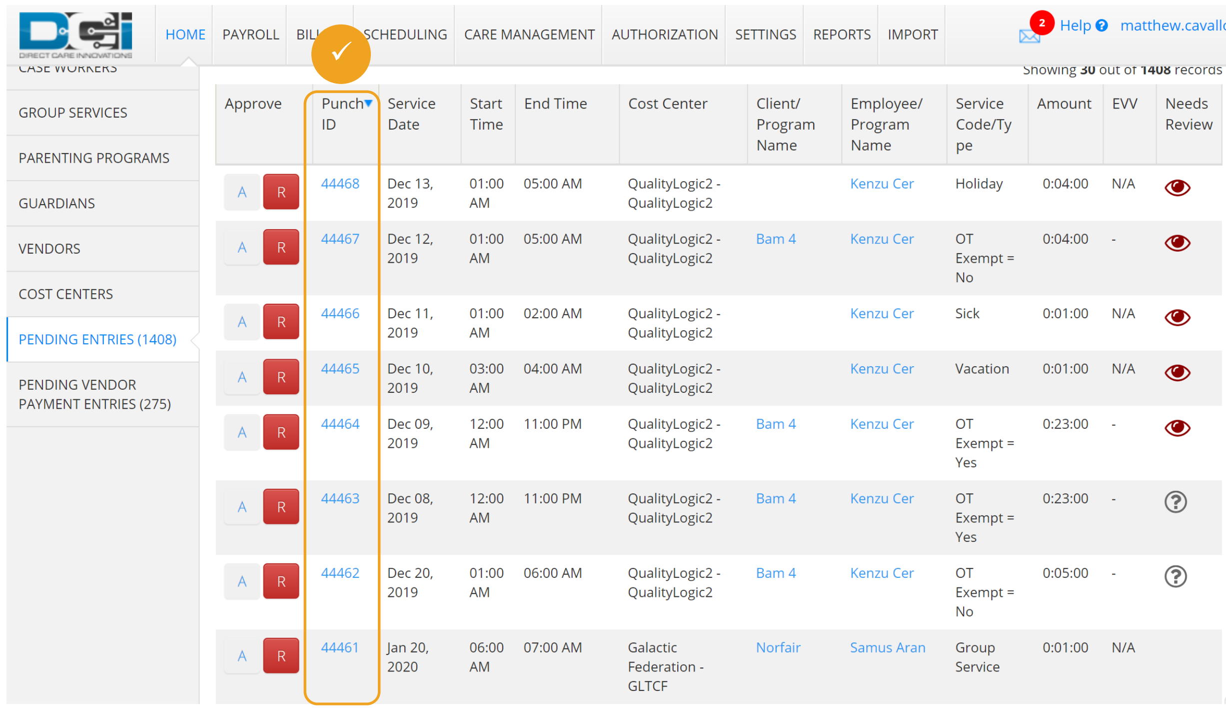
Future State:

✓ The system shall support that only punches that count toward overtime be included in the OT gauge.



Pending Entries

- ✓ Punch ID column is added to the Pending Entries screen
- ✓ Select the hyperlinked Punch ID to open the Punch Entry Details



Imports

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Client Service Accounts

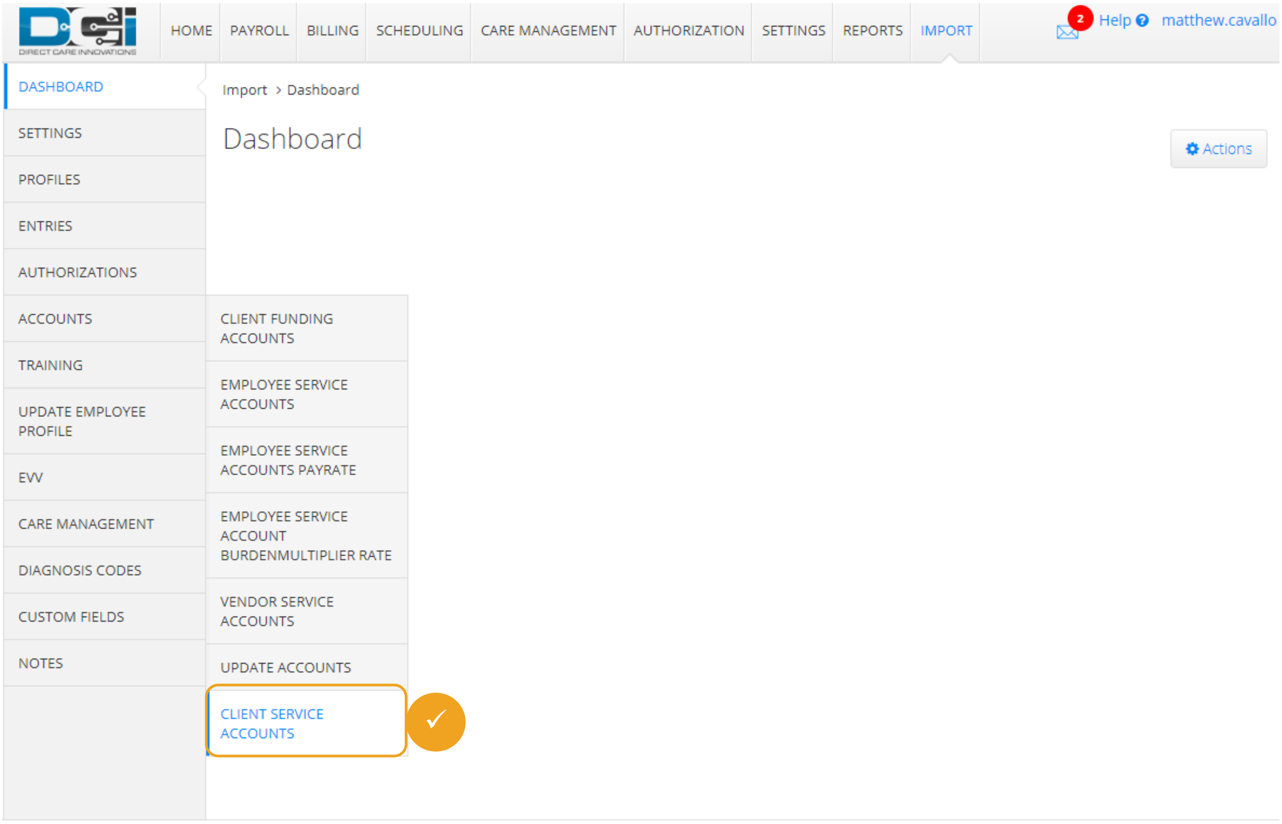
Current State:

- Users cannot import Client Service Accounts

Future State:

✓ Users can now import Client Service Accounts of all types.

✓ All existing fields on the New Client Service Account wizard shall be present on the import file.



Guardian

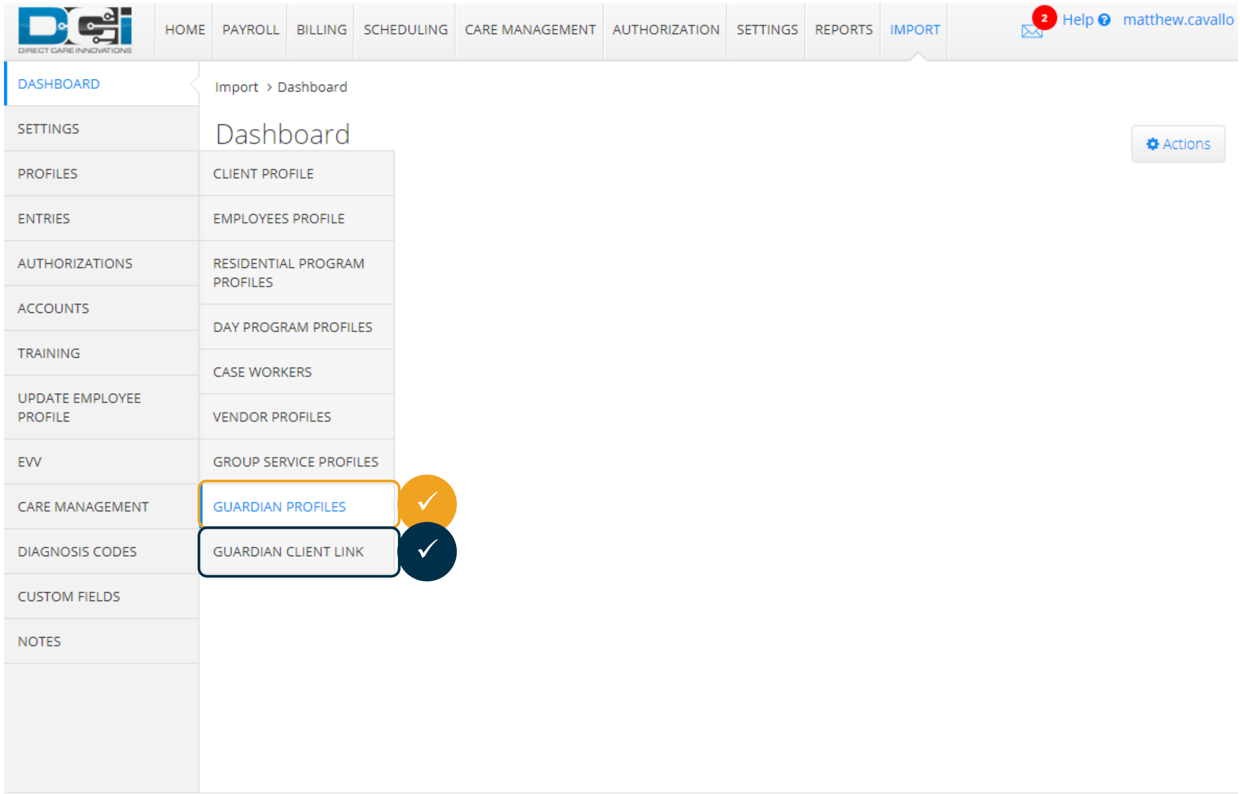
Current State:

- Users cannot import guardian profiles or client links

Future State:

✓ Users will be able to import Guardian Profiles

✓ Users will be able to import Guardian Client Links



Group Service Entries

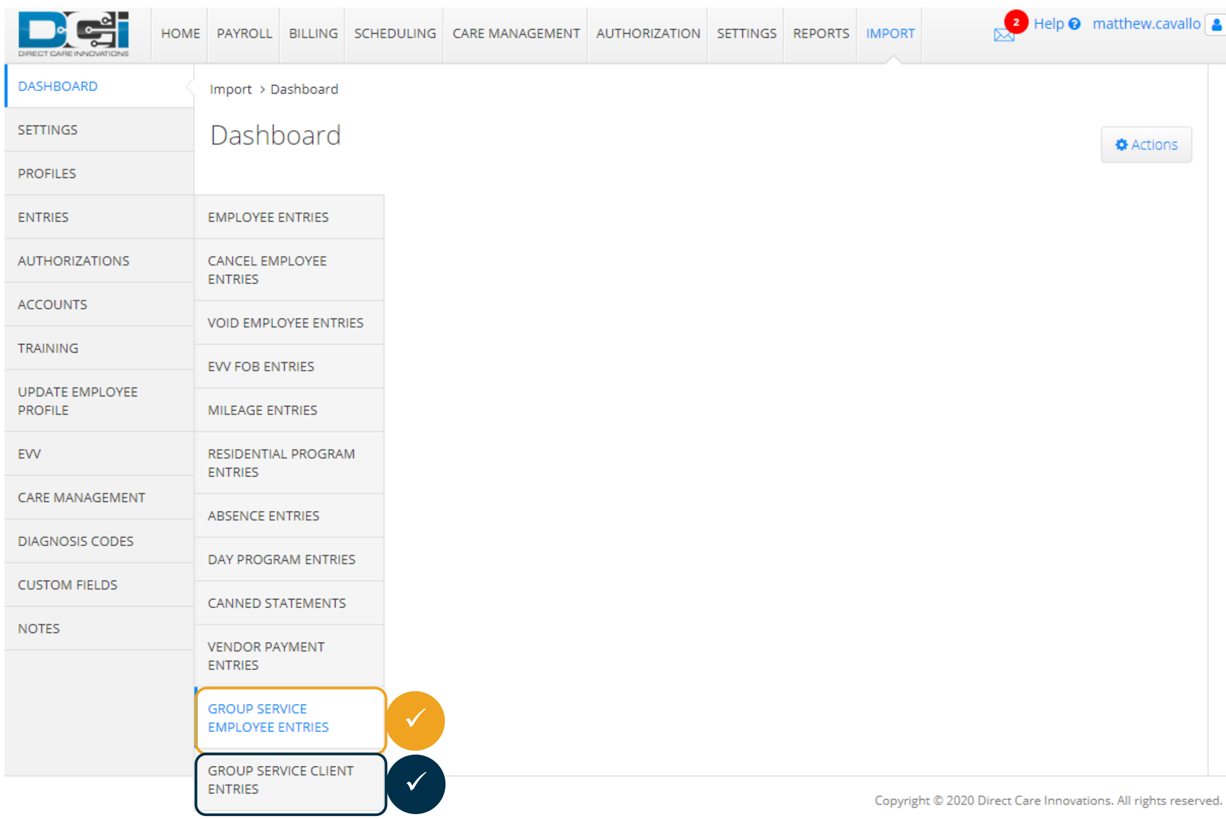
Current State:

- Users cannot import group service entries

Future State:

✓ Users will be able to import Group Service Employee entries

✓ Users will be able to import Group Service Client entries



News Posts

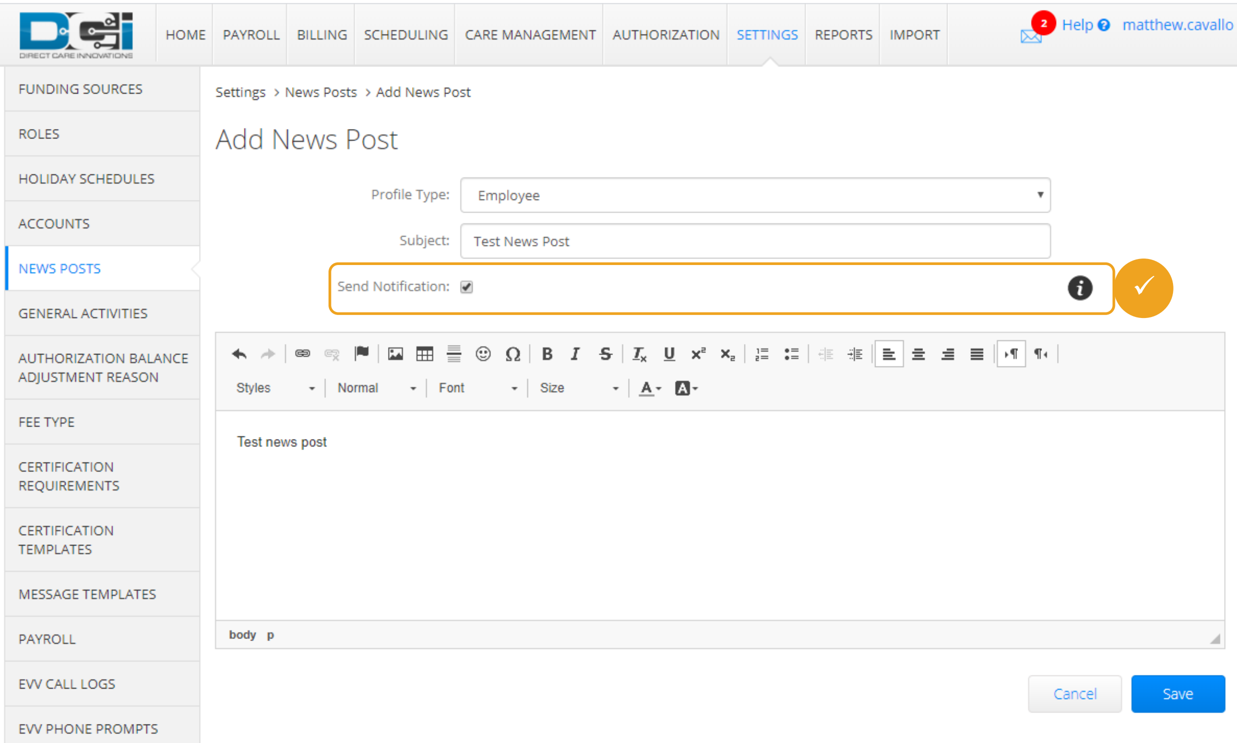
News Post Enhancements

Current State:

- Users cannot see News Posts without scrolling and may miss important message.

Future State:

✓ Select the Send Notification checkbox to notify selected profile type of new News Post



Email Notification

DCI - News Post Notifications Inbox ×

support@dcisoftware.com
to matthewc+3

12:54 PM (3 minutes ago)

DCI

A News Post has been created that applies to you. Click here to see it

https://dcisoftware.page.link/s7YtPTPLAJakJ1aR6

Support
Direct Care Innovations

Need help?
Email: support@dcisoftware.com
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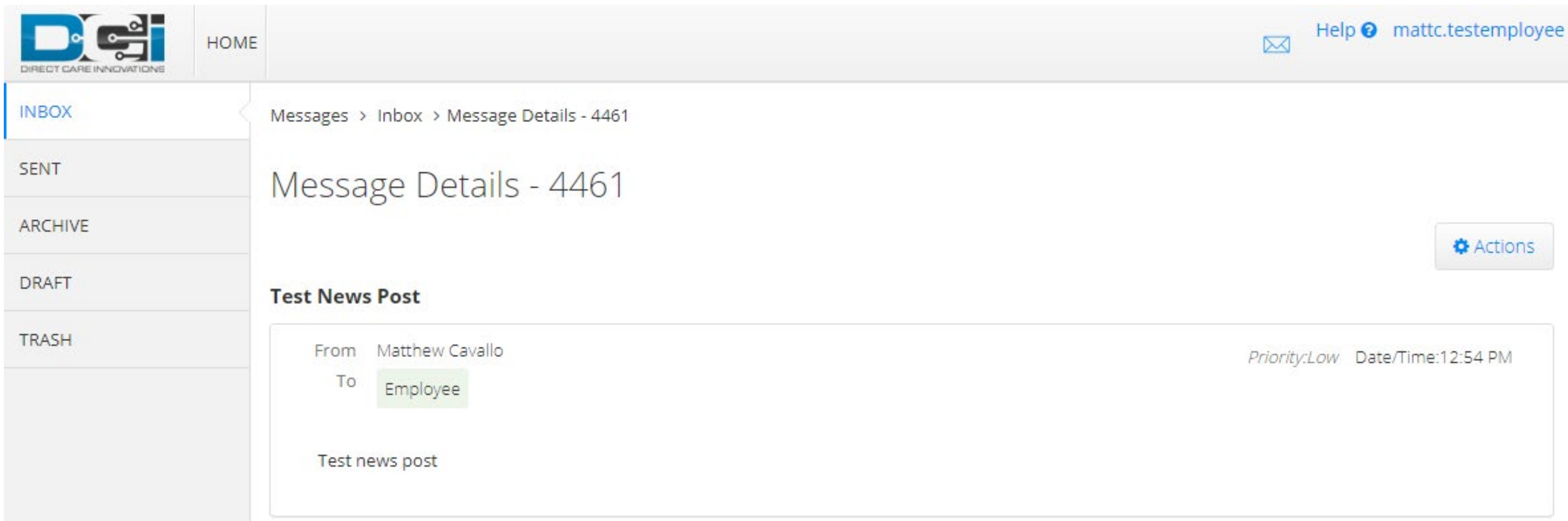
This message is for the designated recipient only and may contain privileged, proprietary, or otherwise private information. If you have received it in error, please notify the sender immediately and delete the original. Any other use of the email by you is prohibited.

Accessing News Post



- Once the hyperlink is selected, DCI will display the News Post in the DCI Message Center
- News Post will still be available on the Home page by scrolling down

Message Template

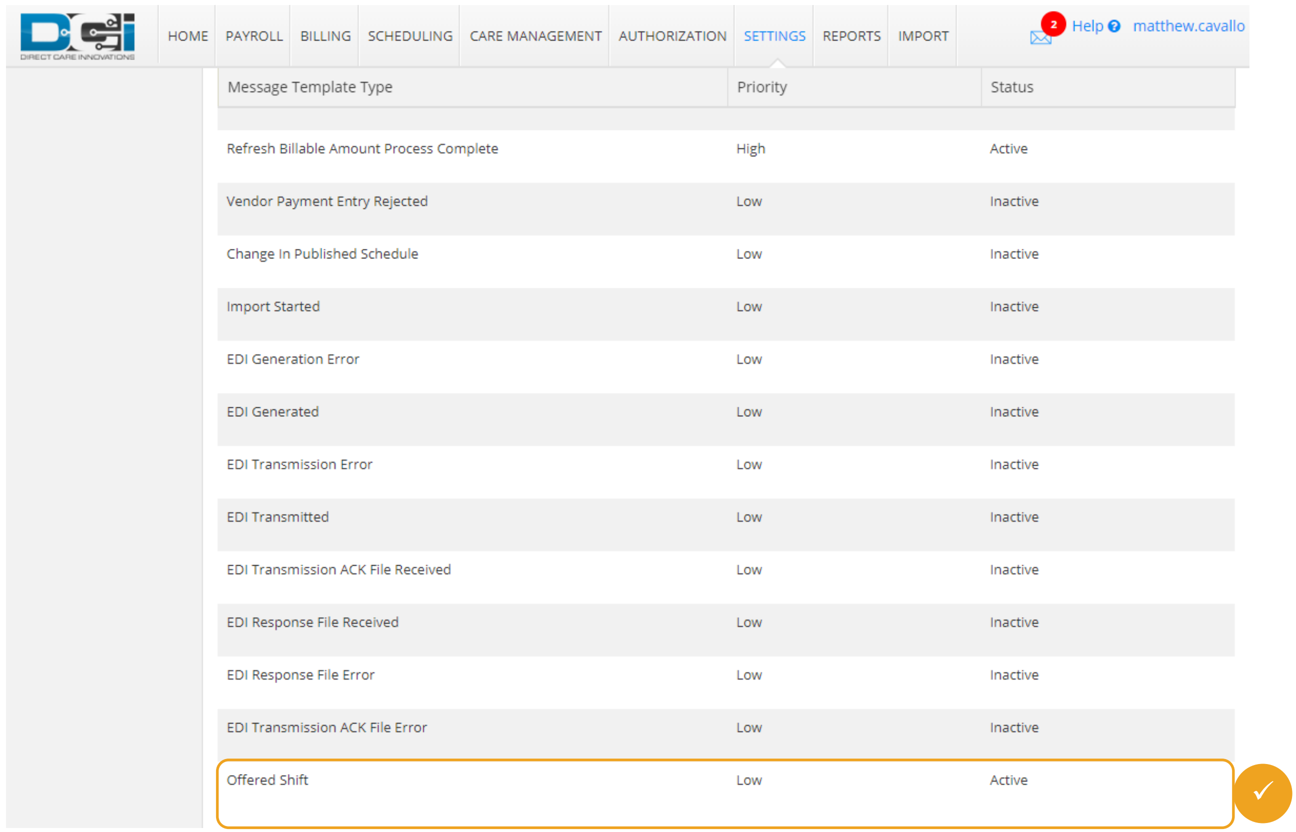
Offer Shift Message Template

Current State:

- Users cannot notify other users of shift availability

Future State:

✓ Offer shift message template will allow users to notify users with the same client/program of shift availability

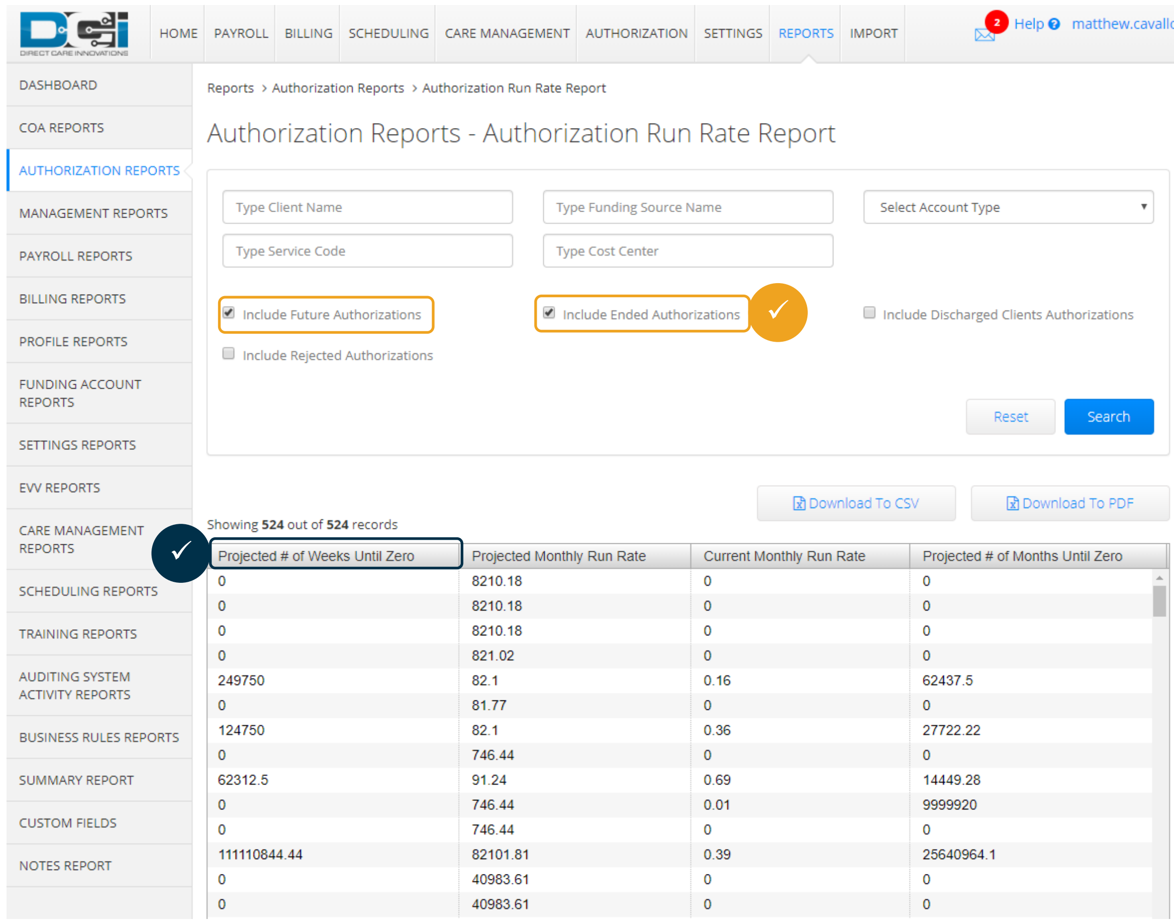


Message Template Type	Priority	Status
Refresh Billable Amount Process Complete	High	Active
Vendor Payment Entry Rejected	Low	Inactive
Change In Published Schedule	Low	Inactive
Import Started	Low	Inactive
EDI Generation Error	Low	Inactive
EDI Generated	Low	Inactive
EDI Transmission Error	Low	Inactive
EDI Transmitted	Low	Inactive
EDI Transmission ACK File Received	Low	Inactive
EDI Response File Received	Low	Inactive
EDI Response File Error	Low	Inactive
EDI Transmission ACK File Error	Low	Inactive
Offered Shift	Low	Active

Reports

Authorization Run Rate Report

- ✓ The word “Include” added to filters
- ✓ The system shall update the Projected # of Weeks Till Zero column on the Authorization Run Rate Report to read Projected # of Weeks Until Zero

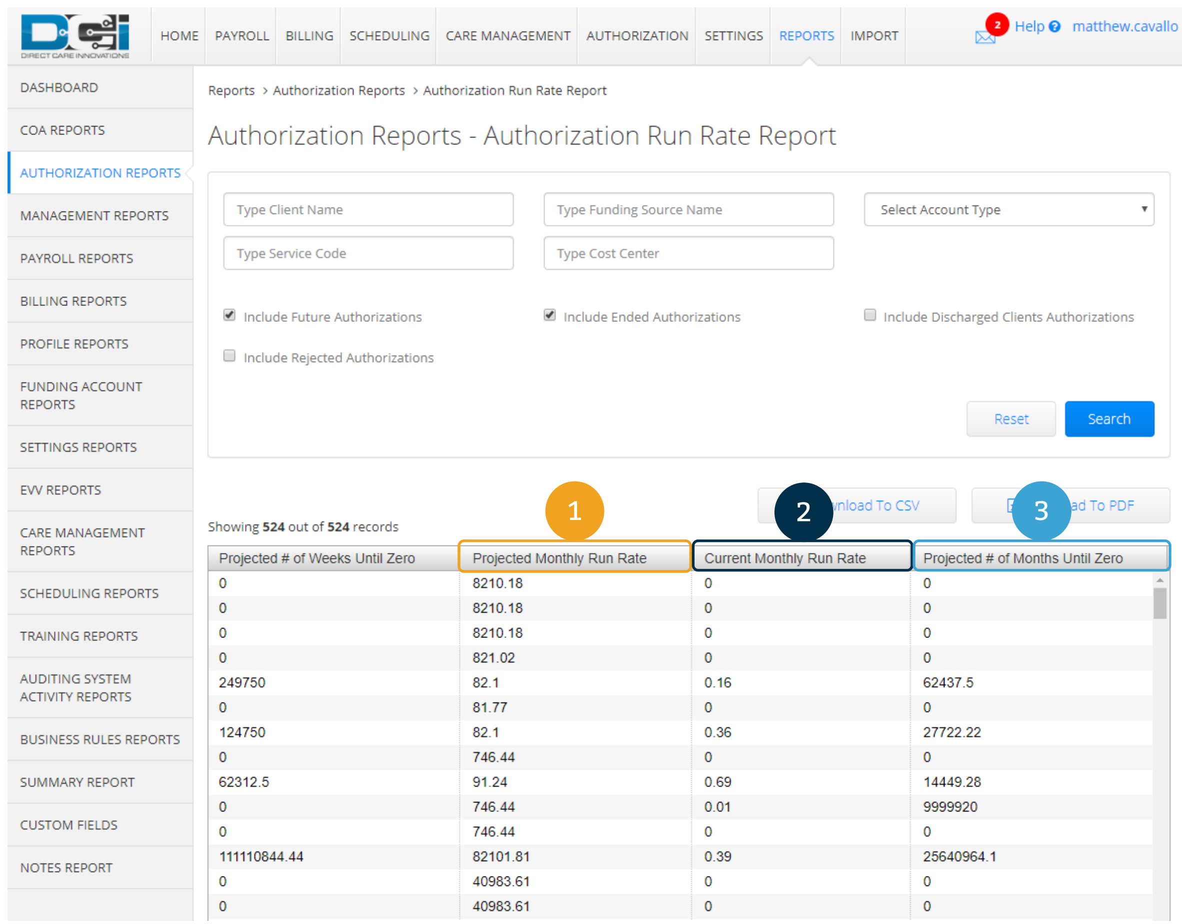


Projected # of Weeks Until Zero	Projected Monthly Run Rate	Current Monthly Run Rate	Projected # of Months Until Zero
0	8210.18	0	0
0	8210.18	0	0
0	8210.18	0	0
0	821.02	0	0
249750	82.1	0.16	62437.5
0	81.77	0	0
124750	82.1	0.36	27722.22
0	746.44	0	0
62312.5	91.24	0.69	14449.28
0	746.44	0.01	9999920
0	746.44	0	0
111110844.44	82101.81	0.39	25640964.1
0	40983.61	0	0
0	40983.61	0	0

Authorization Run Rate Report

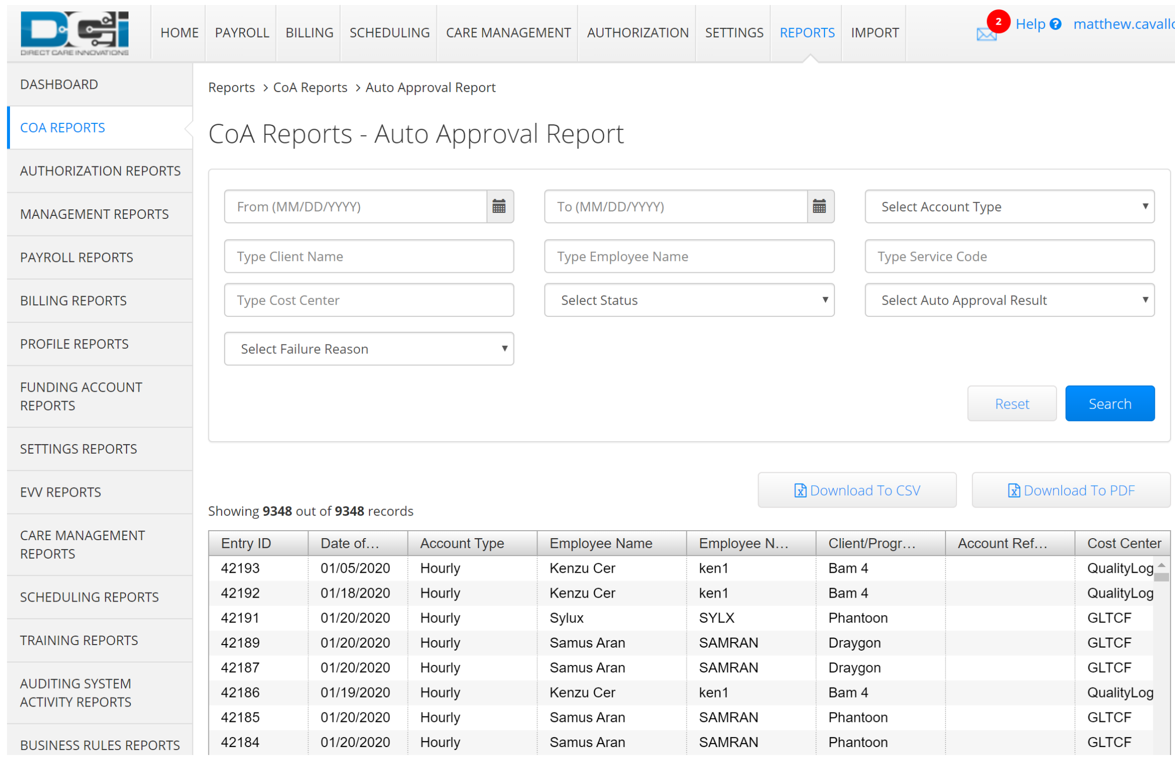
The following columns are added:

1. Projected Monthly Run Rate (Initial balance divided by # of months between Start Date and End Date of authorization)
2. Current Monthly Run Rate (Average number of units consumed each month from Start Date to Current Date)
3. Projected # of Months Until Zero (The value from Current Monthly Run Rate divided into the remaining balance. This should calculate the number of months remaining until remaining balance should reach zero)



Auto Approval Report

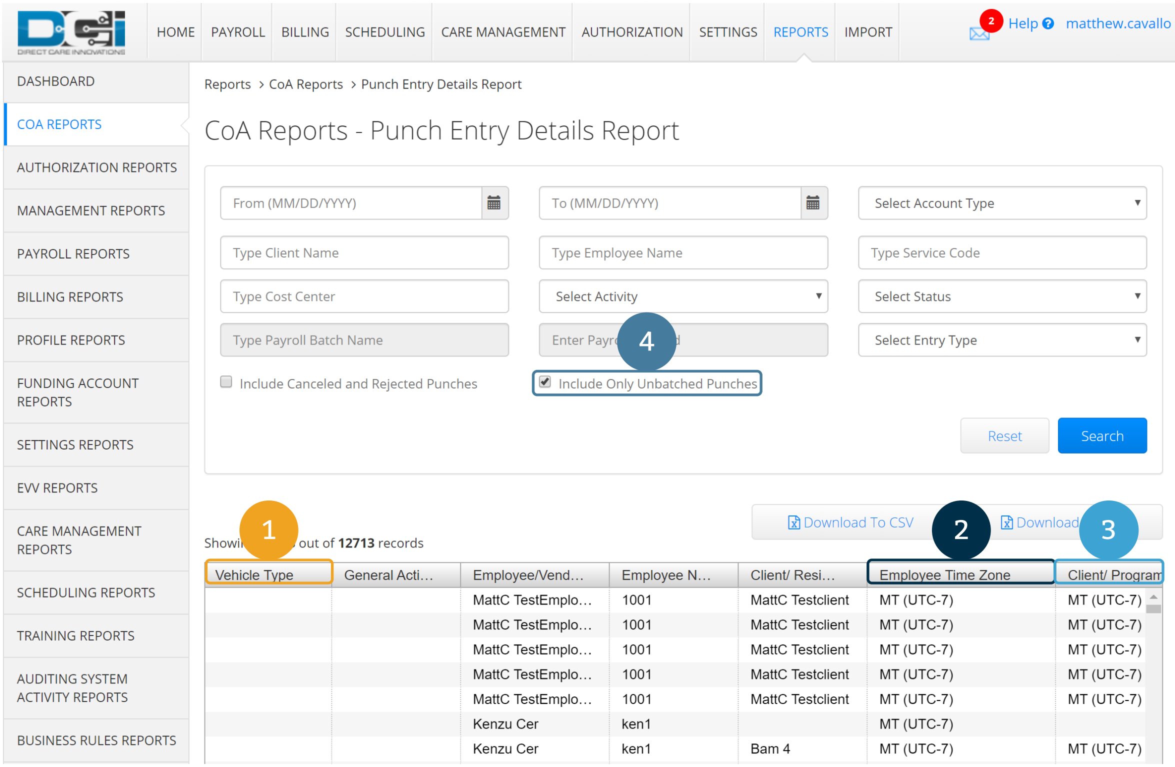
- ✓ Auto Approval Report is a new report listed in COA Reports
- ✓ The purpose of this report is to show the results of all punches that the system attempted to auto approve



Punch Entry Detail Report

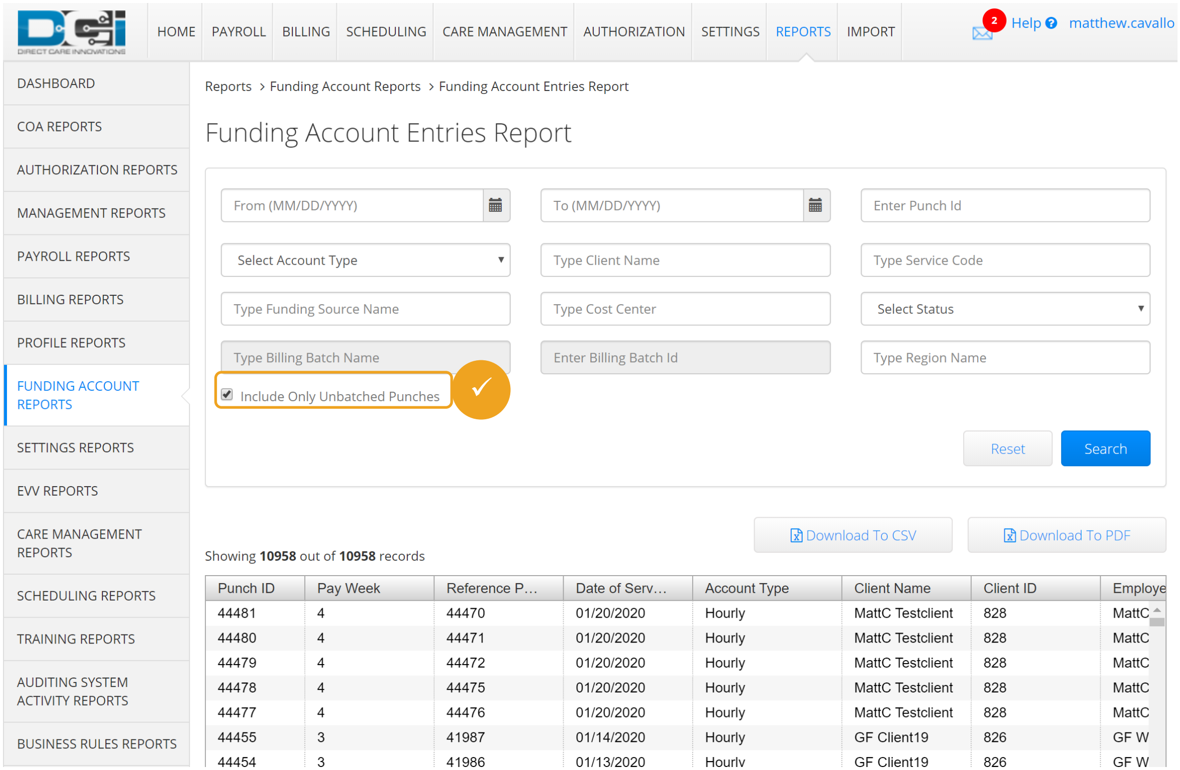
The following columns are added:

1. Vehicle Type: Display the vehicle type for Client Transportation and Mileage entries as applicable
2. Employee Time Zone
3. Client Time Zone
4. Include Only Unbatched Punches: Used in conjunction with existing filters (eg Employee Name, CC, Dates) but restrict return to only entries that match filters AND are not in a payroll batch



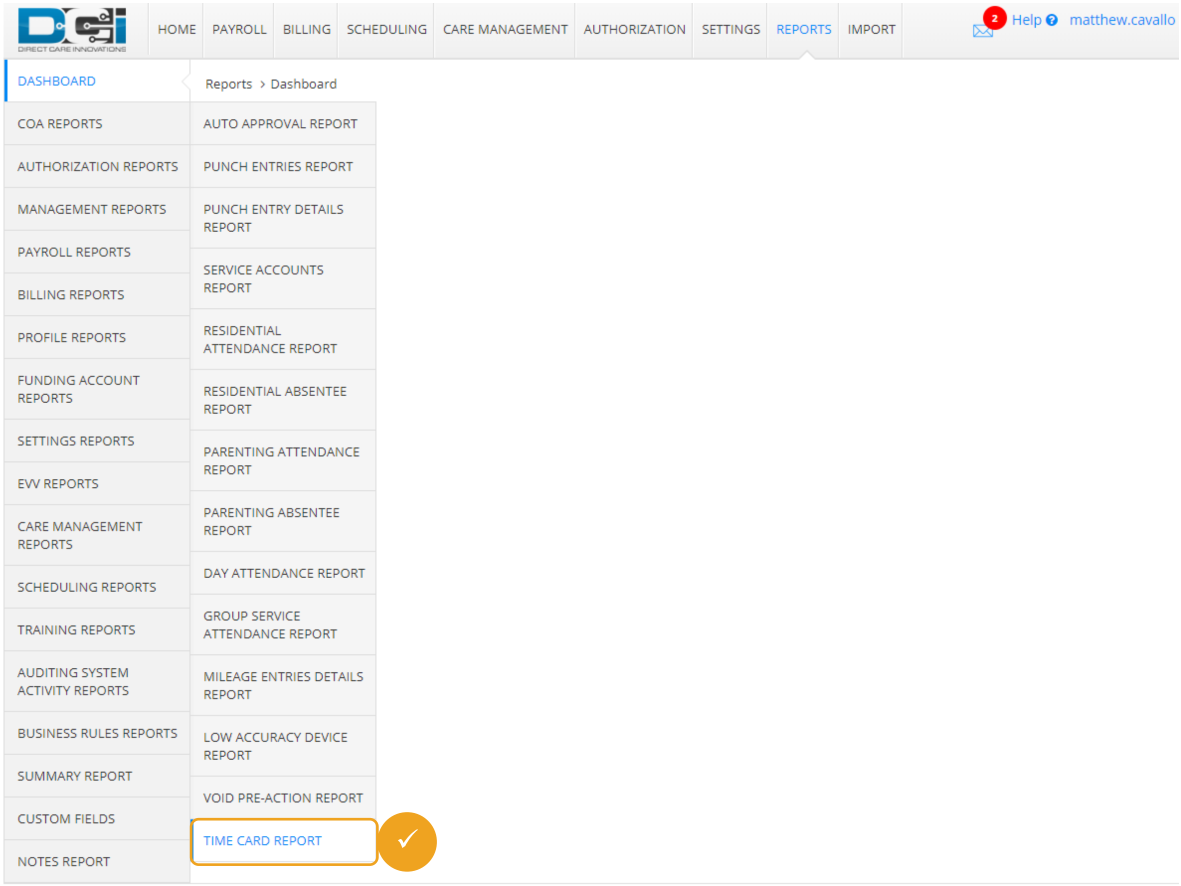
Funding Account Entries Report

✓ Include Only Unbatched Punches: Used in conjunction with existing filters (eg Client Name, CC, Dates) but restrict return to only entries that match filters AND are not in a payroll batch



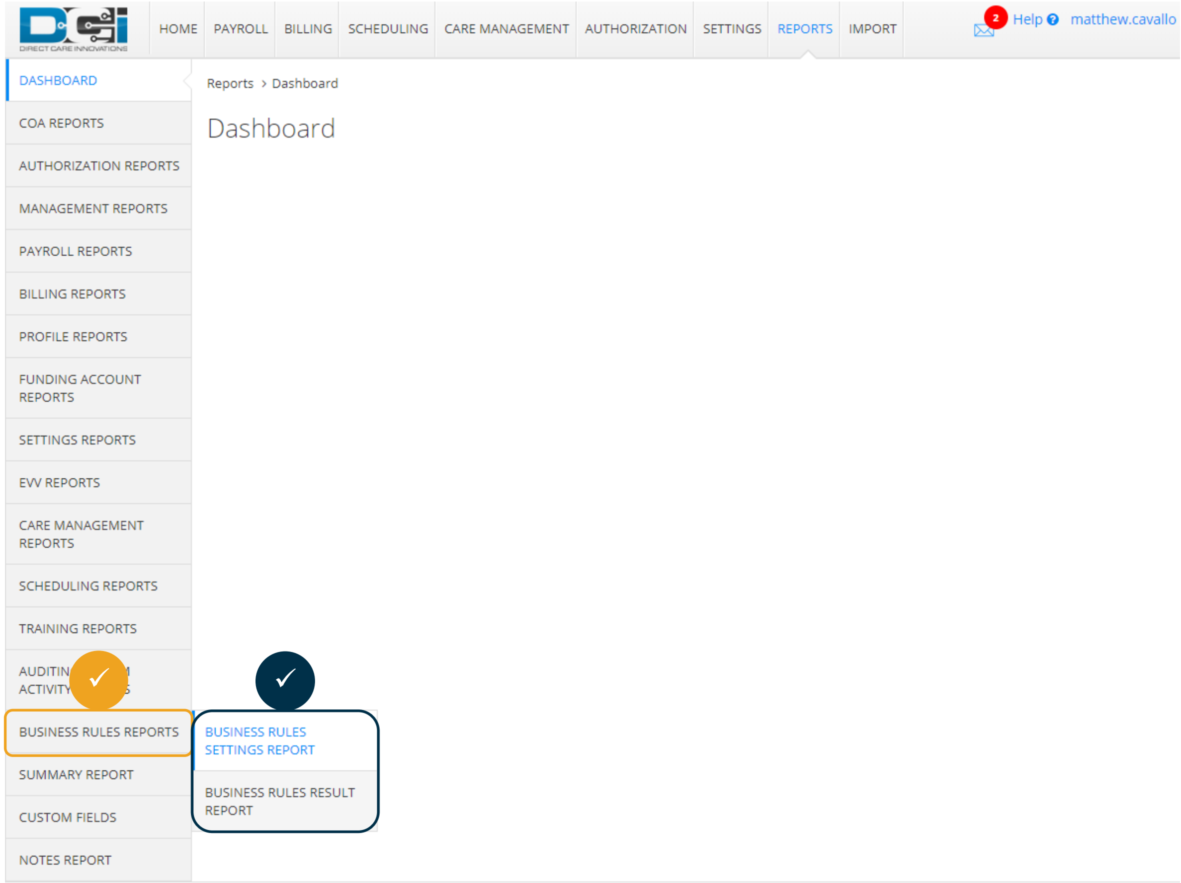
Time Card Report

- ✓ Rename the Time Card Reports to Time Card Report and moving it under COA Reports



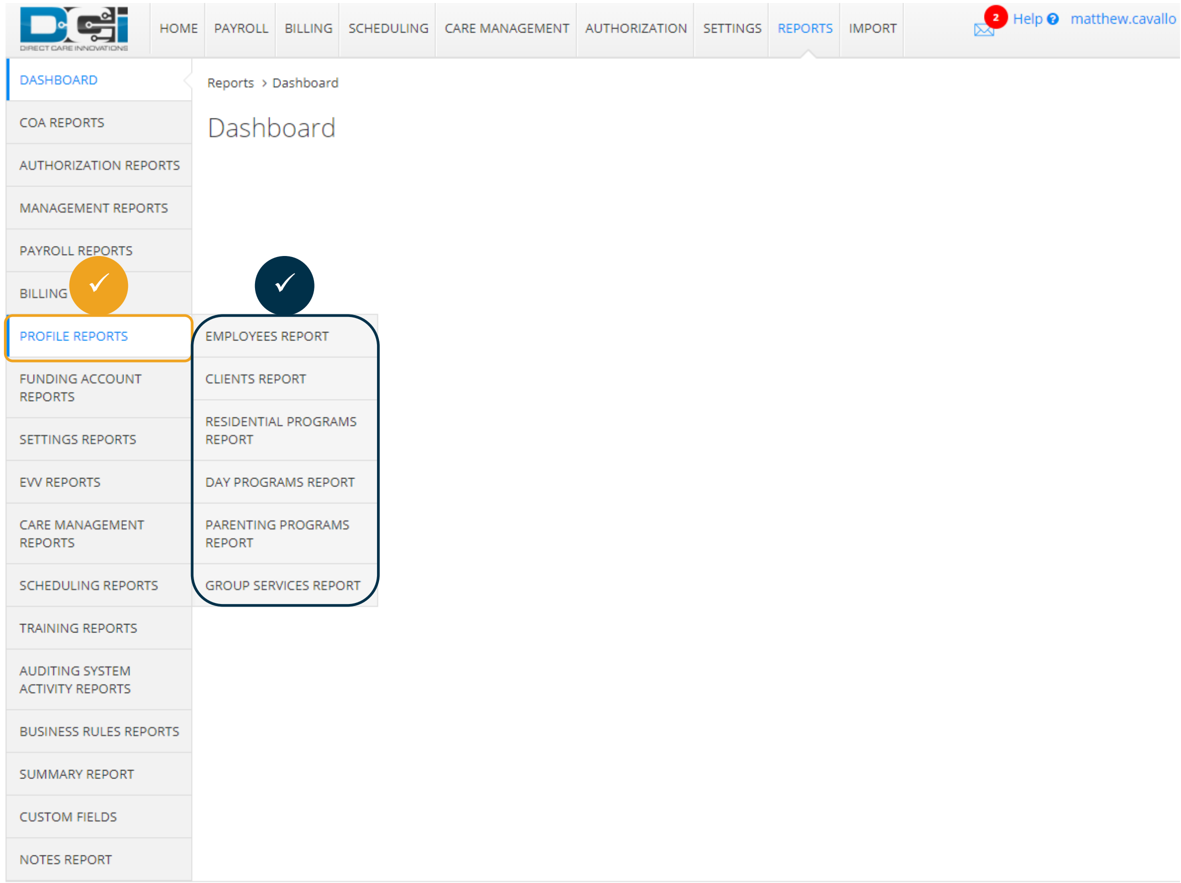
Business Rules Reports

- ✓ Create Business Rules Reports Tab
- ✓ Move Business Rules Settings Report and Business Rules Result Report to Business Rules Report tab



Profile Reports

- ✓ Create Profile Reports Tab
- ✓ Move the following reports to Profile Reports tab:
  - Employees Report
  - Clients Report
  - Residential Programs Report
  - Day Programs Report
  - Parenting Programs Report
  - Group Services Report



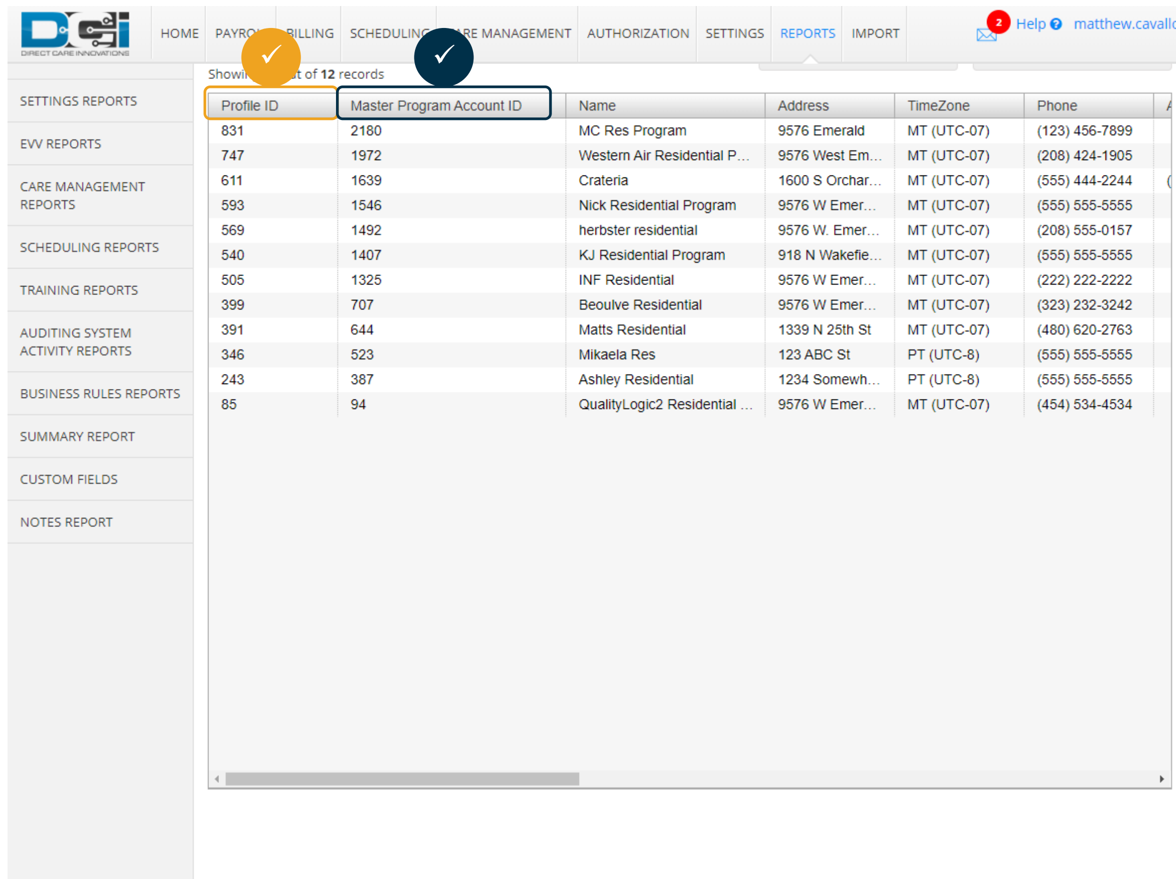
Profile Report Enhancements

Current State:

- Profile reports do not include Profile ID nor Master Program Account ID

Future State:

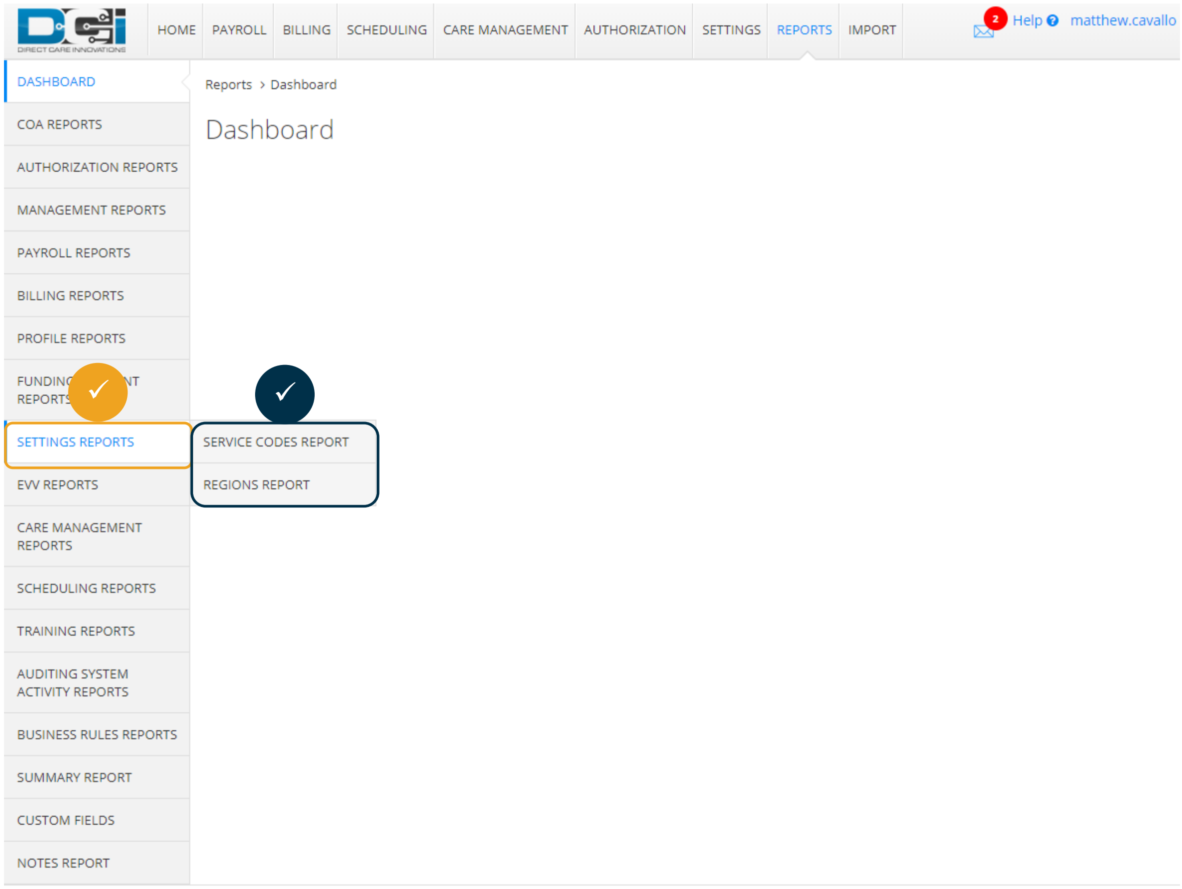
✓ Profile ID and Master Program ID have been added to the following reports:
  - Residential Programs Report
  - Day Programs Report
  - Group Services Report
  - Parenting Programs Report



Profile ID	Master Program Account ID	Name	Address	TimeZone	Phone
831	2180	MC Res Program	9576 Emerald	MT (UTC-07)	(123) 456-7899
747	1972	Western Air Residential P...	9576 West Em...	MT (UTC-07)	(208) 424-1905
611	1639	Crateria	1600 S Orchar...	MT (UTC-07)	(555) 444-2244
593	1546	Nick Residential Program	9576 W Emer...	MT (UTC-07)	(555) 555-5555
569	1492	herbster residential	9576 W. Emer...	MT (UTC-07)	(208) 555-0157
540	1407	KJ Residential Program	918 N Wakefie...	MT (UTC-07)	(555) 555-5555
505	1325	INF Residential	9576 W Emer...	MT (UTC-07)	(222) 222-2222
399	707	Beoulve Residential	9576 W Emer...	MT (UTC-07)	(323) 232-3242
391	644	Matts Residential	1339 N 25th St	MT (UTC-07)	(480) 620-2763
346	523	Mikaela Res	123 ABC St	PT (UTC-8)	(555) 555-5555
243	387	Ashley Residential	1234 Somewh...	PT (UTC-8)	(555) 555-5555
85	94	QualityLogic2 Residential ...	9576 W Emer...	MT (UTC-07)	(454) 534-4534

Settings Reports

- ✓ Create Setting Tab
- ✓ Move the following reports to Settings tab:
  - Service Codes Report
  - Regions Report



Business Rules

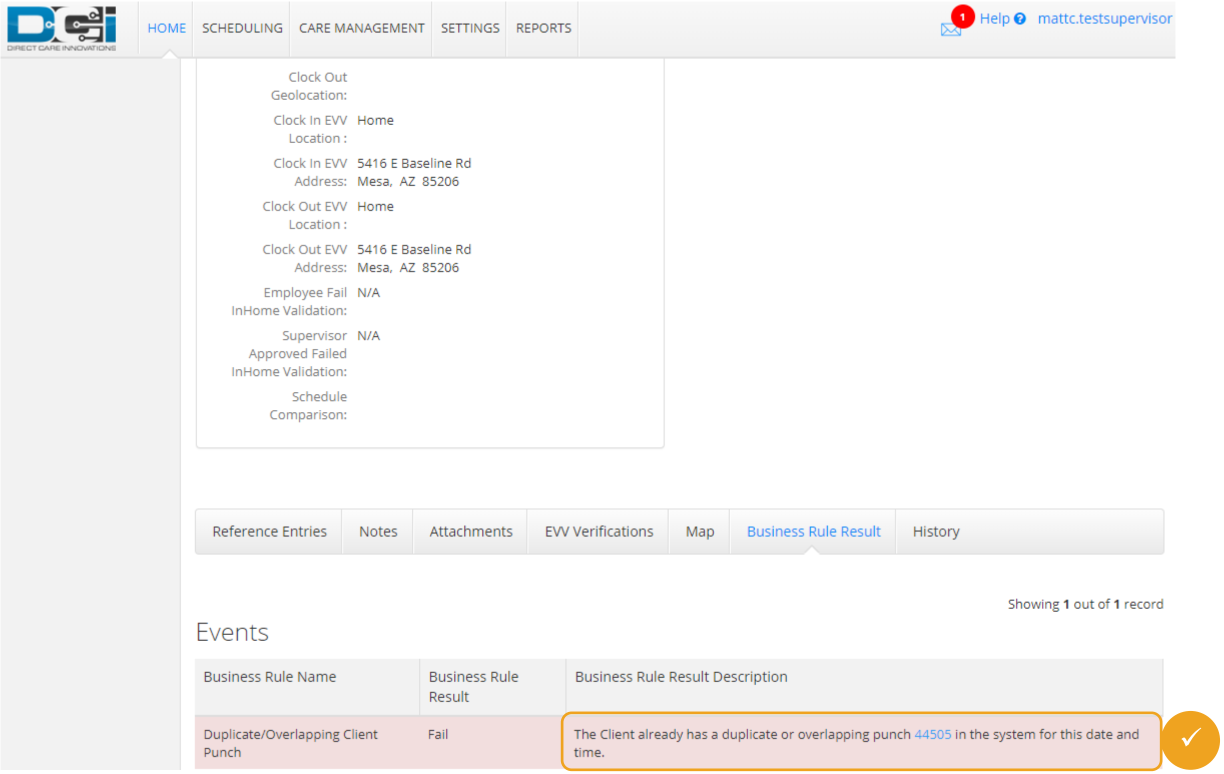
Business Rules Results

Current State:

- When an entry fails a duplicate/overlapping business rule, there is no hyperlink to the entry it overlaps with.

Future State:

- ✓ Business Rule Result description column created on Business Rule Result tab of Punch Details Page
- ✓ The description will match the error message that is displayed when attempting to approve the punch and the Punch ID will be hyperlinked to the overlapping punch



Pay Codes

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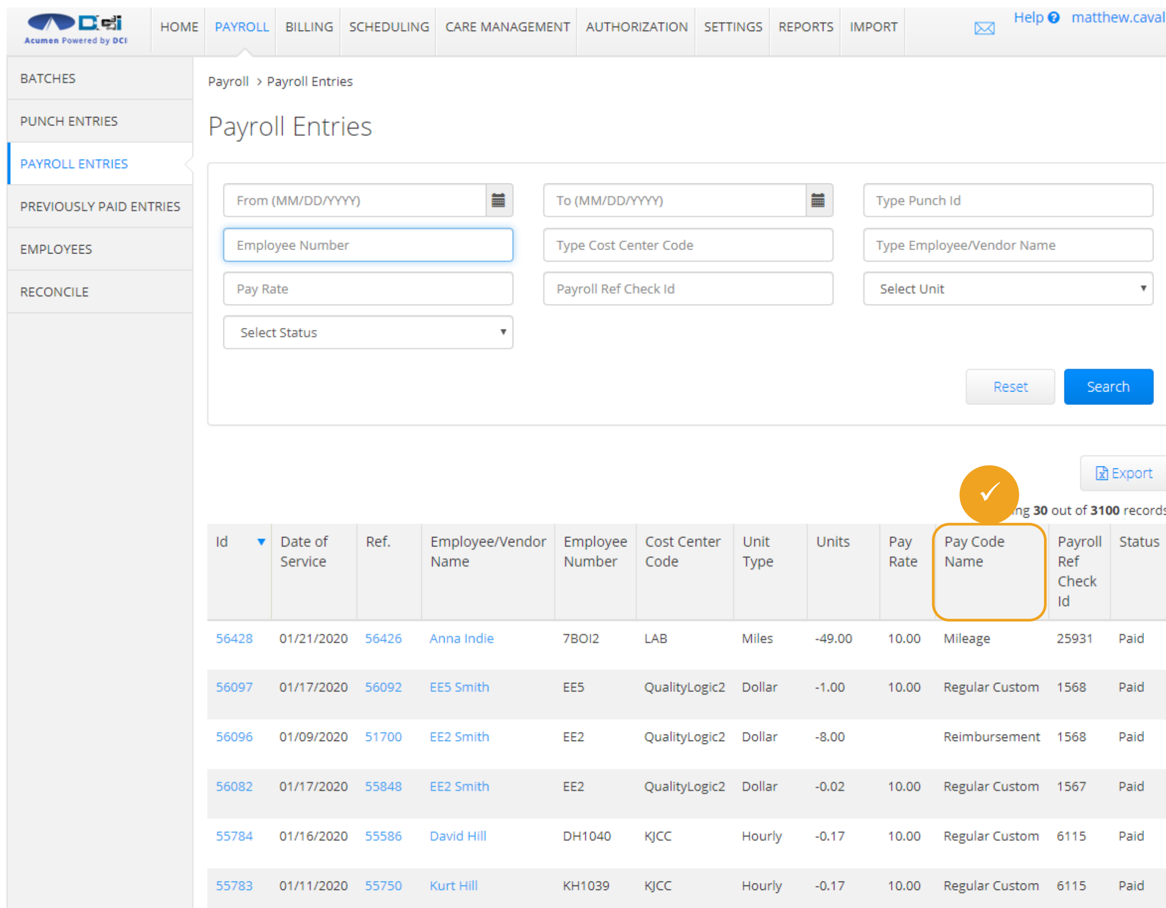
Payroll Entries Detail

Current State:

- Column labeled “Pay Type”

Future State:

✓ Column name updated to “Pay Code Name”



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

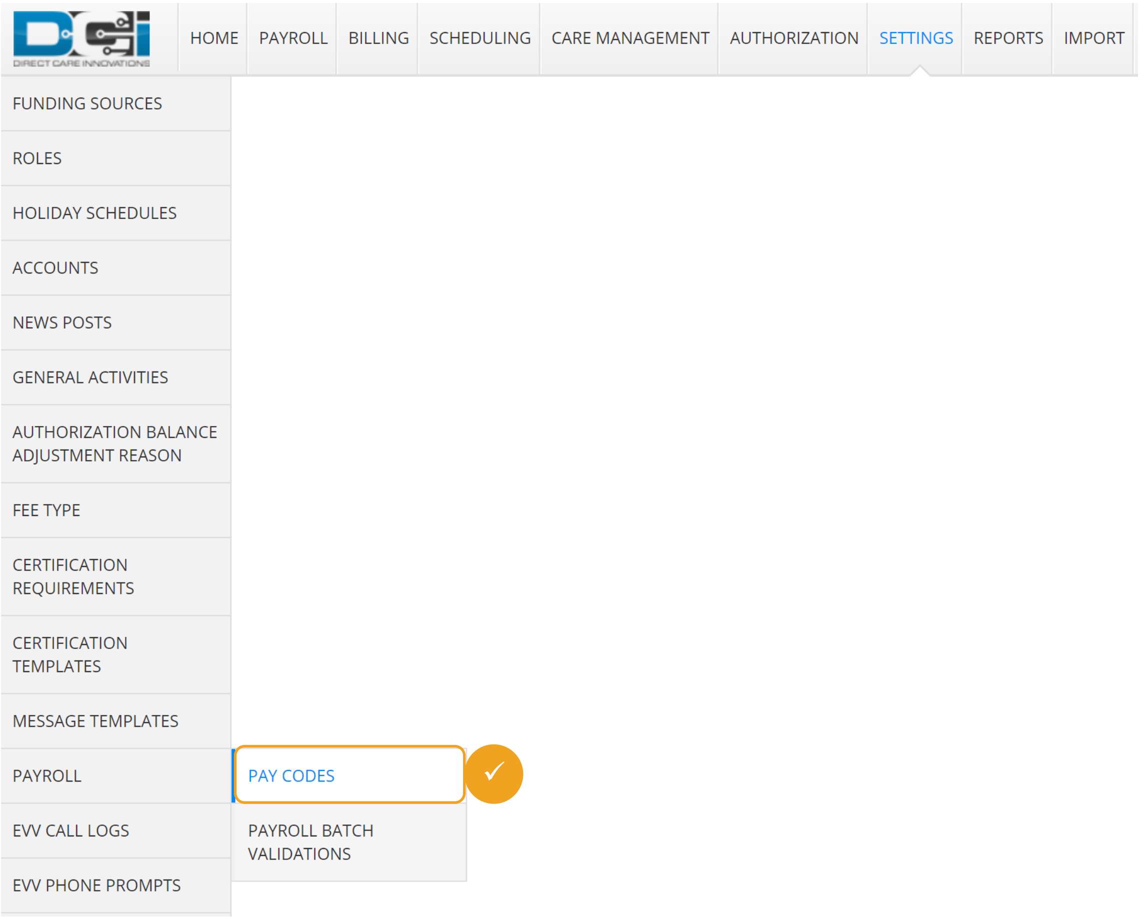
Pay Codes Menu

Current State:

- Payroll menu display "Pay Type Codes"

Future State:

✓ Payroll Menu updated to display "Pay Codes"



Double Overtime

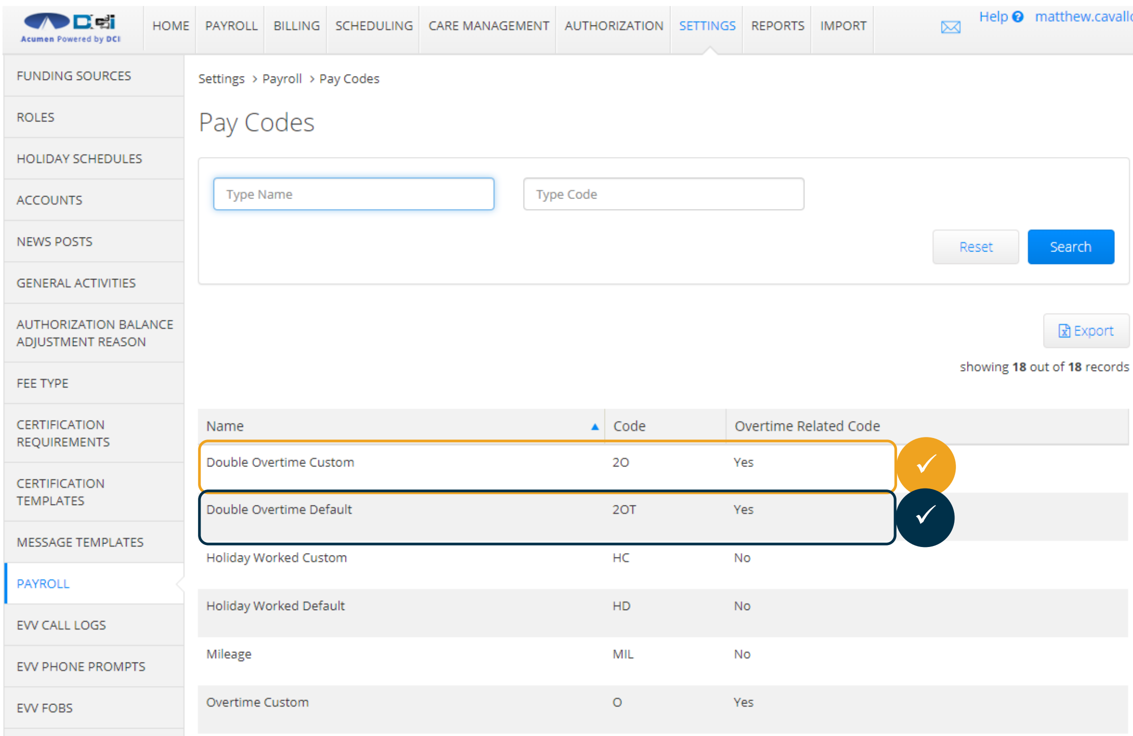
Current State:

- There are no pay codes for double overtime

Future State:

✓ Double Overtime Custom is used for overtime paid at two times the normal rate

✓ Double Overtime Default is used for overtime paid at two times the normal rate



Edit Pay Codes

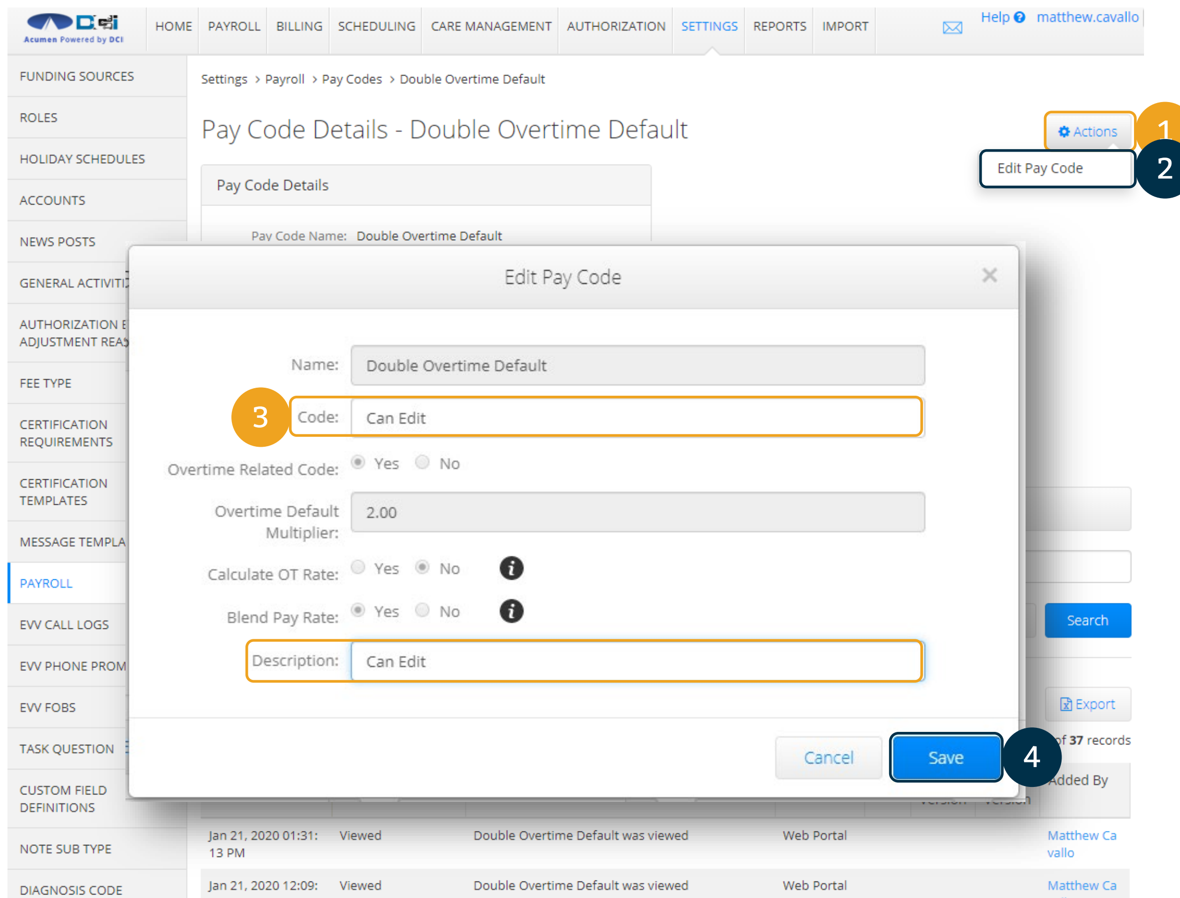
Current State:

- Pay Codes are not editable

Future State:

Code and Description can be edited with the following steps:

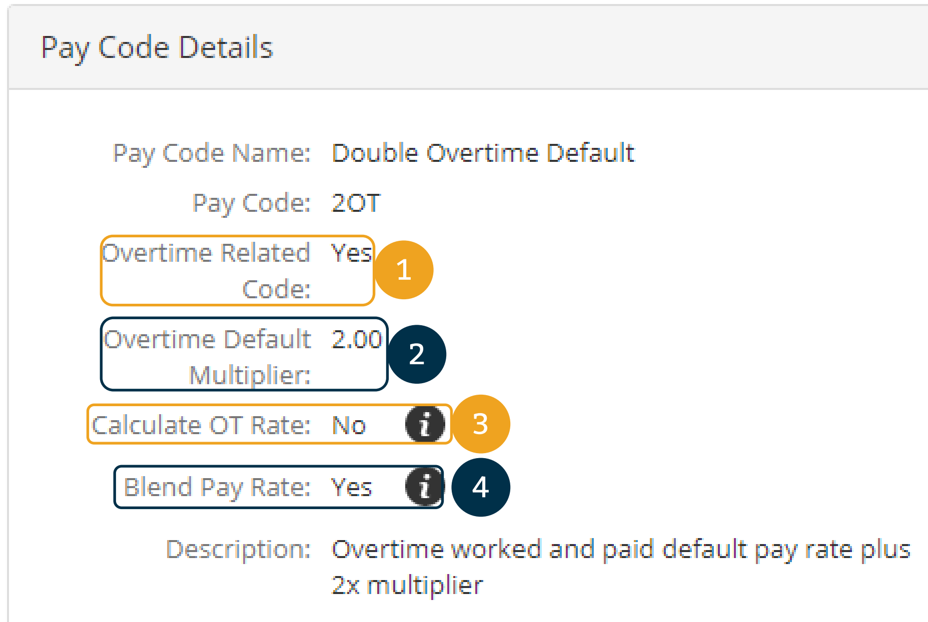
1. Select Action
2. Select Edit Pay Code
3. Enter new information into editable fields
   a. Code
   b. Description
4. Select Save



Overtime Configuration

1. Overtime Related Code: Displays Yes/No whether the code is related to overtime
2. Overtime Default Multiplier: Displays multiplier of the normal pay rate
3. Calculate OT Rate:
    a. If Yes the system will calculate the OT pay rate by multiplying the pay rate by the assigned OT multiplier.
    b. If No the system will not calculate the OT pay rate and it is assumed that your payroll system handles the OT pay rate calculation
4. Blend Pay Rate:
    a. If Yes the system will calculate a blended pay rate using all the pay rates present in the batch for the Employee.
    b. If No the pay rate assigned to the punch will be used

Pay Code Details - Double Overtime Default



History

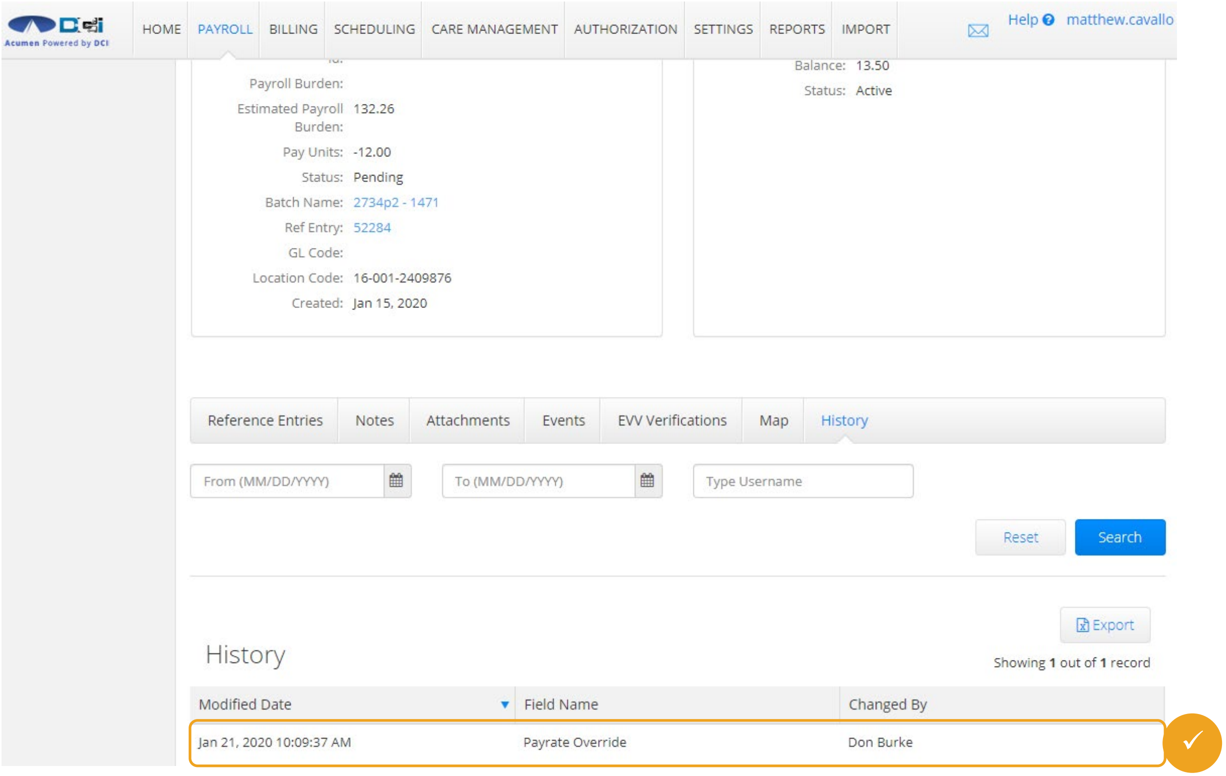
Payroll & Billing Entries

Current State:

- Users cannot see edit history for payroll and billing entries

Future State:

✓ History is no listed for both payroll and billing entries by selecting the entry, then selecting history.



Employee Details

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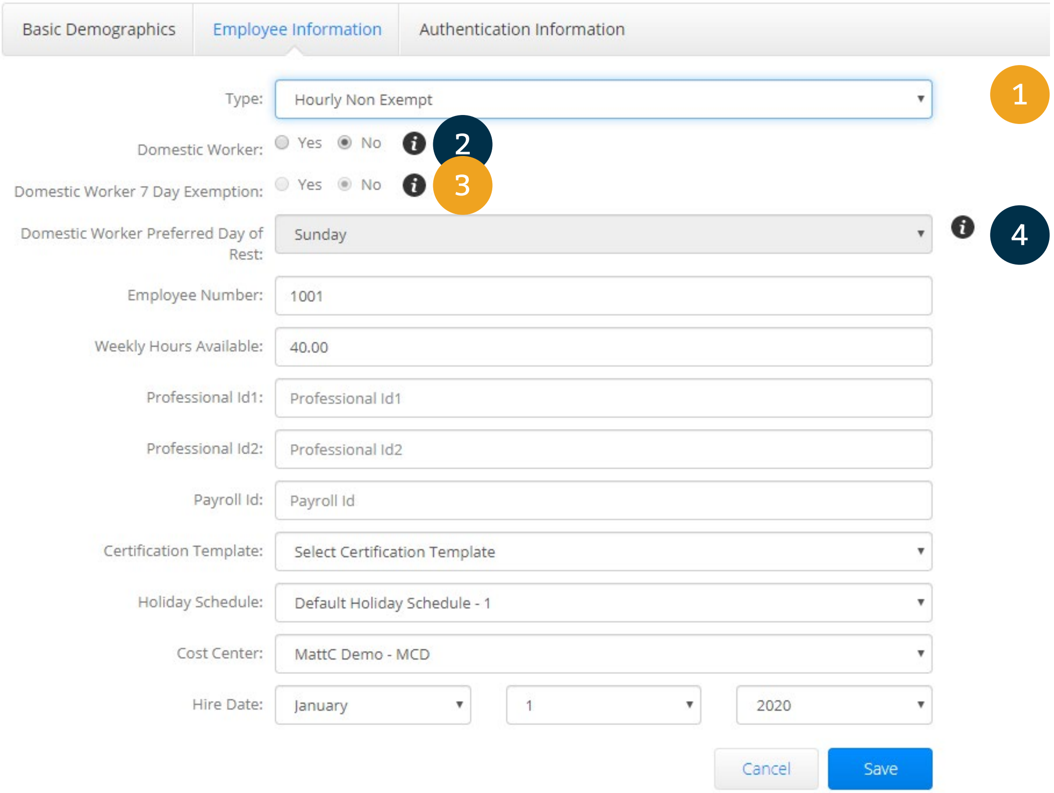
Employee Details

1. Hourly-Exempt removed from Type dropdown
2. Domestic Worker added as a Yes/No option
   a. A domestic worker is considered live-in help like a nanny or butler
3. Domestic Worker 7 Day Exemption added as a Yes/No option
   a. Select Yes if this domestic worker voluntarily agreed to a seven day work week
4. Domestic Work Preferred Day of Rest is a dropdown that displays days of the week
   a. If this employee has agreed to work 7 days a week they may in certain states and situations be paid OT for hours worked on their preferred day of rest.

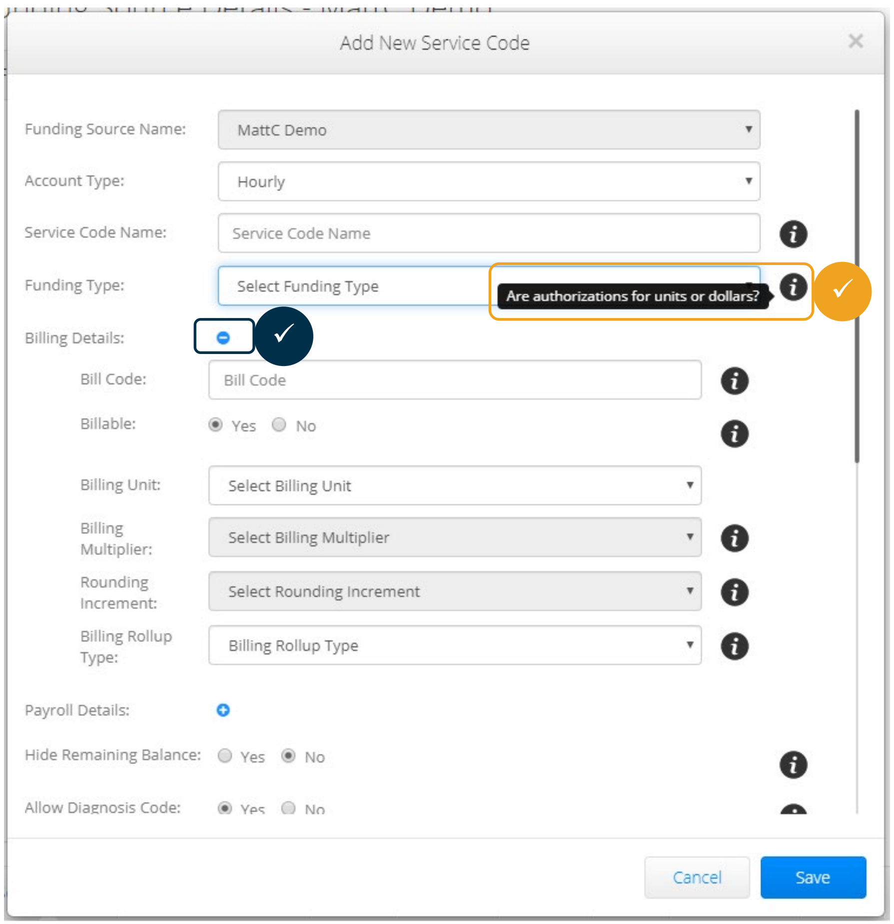


Service Codes

Service Code UI

The Service Code UI is being updated to improve the overall user experience in the following areas:

- ✓ Grammar and spelling
- ✓ Organization: group related items together
- ✓ Tool Tips: provide field explanations to the user
- ✓ Accordion Views: allow for information to be expanded and hidden at the end users discretion



Bug Fixes

Bug List

- 64 Bug fixes are deployed in this release

To Locate a Specific Bug:

1. Select Ctrl-F with the Bug list open and enter the Bug ID
2. If the bug was fixed in the this release, the bug ID will be highlighted

Find (1/1)
1118
Previous Next
Replace with

January Release - Bug List

Bug	Description
1088	[IE11] Download links disappear after importing a TXT file and dismissing the alerts
1101	[Certification Requirements] Any value can be set for Valid Duration Months
1102	[Employee Profile] [Custom Duration Certification Requirement] If Certification Expiration Date is in the past, the "equal or greater" message displays
1105	[Edit Service Account] Optional Daily Pay Max and Daily Rate fields are treated as though they are required if they contain data and the data is removed
1108	Cancelled Entries import is not validating the entry ID to verify it matches a punch entry ID 1113
1118	Blocked users get a concurrent session prompt after resetting their password and attempting to sign in
1119	Invalid message when a blocked user attempts to sign in multiple times
1120	No error when user is logged out due to concurrent session
1122	[Employee Details] [Caregiver Ratings] [Supervisor role] Sorting by Punch ID is incorrect
1131	[Messaging Module] Recipients cannot Reply All

Mobile App

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“Every sunset brings the promise of a new dawn.” — Ralph Waldo Emerson

- ✓ Sunset of support for IOS 10 and below
- ✓ Sunset of support for Android 5 and below

Thank you!

Visit the DCI Help Center to learn more at:
https://directcareinnovations.zendesk.com/hc/en-us

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