



February 2020 Release Notes

Version B10A

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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.

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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

The screenshot displays the DCI (Direct Care Innovations) web application interface. The top navigation bar includes links for HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION (highlighted), SETTINGS, REPORTS, and IMPORT. A user profile for matthew.cavallo is visible in the top right. The left sidebar contains a menu with the following items: APPROVED AUTHORIZATIONS, PENDING AUTHORIZATIONS (1) (highlighted with a yellow box and a checkmark), FUNDING ACCOUNTS, PENDING FEES AND ADJUSTMENTS, and CLIENT FEES AND ADJUSTMENTS. The main content area is titled 'Authorization > Pending Authorizations' and 'Pending Authorizations'. It features a form with input fields for 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Entry Id', 'Type Client Name', 'Type Service Code', 'Initial Balance', and 'Type Cost Center Name'. There are 'Reset' and 'Search' buttons at the bottom of the form. An 'Add New Authorization' button is located in the top right corner of the form area, highlighted with a blue box and a checkmark. Below the form, there is an 'Export' button and a message 'Showing 1 out of 1 record'. A table below shows one record with the following data:

Action	Id	Start Date	Ref.	Client	Service Code	Funding type	Cost Center	Initial Balance
A R	40949	Jan 01, 2020		MattC Testclient	Skills Training	Units	MattC Demo - MCD	1000.00

Chart of Accounts (CoA)

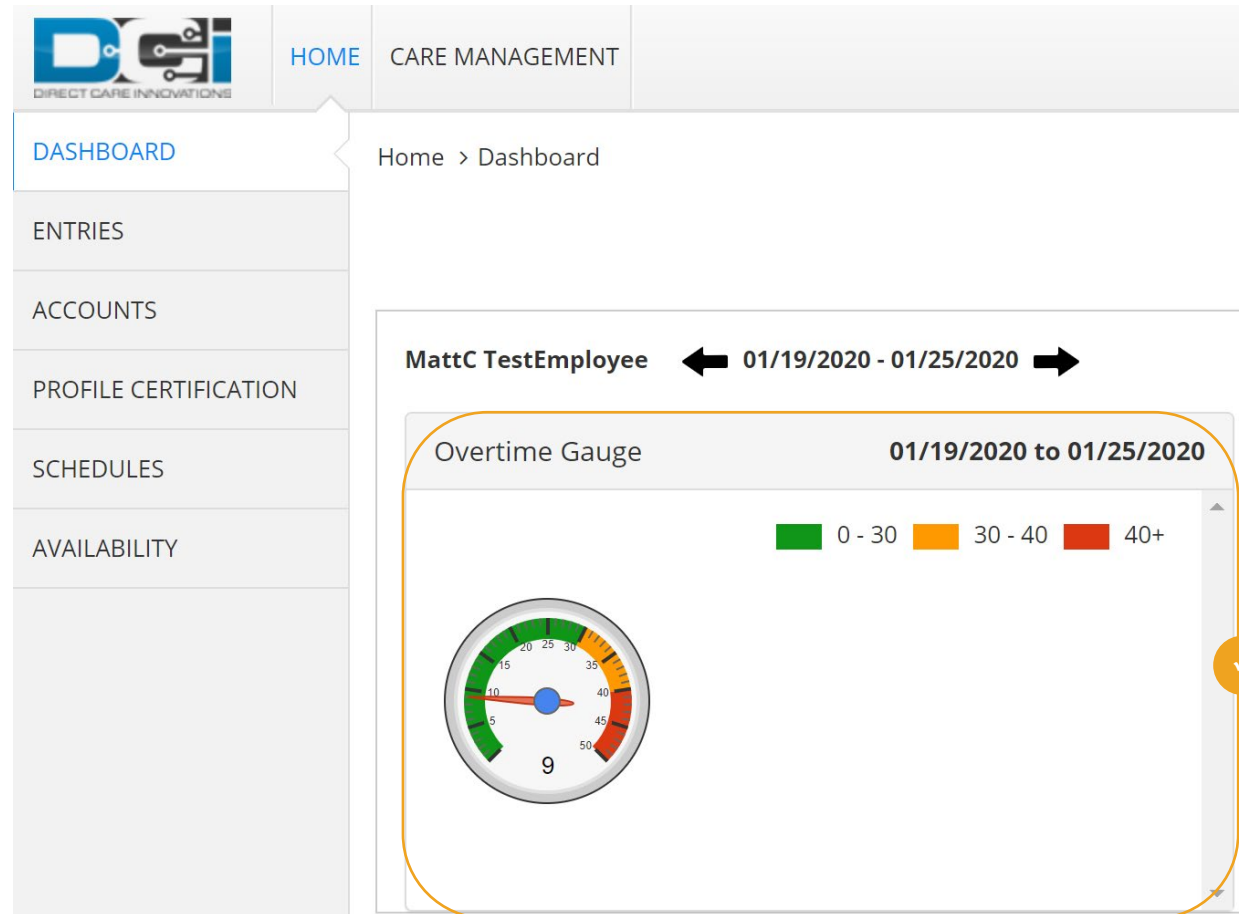
Dashboard

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

DCI DIRECT CARE INNOVATIONS CASE WORKERS												
HOME PAYROLL BILLING SCHEDULING CARE MANAGEMENT AUTHORIZATION SETTINGS REPORTS IMPORT												
Showing 30 out of 1408 records												
GROUP SERVICES	Approve	Punch ID	Service Date	Start Time	End Time	Cost Center	Client/Program Name	Employee/Program Name	Service Code/Type	Amount	EVV	Needs Review
PARENTING PROGRAMS	<input type="checkbox"/>	44468	Dec 13, 2019	01:00 AM	05:00 AM	QualityLogic2 - QualityLogic2		Kenzu Cer	Holiday	0:04:00	N/A	
GUARDIANS	<input type="checkbox"/>	44467	Dec 12, 2019	01:00 AM	05:00 AM	QualityLogic2 - QualityLogic2	Bam 4	Kenzu Cer	OT Exempt = No	0:04:00	-	
VENDORS	<input type="checkbox"/>	44466	Dec 11, 2019	01:00 AM	02:00 AM	QualityLogic2 - QualityLogic2		Kenzu Cer	Sick	0:01:00	N/A	
COST CENTERS	<input type="checkbox"/>	44465	Dec 10, 2019	03:00 AM	04:00 AM	QualityLogic2 - QualityLogic2		Kenzu Cer	Vacation	0:01:00	N/A	
PENDING ENTRIES (1408)	<input type="checkbox"/>	44464	Dec 09, 2019	12:00 AM	11:00 PM	QualityLogic2 - QualityLogic2	Bam 4	Kenzu Cer	OT Exempt = Yes	0:23:00	-	
PENDING VENDOR PAYMENT ENTRIES (275)	<input type="checkbox"/>	44463	Dec 08, 2019	12:00 AM	11:00 PM	QualityLogic2 - QualityLogic2	Bam 4	Kenzu Cer	OT Exempt = Yes	0:23:00	-	
	<input type="checkbox"/>	44462	Dec 20, 2019	01:00 AM	06:00 AM	QualityLogic2 - QualityLogic2	Bam 4	Kenzu Cer	OT Exempt = No	0:05:00	-	
	<input type="checkbox"/>	44461	Jan 20, 2020	06:00 AM	07:00 AM	Galactic Federation - GLTCF	Norfair	Samus Aran	Group Service	0:01:00	N/A	

Imports

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.

The screenshot shows the DCI software interface. The top navigation bar includes: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, IMPORT, Help, and matthew.cavallo. The left sidebar menu lists: DASHBOARD, SETTINGS, PROFILES, ENTRIES, AUTHORIZATIONS, ACCOUNTS, TRAINING, UPDATE EMPLOYEE PROFILE, EVV, CARE MANAGEMENT, DIAGNOSIS CODES, CUSTOM FIELDS, and NOTES. The main content area shows the 'Import > Dashboard' breadcrumb and the 'Dashboard' title. A list of account types is displayed, with 'CLIENT SERVICE ACCOUNTS' highlighted in blue and marked with a checkmark in a yellow circle. Other account types include CLIENT FUNDING ACCOUNTS, EMPLOYEE SERVICE ACCOUNTS, EMPLOYEE SERVICE ACCOUNTS PAYRATE, EMPLOYEE SERVICE ACCOUNT BURDENMULTIPLIER RATE, and VENDOR SERVICE ACCOUNTS. An 'Actions' button is visible in the top right corner.

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

The screenshot shows the DCI software interface. The top navigation bar includes: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, IMPORT, Help, and matthew.cavallo. The left sidebar menu lists: DASHBOARD, SETTINGS, PROFILES, ENTRIES, AUTHORIZATIONS, ACCOUNTS, TRAINING, UPDATE EMPLOYEE PROFILE, EVV, CARE MANAGEMENT, DIAGNOSIS CODES, CUSTOM FIELDS, and NOTES. The main content area shows the 'Import > Dashboard' path and a 'Dashboard' title. A table of profile types is displayed:

CLIENT PROFILE
EMPLOYEES PROFILE
RESIDENTIAL PROGRAM PROFILES
DAY PROGRAM PROFILES
CASE WORKERS
VENDOR PROFILES
GROUP SERVICE PROFILES
GUARDIAN PROFILES
GUARDIAN CLIENT LINK

The 'GUARDIAN PROFILES' and 'GUARDIAN CLIENT LINK' rows are highlighted with a blue border and a checkmark icon. An 'Actions' button is visible in the top right corner.

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

The screenshot shows the DCI software interface. The top navigation bar includes: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, IMPORT, Help, and matthew.cavallo. The left sidebar menu lists: DASHBOARD, SETTINGS, PROFILES, ENTRIES, AUTHORIZATIONS, ACCOUNTS, TRAINING, UPDATE EMPLOYEE PROFILE, EW, CARE MANAGEMENT, DIAGNOSIS CODES, CUSTOM FIELDS, and NOTES. The main content area shows a breadcrumb trail 'Import > Dashboard' and a 'Dashboard' title. A table of entry types is displayed, with 'GROUP SERVICE EMPLOYEE ENTRIES' and 'GROUP SERVICE CLIENT ENTRIES' highlighted in blue and marked with checkmarks. The 'GROUP SERVICE EMPLOYEE ENTRIES' entry is also highlighted with an orange border. A copyright notice at the bottom right reads: Copyright © 2020 Direct Care Innovations. All rights reserved.

EMPLOYEE ENTRIES
CANCEL EMPLOYEE ENTRIES
VOID EMPLOYEE ENTRIES
EV FOB ENTRIES
MILEAGE ENTRIES
RESIDENTIAL PROGRAM ENTRIES
ABSENCE ENTRIES
DAY PROGRAM ENTRIES
CANNED STATEMENTS
VENDOR PAYMENT ENTRIES
GROUP SERVICE EMPLOYEE ENTRIES
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

The screenshot displays the DCI (Direct Care Innovations) web application interface. The top navigation bar includes the DCI logo and menu items: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS (highlighted), REPORTS, and IMPORT. A user profile for 'matthew.cavallo' is visible in the top right corner. The left sidebar contains a list of menu items, with 'NEWS POSTS' highlighted in blue. The main content area shows the 'Add News Post' form. The form includes a 'Profile Type' dropdown menu set to 'Employee', a 'Subject' text field containing 'Test News Post', and a 'Send Notification' checkbox which is checked and highlighted with an orange border. To the right of the checkbox are an information icon and a confirmation icon. Below the form is a rich text editor with a toolbar and a text area containing 'Test news post'. At the bottom right of the form are 'Cancel' and 'Save' buttons.


Email Notification

DCI - News Post Notifications ↳ Inbox x ✕ 🖨 📧

 **support@dcisoftware.com**
to matthewc+3 ▼ 12:54 PM (3 minutes ago) ☆ ↶ ⋮



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
Direct Care Innovations

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

The screenshot displays the DCI Message Center interface. At the top left is the DCI logo (Direct Care Innovations) and a 'HOME' button. On the right, there is a 'Help' icon and the user name 'mattc.testemployee'. A left-hand navigation menu includes 'INBOX', 'SENT', 'ARCHIVE', 'DRAFT', and 'TRASH'. The main content area shows a breadcrumb trail: 'Messages > Inbox > Message Details - 4461'. Below this is the title 'Message Details - 4461' and an 'Actions' button. The message content is titled 'Test News Post' and includes the following details:

- From: Matthew Cavallo
- To: Employee
- Priority: Low
- Date/Time: 12:54 PM

The body of the message contains the text 'Test 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

Reports > Authorization Reports > Authorization Run Rate Report

Authorization Reports - Authorization Run Rate Report

Include Future Authorizations
 Include Ended Authorizations
 Include Discharged Clients Authorizations
 Include Rejected Authorizations

[Reset](#)
[Search](#)

[Download To CSV](#)
[Download To PDF](#)

Showing 524 out of 524 records

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)

Reports > Authorization Reports > Authorization Run Rate Report

Authorization Reports - Authorization Run Rate Report

Type Client Name Type Funding Source Name Select Account Type

Type Service Code Type Cost Center

Include Future Authorizations Include Ended Authorizations Include Discharged Clients Authorizations

Include Rejected Authorizations

Reset Search

Showing 524 out of 524 records

1 2 Download To CSV 3 Print To PDF

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

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

The screenshot shows the DCI software interface. The top navigation bar includes 'HOME', 'PAYROLL', 'BILLING', 'SCHEDULING', 'CARE MANAGEMENT', 'AUTHORIZATION', 'SETTINGS', 'REPORTS', and 'IMPORT'. The 'REPORTS' menu is expanded, showing 'CoA Reports > Auto Approval Report'. The main content area is titled 'CoA Reports - Auto Approval Report' and contains several search filters: 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Select Account Type', 'Type Client Name', 'Type Employee Name', 'Type Service Code', 'Type Cost Center', 'Select Status', and 'Select Auto Approval Result'. There are 'Reset' and 'Search' buttons. Below the filters, there are 'Download To CSV' and 'Download To PDF' buttons. The data table shows 9348 records out of 9348 records. The table has columns: Entry ID, Date of..., Account Type, Employee Name, Employee N..., Client/Progr..., Account Ref..., and Cost Center.

Entry ID	Date of...	Account Type	Employee Name	Employee N...	Client/Progr...	Account Ref...	Cost Center
42193	01/05/2020	Hourly	Kenzu Cer	ken1	Bam 4		QualityLog
42192	01/18/2020	Hourly	Kenzu Cer	ken1	Bam 4		QualityLog
42191	01/20/2020	Hourly	Sylux	SYLX	Phantoon		GLTCF
42189	01/20/2020	Hourly	Samus Aran	SAMRAN	Draygon		GLTCF
42187	01/20/2020	Hourly	Samus Aran	SAMRAN	Draygon		GLTCF
42186	01/19/2020	Hourly	Kenzu Cer	ken1	Bam 4		QualityLog
42185	01/20/2020	Hourly	Samus Aran	SAMRAN	Phantoon		GLTCF
42184	01/20/2020	Hourly	Samus Aran	SAMRAN	Phantoon		GLTCF

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

DCI DIRECT CARE INNOVATIONS

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

Help matthew.cavallo

DASHBOARD

COA REPORTS

AUTHORIZATION REPORTS

MANAGEMENT REPORTS

PAYROLL REPORTS

BILLING REPORTS

PROFILE REPORTS

FUNDING ACCOUNT REPORTS

SETTINGS REPORTS

EVV REPORTS

CARE MANAGEMENT REPORTS

SCHEDULING REPORTS

TRAINING REPORTS

AUDITING SYSTEM ACTIVITY REPORTS

BUSINESS RULES REPORTS

Reports > CoA Reports > Punch Entry Details Report

CoA Reports - Punch Entry Details Report

From (MM/DD/YYYY) To (MM/DD/YYYY) Select Account Type

Type Client Name Type Employee Name Type Service Code

Type Cost Center Select Activity Select Status

Type Payroll Batch Name Enter Payroll Batch ID Select Entry Type

Include Canceled and Rejected Punches Include Only Unbatched Punches

Reset Search

Showing 1 out of 12713 records

Download To CSV Download

Vehicle Type	General Acti...	Employee/Vend...	Employee N...	Client/ Resi...	Employee Time Zone	Client/ Program
		MattC TestEmpl...	1001	MattC Testclient	MT (UTC-7)	MT (UTC-7)
		MattC TestEmpl...	1001	MattC Testclient	MT (UTC-7)	MT (UTC-7)
		MattC TestEmpl...	1001	MattC Testclient	MT (UTC-7)	MT (UTC-7)
		MattC TestEmpl...	1001	MattC Testclient	MT (UTC-7)	MT (UTC-7)
		MattC TestEmpl...	1001	MattC Testclient	MT (UTC-7)	MT (UTC-7)
		Kenzu Cer	ken1		MT (UTC-7)	
		Kenzu Cer	ken1	Bam 4	MT (UTC-7)	MT (UTC-7)

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

Reports > Funding Account Reports > Funding Account Entries Report

Funding Account Entries Report

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

Select Account Type Type Client Name Type Service Code

Type Funding Source Name Type Cost Center Select Status

Type Billing Batch Name Enter Billing Batch Id Type Region Name

Include Only Unbatched Punches

Reset Search

Download To CSV Download To PDF

Showing 10958 out of 10958 records

Punch ID	Pay Week	Reference P...	Date of Serv...	Account Type	Client Name	Client ID	Employee
44481	4	44470	01/20/2020	Hourly	MattC Testclient	828	MattC
44480	4	44471	01/20/2020	Hourly	MattC Testclient	828	MattC
44479	4	44472	01/20/2020	Hourly	MattC Testclient	828	MattC
44478	4	44475	01/20/2020	Hourly	MattC Testclient	828	MattC
44477	4	44476	01/20/2020	Hourly	MattC Testclient	828	MattC
44455	3	41987	01/14/2020	Hourly	GF Client19	826	GF W
44454	3	41986	01/13/2020	Hourly	GF Client19	826	GF W

Time Card Report

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

The screenshot shows the DCI (Direct Care Innovations) web application interface. The top navigation bar includes the DCI logo and menu items: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. The 'REPORTS' menu is expanded, showing a list of report categories. The 'TIME CARD REPORT' is highlighted with a blue border and a checkmark icon, indicating it has been successfully renamed and moved.

REPORTS	REPORTS
DASHBOARD	Reports > Dashboard
COA REPORTS	AUTO APPROVAL REPORT
AUTHORIZATION REPORTS	PUNCH ENTRIES REPORT
MANAGEMENT REPORTS	PUNCH ENTRY DETAILS REPORT
PAYROLL REPORTS	SERVICE ACCOUNTS REPORT
BILLING REPORTS	RESIDENTIAL ATTENDANCE REPORT
PROFILE REPORTS	RESIDENTIAL ABSENTEE REPORT
FUNDING ACCOUNT REPORTS	PARENTING ATTENDANCE REPORT
SETTINGS REPORTS	PARENTING ABSENTEE REPORT
EVV REPORTS	DAY ATTENDANCE REPORT
CARE MANAGEMENT REPORTS	GROUP SERVICE ATTENDANCE REPORT
SCHEDULING REPORTS	MILEAGE ENTRIES DETAILS REPORT
TRAINING REPORTS	LOW ACCURACY DEVICE REPORT
AUDITING SYSTEM ACTIVITY REPORTS	VOID PRE-ACTION REPORT
BUSINESS RULES REPORTS	TIME CARD REPORT
SUMMARY REPORT	
CUSTOM FIELDS	
NOTES REPORT	

Business Rules Reports

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

The screenshot shows the DCI Reports menu. The 'BUSINESS RULES REPORTS' item is highlighted with an orange border and a checkmark icon. A callout box points to the 'BUSINESS RULES SETTINGS REPORT' and 'BUSINESS RULES RESULT REPORT' items, which are also marked with checkmarks. The menu items listed are: DASHBOARD, COA REPORTS, AUTHORIZATION REPORTS, MANAGEMENT REPORTS, PAYROLL REPORTS, BILLING REPORTS, PROFILE REPORTS, FUNDING ACCOUNT REPORTS, SETTINGS REPORTS, EVV REPORTS, CARE MANAGEMENT REPORTS, SCHEDULING REPORTS, TRAINING REPORTS, AUDITING ACTIVITY, BUSINESS RULES REPORTS, SUMMARY REPORT, CUSTOM FIELDS, and NOTES REPORT. The top navigation bar includes: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, IMPORT, and a user profile for matthew.cavallo.

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

The screenshot shows the DCI web application interface. The top navigation bar includes the DCI logo and menu items: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. A user profile for 'matthew.cavallo' is visible in the top right corner. The left sidebar contains a list of report categories, with 'PROFILE REPORTS' highlighted in blue. The main content area displays the 'Dashboard' page, showing a list of reports under the 'Profile Reports' tab. The reports listed are: EMPLOYEES REPORT, CLIENTS REPORT, RESIDENTIAL PROGRAMS REPORT, DAY PROGRAMS REPORT, PARENTING PROGRAMS REPORT, and GROUP SERVICES REPORT. Checkmarks are visible next to the 'BILLING' and 'PROFILE REPORTS' menu items, and a red notification bubble is present in the top right corner.

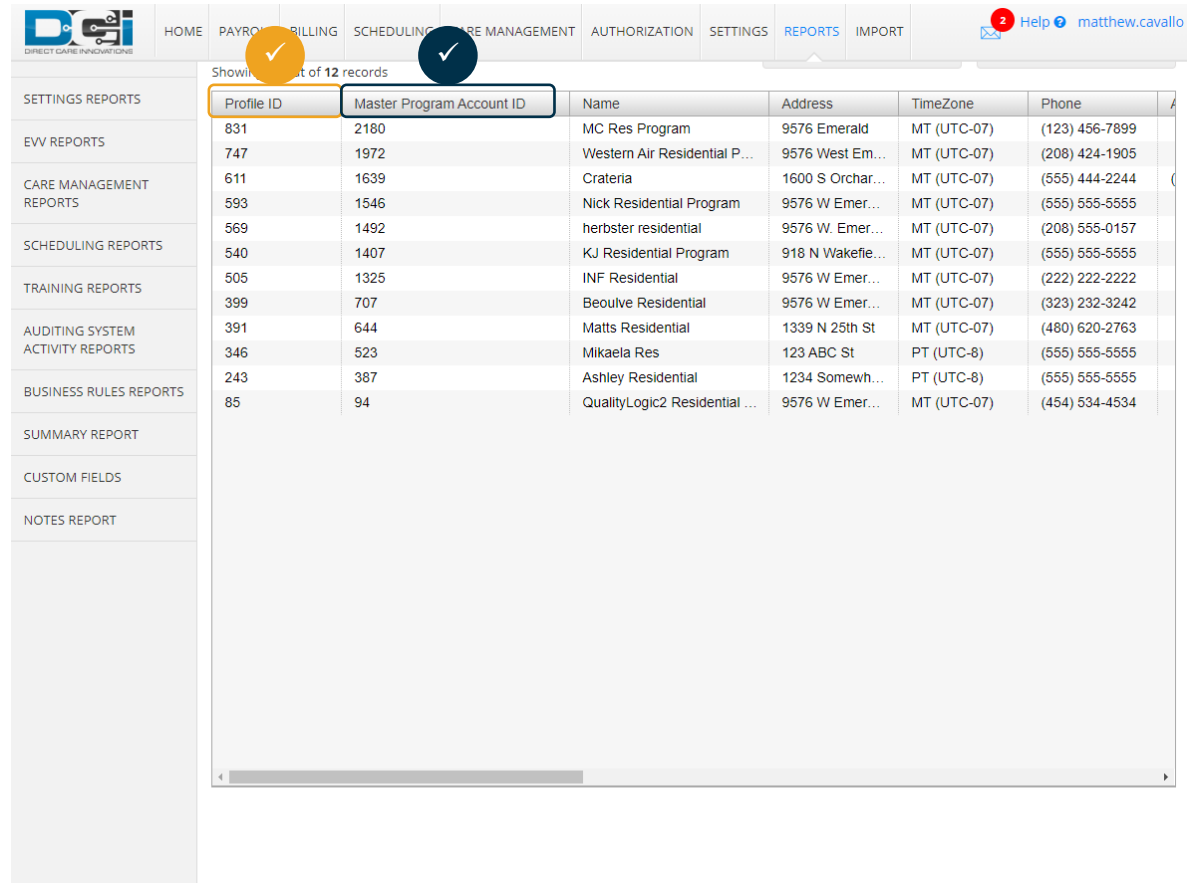
Profile Report Enhancements

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

The screenshot shows the DCI Reports menu. The 'REPORTS' tab is selected in the top navigation bar. The left sidebar lists various report categories. The 'SETTINGS REPORTS' category is highlighted with a blue border. A callout box with a checkmark icon points to the 'SERVICE CODES REPORT' and 'REGIONS REPORT' items, indicating they have been moved to the Settings tab. Another callout box with a checkmark icon points to the 'FUNDING REPORT' item, which is also highlighted with a yellow circle, indicating it has been moved to the Settings tab. The main content area shows the 'Dashboard' page.

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

DCI DIRECT CARE INNOVATIONS

HOME SCHEDULING CARE MANAGEMENT SETTINGS REPORTS

Help mattc.testsupervisor

Clock Out
Geolocation:
Clock In EVV Home
Location :
Clock In EVV 5416 E Baseline Rd
Address: Mesa, AZ 85206
Clock Out EVV Home
Location :
Clock Out EVV 5416 E Baseline Rd
Address: Mesa, AZ 85206
Employee Fail N/A
InHome Validation:
Supervisor N/A
Approved Failed
InHome Validation:
Schedule
Comparison:

Reference Entries Notes Attachments EVV Verifications Map Business Rule Result History

Showing 1 out of 1 record

Events

Business Rule Name	Business Rule Result	Business Rule Result Description
Duplicate/Overlapping Client Punch	Fail	The Client already has a duplicate or overlapping punch 44505 in the system for this date and time.

Pay Codes

Payroll Entries Detail

Current State:

- Column labeled “Pay Type”

Future State:

- ✓ 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

Pay Codes Menu

Current State:

- Payroll menu display “Pay Type Codes”

Future State:

- ✓ Payroll Menu updated to display “Pay Codes”

The screenshot displays the DCI (Direct Care Innovations) software interface. At the top, there is a navigation bar with the following tabs: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. The 'SETTINGS' tab is currently selected. Below the navigation bar is a vertical menu with the following items: FUNDING SOURCES, ROLES, HOLIDAY SCHEDULES, ACCOUNTS, NEWS POSTS, GENERAL ACTIVITIES, AUTHORIZATION BALANCE ADJUSTMENT REASON, FEE TYPE, CERTIFICATION REQUIREMENTS, CERTIFICATION TEMPLATES, MESSAGE TEMPLATES, PAYROLL, EW CALL LOGS, and EW PHONE PROMPTS. The 'PAYROLL' item is highlighted with a blue border, and a sub-menu is visible next to it containing 'PAY CODES' and 'PAYROLL BATCH VALIDATIONS'. The 'PAY CODES' item is highlighted with a blue border and a yellow checkmark icon to its right.

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

The screenshot shows the 'Pay Codes' configuration page in the Acumen system. The page has a sidebar on the left with navigation options: FUNDING SOURCES, ROLES, HOLIDAY SCHEDULES, ACCOUNTS, NEWS POSTS, GENERAL ACTIVITIES, AUTHORIZATION BALANCE ADJUSTMENT REASON, FEE TYPE, CERTIFICATION REQUIREMENTS, CERTIFICATION TEMPLATES, MESSAGE TEMPLATES, PAYROLL (highlighted), EVV CALL LOGS, EVV PHONE PROMPTS, and EVV FOBS. The main content area is titled 'Settings > Payroll > Pay Codes' and 'Pay Codes'. It features a search bar with 'Type Name' and 'Type Code' input fields, a 'Reset' button, and a 'Search' button. Below the search bar is an 'Export' button and the text 'showing 18 out of 18 records'. A table lists the pay codes with columns for Name, Code, and Overtime Related Code. The table contains the following data:

Name	Code	Overtime Related Code
Double Overtime Custom	2O	Yes
Double Overtime Default	2OT	Yes
Holiday Worked Custom	HC	No
Holiday Worked Default	HD	No
Mileage	MIL	No
Overtime Custom	O	Yes

Two checkmarks are visible on the right side of the table, one orange and one dark blue, indicating that the 'Double Overtime Custom' and 'Double Overtime Default' entries are selected or confirmed.

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

The screenshot displays the Acumen Payroll interface. The top navigation bar includes 'HOME', 'PAYROLL', 'BILLING', 'SCHEDULING', 'CARE MANAGEMENT', 'AUTHORIZATION', 'SETTINGS', 'REPORTS', and 'IMPORT'. The user is logged in as 'matthew.cavallo'. The main content area shows 'Pay Code Details - Double Overtime Default'. A modal dialog titled 'Edit Pay Code' is open, allowing for the following fields to be edited:

- Name: Double Overtime Default
- Code: Can Edit (highlighted with a red circle and the number 3)
- Overtime Related Code: Yes No
- Overtime Default Multiplier: 2.00
- Calculate OT Rate: Yes No
- Blend Pay Rate: Yes No
- Description: Can Edit (highlighted with a red circle)

Buttons for 'Cancel' and 'Save' are visible at the bottom of the dialog. The 'Save' button is highlighted with a red circle and the number 4. In the background, a table shows recent activity logs for the 'Double Overtime Default' pay code.

Date	Time	Action	Details	Location	User
Jan 21, 2020	01:31:13 PM	Viewed	Double Overtime Default was viewed	Web Portal	Matthew Cavallo
Jan 21, 2020	12:09:	Viewed	Double Overtime Default was viewed	Web Portal	Matthew Ca

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

Pay Code Details

Pay Code Name: Double Overtime Default

Pay Code: 2OT

Overtime Related Code: Yes **1**

Overtime Default Multiplier: 2.00 **2**

Calculate OT Rate: No **3**

Blend Pay Rate: Yes **4**

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

History

Payroll & Billing Entries

Current State:

- Users cannot see edit history for payroll and billing entries

Future State:

- ✓ History is now listed for both payroll and billing entries by selecting the entry, then selecting history.

The screenshot displays the Acumen software interface. The top navigation bar includes: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, IMPORT, and a user profile for matthew.cavallo. The main content area shows details for a payroll/billing entry:

- Payroll Burden: 132.26
- Estimated Payroll: 132.26
- Burden: -12.00
- Pay Units: -12.00
- Status: Pending
- Batch Name: 2734p2 - 1471
- Ref Entry: 52284
- GL Code: 16-001-2409876
- Location Code: 16-001-2409876
- Created: Jan 15, 2020

Additional details on the right include: Balance: 13.50 and Status: Active.

Below the entry details is a tabbed interface with options: Reference Entries, Notes, Attachments, Events, EVV Verifications, Map, and History. The History tab is selected.

Search filters include: From (MM/DD/YYYY), To (MM/DD/YYYY), and Type Username. Buttons for Reset and Search are present.

An Export button is located above the History table.

The History table shows 1 record:

Modified Date	Field Name	Changed By
Jan 21, 2020 10:09:37 AM	Payrate Override	Don Burke

Employee Details

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.

The screenshot shows the 'Employee Information' tab of a form. It contains several fields and dropdown menus. Callouts 1 through 4 are placed over specific elements: 1 is over the 'Type' dropdown (set to 'Hourly Non Exempt'), 2 is over the 'Domestic Worker' radio buttons (set to 'No'), 3 is over the 'Domestic Worker 7 Day Exemption' radio buttons (set to 'No'), and 4 is over the 'Domestic Worker Preferred Day of Rest' dropdown (set to 'Sunday'). Other fields include 'Employee Number' (1001), 'Weekly Hours Available' (40.00), 'Professional Id1' (Professional Id1), 'Professional Id2' (Professional Id2), 'Payroll Id' (Payroll Id), 'Certification Template' (Select Certification Template), 'Holiday Schedule' (Default Holiday Schedule - 1), and 'Cost Center' (MattC Demo - MCD). The 'Hire Date' is set to January 1, 2020. 'Cancel' and 'Save' buttons are at the bottom right.

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

The screenshot shows a web form titled "Add New Service Code" with the following fields and annotations:

- Funding Source Name:** MattC Demo (dropdown)
- Account Type:** Hourly (dropdown)
- Service Code Name:** Service Code Name (text input)
- Funding Type:** Select Funding Type (dropdown) with a tooltip that says "Are authorizations for units or dollars?" and a checkmark icon.
- Billing Details:** (Section header) with a plus icon and a checkmark icon.
- Bill Code:** Bill Code (text input)
- Billable:** Yes (selected) / No (radio buttons)
- Billing Unit:** Select Billing Unit (dropdown)
- Billing Multiplier:** Select Billing Multiplier (dropdown)
- Rounding Increment:** Select Rounding Increment (dropdown)
- Billing Rollup Type:** Billing Rollup Type (dropdown)
- Payroll Details:** (Section header) with a plus icon.
- Hide Remaining Balance:** Yes / No (radio buttons)
- Allow Diagnosis Code:** Yes (selected) / No (radio buttons)

At the bottom right, there are "Cancel" and "Save" buttons.

Bug Fixes

Bug List

- 64 Bug fixes are deployed in this release

To Locate a Specific Bug:

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



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



**“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>