June 2021 Release Notes

Table of Contents

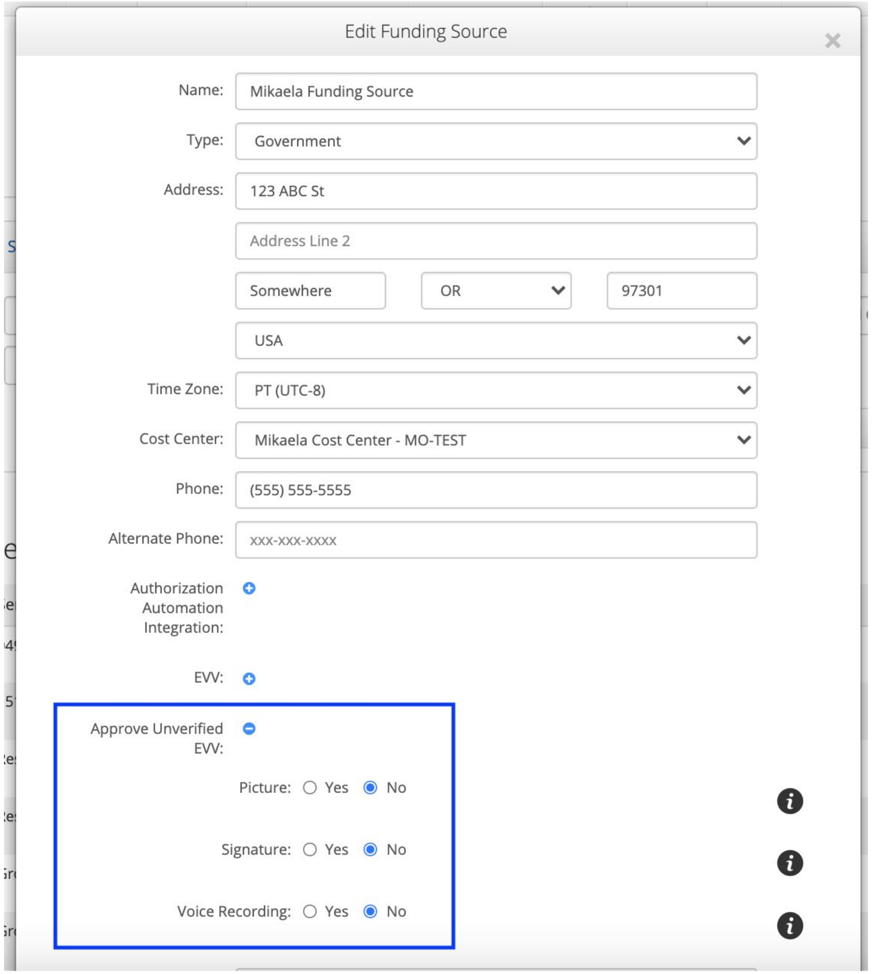
This guide provides details of the feature enhancements for the DCI Release. The table of contents is hyperlinked. Select any of the topics below to jump to that section.

Funding Sources

DIRECT CARE INNOVATIONS
www.dcisoftware.com

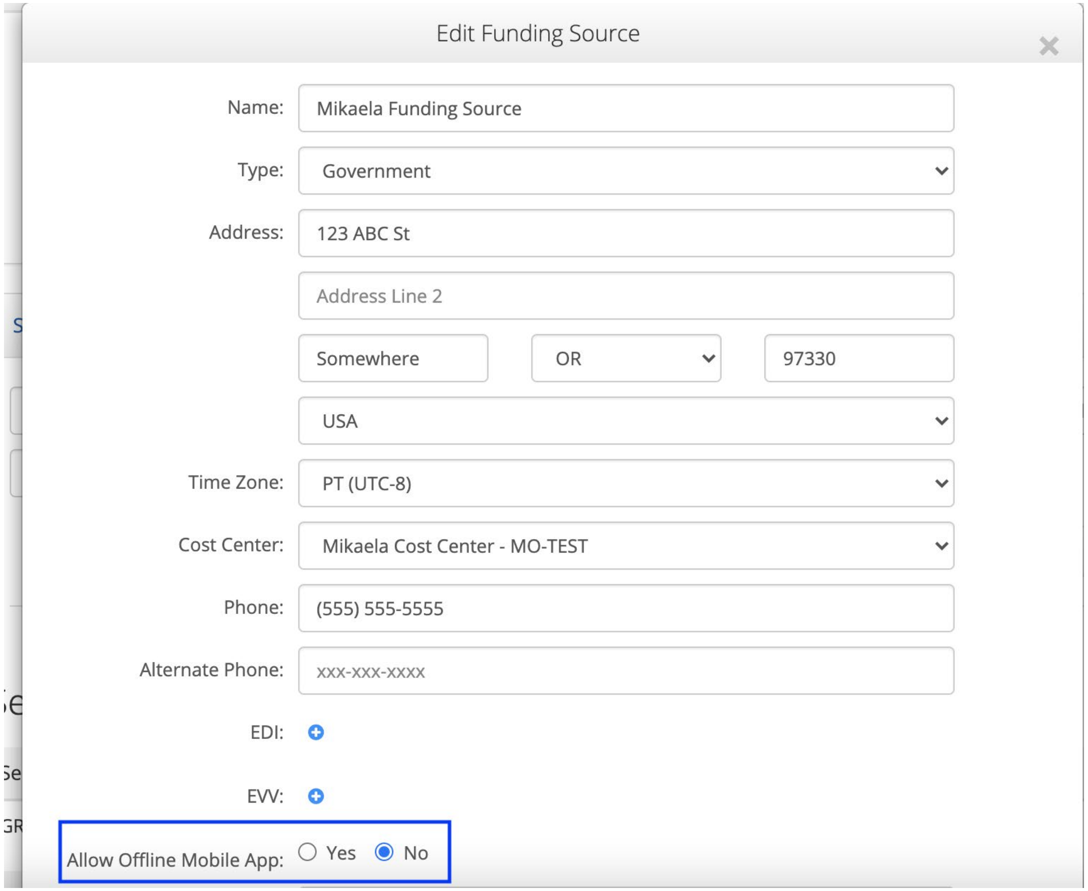
Funding Sources: Approve Unverified EVV

- There is a new setting available on the Add/Edit Funding Source wizards called Approve Unverified EVV. This was an instance level setting that has been moved to the Funding Source level.
- When enabled for the specified EVV type, punches can be approved (manually or via auto approval) even if there is an unverified EVV of the specified type.
- The setting can be enabled for:
    - EVV Picture
    - EVV Signature
    - EVV Voice



Funding Sources: Mobile App Offline

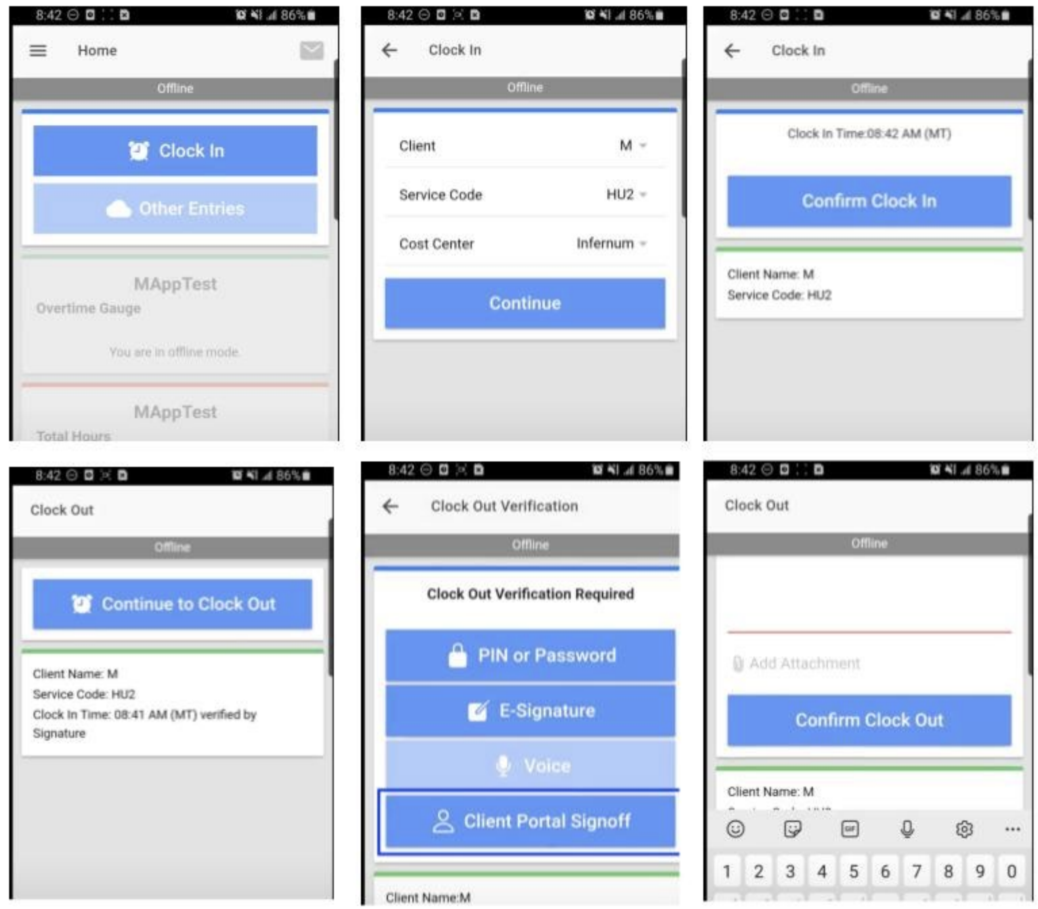
- There is a new setting on the Add/Edit Funding Source wizards called Allow Offline Mobile App.
- When enabled, real-time punches can be made from the mobile app even if there is no internet connection or the connection is lost.
- See the next section for more information about Mobile App Offline Mode.



Mobile App Offline Mode

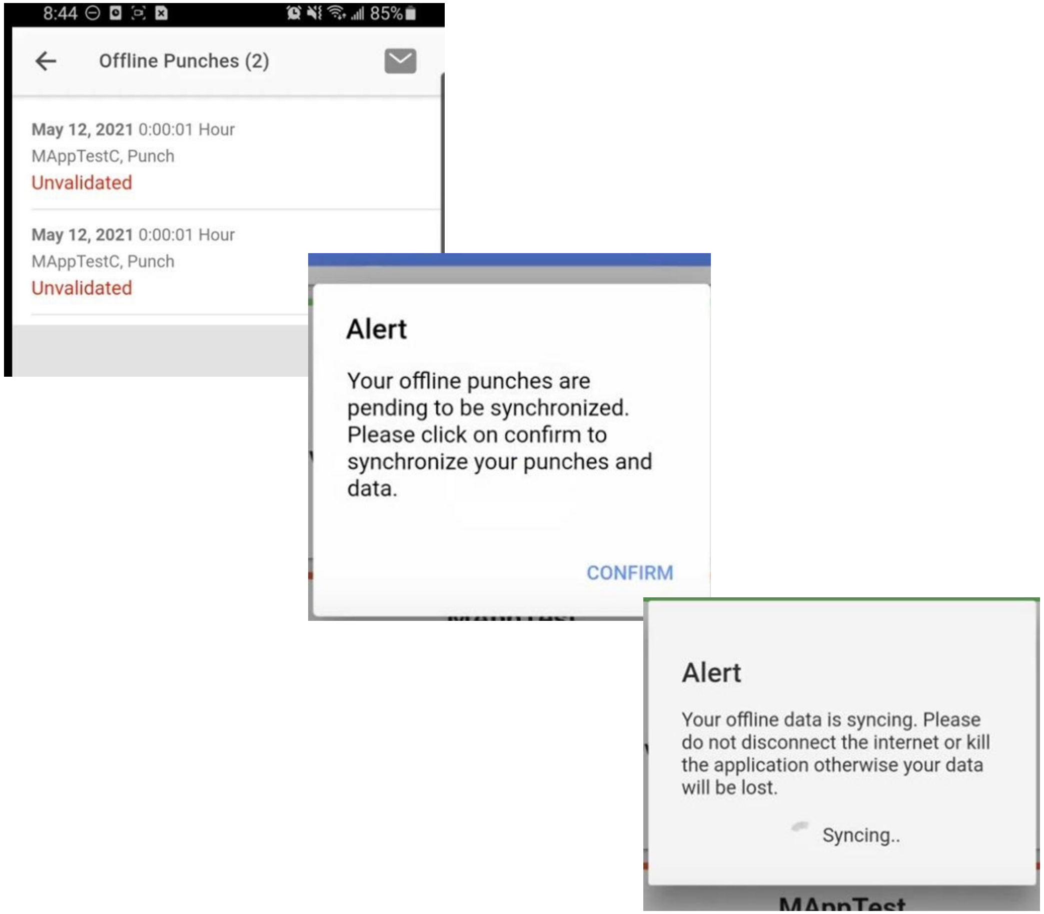
Mobile App Offline Mode

- There is a new feature that allows users to continue limited use of the Mobile App on a registered device even when the device is offline.
- The Mobile App will assess the internet connection and automatically switch to offline mode in the event that no connection is found or connection is lost.
- When in Offline Mode, users are limited to logging in and making real-time punches. Client Transportation is not available in Offline mode.



Mobile App Offline Mode

- Offline punches are stored in the Mobile App until internet connection is restored. The user can only be offline a specified number of days in a row and/or make a specified number of offline punches in a row before they need to reconnect to the internet.
- The user will be prompted to sync offline punches when internet connection is restored. Once the punches are synced, they will be visible in the Entries table.
- Using Mobile App Offline Mode requires several instance level setting changes. Please contact your DCI representative if you are interested in using this feature.



Dashboard Authorization Widget

DIRECT CARE INNOVATIONS
www.dcisoftware.com

Dashboard Authorization Widget: New Columns

- There are now Monthly Max, Weekly Max, and Daily Max columns on the Authorization Widget on the dashboard.

Authorizations

Biggs Darklighter - 124 ✖ Search Reset

Click link to see Monthly Budget Summary

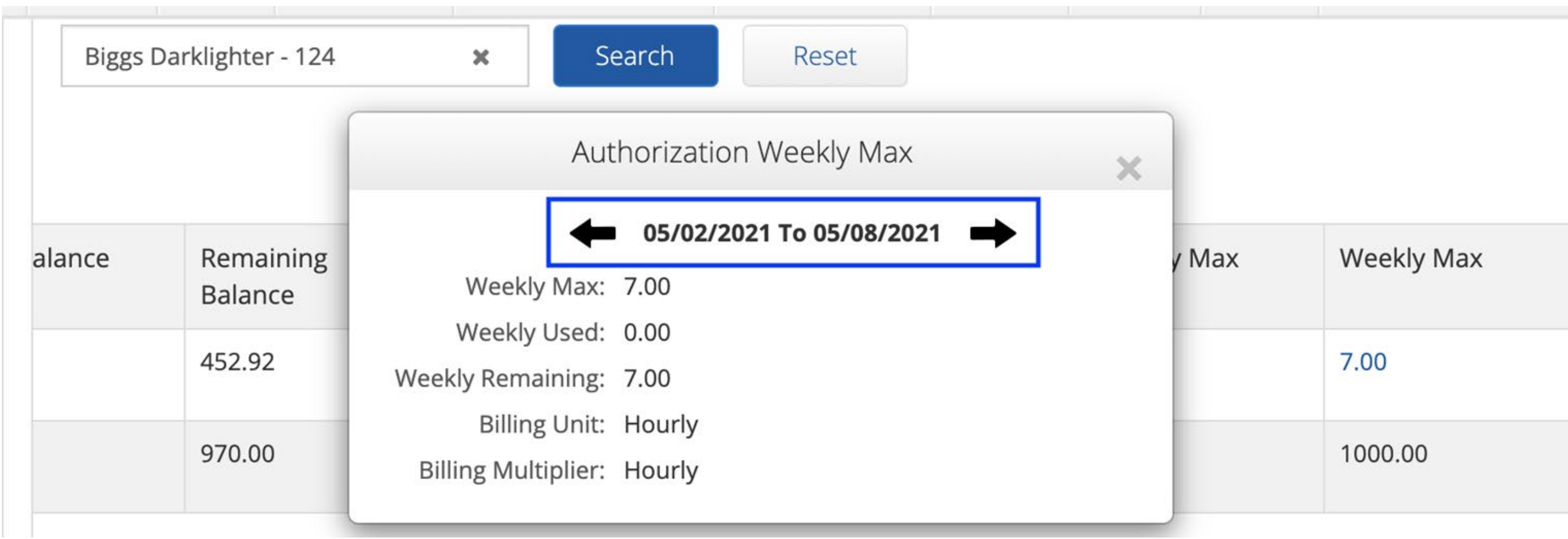
alance	Remaining Balance	Pre Authorizations Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
	455.00	0.00	455.00	35.00	7.00	7.00
	970.00	107.03	862.97	1000.00	1000.00	1000.00

Authorization Widget: Monthly/Weekly Summation

- There is a new feature on the Authorization Widget called Monthly/Weekly Summation. When enabled, the Monthly Max and Weekly Max columns on unit-funded authorizations will be hyperlinks to a pop-up with the following information:
    - Monthly or Weekly Max
    - Monthly or Weekly Used
    - Monthly or Weekly Remaining
    - Billing Unit
    - Billing Multiplier

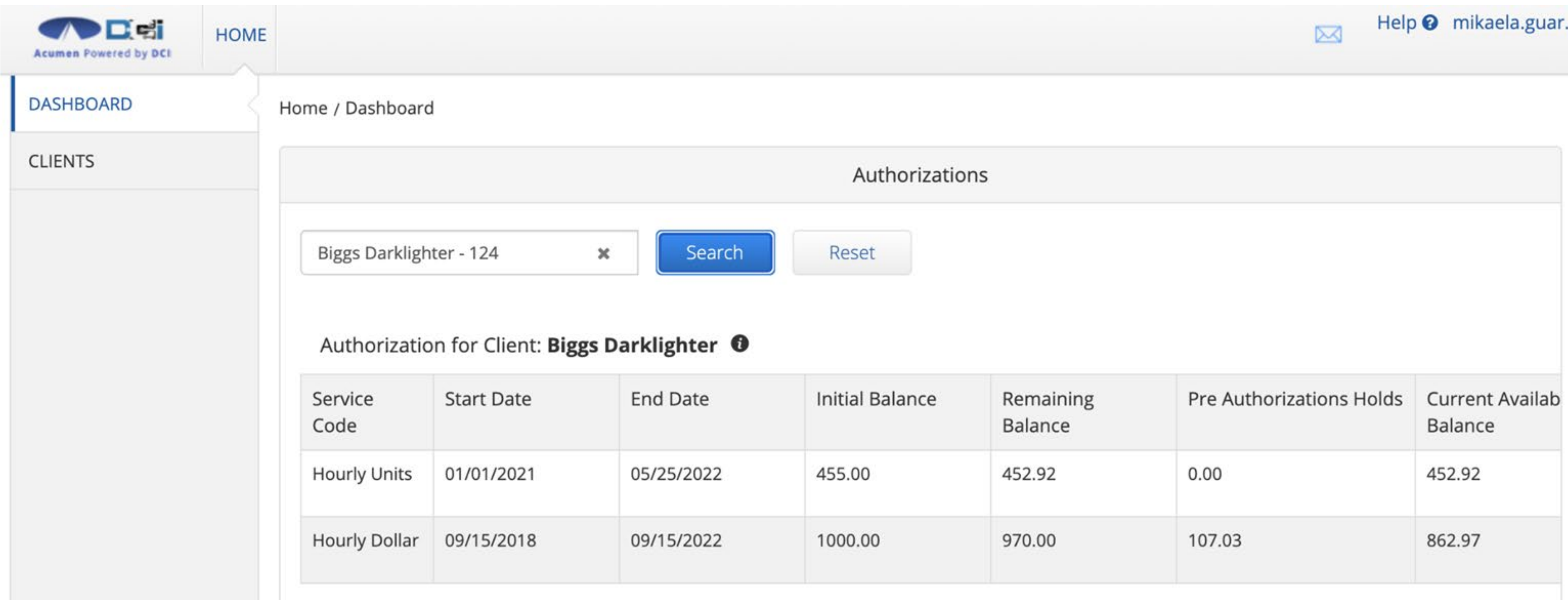
Authorization Widget: Monthly/Weekly Summation

- Users are able to navigate to previous months/weeks on the pop-up.
- The Monthly/Weekly Summation is only visible if the instance level setting is enabled. Please contact your DCI representative if you would like to use this feature..



Authorization Widget: Guardian Profiles

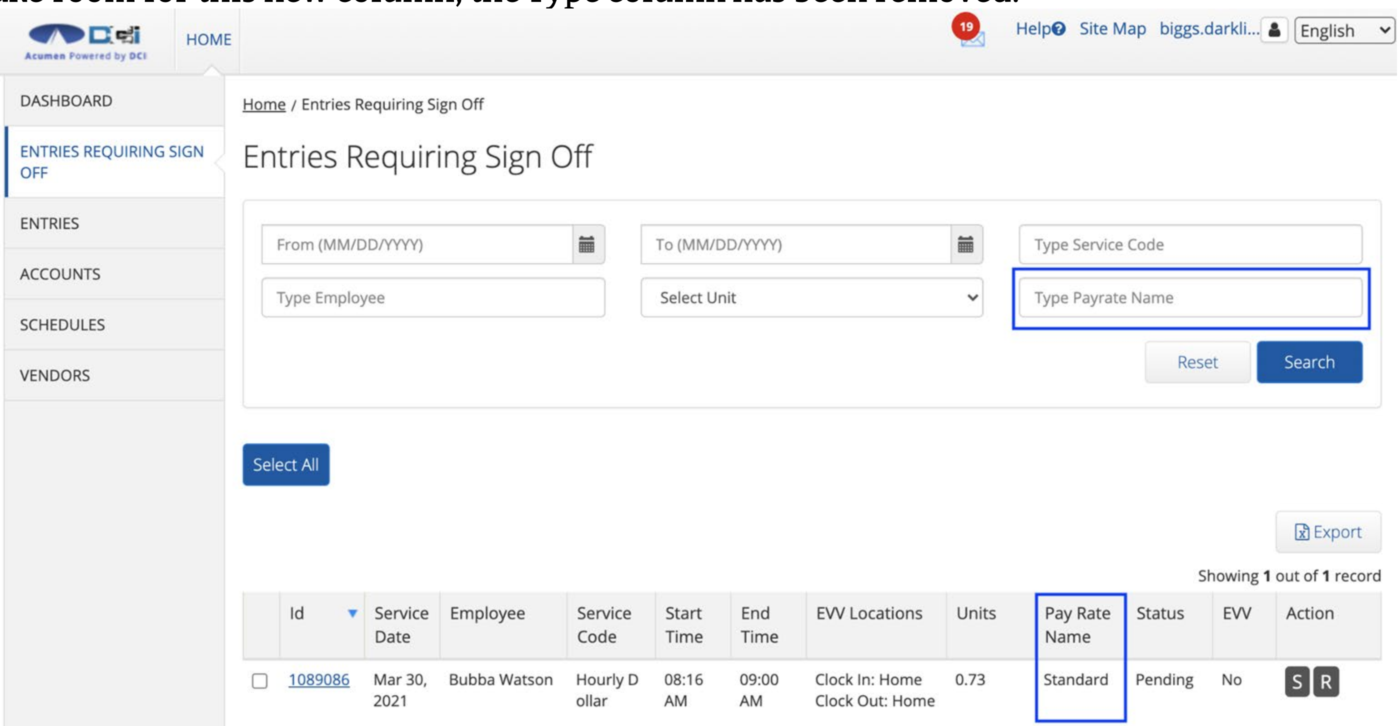
- The Authorization Widget with the additional columns listed in the previous slides is also now visible to Guardian Profiles.



Profiles

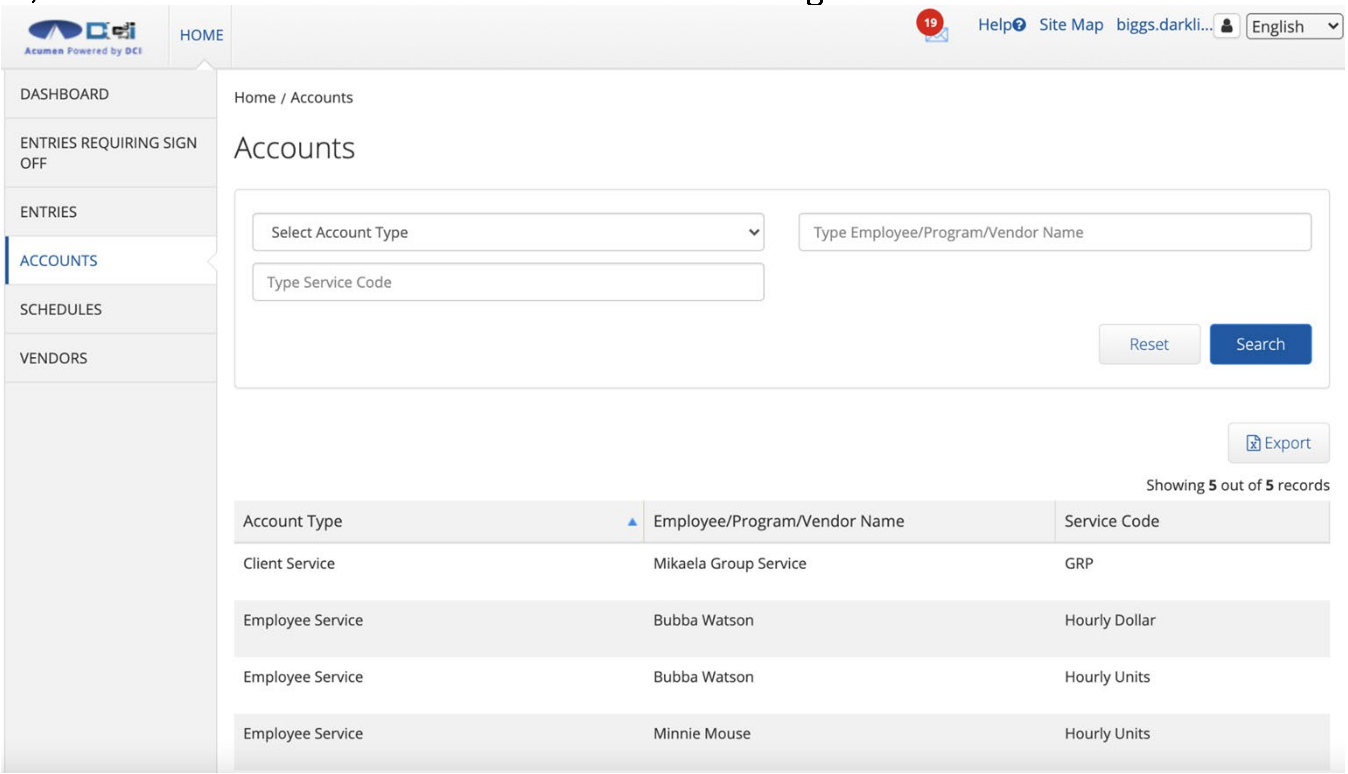
Client & Guardian Profiles: Pay Rate Name

- Client and Guardian Profiles now have a Pay Rate Name column and search filter on the Entries Requiring Sign Off page.
- If the punch does not have a Pay Rate Name, then the column will be left blank.
- To make room for this new column, the Type column has been removed.



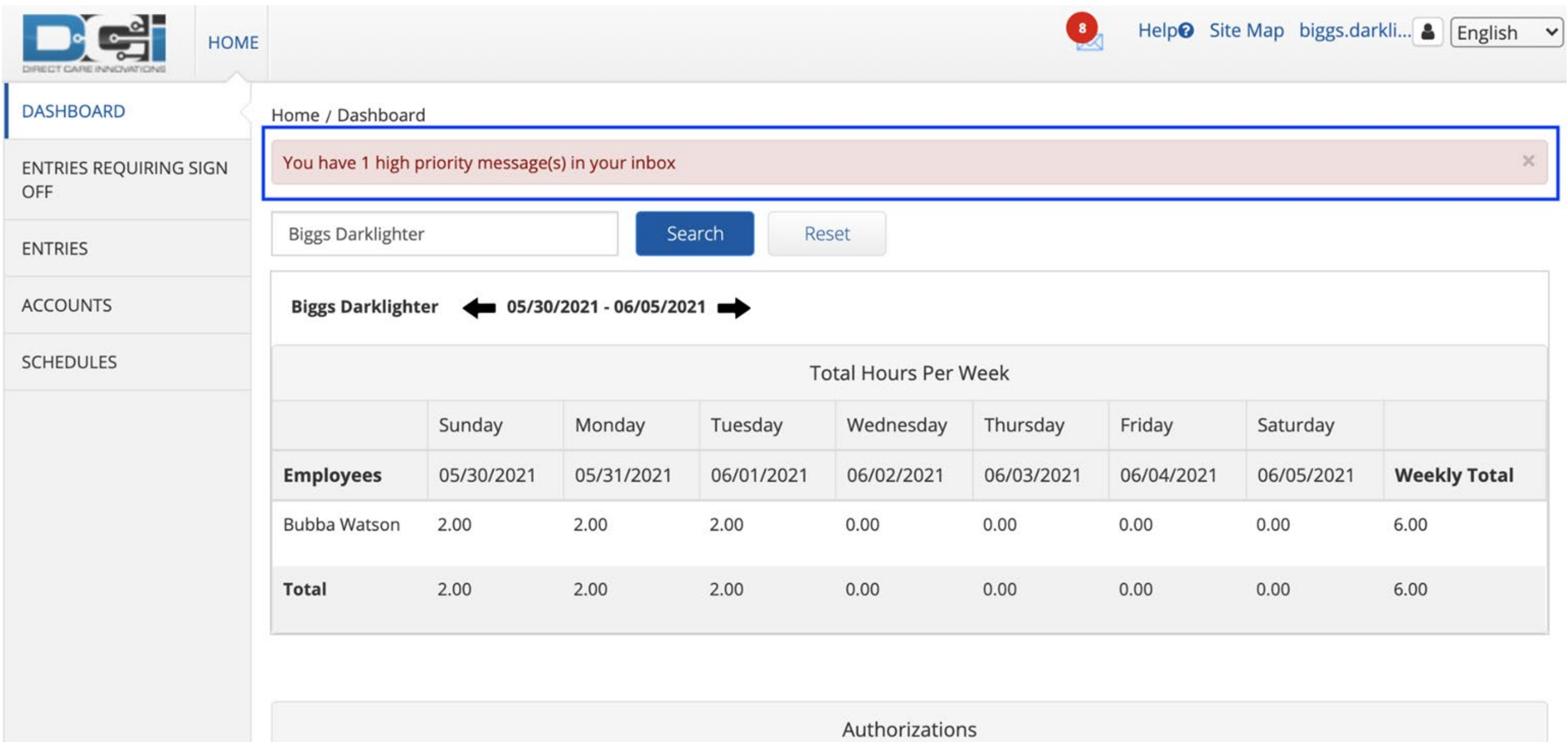
Client Profiles: Client Accounts

- Client Profiles now have the ability to view their own Accounts.
- The Accounts function is located between the Entries and Schedules functions on the Home Screen.
- Clicking the Accounts function will display all of the user's accounts. The user is able to filter the list of accounts, but will not be able to view the Account Details Pages.



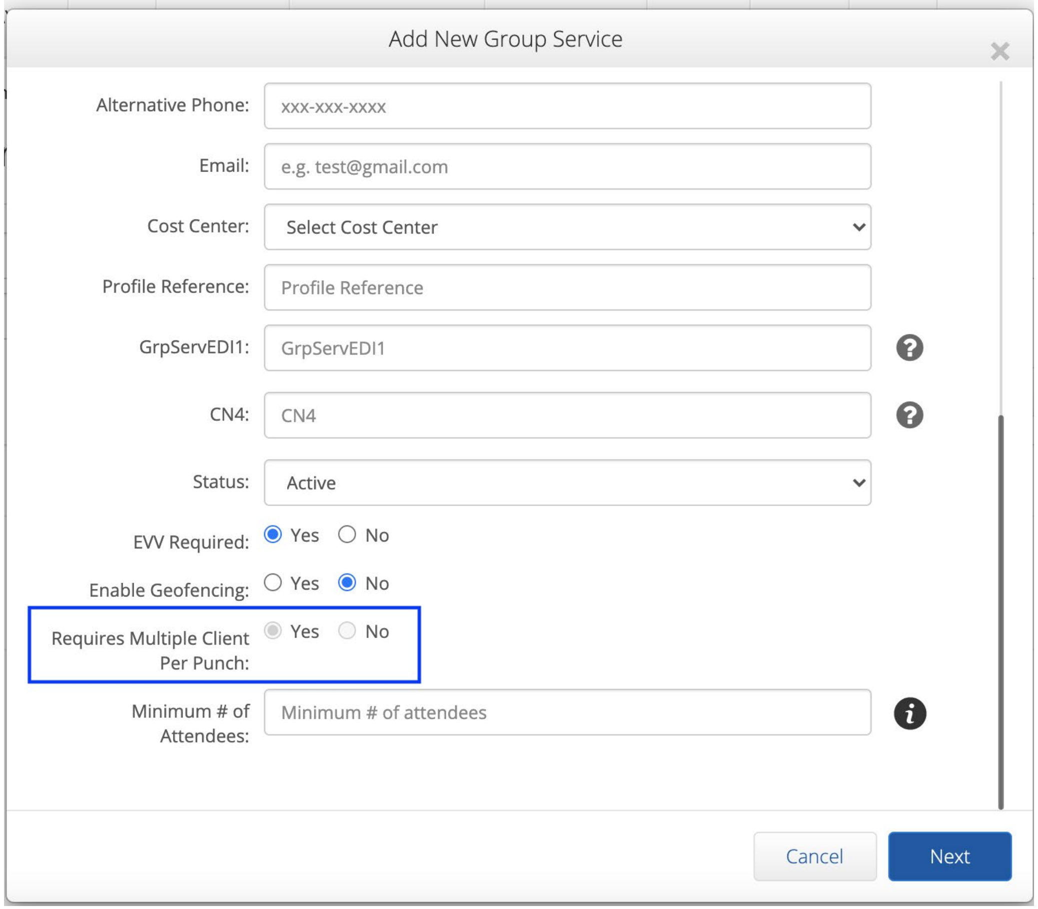
Client & Case Worker Profiles: High Priority Message Banner

- Client and CaseWorker Profiles now see a red banner on the dashboard if there are any unread High Priority messages.



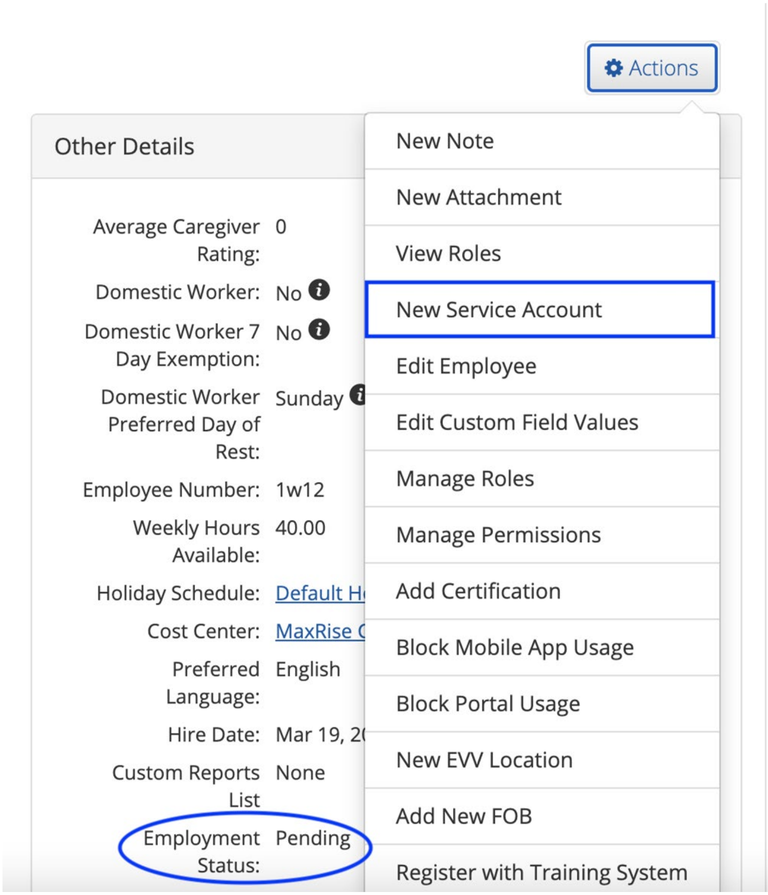
Group Services Profiles: Require Multiple Attendees

- There is a new instance level setting called Group Service Require Multiple Attendees.
- Requiring more than one attendee for Group Services is currently an editable field on Group Service Profiles. When the new setting is enabled, all Group Service Profiles will automatically have this Require Multiple Attendees field set to Yes and it will not be editable.
- If the instance level setting is not enabled, users will continue to set the field manually per each Group Service Profile.
- Please contact your DCI representative if you would like the instance level setting enabled.



Employee Profiles: Employee Service Accounts for Pending Employees

- There is a new feature that allows users with the appropriate role and/or permission to create Employee Service Accounts for employees in Pending status. Employee Profiles created through self-registration remain in Pending status until a user with the appropriate role/permission changes the status. Employee Profiles can also be manually changed to Pending status by a user with the appropriate role/permission.
- The employee will not be able to make punches against the service account until the profile is in Active status.
- This feature can be used when creating service accounts via the UI or import.
- Please note that this feature requires an instance level setting change. Please contact your DCI representative if you are interested in using this feature.

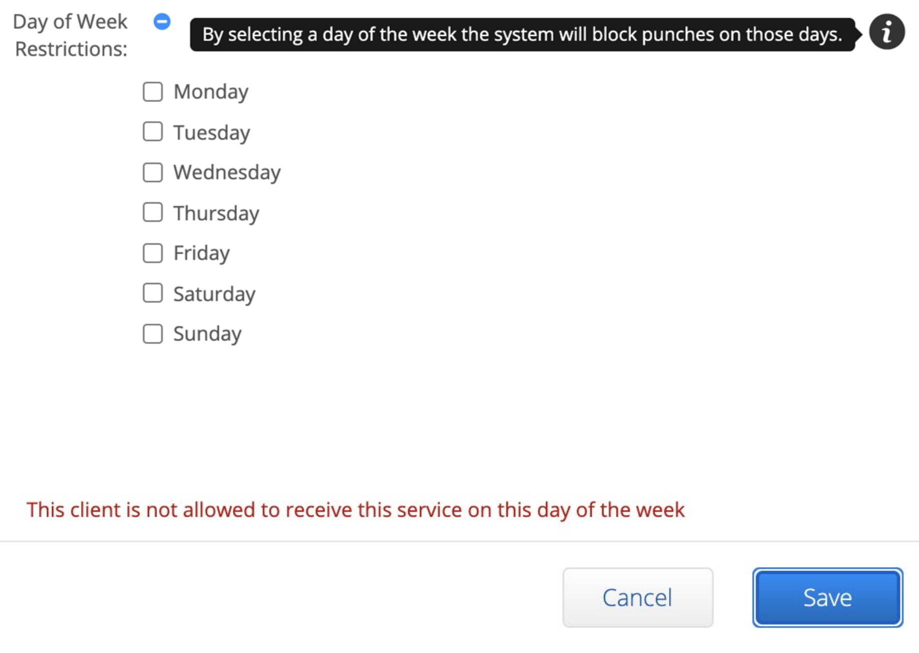


Employee Service Accounts

DIRECT CARE INNOVATIONS
www.dcisoftware.com

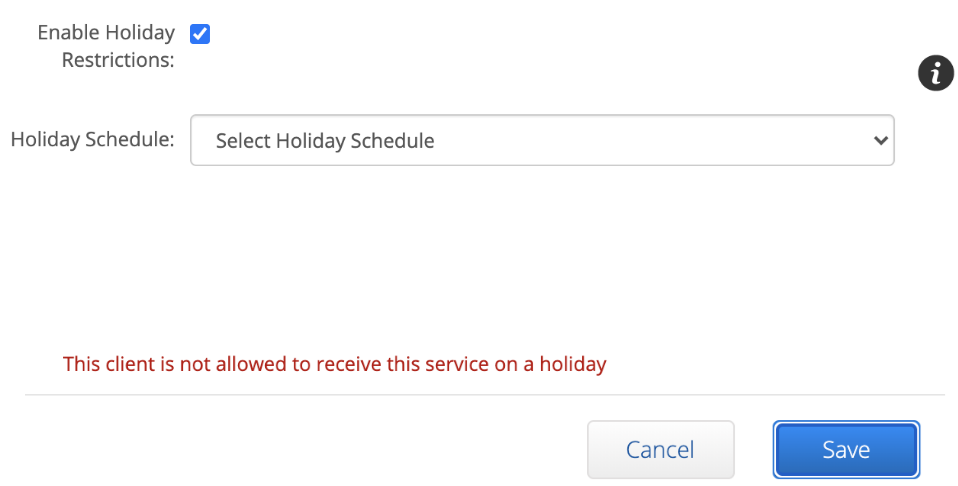
Employee Service Accounts: Day of Week Restriction

- There is a new setting that allows companies to restrict punches to only certain days of the week.
- Employee Service Accounts configuration will include checkboxes to select which days of the week punches should be blocked. If punches are allowed on all days for this particular Employee Service Account, then no checkboxes would be selected.
- When enabled, the system will block punches at clock-in or upon attempted creation of historical punches for days specified on the Employee Service Accounts.
- Please note that this feature requires an instance level setting change. Please contact your DCI representative if you are interested in using this feature.



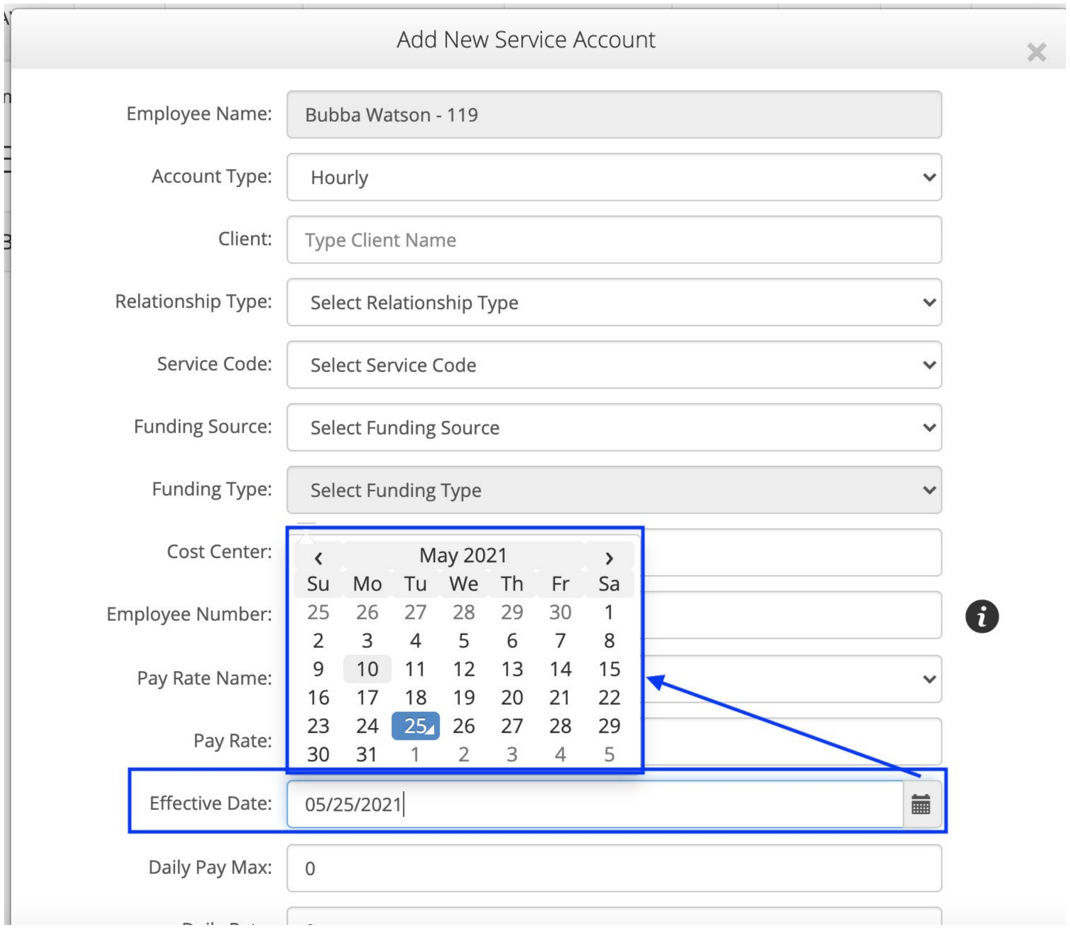
Employee Service Accounts: Holiday Restriction

- There is a new setting that allows companies to block punches on holidays.
- Employee Service Accounts configuration will include the ability to enable Holiday Restriction, along with the ability to link the Employee Service Account to a Holiday Schedule. If punches are allowed on holidays for this particular Employee Service Account, then Holiday Restriction would not be enabled.
- When enabled, the system will block punches at clock-in or upon attempted creation of historical punches for dates on the Holiday Schedule that is linked to the Employee Service Account.
- Please note that this feature requires an instance level setting change. Please contact your DCI representative if you are interested in using this feature.



Employee Service Accounts: Pay Rate Effective Date

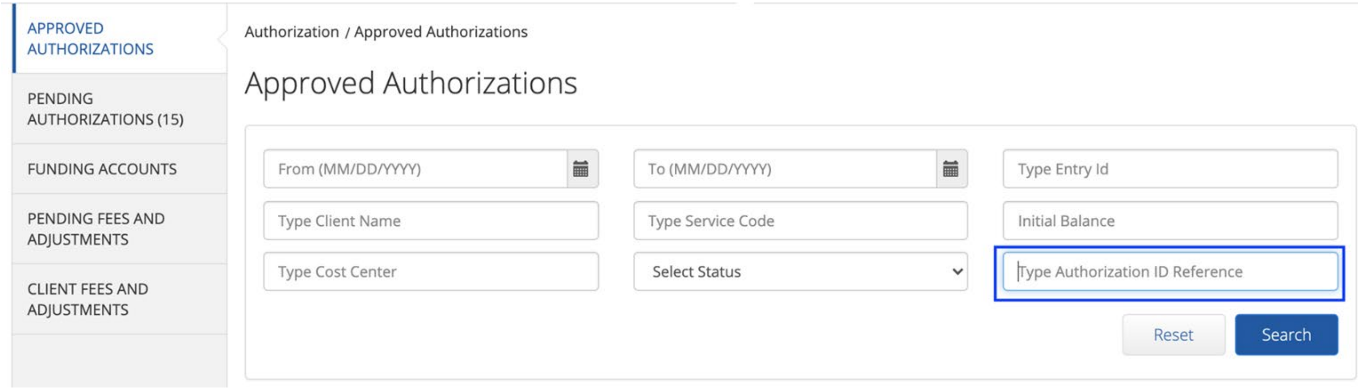
- The Pay Rate Effective Date field on the Add New Service Account wizards is now an editable field.
- This field used to be automatically populated with the date the service account was created and was not editable.
- It is still a required field.

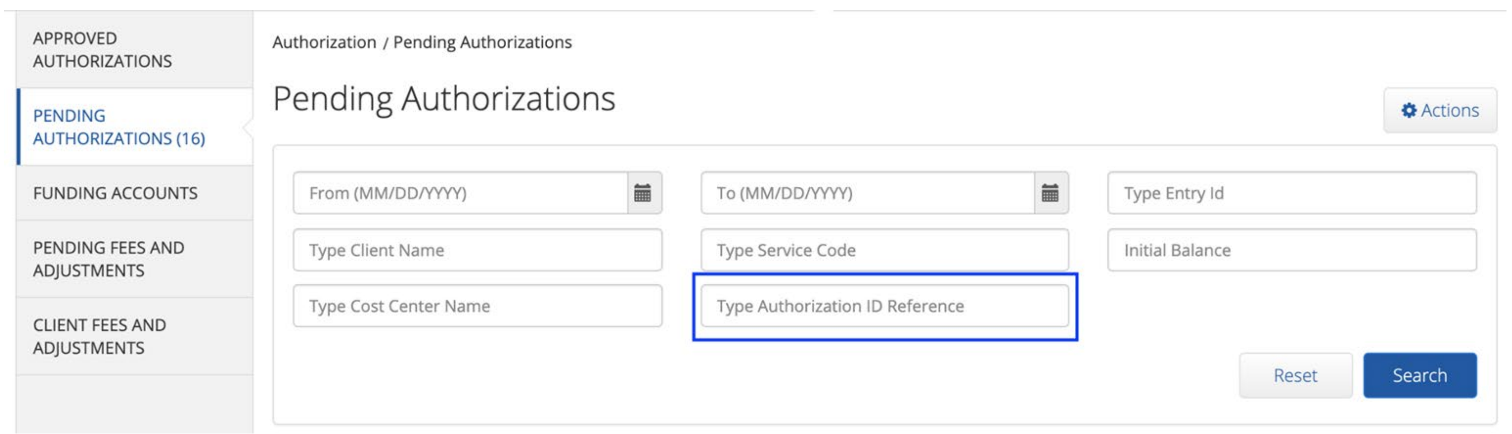


Authorizations

Authorizations: Authorization Reference ID

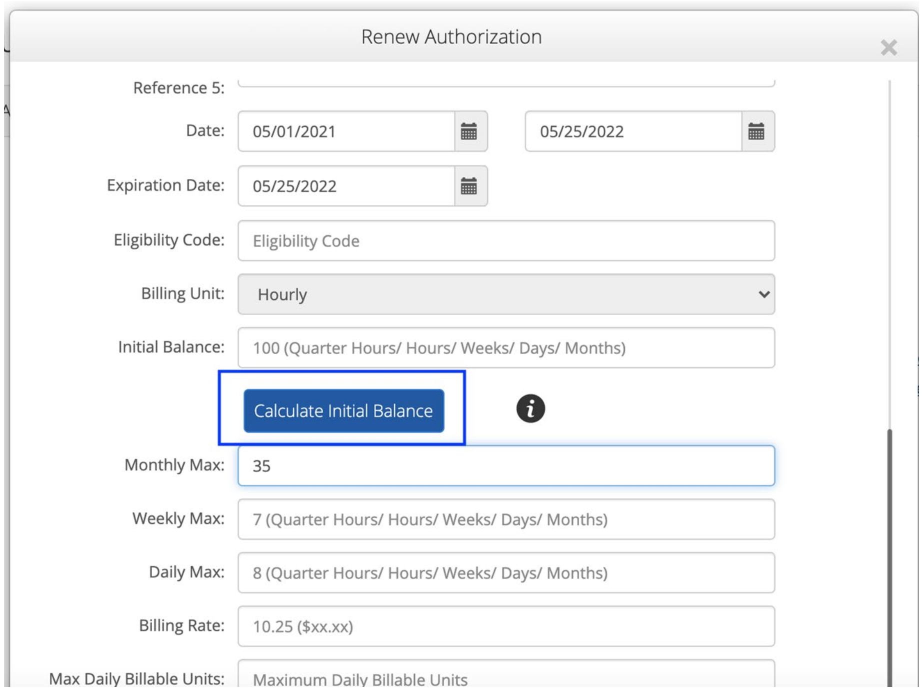
- Authorization ID Reference has been added as a filter on both the Approved Authorizations and Pending Authorizations pages.





Authorizations: Calculate Initial Balance

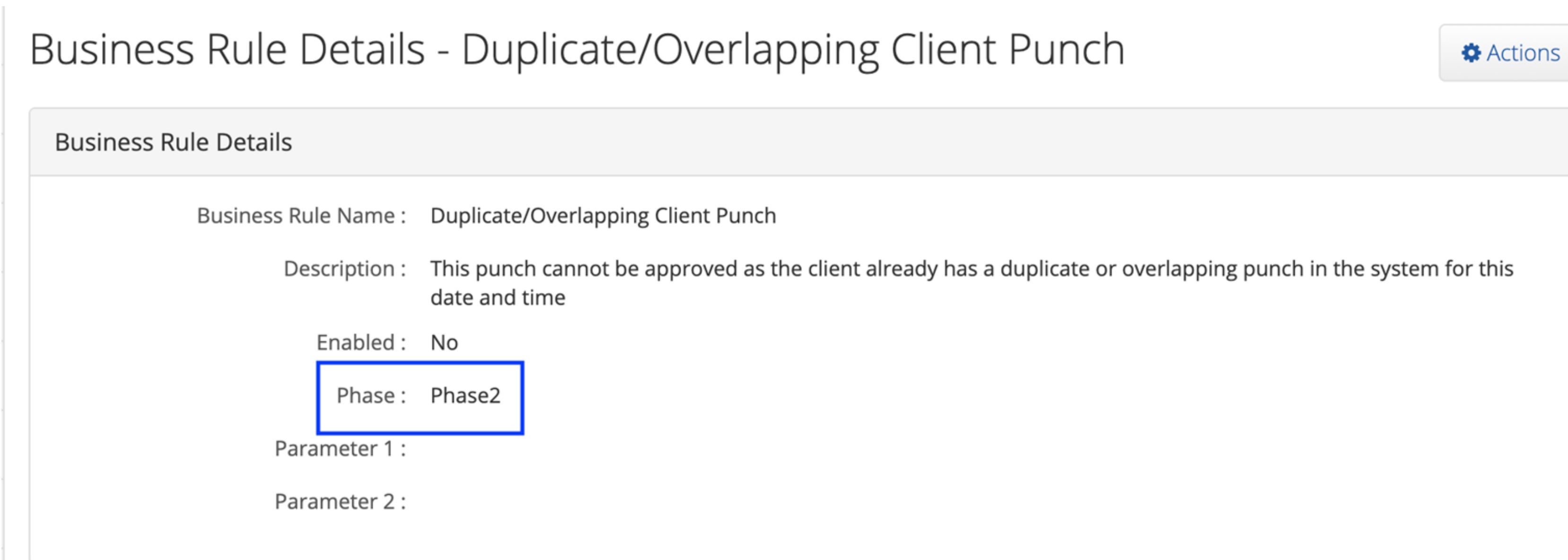
- There is a new feature that allows users with the appropriate role and/or permission to calculate the initial balance when creating or renewing authorizations.
- When the Calculate Initial Balance button is clicked, the system will automatically populate the initial balance based on the values set in the Start Date, End Date, and Monthly Max fields. The initial balance field will still be editable even after clicking the Calculate Initial Balance button in case any changes need to be made.
- Calculating the Initial Balance has no effect on authorization imports or the remaining balance of existing authorizations.
- This feature requires an instance level setting change. Please contact your DCI representative if you would like it enabled.



Business Rules

Business Rule: Client Duplicate/Overlapping Punch

- The Client Duplicate/Overlapping Punch business rule validation has been moved from Phase 3 to Phase 2.
- This means that the check runs after the punch is created but prior to being approved.



Business Rule: Max Hours Per Year Per Employee Per Client Per Service Code

- There is a new business rule called Max Hours Per Year Per Employee Per Client Per Service Code.
- This business rule validates that an employee has not exceeded the maximum allowed hours for a client per year under a specific service code
- This business rule will be validated during Phase 2 validation.

Business Rule Details - Max Hours Per Year Per Employee Per Client Per Service Code

Actions

Business Rule Details

Business Rule Name : Max Hours Per Year Per Employee Per Client Per Service Code

Description : The purpose of this business rule is to validate that an employee has not exceeded the maximum allowed hours for a client per year under a specific service code

Enabled : No

Phase : Phase2

Parameter 1 :

Parameter 2 :

Edit Business Rule

Business Rule Name: Max Hours Per Year Per Employee Per Client Per Service Code

Enable:

Parameter 1: Mode (Integer 1 or 2)

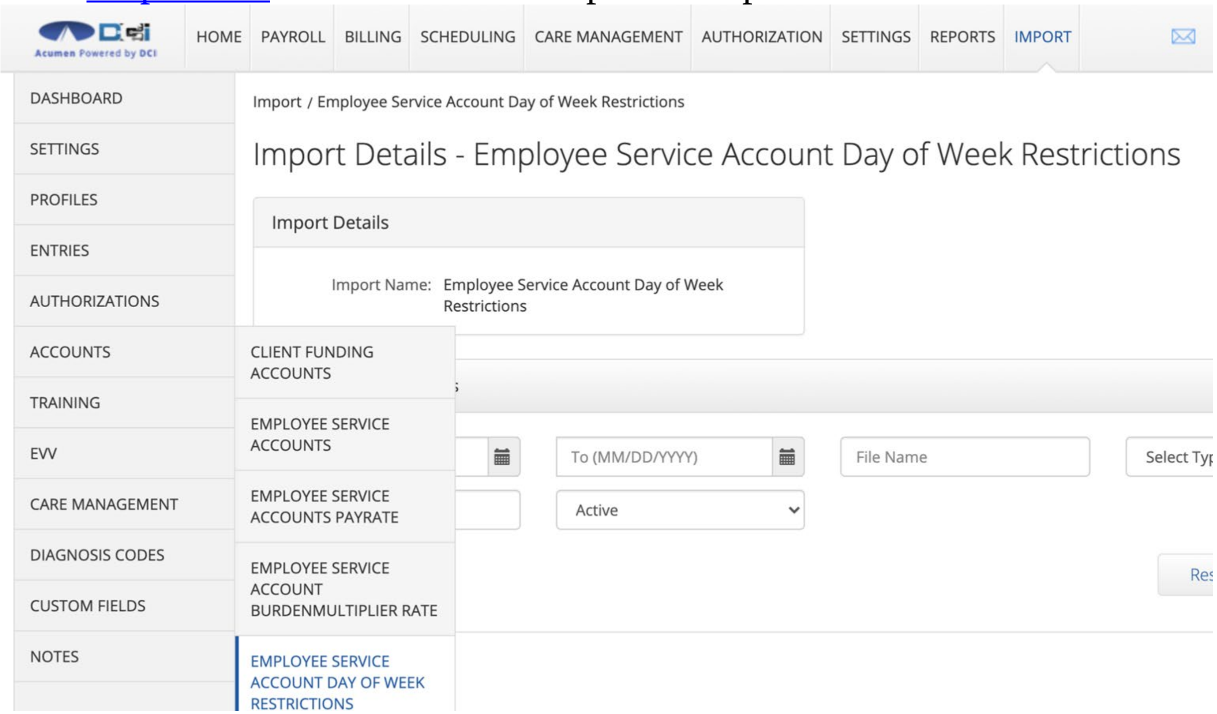
Parameter 2: Max Hours (Decimal)

Cancel Save

Imports

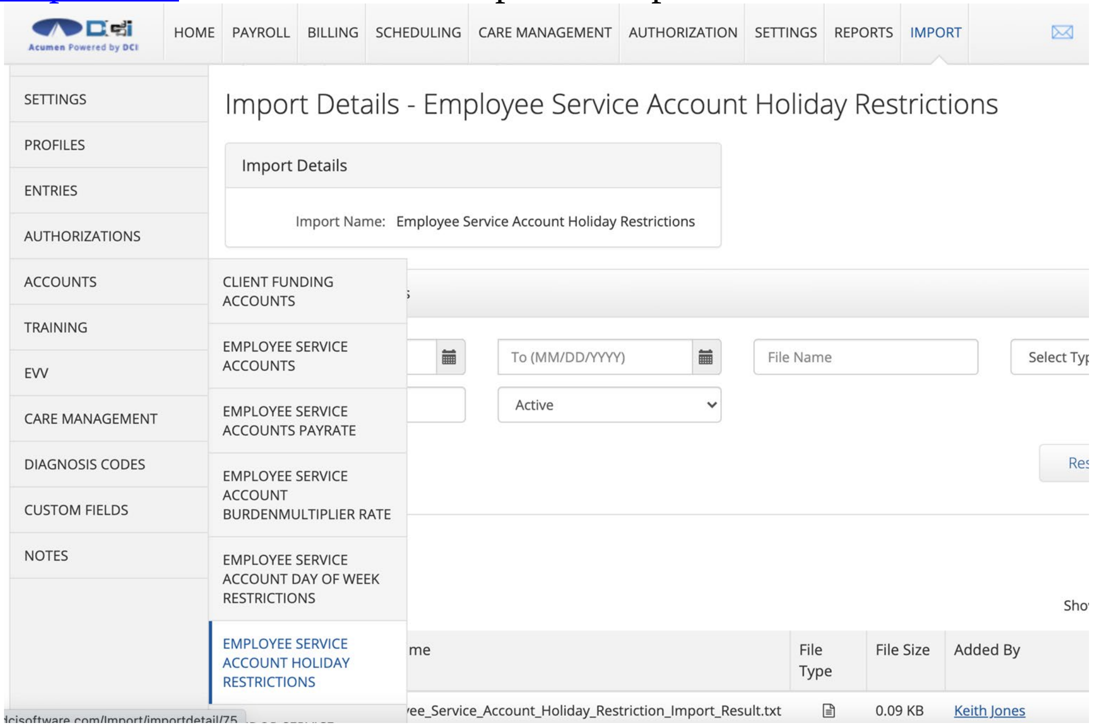
Imports: Employee Service Account Day of Week Restrictions

- There is now an import for Day of Week Restrictions.
- This import allows users with the appropriate role or permission to enable or disable day of week restrictions in bulk.
- Please visit the [Help Center](#) to obtain the most updated Import File Formats Document.



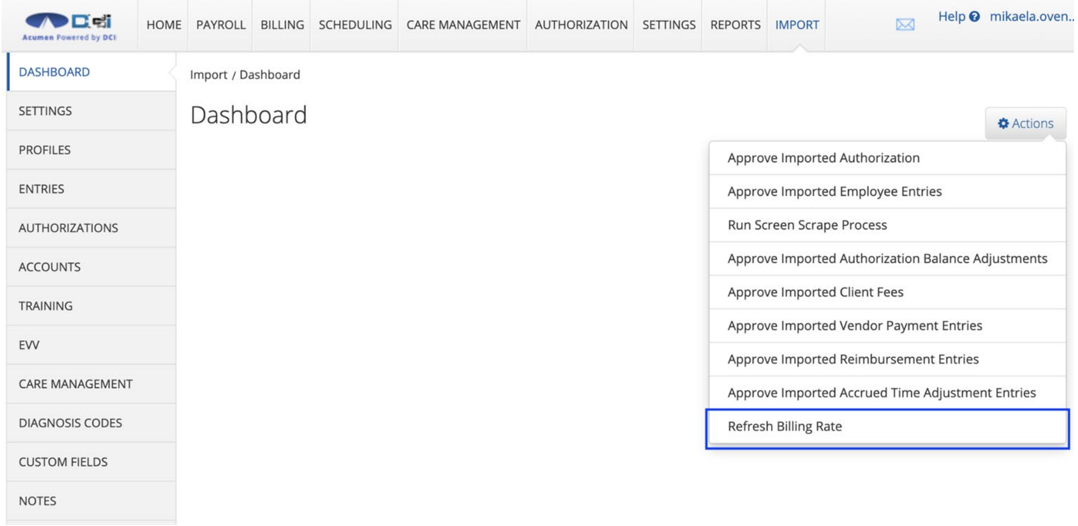
Imports: Employee Service Account Holiday Restrictions

- There is now an import for Holiday Restrictions.
- This import allows users with the appropriate role or permission to enable or disable holiday restrictions in bulk.
- Please visit the [Help Center]() to obtain the most updated Import File Formats Document.



Imports: Refresh Billing Rate

- There is a new task available on the Actions menu of the Import Module Dashboard called Refresh Billing Rate.
- When clicking Refresh Billing Rate, the system will:
    - Pull a list of Rate Change Authorization Entries imported by the current user.
    - Using the list pulled above, will search the system for approved and batched funding account entries impacted.
    - Update the rate on the funding account entries.
- This action functions the same as the Refresh Billing Rate button in the Billing module.



Additional Updates

Additional Updates

- This release includes additional updated to enhance user experience. Some of these updates include:
  - There is a new Employment Status of Inactive on the Add/Edit Employee wizards. This new status functions the same as the status of Suspended and prevents the employee from logging in.
  - SSN is now a conditionally optional field for Employee Type of Contractor. If Allow SSN Retrieval is not enabled, then Contractor SSN is optional. If Allow SSN Retrieval is enabled, then it is a required field for Contractors. As part of this change, the Employee Type field on the Add/Edit Employee Wizard has been moved from the second tab to the first tab just above the SSN field.
  - Decimal values are now allowed on Starting and Ending Odometer fields for Mileage and Client Transportation entries.

Thank you!

DIRECT CARE INNOVATIONS
www.dcisoftware.com