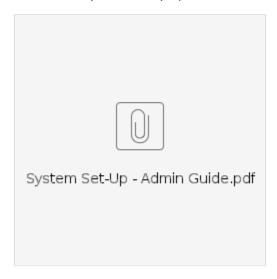# System Set-Up - Admin Guide

Description: In this guide, users will learn how to complete hourly system set-up, along with all profile types.

Roles Required: Super User, Varies by object

Permissions Required: Varies by object

System Set-Up - Admin Guide.pdf

Contents

Overview

The information below is for an hourly service set-up in DCI.

After these steps are completed, the user can build any type of service or program in DCI.

This guide is foundational. Our help center has supplemental set-up guides for:

- Creating a day program, parenting program, residential program, and group services
- Granting roles, i.e., supervisor or employer, or permissions to a user account (employee profile)
- Profiles - guardian, case worker, or vendor
- System settings - business rules, holiday schedules

The purpose of this set-up guide is to establish a strong foundation. Enter key word(s) into the help center to locate additional resources.

When reading below, certain steps will refer to the following information:

*Denotes fields in which data is stored but does not trigger action in another part of the system.

**Denotes an optional reference field available for use based on the unique needs of your business.

NOTE: If there are fields that are needed but not listed, they can be added using the Custom Fields functionality. Please refer to the Custom Fields Admin Guide for more details.

Create Cost Center

Description: The department or other unit within the organization to which costs should be charged or revenue should be applied for accounting purposes.

Roles Required: Super User

Permissions Required: Cost Center Admin

Required Entities Before Creation:

- Super User access

Steps to create:

1. Log in to DCI
2. Click **Cost Centers** on the submenu
3. Click **Actions**
4. Select **Add New Cost Center** and complete the form wizard
   a. Cost Center Name **(required)**: Generic cost center name recognizable by most users
   b. Cost Center Code **(required)**: Accounting code
   c. Select State **(required)**: State of the cost center
   d. **Cost Center Reference (optional)
   e. **Cost Center Reference 2 (optional)
   f. Certification Template (optional): Select if there are a set of certification requirements specific to the cost center
5. Status **(required)**: Defaults to active. Switch to inactive when this is no longer a valid cost center.
6. Click **Save** to continue and **Yes** to confirm

Create Funding Source

Description: Entity that pays the organization to provide the service, defines specifications for those services, and issues authorizations for clients to receive said services.

Roles Required: Super User

Permissions Required: Funding Source Admin

Required Entities Before Creation:

- Cost Center

Steps to create:

1. Log in to DCI
2. Click **Settings** on the main menu
3. Click **Funding Sources** on the submenu
4. Click **Actions**
5. Select **Add New Funding Source**. Complete the form wizard.
   a. Name **(required)**
   b. Type **(required)**
   c. Address **(required)**
   d. Time Zone (optional): Select from drop-down
   e. Cost Center **(required)**: Administrative or overhead cost center
   f. Phone **(required)**
   g. *Alternate Phone (optional)
   h. Authorization Automation Integration (optional): Auto updates authorization from the state
         i. Supports Automated Authorization Download: Currently only available in Oregon and Arizona for government funding sources.
         ii. See Screen Scaping Guide for more details
   i. EDI (optional – **required if using EDI**):
         i. Enable EDI: Yes or no options, defaults to no.
         ii. Enable EDI Transmission: Field becomes available if selected yes in enable EDI. Yes or no options default to no.
         iii. EDI Sender ID: Unique id provided by DCI
         iv. EDI Receiver ID: Unique id provided by DCI
   j. EVV (optional – client attestation): Click the blue **plus (+)** icon to enable EVV options. These options all have a yes or no option. Selecting yes will turn this option on and the employee will be able to select this EVV method when prompted:
         i. Allow Signature EVV Verification
         ii. Allow Password EVV Verification
         iii. Allow Pin EVV Verification
         iv. Allow Picture EVV Verification
               1. If Yes, the following field appears:
                     a. Perform Picture Facial Recognition
                           i. If yes, the following field appears:
                                 1. Picture Facial Recognition Threshold: Enter the minimum accuracy threshold
         v. Allow Voice Recording EVV Verification
         vi. Allow FOB EVV Verification
         vii. Allow Mobile App Client Signoff Verification
   k. Approve Unverified EVV (optional): Yes or no options. If yes is selected, auto approval will have the ability to approve the following:
         i. Picture

          ii. Signature
          iii. Voice Recording
- l. Allow Offline Mobile App (instance level setting): If enabled for instance, yes or no options, default is no. If yes is selected, offline mode will be enabled for this funding source.
- m. Email **(required)**
- n. Sleep Shift Start and End (optional): Enter if the funding source authorizes a defined sleep shift.
- o. **Provider Id (optional)
- p. **Profile Reference (optional)
- q. Status: Defaults to active. Select inactive when this is no longer a valid funding source.
- r. Exclude from Auto Approval: Yes or no options, default is no. Select yes to exclude entries from this funding source from being processed for auto-approval.
- s. Schedule Compare Logic **(required)**: Select default or duration
- t. Require Reason Codes for Late Entries: Yes or no options, default is no. Select this to require a reason code for historical entries.
- u. Require Reason Codes for Manual Entries: Yes or no options, default is no. Select this to require a reason code for manual entries.
6. Click **Save** to continue and **Yes** to confirm

Create Service Code

Description: Service a client is receiving with specifications of how it should be provided and billed by the funding source. Completing a service code has many of the same fields regardless of account type. The process lists detail for all fields in the form wizard for hourly account type and highlights the differences for other account types. The hourly account type has the most fields and is the longest-form wizard. Other account types have many of the same fields, but some are omitted.

To create a different account type such as client transportation, group services, or day program, follow the steps below, but select the appropriate account type in step 9b.

Roles Required: Super User

Permissions Required: Funding Source Admin

Required Entities Before Creation:

- Cost Center
- Funding Source

Steps to create:

1. Log in to DCI
2. Select **Settings** on the main menu
3. Select **Funding Sources** on the submenu
4. Search for a funding source in the search box
5. Select the funding source
6. View or edit by clicking anywhere in the funding source row
7. funding source details page will open
8. Click **Actions**
9. Select **New Service Code**. Complete the form wizard.
    - a. Funding Source: Is populated from the funding source used to create the service code. The field is locked.
        - i. If a service code is added directly from the funding source tab without first opening a funding source, the field is unlocked, and a funding source can be selected from the drop-down.
    - b. Account Type **(required):** The type of program or service correlated with this service code.
        - i. Hourly – 1 to 1 service
        - ii. Residential Program – client lives at the program
        - iii. Day Program – client travels to the program
        - iv. Group Service – 2 or more clients
        - v. Parenting Program - client lives at the program
        - vi. Transportation – to and from the day program
        - vii. Client Transportation – used in conjunction with an hourly service
        - viii. Vendor (FI only) – vendor payments
    - c. Service Code Name **(required)**: User-friendly name. Employees will select when adding a punch.
    - d. Funding Type **(FI only - required)**: Select whether authorization is units-based or dollar-based
    - e. Billing Details: Click the blue **plus (+)** icon to expand the billing options
        - i. Bill Code **(required)**: Unique identifier provided by the funding source
        - ii. Bill Code Modifiers: Optional field allowing up to four bill code modifiers
        - iii. Billable: Defaults to yes. Select no if this is a non-billable service.
        - iv. Billing Unit **(required)**: The increment in which the funding source requires the service to be billed
        - v. Billing Multiplier **(required for hourly)**: Use to define hourly units for billing. Options are:
            1. Hourly – 60 minutes
            2. Half Hourly – 30 minutes
            3. Quarter Hourly – 15 minutes
        - vi. Default Billing Modifier (optional): Optional modifier, appears on the billing file
        - vii. Rounding Increment **(required)**: Select by minutes
            1. None – no rounding
            2. 15 – round by 15 minutes
            3. 30 - round by 30 minutes
            4. 60 - round by 60 minutes
        - viii. Rounding Type **(required if the rounding increment is 15, 30, 60)** – Select how to round
            1. Round – to the nearest
            2. Truncate – round down

3. Increment – round up
        ix. Billing Rollup Type **(required)**: Entries will be reported by billing rollup ID by the client
            1. None – Each entry has a unique billing rollup id
            2. Daily – Entries with the same date and client have the same billing rollup id
            3. Weekly - Entries in the same week and for the same client have the same billing rollup id
            4. Monthly - Entries in the same month and for the same client have the same billing rollup id
    f. Payroll Details: Click the blue **plus (+)** icon to expand the payroll options
        i. Payable: If yes, all employee time entries associated with this service code will appear on the payroll file. If no, the employee will not be paid for time clocked against this service.
        ii. Overtime Exempt: If yes, employee time entries associated with this service code will not count towards the accumulation of 40 hours to calculate overtime.
        iii. Payback/Rebill (only for dollars-based): If Yes, overtime automatically reallocates to the correct date of service in the pay period.
        iv. Default Pay Rate (optional): Entering a pay rate here will autofill the pay rate in all service accounts created with this service code.
            1. Default Pay Rate can be edited on the Service Account
        v. Has Max Pay Rate (optional): Defaults to no. If yes, this service code will have a max pay rate for any employee providing the service. This includes overtime.
        vi. Max Pay Rate (optional): If yes, this field unlocks and becomes required.
    g. Show Remaining Balance: Defaults to no. If yes, when an employee creates a punch, the remaining authorization balance displays in units or dollars in the web portal, and displays total available time in the mobile app.
        a. Please note: For dollars-based service codes, the remaining balances are **estimates** as they can be impacted by several factors such as overtime, changes in employee pay rates, or having multiple employees with different pay rates working for the same client.
    h. Remaining Balance Details: Click the blue **plus sign (+)** to expand the section
        i. Show Monthly Balance: If yes, the remaining monthly balance displays as time when employees create a punch in the mobile app.
        ii. Show Weekly Balance: If yes, the remaining weekly balance displays as time when employees create a punch in the mobile app.
        iii. Show Daily Balance: If yes, the remaining daily balance displays as time when employees create a punch in the mobile app.
    i. Allow Diagnosis Code: Defaults to yes. If no, this field will not appear when an employee adds an entry for this service code.
    j. Allow Accrued Time Entries: If yes, accrued time entries are permitted.
    k. Require EVV Location: Defaults to no. If yes, all entries will require an EVV location.

        i. When the setting is enabled, employees will be required to select an EVV location at clock in and clock out for punch entries.
        ii. If an EVV location is not selected, the user will receive an alert and the clock in or clock out cannot occur until the location is selected.
    l. EVV Required: If yes, EVV will be required on all punches associated with this service code. EVV must be enabled to activate Phone EVV and/or FOB functionality.
    m. Enable Geofencing: If yes, this service can only be provided within an established radius from approved locations.
        i. The punch is flagged for review, not rejected.
    n. Require Care Notes: Only for Hourly account type when the Care Management module is enabled, and the task is required. If yes is selected, employees cannot clock out in the mobile app without publishing care notes.
    o. Has Daily Rate: Defaults to yes, meaning the funding source will switch to a daily rate for this service after a specified number of hours is reached in a day.
        i. Daily Max **(required)**: The maximum number of hours this service can be provided in a day before switching to the daily rate.
        ii. Include Daily Pay Hours in OT Calculations: When converted to the daily rate, selecting yes means hours are included in overtime calculations.
    p. Default Auth Specs (optional): If this service code has a standard billing rate, daily max, weekly max, and/or monthly max, mark yes and complete the fields that are made visible. All new authorizations under this service code will auto-populate these figures.
    q. Service Code Reference 1, 2, and 3 (optional): Data entered in these fields are defined by the user and appear on the billing file
    r. GL Code **(required)**: Code that will link all associated time entries to the appropriate GL account for the customer
    s. Description (optional): Additional information as needed
    t. Status: Defaults to active. Select inactive when no longer a valid service code.
    u. Canned Statements (optional): Enter canned statements (acknowledgments) that the employee can select at clock out.
    v. Default CPT Code and Default HCPCS Code (optional): The default code for this service. Only one or the other may be entered.
        i. CPT and HCPCS codes appear on client funding accounts and may be edited.
    w. Certification Template (optional): Select if there are a set of certification requirements specific to this service code
    x. EVV Aggregation Required (account type only - hourly, client transportation, group service) Yes or no options, defaults to no.
    y. Is Travel Time (account type only - hourly): Yes or no options, defaults to no.
    z. Display Monthly Budget Link (instance level setting): Monthly budget report will be linked to the authorizations of individuals receiving this service and available for viewing on employer and case worker profiles
10. Select **Save** to continue and **Yes** to confirm

Create Client Profiles

Description: Profile in DCI representing a client (member) receiving services. Users of this type can view their employees' entries.

Roles Required: Super User

Permissions Required: Client Admin

Required Entities Before Creation:

- Cost Center

Steps to Create:

1. Log in to DCI
2. Click **Home** on the main menu

3. Click **Clients** on the submenu
4. Click **Actions**
5. Select **Add New Client**. Complete the form wizard.
    a. Basic Demographics tab:
        i. First Name **(required)**
        ii. Last Name **(required)**
        iii. Full Name (optional)
        iv. Address **(required)**: Client's physical address
        v. GNIS Code **(required)**: Click the blue **search location** link after entering the address. This will generate the GNIS Code.
        vi. Time Zone (optional): Select from drop-down
        vii. Phone **(required)**
        viii. *Alternate Phone (optional)
        ix. Mobile (optional)
        x. Email **(required)**: If EVV will be used, a valid and unique email address for the client must be entered.
        xi. DOB **(required)**
        xii. **Profile reference (optional)
        xiii. *SSN (optional)
        xiv. *Verify SSN **(required if SSN was entered)**
        xv. Allow SSN Retrieval: Yes or no options, default is no. If yes is selected, the SSN will be stored in a retrievable format for EVV aggregation. Only select yes if the funding source requires SSN to be aggregated.
        xvi. Attach Photo (optional): Required if facial recognition will be used for EVV
    b. Click **Next**
    c. Client Information tab:
        i. Client Id **(required)**: Unique Id usually provided by the funding source
        ii. Medicaid No (optional)
        iii. Insurance Group No (optional)
        iv. Insurance Plan No (optional)
        v. Insurance Payer No (optional)
        vi. Insurance Number (optional)
        vii. Certification Template (optional): Select if there are a set of certification requirements for employees working with this client
        viii. Cost Center **(required)**: Select the client's home cost center
        ix. Preferred Language (optional): Select the language spoken by the client
        x. *Received Date (optional): The date the client entered the company's services
        xi. *Packet Mailed (optional): The date the company completed and returned to the funding source all required documentation for the client to enter its services
        xii. Client Status: Defaults to active. Select inactive when no longer a client.
        xiii. Discharge Date (optional): Enter at time of the client's discharge
        xiv. Suspended Date (optional): Enter the date the client suspended services, i.e., for a hospitalization.
        xv. **Code (optional)
        xvi. *Region (optional): The region in which the client receives services, as designated by the funding source.
        xvii. *Guardian (optional): Client's guardian name if the client is not his or her guardian
        xviii. *Fee (optional): The fee charged to the program for serving the client
        xix. *Primary Diagnosis (optional): The ICD-10 code that enables the client's eligibility for service, as required by some funding sources.
        xx. *Cost Share (optional): The client's responsibility for payment toward services
        xxi. Enable Caregiver Rating Emails (optional): If checked the client and/or guardian will receive emails to rate their experience with their caregiver.
        xxii. Enable Care Management (optional): If checked the client will be available in the care management module for a plan of care and goal tracking.
        xxiii. Enable Vendor Payment (FI mode only - optional): If checked the client will be eligible to make vendor payments.
        xxiv. Enable Employer Reimbursement (FI mode only - optional): If checked the client will be eligible for reimbursements.
    d. Click **Next**
    e. EVV Location tab:
        i. Copy from Profile Address (optional): Copy the address from the basic demographics tab of the form.
        ii. EVV Location Name **(required if completing the form)**: The name of the location, i.e., home.
        iii. EVV Location Type **(required if completing the form)**: Select from drop-down
        iv. Address **(required if completing the form)**: The location address
        v. Country **(required if completing the form)**
        vi. Phone Number (optional): Required for Phone EVV
        vii. Phone Verified **(required):** Select yes or no, has the phone number been verified for Phone EVV?
        viii. Phone Type (optional)
        ix. Phone Carrier (optional)
        x. Begin Date **(required if completing form)**: The first date the location is approved for use
        xi. End Date (optional): The last date the location is approved if known.
        xii. Status **(required):** Select from the drop-down.
        xiii. Primary (optional): Select if this is the primary location to receive services
    f. Click **Next**
    g. Authentication Information tab:
        i. Enable Client Login (optional): Required if client portal sign-off will be used for EVV
            1. Password **(required)**: Enter a temporary password. Hover over the white "i" (information) for password requirements. The client will be prompted to change their password when they log in.
            2. Confirm Password **(required)**: Enter the same as above to confirm.
            3. Pin **(required)**: Can be used instead of a password on mobile devices.
        ii. Username (optional to change): Will be used by the client for all future logins.
        iii. Authentication Status: Defaults to active if enable client login is checked. Defaults to disabled if enable client login is not checked.
    h. Click **Next**
6. Review client information, click **Save** to continue, and **Yes** to confirm.

Create Funding Account

Description: Ledger or bucket where client authorizations, attendance, employee service, and billing entries are placed.

Roles Required: Super User

Permissions Required: Billing Role, Authorization Role

Required Entities Before Creation:

- Cost Center
- Funding Source
- Service Code
- Client Profile

Steps to create:

1. Log in to DCI
2. Click **Authorization** on the main menu
3. Click **Funding Accounts** on the submenu
4. Click **Actions**
5. Select **Add New Funding Account**. Complete the form wizard.
   a. Funding Source **(required)**
   b. Account Type **(required)**: Select the account type associated with the appropriate service code.
      i. Residential or Parenting Program:
         1. Start and End Dates **(required):** The start and end date for this funding account
      ii. Day Program or Group Service:
         1. Staff Ratio **(required)**: The minimum staffing ratio required for this funding account. Hover over the white "i" (information) for details.
   c. Service Code **(required)**: All service codes associated with the account type and funding source selected will appear in the drop-down menu
   d. Funding Type: Auto populates based on the service code
   e. Client **(required)**: The client receiving the service
   f. Certification Template (optional): Select if there are a set of certification requirements specific to this funding account
   g. Cost Center **(required):** The cost center in which the service is being provided (this may differ from the cost center associated with the Funding Source).
   h. *Case Worker (optional)
   i. *Region (optional)
   j. Billing Unit **(required)**: The field is auto-filled based on the Service Code.
   k. **Account Reference (optional)
   l. Grace Period: Defaults to disabled. By clicking enabled, the grace period for a certification template that is linked to this funding account will be permitted.
      i. Grace Period Expiration: The date the grace period will expire is based on the time frame associated with the linked certification template.
   m. Status: Defaults to active. Switch to inactive when this is no longer a valid funding account.
   n. Default CPT Modifiers and Default HCPCS Modifiers (optional): These fields will be editable if a default CPT code or default HCPCS code is added to the service code. Up to four two-digit modifiers can be added.
6. Click **Save** to continue and **Yes** to confirm

Create Authorization

Description: An entry in DCI representing an allotment of dollars/units from a funding source to provide a service to a client. Authorization is for one service code and client.

Roles Required: Super User

Permissions Required: Billing Role, Authorization Role

Required Entities Before Creation:

- Cost Center
- Funding Source
- Service Code
- Client Profile
- Client Funding Account

Steps to create:

1. Log in to DCI
2. Click **Authorization** on the main menu
3. Click **Pending Authorizations** on the submenu
4. Click **Actions**
5. Select **Add New Authorization.** Complete the form wizard.
   a. Client Name **(required)**
   b. Account Type **(required)**: Select the account type associated with the appropriate service code
   c. Funding Source: The system auto-populates this field based on the client's name
   d. Service Code: Select from the drop-down
   e. Funding Type: The system auto-populates this field based on the account type

f. Cost Center: The system auto-populates this field based on the client's name
g. **Authorization ID Reference (optional)
h. **Authorization ID Reference 1-5 (optional)
i. Date **(required)**: Enter the start and end date during which time the service can be provided under this authorization
j. Expiration Date **(required)**: Enter the date the authorization expires, and a new authorization must be obtained to continue providing this service.
k. Eligibility Code (optional): Code that denotes the client's eligibility for this service
l. Billing Unit: The system auto-populates this field based on the account type
m. Initial Balance **(required)**: The total units of service that can be provided under this authorization
n. Monthly Max **(required)**: The maximum units of service that can be provided per month
o. Weekly Max **(required)**: The total units of service that can be provided per week
p. Daily Max **(required)**: The total units of service that can be provided per day
q. Billing Rate **(required)**: The rate per unit of service authorized to bill for as determined by the funding source
r. Max Daily Billable Units (optional): If completed, billing will switch to daily (at the rate established on the associated service code) after the indicated units of service have been exceeded.
s. Non billable (optional): Check box if funding source will not be billed for this service
t. Hide Initial Balance (optional): Check box if initial balance should not display on reports or widgets
u. Billing Hold: Yes or no options, defaults to no.
v. Additional budget fields (FI only - optional): For reporting purposes
6. Click **Save** to continue and **Yes** to confirm
7. Use filters to find the desired authorization and click **Search**
8. Select the **"A"** in the authorization row to approve
9. Click **Yes** to confirm

Create Employee Profiles

Description: An account in which an employee is assigned to a client, program, or administration function to provide a specified service. This can be a client or non-client specific. Authorizes staff to make a punch for that service.

Roles Required: Super User, Supervisor

Permissions Required: Employee Admin

Required Entities Before Creation:

- Cost Center
- Employee Profile
- For Hourly and Client Transportation Service Accounts:
  - Funding Source
  - Service Code
  - Client Profile
  - Client Funding Account

Steps to Create:

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Click **Actions**
5. Select **Add New Employee.** Complete the form wizard.
   a. Basic Demographics tab:
      i. First Name **(required)**
      ii. Last Name **(required)**
      iii. Full Name **(required)**
      iv. Address **(required)** – After entering, the click blue **search location** hyperlink to populate GNIS Code.
      v. Time Zone: Select from drop-down
      vi. Phone **(required)**
      vii. *Alternate Phone (optional)
      viii. Mobile Number (optional)
      ix. Email **(required)**
      x. DOB (optional)
      xi. **Profile Reference (optional)
      xii. **Training System Reference (optional)
      xiii. Employee Type **(required)**: Dictates how the employee's hours are processed for payroll, including whether they are eligible for overtime.
      xiv. *SSN **(required)**
      xv. *Verify SSN **(required)**
      xvi. Allow SSN Retrieval: Yes or no options, default is no. If yes is selected, the SSN will be stored in a retrievable format for EVV aggregation. Only select yes if the funding source requires SSN to be aggregated.
      xvii. Gender (optional): Select from drop-down
      xviii. Employee Mailing Address (optional): If using, exclude commas and special characters.
      xix. Attach Photo (optional): Required if facial recognition will be used for EVV.
6. Click **Next**
   a. Employee Information tab:
      i. Domestic Worker (optional): Only select yes if an employee is classified as a domestic worker (not applicable to all states)
      ii. Domestic Worker 7 Day Exception: This field unlocks if domestic worker is set to yes. Only select yes if the domestic worker agrees to a 7-day work week.

      iii. Domestic Worker Preferred Day of Rest: Unlocks if yes is selected for domestic worker 7 Day exemption is selected. Certain states pay overtime if the domestic worker works on their day of rest.
      iv. Employee Number **(required)**: Number provided by the organization at the time of hire
      v. Weekly Hours Available **(required)**: Maximum number of hours the employee is available to work each week. Links to the scheduling module.
      vi. **Professional Id1 (optional)
      vii. **Professional Id2 (optional)
      viii. **Payroll Id (optional)
      ix. Certification Template (optional): Select if there are a set of certification requirements specific to this employee
      x. Holiday Schedule **(required)**: Dictates which days this employee is eligible for holiday pay
      xi. Cost Center **(required)**: The employee's home cost center
      xii. *Hire Date (optional): The date the employee was hired
      xiii. Preferred Language: Default is English

7. Click **Next**
    a. EVV Location tab (not used for employees – specific to the client, where they are receiving service):
      i. Copy from Profile Address (optional): Copies the address from the basic demographics tab
      ii. EVV Location Name **(required if completing)**: The name of the location, i.e., home.
      iii. EVV Location Type **(required if completing)**: Select from drop-down
      iv. Address **(required if completing)**: The location address. Auto-populates if Copy from Profile Address box was checked.
      v. Country **(required if completing)**
      vi. Phone Number (optional): Required for Phone EVV
      vii. Phone Verified **(required):** Select yes or no, has the phone number been verified for Phone EVV?
      viii. Phone Type (optional)
      ix. Phone Carrier (optional)
      x. Begin Date **(required if completing)**: The first date the location is approved for use
      xi. End Date (optional): The last date the location is approved, if applicable.
      xii. Status **(required if completing)**: Select from drop-down
      xiii. Primary (optional): Select if this is the primary EVV location

8. Click **Next**
    a. Authentication Information tab:
      i. Username (optional to change): Will be used for all future logins by this employee
      ii. Password **(required)**: Will be used for all future logins by this employee. Hover over the white "i" (information) for password requirements.
      iii. Confirm Password **(required)**: Enter the same password as above to confirm
      iv. Pin **(required)**: Can be used instead of a password when logging in via a mobile device
      v. Employment Status **(required)**: The employee's status with the organization
      vi. Authentication Status **(required)**: The status of the employee profile. Defaults to active. Select disabled if the employee is no longer with the organization. Select locked to temporarily prevent the employee from logging in.
      vii. Permissions (optional): Select all tasks the employee can perform for the entire system
        1. See the Permissions Guide to learn more

9. Click **Next**
10. Review Employee Information, click **Save** to continue, and **Yes** to confirm.

<u>Create Employee Service Account</u>

Description: An account in which an employee is assigned to a client, program, or administration function to provide a specified service. This can be a client or non-client specific. Authorizes staff to make a punch for that service.

Roles Required: Super User, Supervisor

Permissions Required:

Required Entities Before Creation:

- Cost Center
- Employee Profile
- For Hourly and Client Transportation Service Accounts:
  - Funding Source
  - Service Code
  - Client Profile
  - Client Funding Account

Steps to create:

1. Log into DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Search for and locate the employee
5. Click anywhere in the row to open the **Employee Details** page
6. Click **Actions**
7. Select **New Service Account.** Complete the form wizard.
    a. Account Type **(required)**: Select the account type associated with the appropriate service code
      i. Hourly/Client Transportation
        1. Client **(required)**: The client receiving service from the employee
        2. Relationship Type **(required)**: Employee's relationship with the client
        3. Service Code **(required)**: The system generates drop-down options based on the client's name
        4. Funding Source: The system generates drop-down options based on the client's name
        5. Funding Type: System auto-populates

      a. Dollar funding type only
          i. Burden Multiplier **(required)**: The percentage of the pay rate that must be added to account for all associated fees. Enter as a decimal.

6. Cost Center **(required)**: The cost center in which the employee will provide the service
7. Employee Number (optional): Recommended for use when an employee can work for multiple employers and has a unique employee number for each
8. Pay Rate Name **(required)**
9. Pay Rate (optional): Defaults to 0. If the client has a unique pay rate, it will default to that pay rate. This number can be changed if there is a unique pay rate for this service account.
10. Effective Date (optional): The date the pay rate is effective
11. Daily Pay Max (optional): Enter if the pay rate will switch to daily after a set number of hours
12. Daily Rate (optional): Required if a daily pay max is entered
13. Min Units Per Punch (optional): Enter if a minimum number of pay units must be used when the employee clocks in under this service account
14. Max Units Per Punch (optional): Enter if the employee may not exceed a maximum number of pay units in one shift
15. Start Date (optional): If a date is entered, the employee will not be able to make a punch before this date.
16. End Date (options): If a date is entered, the employee will not be able to make a punch after this date.
17. Payroll Modifier (optional): Used for extra pays. A way to differentiate additional service on the payroll file. A code, not an amount (i.e., TRANS).
18. **Account Reference (optional)
19. Grace Period: Defaults to disabled. By clicking enabled, the grace period for a certification template that is linked to this service account will be permitted.
      a. Grace Period Expiration: The date the grace period will expire based on the time frame associated with the linked certification template
20. EVV Exempt: Yes or no options, defaults to no.
21. Allow Overlapping Pay Rates: Check this box to allow overlapping pay rates
      a. See Pay Rates Guide for details
22. EVV Frequency Type (Hourly Only): If the service code is set to require EVV, this field is required.
23. Case manager (optional)
24. Status: Defaults to active. Switch to inactive when this is no longer a valid service account.

  ii. Administration/Drive/Training/Vacation/Sick/Holiday
1. Cost Center **(required)**
2. Pay Rate Name **(required)**
3. Pay Rate (optional): Defaults to 0. This number can be changed if there is a unique pay rate for this service account.
4. Min Units Per Punch (optional): Enter if a minimum number of billing units must be used when the employee clocks in under this service account
5. Max Units Per Punch (optional): Enter if the employee may not exceed a maximum number of billing units in one shift
6. Start Date (optional): If a date is entered, the employee will not be able to make a punch before this date.
7. End Date (options): If a date is entered, the employee will not be able to make a punch after this date.
8. **Account Reference (optional)
9. Grace Period: Defaults to disabled. By clicking enabled, the grace period for a certification template that is linked to this service account will be permitted.
      a. Grace Period Expiration: The date the grace period will expire based on the time frame associated with the linked certification template
10. Status: Defaults to active. Switch to inactive when this is no longer a valid service account.

  iii. Residential Program/Day Program/Group Service/Parenting Program
1. All fields from Administration/Drive/Training/Vacation/Sick/Holiday

  iv. PTO
1. All fields from Administration/Drive/Training/Vacation/Sick/Holiday, and:
2. PTO Increment (optional): Enter if PTO can only be entered in a set increment (i.e., 8 hours)

  v. Mileage
1. All fields from Administration/Drive/Training/Vacation/Sick/Holiday, and:
2. Payability: Defaults to payable. Change to not payable if the employee will not be paid for this service.

8. Click **Save** to continue and **Yes** to confirm

<u>Create Client Service Account</u>

Description: An account in which a client is linked to an employee or a program to receive a specified service.

Roles Required: Super User, Supervisor

Permissions Required:

Required Entities Before Creation:

- Cost Center
- Funding Source
- Service Code
- Client Funding Account
- Program Profile or Employee Profile (depending on the type of account)

Steps to create:

1. Log into DCI
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Search for and locate the client
5. Click anywhere in the row to open the **Client Details** page

6. Click **Actions**
7. Select **New Service Account.** Complete the form wizard in the same manner as an Employee Service Account. When creating a Client Service Account, the following account types are available:
    a. Hourly
    b. Residential Program
    c. Day Program
    d. Group Service
    e. Parenting Program
    f. Transportation
    g. Client Transportation
8. Click **Save** to continue and **Yes** to confirm

Create Supervisor Profiles

Description: An employee profile that has been assigned the Supervisor role for a cost center. This role can manage employees, clients, service accounts, profile certifications, punch entries, attendance and absence entries, schedules, notes, and attachments.

Roles Required: Super User

Permissions Required: Employee Admin, Role Admin

Required Entities Before Creation:

- Cost Center
- Employee Profile

Steps to create:

1. Follow the steps in *Create Employee Profiles* section to create an employee (base user profile)
2. Click **Settings** on the main menu
3. Click **Roles** on the submenu
4. Click **Actions**
5. Select **Manage Role**
6. Search by name for the newly created employee
7. Select **Supervisor** in the Role field
8. Search and select a **cost center**
9. Click the **+** icon to add the supervisor role to this employee
10. Click **Save** to continue and **Yes** to confirm

Create Employer Profiles (FI mode only)

Description: An employee profile that has been assigned the Employer role for a cost center. This role can manage employee punch entries, add employee punches, notes, and attachments, and run reports for associated cost center(s). An employer may have multiple clients.

Roles Required: Super User

Permissions Required: Employee Admin, Role Admin

Required Entities Before Creation:

- Cost Center
- Employee Profile

Steps to create:

1. Follow the steps in *Create Employee Profiles* section to create an employee (base user profile)
2. Click **Settings** on the main menu
3. Click **Roles** on the submenu
4. Click **Actions**
5. Select **Manage Role**
6. Search by name for the newly created employee
7. Select **Employer** in the Role field
8. Search and select a **cost center**
9. Click the **+** icon to add the employer role to this employee
10. Click **Save** to continue and **Yes** to confirm

Create Guardian Profiles

Description: A guardian profile is intended for parents, family members, guardians, or other designated representatives. It allows those who are authorized to view and sign off on services provided and to view and track authorization information. A user with the guardian profile may have access to one or more clients. While the guardian profile can be linked to multiple clients, the client profile can only be linked to one guardian profile.

Roles Required: Super User

Permissions Required: Guardian Admin

Required Entities Before Creation:

- Cost Center
- Funding Source
- Client Profile

Steps to create:

1. Log into DCI
2. Click **Home** on the main menu
3. Click **Guardians** on the submenu
4. Click **Actions**
5. Select **Add New Guardian.** Complete the form wizard.
   a. Basic Demographics tab:
      i. First Name **(required)**
      ii. Last Name **(required)**
      iii. Address **(required)**
      iv. Time Zone (optional): Select from drop-down
      v. Phone **(required)**
      vi. Alternate Phone (optional)
      vii. Mobile Number (optional): Allows the guardian to receive text notifications after the mobile number has been verified
      viii. Email **(required)**: Must be unique from the client(s) email address
      ix. Cost Center **(required)**
      x. **Profile Reference (optional)
      xi. Click **Next**
   b. Authentication Information tab:
      i. Username **(required)**
      ii. Password **(required)**
      iii. Confirm Password **(required)**
      iv. Pin **(required)**
      v. Status **(required)**: Defaults to active. Select disabled if the guardian is no longer active. Select locked to temporarily prevent the guardian from logging in.
      vi. Click **Next**
      vii. Review Summary tab
      viii. Click **Save** to continue and **Yes** to confirm
6. To link a guardian to a client, add the guardian's name to the Guardian field on the client's profile in the Client Information tab. To complete this process:
   a. Log in to DCI
   b. Click **Home** on the main menu
   c. Click **Clients** on the submenu
   d. Search for and locate the client
   e. Click anywhere in the row to open the **Client Profile Details** page
   f. Click **Actions**
   g. Select **Edit Client.** In the form wizard, select the **Client Information tab.**
      i. In the Guardian field, enter the name of the guardian for this client.
7. Click **Save** to continue and **Yes** to confirm

Create Case Worker Profiles

Description: A case worker represents a funding source worker. Case workers can log in to DCI and view a limited subset of information.

Roles Required: Super User

Permissions Required: Case Worker Admin

Required Entities Before Creation:

- Cost Center
- Funding Source

Steps to create:

1. Log into DCI
2. Click **Home** on the main menu
3. Click **Case Workers** on the submenu
4. Click **Actions**
5. Select **Add New Case Worker.** Complete the form wizard.
   a. Basic Demographics tab:
      i. First Name **(required)**
      ii. Last Name **(required)**
      iii. Address **(required)**
      iv. Time Zone (optional): Select from drop-down
      v. Phone **(required)**
      vi. Alternate Phone (optional)
      vii. Mobile Number (optional)
      viii. Email **(required)**
      ix. Cost Center **(required)**
      x. Funding Source (optional): Select from the drop-down and click the + icon to add
      xi. **Profile Reference (optional)

Can View Notes **(required)**: Defaults to no. If yes is selected, can view notes linked to clients and punches.
xiii. Can View Attachments **(required)**: Defaults to no. If yes is selected, can view attachments linked to clients and punches.
xiv. Click **Next**
    b. Authentication Information tab:
        i. Enable Case Worker Login (optional): If checked, allows the case worker to log in.
        ii. Username **(required)**
        iii. Password **(required if Enable Case Worker Login box is checked)**
        iv. Confirm Password **(required if Enable Case Worker Login box is checked)**
        v. Authentication Status: If Enable Case Worker Login box *is not* checked, options will be disabled or locked. Select disabled if the case worker is no longer active. Select locked to temporarily prevent the case worker from logging in. If Enable Case Worker Login box *is* checked, the field will be locked too active.
        vi. Click **Next**
        vii. Review Summary tab
6. Click **Save** to continue and **Yes** to confirm
7. To link a case worker to a funding source, complete the following:
    a. Log in to DCI
    b. Click **Home** on the main menu
    c. Click **Case Workers** on the submenu
    d. Search for and locate the case worker
    e. Click anywhere in the row to open the **Case Worker Details** page
    f. Click **Actions**
    g. Select **Edit Case Worker.** In the form wizard, select the **Basic Demographics tab.**
        i. Select Cost Center
        ii. Select one or more funding sources from the drop-down
        iii. Click the blue **+ icon** to add the funding source
8. Click **Save** to continue and **Yes** to confirm

<u>Create Residential Program Profile</u>

Description: A profile specific to a residential program in which clients receive services. A residential program profile links to a cost center and may serve multiple clients. Employees log into program profiles to add punches, view entries, and view the program schedule.

Roles Required: Super User

Permissions Required: Residential Program Admin

Required Entities Before Creation:

- Cost Center

Steps to create:

1. Log into DCI
2. Click **Home** on the main menu
3. Click **Residential Programs** on the submenu
4. Click **Actions**
5. Select **Add New Residential Program**. Complete the form wizard.
    a. Basic Demographics tab:
        i. Name **(required)**: Must be at least six characters
        ii. Address **(required)**: After entering, click the blue **search location** hyperlink to populate GNIS Code.
        iii. Time Zone (optional): Select from drop-down
        iv. Phone **(required)**
        v. Alternative Phone (optional)
        vi. Email **(required)**
        vii. Cost Center **(required)**
        viii. Weekly Default Hours (optional): Enter only if the program does not operate 24x7
        ix. Provider Service Location (optional): Unique location identifier such as program license number
        x. **Profile Reference (optional)
        xi. On Call Ratio (optional): Number of employees who can be scheduled as on-call for any given shift
        xii. Allow Sleep Shift: Yes or no options, default is yes. Select no if sleep shifts will not be permitted.
        xiii. EVV Required: Yes or no options, default is yes. Select no if not required.
        xiv. Sleep Shift Start and End: Visible and required if yes was selected in Allow Sleep Shift field.
        xv. Click **Next**
    b. EVV Location tab (optional): Can be added later
        i. Copy from Profile Address (optional): Copies address from the Basic Demographics tab
        ii. EVV Location Name **(required)**: Name of the location
        iii. EVV Location Type **(required)**: Select from drop-down
        iv. Address **(required)**: Location address. Prefills if Copy from Profile Address box was checked.
        v. Phone Number (optional)
        vi. Phone Verified **(required):** Select yes or no, has the phone number been verified for Phone EVV?
        vii. Phone Type (optional)
        viii. Phone Carrier (optional)
        ix. Begin Date **(required)**: First date the location is approved for use
        x. End Date (optional): If applicable, the last date the location is approved for use.
        xi. Status **(required)**: Defaults to active. Change to inactive when the program is no longer valid.
        xii. Primary (optional): Select if this is the primary location to provide services
        xiii. Click **Next**
    c. Authentication Information tab:

i. IP Address (optional): Enter the IP address of the program device to restrict employees to only clock in and out from this device
ii. Username (optional to change): Employees will use this for program log in
iii. Password **(required)**: Employees will use this for program log in
iv. Confirm Password **(required)**: Enter the same password to confirm
v. Pin **(required)**: Used to log in to the program from a mobile device
vi. Status **(required)**: Defaults to active. Change to inactive when the program is no longer valid.
vii. Click **Next**
viii. Confirm summary details
6. Click **Save** to continue and **Yes** to confirm

Create Day Program Profile

Description: A profile specific to a day program in which clients receive services. A day program profile links to a cost center and may serve multiple clients. Employees log into a day program profiles to add punches, view entries, and view the program schedule.

Roles Required: Super User

Permissions Required: Day Program Admin

Required Entities Before Creation:

- Cost Center

Steps to create:

1. Log into DCI
2. Click **Home** on the main menu
3. Click **Day Programs** on the submenu
4. Click **Actions**
5. Select **Add New Day Program**. Complete the form wizard.
   a. Basic Demographics tab:
      i. Name **(required)**: Must be at least six characters
      ii. Address **(required)**: After entering, click the blue **search location** hyperlink to populate GNIS Code.
      iii. Time Zone (optional): Select from drop-down
      iv. Phone **(required)**
      v. Alternative Phone (optional)
      vi. Email **(required)**
      vii. Holiday Schedule **(required)**: Select the holiday schedule from the drop-down that applies to this program. Create as needed.
      viii. Cost Center **(required)**
      ix. Provider Service Location (optional): Unique location identifier such as program license number
      x. **Profile Reference (optional)
      xi. On Call Ratio (optional): Number of employees who can be scheduled as on-call for any given shift
      xii. Operations Hours **(required)**: Hours the program is open and serving clients
      xiii. EVV Required **(required)**: Yes or no options, default is yes. Select no if not required.
      xiv. Logo (optional): Attach logo if desired
      xv. Click **Next**
   b. EVV Location tab (optional): Can be added later
      i. Copy from Profile Address (optional): Copies address from the Basic Demographics tab
      ii. EVV Location Name **(required)**: Name of the location
      iii. EVV Location Type **(required)**: Select from drop-down
      iv. Address **(required)**: Location address
      v. Begin Date **(required)**: First date the location is approved for use
      vi. End Date (optional): If applicable, the last date the location is approved for use.
      vii. Status **(required)**: Defaults to active. Change to inactive when the program is no longer valid.
      viii. Primary (optional): Select if this is the primary location to provide services
      ix. Click **Next**
   c. Authentication Information tab:
      i. IP Address (optional): Enter the IP address of the program device to restrict employees to only clock in and out from this device
      ii. Username (optional to change): Employees will use this for program log in
      iii. Password **(required)**: Employees will use this for program log in
      iv. Confirm Password **(required)**: Enter the same password to confirm
      v. Pin **(required)**: Used to log in to the program from a mobile device
      vi. Status **(required)**: Defaults to active. Change to inactive when the program is no longer valid.
      vii. Click **Next**
      viii. Confirm summary details
6. Click **Save** to continue and **Yes** to confirm

Create Group Service Profile

Description: A service created for clients to receive services in a group, one or more clients. A group service profile is connected to a cost center and may serve multiple clients. Employees do not log into group service profiles. Employees log into their profile and select group service as the service and select the clients in the group to add punches.

Roles Required: Super User

Permissions Required: Group Service Admin

Required Entities Before Creation:

- Cost Center

Steps to create:

1. Log into DCI
2. Click **Home** on the main menu
3. Click **Group Services** on the submenu
4. Click **Actions**
5. Select **Add New Group Service**. Complete the form wizard.
   a. Basic Demographics tab:
      i. Name **(required)**: Must be at least six characters
      ii. Address **(required)**: After entering, click the blue **search location** hyperlink to populate GNIS Code.
      iii. Time Zone (optional): Select from drop-down
      iv. Phone **(required)**
      v. Alternative Phone (optional)
      vi. Email **(required)**
      vii. Cost Center **(required)**
      viii. **Profile Reference (optional)
      ix. Status **(required)**: Defaults to active. Change to inactive when service is no longer valid.
      x. EVV Required **(required)**: Yes or no options, default is yes. Select no if not required.
      xi. Enable Geofencing **(required)**: Yes or no options, default is no. Select yes to enable geofencing for this program.
      xii. Requires Multiple Clients Per Punch **(required)**: Yes or no options, default is no. Select yes to require employees to select more than one client upon punch creation.
      xiii. Minimum # of Attendees **(required if selected yes on Requires Multiple Client Per Punch field)**: Minimum number of clients that must be in attendance for the employee to be allowed to create a punch for this group service.
      xiv. Click **Next**
   b. EVV Location tab (optional): Can be added later
      i. Copy from Profile Address (optional): Copies address from the Basic Demographics tab
      ii. EVV Location Name **(required)**: Name of the location
      iii. EVV Location Type **(required)**: Select from drop-down
      iv. Address **(required)**: Location address
      v. Begin Date **(required)**: First date the location is approved for use
      vi. End Date (optional): If applicable, the last date the location is approved for use.
      vii. Status **(required)**: Defaults to active. Change to inactive when the program is no longer valid.
      viii. Primary (optional): Select if this is the primary location to provide services
      ix. Click **Next**
6. Click **Save** to continue and **Yes** to confirm

Create Parenting Program Profile

Description: A profile specific to a parenting program in which a client receives services. A parenting program profile links to a cost center and may serve multiple clients. Employees log into parenting program profiles to add punches, view entries, and view the program schedule.

Roles Required: Super User

Permissions Required: Parenting Program Admin

Required Entities Before Creation:

- Cost Center

Steps to create:

1. Log into DCI
2. Click **Home** on the main menu
3. Click **Day Programs** on the submenu
4. Click **Actions**
5. Select **Add New Parenting Program**. Complete the form wizard.
   a. Basic Demographics tab:
      i. Name **(required)**: Must be at least six characters
      ii. Address **(required)**: After entering, click the blue **search location** hyperlink to populate GNIS Code.
      iii. Time Zone (optional): Select from drop-down
      iv. Phone **(required)**
      v. Alternative Phone (optional)
      vi. Email **(required)**
      vii. Cost Center **(required)**
      viii. Weekly Default Hours (optional): Enter only if the program does not operate 24x7
      ix. **Profile Reference (optional)
      x. EVV Required: Yes or no options, default is yes. Select no if not required.
      xi. Enable Geofencing **(required)**: Yes or no options, default is no. Select yes to enable geofencing for this program.
      xii. Click **Next**
   b. EVV Location tab (optional): Can be added later
      i. Copy from Profile Address (optional): Copies address from the Basic Demographics tab
      ii. EVV Location Name **(required)**: Name of the location
      iii. EVV Location Type **(required)**: Select from drop-down
      iv. Address **(required)**: Location address

          v. Phone Number (optional)

          vi. Phone Verified **(required)**: Select yes or no, has the phone number been verified for Phone EVV?

          vii. Phone Type (optional)

          viii. Phone Carrier (optional)

          ix. Begin Date **(required)**: First date the location is approved for use

          x. End Date (optional): If applicable, the last date the location is approved for use.

          xi. Status **(required)**: Defaults to active. Change to inactive when the program is no longer valid.

          xii. Primary (optional): Select if this is the primary location to provide services

          xiii. Click **Next**

     c. Authentication Information tab:

          i. IP Address (optional): Enter the IP address of the program device to restrict employees to only clock in and out from this device

          ii. Username (optional to change): Employees will use this for program log in

          iii. Password **(required)**: Employees will use this for program log in

          iv. Confirm Password **(required)**: Enter the same password to confirm

          v. Pin **(required)**: Used to log in to the program from a mobile device

          vi. Status **(required)**: Defaults to active. Change to inactive when the program is no longer valid.

          vii. Click **Next**

          viii. Confirm summary details

6. Click **Save** to continue and **Yes** to confirm

Related articles

- Service Codes - Create, View, Edit, or Deactivate
- Service Accounts - Employee - Create, View, Edit, or Deactivate
- Supervisor Profile - Create, View, Edit, or Deactivate
- Employer Profile - Create, View, Edit, or Deactivate - FI Mode Only
- Case Worker Profile - Create & Link to Funding Source or Funding Account, View, Edit, or Deactivate