

Message Templates - Quick Reference

Description: In this topic the user will learn about message templates, view a comprehensive list of all available message templates within DCI, and understand conditions for notifications to be sent. Message templates automate end user notifications and can be customized for the organization. Super users can activate message templates and determine which user roles will receive messages.

Roles Required: Super User

Permissions Required: N/A

Available Message Templates

Punch Created: A new punch is created (occurs when user saves a non-true clock in/out punch or when a user clicks Clock In on a true clock in/out punch)

Punch Updated: User clocks out of a true clock in/out punch

Compensate Punch Created: An approved punch is canceled or edited. Compensate punch means that an off-setting punch was created to cancel out the original, approved punch.

Punch Verified: An employee verifies an unverified punch (a punch entered on behalf of the employee by a supervisor)

Portal SignOff Override: A punch requiring EVV is approved without EVV

Punch Approved: A new punch is approved

Punch Canceled: An approved punch is canceled

Punch Rejected: A pending punch is rejected

User Locked Out: A profile is locked due to entering the incorrect password three times in a row

Reset Password: A profile's password was reset by an administrator

Changed Password: A profile password is changed

User Unlocked: A profile is unlocked after being locked

Processed: Payroll or billing batch has finished processing

Approved: Payroll or billing batch has finished approval process

Pay Rate Refreshed: The PayRate refresh process on a payroll batch has completed

Portal Signoff: Client signoff is completed on a punch

Signoff Rejected: Client or Guardian rejects sign off on a punch

Reconciliation Failed: Payroll or billing batch reconciliation failed

Bill Rate Refreshed: The bill rate refresh process on a billing batch has completed

Pin Changed: A profile pin is changed

Pin Added: A profile pin is added for the first time

Authorization Related Business Rule Violation: A punch entry violates a business rule relating to an authorization

Approved Authorization Related Business Rule Violation: A punch entry that violates a business rule relating to an authorization is approved

Exceed Daily Limit: A punch that exceeds the daily max set on the authorization is created

Approved Excess of Daily Limit: A punch that exceeds the daily max set on the authorization is approved

User Changed Email: User updates their own email address. Applicable to employee, client, guardian, and case worker profiles.

Admin Changed Email: The owner of the email address receives a notification that the email was changed by an admin (admin email via edit profile wizard or import)

Profile Certification Created: A new profile certification is created

Profile Certification Edited: A profile certification is edited

Profile Certification Expired: A profile certification expires

Account Inactive: A service account is deactivated due to the employee not having the required certifications

Certification reached initial reminder deadline: The first reminder that a certification is going to expire

Certification reached reminder deadline frequency: Set reminders that a certification is going to expire

Schedule Published: A schedule is published

Day Program Out Of Ratio: The number of employees clocked in at a day program does not match the number of required employees based on the published Day Program schedule

Shift Claimed Employee: An offered shift is claimed by another employee

Scheduling Notify Failure To Punch: An employee has not clocked in for scheduled True Clock In/Out shift (Day Program, Residential Program)

Schedule Entry Rejected: A schedule entry is rejected due to a profile certification expiring and the employee being out of compliance

Profile Certification Rejected: A profile certification is rejected

Availability Template reached initial reminder deadline: The first reminder that an availability template is going to expire

Availability Template reached reminder deadline frequency: Set reminders that an availability template is going to expire

Punch Auto Approved: A punch is auto approved by the system

Punch Auto Approve Failed: A punch fails auto approval due to creating overtime, going over authorization, or missing EVV (if EVV is required).

Grace Period Expired: The grace period of a service account expires

Training System Student Registration Failure: The system is unable to register a profile with the Training Player

Business Rule Validation Succeeded: All enabled business rules succeeded

Business Rule Validation Failed: At least one enabled business rule failed

Business Rule Executed: Business rules were executed on a punch

Net Pay Reconciliation Process Completed: For Dollar Based Auths, the Net of Pay Reconciliation Process completed, and the billable amount is updated on the funding account entry.

Secure Token Validation Success: EVV FOB succeeded (token entered for start and end time are correct)

Secure Token Validation Failure: EVV FOB failed (token entered for start and/or end time is incorrect)

Client Phone line Validation Success: EVV Phone succeeded (punch was entered from the correct phone number)

Client Phone Line Validation Failure: EVV Phone failure (employee attempted to enter punch from the incorrect phone number)

Client Electronic Approval Success: Client has approved the punch

DriveGeo Punch Out Tolerance: The difference between the duration of a Drive punch entered via Mobile App and the expected duration for the distance traveled is greater than the tolerance set in the system

EVV Verification failed: An EVV verification failed (such as incorrect password/PIN entered)

InHomeOnly Validation failure: A punch for a service code that is In Home Only was entered too far away from the client's address based on the tolerance set in the system

Employee Net Negative Hours: The Net Total of employee punches in a payroll batch is negative. Only sent when the Net Negative Hours Payroll Batch Validation is enabled.

Exception Batch Created: An exception batch is created (payroll or billing)

OT Check Insufficient Balance: Dollar based punches are processed in a payroll batch as overtime. There is not enough remaining balance on the authorization to cover the OT rate.

Import Completed: An import completed with no failed rows

Import Failed: An import completed with at least one failed row

Authorization Management System Authentication Failure: During screen scraping, the system was unable to log in to the authorization management system due to an incorrect username or password.

EVV Facial Verification Failed: Facial recognition failed to meet the minimum threshold when compared against the client profile picture

Username Changed: A user changed their username

OT Check Insufficient Daily Max: Dollar based punches are processed in a payroll batch as overtime. There is not enough remaining in the daily max for the authorization to cover the OT rate.

Unverified Punch Created: A user added a punch on behalf of an employee or edited an existing punch, resulting in an unverified punch.

Employee Self Registration: An employee self-registered

New Vendor Request: (FI Mode Only) Authorized user has requested a new vendor profile be added in order to process invoices

Critical Service Gap: The employee does not clock in within the established timeframe for a scheduled shift marked as critical

Unauthorized Access Tolerance Exceeded: A user attempted to access an unauthorized page beyond the tolerance set for the customer's instance

Unscheduled Punch: An employee created a punch that is not on the schedule

Scheduling Notify Upcoming Shift Reminder: If a schedule reminder is set on a scheduled shift, this message template must also be enabled in order for the employee to receive the reminder.

Geofence Rejection: Geofencing is enabled and a punch is created outside the approved radius of the selected EVV location

Past Due Care Notes: Care management module must be enabled. Notifies of punches with overdue care notes.

Pending Care Notes: Care management module must be enabled. Notifies of punches with care notes pending.

Low Goal Outcome: Care management module must be enabled. Notifies of goals not being met.

Refresh Billable Amount Process Complete: The refresh billable amount process in the billing module is complete

Vendor Payment Entry Rejected: (FI Mode Only) Vendor payment entry is rejected

Change In Published Schedule: Published schedule is changed

Import Started: Import has started

EDI Generation Error: Error during the generation of an EDI file

EDI Generated: EDI file is generated

EDI Transmission Error: Transmission error when transmitting an EDI file

EDI Transmitted: EDI file is successfully transmitted

EDI Transmission ACK File Received: EDI transmission ACK file is received

EDI Response File Received: EDI response file is received

EDI Response File Error: Error in the transmission of an EDI response file

EDI Transmission ACK File Error: Error in the transmission of an EDI transmission ACK file

Offered Shift: A shift has been offered by an employee. This message will only be sent to employees who have an account for the shift being offered.

Offline Punch Synchronized: Informs the employee that their offline punch has been successfully synchronized

Authorization Expiration Date Business Rule Violation: Punch violated the Authorization Expiration Date Business Rule

EDI File(s) Received: 835 file received

Related articles

- [Group Service - Supervisor Guide](#)
- [Message Templates - Quick Reference](#)
- [November 2023 Release Notes](#)
- [Messaging Module - Navigation - Mobile App](#)
- [Messaging Module - Navigation - Web Portal](#)

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