

# Service Accounts - Employee - Create, View, Edit, or Deactivate

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**Description:** In this topic, the user will learn how to create, view, edit, or deactivate employee service accounts. Deactivating specific employee service accounts can be done when they are no longer needed by changing the status to inactive. Making edits to the employee service account allows changes to be made, for example, changing the cost center.

\*Please note: Cost Center and Employee Profile must be created prior to the Employee Service Account. For hourly and client transportation service accounts, the Funding Source, Service Code, Client Profile, and Client Funding Account must be created prior to the Employee Service Account. Employee Service Accounts added cannot be deleted, but the status may be changed to inactive when making edits in the form wizard.

**Role Required:** Super User, Supervisor

**Permission Required:** N/A

## **Create an Employee Service Account**

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.
  - i. Hourly/Client Transportation
    - 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.
    - a. Grace Period Expiration: The date the grace period will expire based on the time frame associated with the linked certification template
    - a. See Pay Rates Guide for details
      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
      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 billin 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 billing 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
      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.
      20. EVV Exempt: Yes or no options, defaults to no.
      21. Allow Overlapping Pay Rates: Check this box to allow overlapping pay rates
      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
      - a. Grace Period Expiration: The date the grace period will expire based on the time frame associated with the linked certification template
        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 pay 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 pay 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.
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.
- a. Account Type (**required**): Select the account type associated with the appropriate service code
8. Click **Save** to continue and **Yes** to confirm

#### **View, Edit, or Deactivate an Employee Service Account**

1. Log in to DCI with personal profile
2. Select **Home** from the main menu
3. Select **Employees** from the submenu
4. Use filters to search for the employee and click **Search**
5. **Click anywhere in the employee row** to open the Employee Details page
6. Select the **Accounts** tab located below the details window
7. Select **the account** that needs to be viewed, edited, or deactivated.
8. Click **Actions**
9. Select **Edit Account** from the drop-down menu
10. View or make edits in the Edit Service Account form wizard
  - a. To deactivate, change the status to **Inactive**.
11. Click **Save** and **Yes** to confirm

## Related articles

- [Service Accounts - Employee - Create, View, Edit, or Deactivate](#)
- [Employee Service Accounts vs. Client Service Accounts](#)
- [Create Employee Service Accounts - Video](#)
- [April 2021 Release Notes](#)