DCI Glossary

Term	Definition
Approved Authorization	An optional background process that can automatically approve employee (provider) time entries based on criteria the agency can set. Examples of criteria include, "Does it put the employee into overtime?", "Does it put the client over the authorization?" and "Did it pass all EVV requirements?"
Auditor Role	The auditor role has the view-only role. A user with the auditor role can view events and download attachments.
Authorization	An entry in DCI representing an allotment of units from a funding source to provide a service to a client. An authorization is for one and only one service code and client. Synonymous with a voucher.
Authorization Admin Permission	Complete all tasks within the authorization module
Authorization Module	Responsible for managing authorizations and client funding accounts. Only accessible by billing or authorization role, as well as super users.
Authorization Role	A user with the authorization role has the abilities of a base employee (e.g., view time entries, edit pending entries, enter new punch entries, view news posts, and view online training). In addition, the user can add and edit client (consumer) funding accounts, add and edit authorizations, and run reports.
Auto Approval	DCI can run a system process to automatically approve employee times based on criteria the agency sets. If the entry meets the criteria, a client or client employer rep would not need to approve the entry. DCI would auto-approve the entry instead.
Base User	Basic profile used to make punches, view accounts, entries, schedules, create availability templates, complete profile certification training, and access the messaging module. All new provider and state staff profiles default to a base user.
Business Rule	Business rules are a way to validate, per service code, specific requirements mandated by a service. Currently, business rules can be set for hourly service codes and hourly transportation. When a business rule is enabled, the system will check that a punch meets the requirements before it can be saved, created, or approved.

Business Rule: Phase 1 - Punch Creation	If a punch fails a Phase 1 business rule, an alert will be generated when clicking Save or Clock Out. Depending on the company's portal settings, users may not be able to save a punch if it violates a business rule.
Business Rule: Phase 2 - After punch creation, before approval	If a punch fails a Phase 2 business rule, it will be moved from unvalidated status to rejected. The user and their supervisor/employer will receive a notification.
Business Rule: Phase 3 - Punch Approval	If a punch fails a Phase 3 business rule, it will not be able to be approved. The punch will either need to be rejected or edited to pass the business rule.
Canned Statement	A canned question or statement that a company can create and associate with a service code. Activity codes that a provider must select from when making a punch to provide further clarification as to what activity was being completed during the punch.
Case Worker	Profile representing a funding source worker. Users of this type can log in to see authorizations and employee entries. Synonymous with case manager.
Case Worker Admin Permission	Create/edit caseworker profiles
Certification Requirements	Certification requirements are housed within a certification template (see Certification Templates). Examples of requirements may be CPR certifications, HIPPA training certifications, driver's licenses, or others that providers may need to perform certain services.
Certification Templates	Certification templates are containers for certification requirements (see Certification Requirements). Templates can be added to service codes. This can prevent providers without specific, valid certifications from punching time against service codes that require certifications.
Client	Individual receiving the services. Synonymous with consumer.
Client Admin Permission	Create/edit client (consumer) profiles

Client Profile	A profile type that enables consumers to view their schedule and provider entries, and to request services. Clients can also sign off on entries (EVV) via the web portal using their client profile.
Client Transportation Account	A provider transports a client and is reimbursed for the mileage, which is also billable to the client's funding source.
Cost Center	Department or another unit within an organization that the client/provider/program revenue and expenses should hit.
Cost Center Admin Permission	Create/edit cost centers
Custom Field Definitions	The custom field definitions module is where custom fields can be added (see Custom Fields).
Custom Fields	Custom fields are a way to add any additional required information that is not already listed. Examples of information that can be stored in custom fields are mailing addresses, additional email addresses, or other necessary information. They can be added to the following entities: Client profile, employee profile, funding source, authorization, residential program, day program, case worker, group service, parenting program, guardian, vendor, cost center, service code, regions, client funding account, employee service account, client service account, and vendor service account.
Dashboard	The dashboard is the first page that loads when any user logs in (web portal, mobile app, and mobile web). The dashboard shows the number of hours the user has worked during the week (broken down by approved, pending, and verified hours), expiring certifications, online training, and news posts.
Employee Admin Permission	Create/edit employee (provider) profiles
Employee Profile	A profile that enables a user to access DCI. Roles and permissions are added to an employee profile based on the user's role in the organization. The employee could refer to providers, state staff, and other individuals.
Employee Service Account	Account where a provider is assigned to provide a specified service. This can be client or non-client specific. Authorizes staff to make a punch for that service.

EVV Call Log	The EVV call log is a sub-module within the settings module. The call log shows the date, time, language, account type, cost center, phone number, client name, employee, and result (e.g., Call disconnected, clock out successful, and clock in successful).
EVV FOBS	EVV FOBS is a sub-module within the settings module. It is a log of FOBs that includes the serial number, the client's profile ID, the profile type (which will be client), the client's name, and the cost center that is on the client's profile.
EVV Location	The EVV locations functionality is a way to specify and record approved work locations per electronic visit verification requirements. The EVV locations drop-down menu will appear when providers clock in or out of an hourly service code on the mobile app or the web portal. The EVV locations are added via the client (provider) profile.
EVV Phone Prompts	EVV phone prompts is a sub-module within the settings module. It stores each sentence of the message recording for providers who call to clock in and clock out. The prompts themselves have a history log that shows when the prompt was modified, the item that was modified, the language, and who it was changed by.
Funding Source	Programs, such as APD and AMH Behavioral Health, under which services are offered.
Funding Source Admin Permission	Create/edit funding source profiles and service codes
Holiday Schedule	A schedule of holidays observed by the organization that results in unique payroll entries for a specific provider and/or employee type. The agency does not have a holiday pay policy for providers. A blank schedule will be used.
Holiday Schedule Admin Permission	Create/edit holiday schedules
Import Module	Module where various imports (bulk load) live.
Messaging Module	Module that controls system and end user-generated messages. Includes the notification engine.

News Posts	News posts are shown on the dashboard below the training subsection of the dashboard. The agency can use news posts to relay information to many individuals without having to send individual messages.
Notes	Notes can be added to client (consumer) and employee (provider) profiles, service accounts, punch entries, payroll entries, and authorizations. Notes regarding client dissatisfaction, employee pay, client suspension, and other information can be stored in notes for future reference.
Open Punch Entry	When a user is clocked in but has not yet clocked out. The punch will have an open status.
Paid Entry	A punch entry that has been processed in a payroll batch and has been reconciled either manually or by the system process.
Payroll Batch	A batch of payroll entries based on criteria established by the payroll user. Processing a payroll batch will produce the payroll data needed to import into the payroll system.
Payroll Entry	Processing a payroll batch will create one payroll entry for each punch entry. If punch entries have a positive amount, the payroll entry will be negative, thereby zeroing out the payroll batch amount.
Payroll Module	Module responsible for the creation and processing of payroll batches. Processes employee punch entries and creates their associated payroll entries.
Payroll Team Role	A user with the payroll team role has all the abilities of a base user (e.g., view consumer and provider profiles, view reports, etc.). In addition, the user can create new payroll batches (see Payroll Batch), add transactions to an existing payroll batch, remove or split transactions from a payroll batch, merge payroll batches, transmit payroll batches, reconcile payroll batches, and run reports.
Pending Authorization	Pending authorizations have been entered but have not been approved by state or AAA staff. To make the authorization active and ready to use, the authorization must be approved. Once approved, a provider will be able to successfully clock time against the specified service.
Pending Punch Entry	An entry that has not yet been approved, edited, or rejected. The actions of approving and rejecting can only be executed on entries in a pending status. Providers can only edit entries in a pending status.
Permission	Allows a user to perform a specific task for the entire system. A state employee can be assigned multiple permissions for access in all cost centers.

Processed Punch Entry	A punch entry that has been processed in a payroll batch will have the status of processed.
Profile Certification	Certifications, such as CPR or HIPPA certifications, that appear on an employee's (provider's) profile.
Punch Entry	A type of entry representing a time entry by a provider for work that was or is currently being performed. These include both client /service code related and non-client/service code-related entries.
Role	Allows a user to perform a group of tasks for specific cost center(s). Users have access to perform several predetermined tasks for one or more cost centers but can only have one role per cost center.
Role Admin Permission	Manage role assignments
Service Code	Service a client is receiving with specifications of how it should be provided and billed by the funding source.
Status	Statuses can be active or inactive. Statuses are shown on employee (provider) profiles, client (consumer) profiles, employee service accounts, funding sources, funding accounts, and other entities in DCI. Users will be able to take action on active entities. For example, if an employee service account is active, the provider will be able to see the service in the mobile app and be able to clock in and out for that service. However, if the service is inactive, the provider will not see the service in the mobile app, and they will not be able to clock in or out on the inactive service account.
Supervisor	An employee profile that has been assigned the supervisor role for a cost center. Manage providers, consumers, service accounts, profile certifications, punches, attendance and absence entries, schedules, notes, and attachments.
Supervisor Role	A user with the supervisor role has view-only role capabilities (see View Only Role). Additionally, the user will be able to edit consumer and provider details, add employee (consumer) service accounts, add, edit, approve, and reject provider punches, add compensating provider punches, add notes and attachments, and run reports.
Training Admin Permission	Manage certification requirements and certification templates

Unvalidated Punch Entry	Status before pending, which occurs for all entries that are subject to Phase 2 business rule violations. An entry will remain in this status until the next scheduled business rule sweep process completes.
Unverified Punch Entry	An entry created by a state user on behalf of a provider by either editing a pending entry or adding a new entry. The provider must view the unverified punch entry to make sure it is correct, and then select the Verify button to move the punch to pending status.
View Only Role	A user with the view only role will be able to view accounts and account details, employees and providers and their respective details, clients and client details, punches and punch details, notes, and attachments, and will be able to run reports.

Related articles

- Status - Quick Reference
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