

Term	Definition
Administration Account	Account type that enables an employee to clock time for non-training and non-client specific work.
Attendance Entry	An entry type representing that a client received services by attending a program. Residential, Day and Group Services are examples of programs that provide service to a client when they are in attendance.
Authorization	An entry in DCI representing an allotment of dollars/units from a funding source to provide a service to a client. An authorization is for one and only one service code and client.
Authorization Check	A check an employee providing services can run in DCI to ensure the client has sufficient dollars/units remaining in the authorization for a future shift.
Authorization Module	Responsible for managing authorizations and client funding accounts. Only accessible by billing or authorization role, as well as super users.
Availability Template	A template completed by an employee that represents the employee's availability. If the template is approved by a supervisor, DCI will restrict scheduling the employee based on template.
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 employee profiles default to a base user.
Billing Batch	A batch of billing entries based on criteria established by the billing user for each batch. Processing a billing batch will produce the billing data needed to bill a funding source.
Billing Module	The module in DCI that is responsible for the creation and processing of billing batches. This module processes client funding account entries and creates their associated billing entries.
Canned Statement	A canned question or statement that a company can create and associate with a service code. Activity codes that an employee must choose from when making a punch to provide further clarification as to what they were doing during the punch.
Case Worker	Profile in DCI representing a funding source worker. Users of this type can log into DCI and see authorizations and employee entries.
Certification	Any training, certification, or task that must be completed by all or a subset of employees.
Certification Template	A grouping of certifications that are required for specific service accounts, service codes, cost centers, or profiles.
Client	The individual receiving a service or services.
Client Profile	A profile type that enables clients to view their schedule and employee entries, and to request services. Clients can also sign off on entries (EVV) via the web portal using their client profile.
Client Service Account	Account where a client is linked to an employee or program providing a specified service.
Client Transportation Account	An employee transports a client and is reimbursed for the mileage, which is also billable to the client's funding source.
COA Module	Chart of Accounts Module. Foundation of DCI that consists of profiles, entries, accounts, service codes, cost centers, batches.
Cost Center	Department or other unit within an organization that the client/employee/program revenue and expenses should hit.
Day Program Account	Client receives the service at a specific site, and employees clock in and out at that site. Funding source pays based on client attendance. See DCI Billing Cheat Sheet.
Day Program Profile	Profile with a unique username and login in which employees can view the program schedule and clock in and out. When a client receives service at a day program, a service account links a client profile with the program profile.
DCI	Direct Care Innovations
Drive Account	Account type where an employee is paid for time spent driving, not associated with a specific client.
Drive - Mobile App	Real time capture of mileage for the purpose of reimbursing the employee for mileage.
Employee Profile	A profile that enables an employee to access DCI. Roles and permissions are added to an employee profile based on the employee's role in the organization. See DCI Roles and Permissions document.

Employee Service Account	Account where an employee 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	Electronic Visit Verification. The means of electronically verifying that a employee/caregiver was physically present with the client.
Funding Account	Ledger or bucket where client authorizations, attendance, employee service and billing entries are placed.
Funding Source	Entity that pays the agency to provide the service, defines specifications for those services and issues authorizations for clients to receive said services.
Grace Period	The period of time after hire in which an employee may add punch entries without completing a required certification.
Group Service Account	Client receives service in any location and is not tied directly to a site. Employees can work with one or more clients at a time in any capacity. Funding source pays based on service provided (hourly, daily, monthly, milestone, etc.). See DCI Billing Cheat Sheet.
Group Service Profile	Profile with a unique username and login in which employees can view the group service schedule and clock in and out. When a client receives a group service, a service account links a client profile with the group service profile.
Guardian	Legal guardian of a client receiving services.
Guardian Profile	A profile type in which a guardian can act on behalf of the client for actions such as requesting or approving services in DCI.
Holiday Account	Employees with this service account will receive a payroll entry for all holidays on a specific holiday schedule. It is assumed that employees with this service account do not work on the holidays but will be paid their normal wage.
Holiday Schedule	A schedule of holidays observed by the organization and that result in unique payroll entries for a specific employee type. An organization may have multiple holiday schedules.
Hourly Account	See DCI Billing Cheat Sheet.
Import Module	The module in DCI where various imports (bulk load) live.
Messaging Module	The module in DCI that controls system and end user generated messages. This module also includes the Notification Engine.
Mileage Account	Account type where an employee is reimbursed for miles traveled; not tied to a particular client. Referred to in the Mobile App as Drive.
Notifications Engine	Engine responsible for sending notifications to end users when messages are generated in DCI. Currently supports SMS, email and internal application notifications.
Parenting Program Account	Client lives at a foster home/professional parent home and employees clock in and out at that home. Funding source pays based on client attendance. See DCI Billing Cheat Sheet.
Parenting Program Profile	Profile with a unique username and login in which employees can view the program schedule and clock in and out. When a client receives service at a parenting program, a service account links a client profile with the program profile.
Payroll Batch	A batch of payroll entries based on criteria established by the payroll user for each batch. Processing a payroll batch will produce the payroll data needed to import into the payroll system.
Payroll Module	The module in DCI that is responsible for the creation and processing of payroll batches. This module processes employee punch entries and creates their associated Payroll entries.
Permission	Allows user to perform a specific task for the entire system. An employee can be assigned multiple permissions and they have this access for all cost centers.
Profile Certification	A certification complete by an employee and linked to his/her employee profile.
PTO Account	Account type that enables an employee to add a PTO entry.
Punch Entry	A type of entry representing a time entry by an employee for work that was or is currently being performed. These include both client/service code related and non-client/service code related entries.
Reports Module	The module in DCI where all of the canned reports with filters live.
Residential Program Account	Client lives at a residential program and employees clock in and out at that program. Funding source pays based on client attendance. See DCI Billing Cheat Sheet.

Residential Program Profile	Profile with a unique username and login in which employees can view the program schedule and clock in and out. When a client receives service at a residential program, a service account links a client profile with the program profile.
Role	Allows 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 center but can only have one role per cost center.
Scheduling Module	The module in DCI that is responsible for the creation and management of schedules and manages client requests for services and employee availability templates.
Scrub	Scrubs are a way to validate business rules per service code to meet specific requirements mandated by that particular service.
Service Code	Service a client is receiving with specifications of how it should be provided and billed by the funding source.
Settings Module	The module in DCI responsible for managing many of the user definable settings and entities. This includes funding sources, service codes, regions, holiday schedules, news posts, general activities, training module, message templates, and EVV.
Sick Account	Account type that enables an employee to add a Sick entry.
Super Admin User	The most robust user in DCI that has access to all modules and functionality within the system, including chart of accounts, payroll, billing, scheduling, authorization, settings, reports, imports.
Supervisor	An employee profile which has been assigned the Supervisor role for a cost center. Manage employees, clients, service accounts, profile certifications, punches, attendance & absence entries, schedules, notes & attachments.
Training Account	Account type that enables an employee to clock time for training.
Transportation	Account type when a client receives funding for transportation to and from a Day Program.
Vacation Account	Account type that enables an employee to add a Vacation entry.
Rv. 10/11/18	