A Super User's Guide to Troubleshooting

Resources

- Help Center: https://directcareinnovations.zendesk.com/hc/en-us

Process for Accessing Help

1. Search the Help Center
2. Ask your Supervisor
3. Contact your Local DCI Super User
4. Call the Help Desk (855) 344-3729

General Troubleshooting Steps

- Gather all situation details
    - Employee
    - Client
    - Service Code
    - Entry Date/Time
    - Cost Center
    - Program Type
- Get screenshot if possible
- Check Employee Status, Service Account, Roles/Permissions, Authorization
- Follow same steps to recreate the issue (don't save if given the option)
- Respond with brief summary of what they need to do differently and provide link to How-To on Help Center if applicable
- Direct to their supervisor if they need different access (instead of changing their roles/permissions for them)

Common Help Topics

Topic	Specific Troubleshooting Steps
Access/View	● Check roles/permissions
Accounts	● Check roles/permissions ● Select correct Account type ● Check active client funding account (Hourly and Client Service Accounts) ● Direct to deactivate incorrect accounts instead of editing
Authorizations	● Check Authorization start/end date and remaining balance ● Direct them to contact service authorizations to get auth entered
Punch Creation	● Check employee status ● Check service account ● Make sure selecting correct account type ● Check active auth
Punch Edit/Approval	● Follow steps for Punch Creation ● Check the status of the shift (should not be open or unverified) ● Make sure compensating entries were approved ● Check for other shifts at the same time as attempted entry
Reports	● Run the same report they are trying to run (use same filters if applicable) ● Direct to which reports will give them the info they are looking for
Login	● Check that they have the correct link and username ● Check employee status ● Check if profile is locked ● Verify email address, then send reset password email (Actions->Edit Employee->Authentication Information->Resend email)
Payroll	● Check punch creation and approval date ● Check employee type (salaried do not show up on transmit file) ● Check service code (payable/nonpayable) ● Check service account for daily max, daily rate, and pay rate ● Check Holiday Schedule
Billing	● Check auth ● Check billable/nonbillable status
Client Sign-Off	● Check Client Authentication Status

	• Verify client does not have an employee profile • Check client authentication status • Check if profile is locked • Verify email address, then send reset password email • Check Punch status (clients won’t see punches already approved by a supervisor)