Entries: Sequencing and Prerequisites in DCI v1.0

Employee Punch Entries

All Entry Types:

1. Cost Center must be in DCI
2. Activate Employee Profile
    a. Employee ID must be entered
    b. Correct Cost Center verified

Non-Client Entries (Administration, Drive, Training, Sick, Vacation, PTO, Mileage)

1. Complete steps 1 & 2 above
2. Create Employee Service Account

Client-Service Entries (Hourly, Client Transportation)

1. Complete Steps 1 & 2 of "All Entry Types"
2. Submit New Client/Authorization Request
3. Funding Source must be in DCI
4. Service Code must be in DCI
5. Create Client Profile
6. Create Client Funding Account
7. Create Authorization
    a. New authorizations and rate changes must be approved after creation
8. Create Employee Service Account

Program Entries (Residential Program, Day Program, Group Service, Parenting Program)

1. Complete steps 1 & 2 of "All Entry Types"
2. Submit New Program Request
3. Create Program Profile
4. Create Employee Service Account
    a. Residential/Day Program Accounts: True Clock In/Out must be selected for and entries must be entered from the Program Profile

Client Attendance/Absence Entries (Residential, Day, Group Service, and Parenting Programs)

1. Cost Center must be in DCI
2. Submit New Program Request
3. Create Program Profile
4. Submit New Client/Authorization Request
5. Funding Source must be in DCI
6. Service Code must be in DCI
7. Create Client Profile

8. Create Client Funding Account
9. Create Authorization
    a. New authorizations and rate changes must be approved after creation
10. Create Client Service Account

Independent Deactivation

The following may be deactivated without deactivating other items. All items linked to that item can remain active, but no entries can be made.

- Employee Profile
- Client Profile
- Day Program Profile
- Residential Program Profile
- Group Service Program Profile
- Parenting Program Profile

Sequential Deactivation

In order to deactivate any item on this list, all items listed above the item that are linked to it must first be deactivated.

- Employee Service Account and Client Service Account
- Client Funding Account
- Service Code
- Funding Source
- Cost Center

Examples

Test Staff currently provides Respite Service to Test Client. Test Client no longer receives Respite Service, so the Client Funding Account needs to be deactivated. To do so complete the following steps in order:

1. Change status of Test Staff's Employee Service Account to Inactive
2. Change status of Test Client's Client Funding Account to Inactive

Test Client has exited the residential program where they received Residential Services.

1. Change status of Test Client's Client Service Account to Inactive
2. Change status of Test Client's Client Funding Account to Inactive

The funding source has changed payment of Respite Service to pay one daily unit instead of per hour. A new service code must be created and the original Respite service code needs to be deactivated.

1. Deactivate every Employee Service Account linked to Respite Service code

2. Deactivate every Client Funding Account linked to Respite Service code
3. Deactivate Respite Service Code
4. Create new Respite Service Code
5. Create new Client Funding Accounts
6. Create and approve new authorizations
7. Create new Employee Service Accounts.