



2018

# (SP) Admin Guide: System Set-Up

V1.6

DIRECT CARE INNOVATIONS

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\*Denotes fields in which data is stored but does not trigger action in another part of the system.

\*\*Denotes an optional reference field available for use based on the unique needs of your business.

NOTE: If there are any fields that are needed but not listed, they can be added using the Custom Fields functionality. Please refer to the Custom Fields Admin Guide for more details.

## Cost Center

Description: The department or other unit within the organization to which costs should be charged or revenue should be applied for accounting purposes. In FI Mode, this is typically the Employer.

Security Access: Superadmin user or Cost Center Admin Permission

Required Entities Prior to Creation:

- Superadmin user

Steps to Create:

1. Click Cost Centers
2. Click Actions
3. Click Add New Cost Center
4. Complete Fields

- a. Cost Center Name **(required)**: Generic name of the Cost Center that is recognizable by most users
  - b. Cost Center Code **(required)**: Accounting code
  - c. Select State **(required)**: State of the Cost Center
  - d. \*\*Cost Center Reference **(optional)**
  - e. \*\*Cost Center Reference 2 **(optional)**
  - f. Certification Template **(optional)**: Select if there are a set of certification requirements specific to the cost center
  - g. Status **(required)**: Defaults to Active. Switch to Inactive when this is no longer a valid cost center.
5. Click Save
  6. Click Yes on confirmation window

## Employee Profile

Description: Basic profile used to make punches; view accounts, entries, and schedules; create availability templates, complete profile certification training, and access the messaging module. All employee profiles default as a base user unless a role is added.

Security Access: Superadmin user or Employee Admin Permission

Required Entities Prior to Creation:

- Cost Center

Steps to Create:

1. Click Employees.
2. Click Actions.
3. Click Add New Employee.
4. Complete the Basic Demographics form.
  - a. First Name **(required)**
  - b. Last Name **(required)**
  - c. Full Name **(required)**
  - d. Address **(required)**
  - e. Phone **(required)**
  - f. \*Alternate Phone **(optional)**
  - g. Mobile Number **(optional)**
  - h. Email **(required)**
  - i. DOB **(required)**
  - j. \*\*Profile Reference **(optional)**
  - k. SSN **(required)**
  - l. Verify SSN **(required)**
  - m. Attach photo **(optional)**
5. Click Next.
6. Complete the Employee Information form.

- a. Employee Type (**required**): Dictates how the employees hours are processed for payroll, including whether they are eligible for overtime.
  - b. Employee Number (**required**): Number provided by the organization at time of hire.
  - c. Weekly Hours Available (**required**): Maximum number of hours the employee is available to work each week; links to the scheduling module.
  - d. \*\*Professional Id1 (**optional**)
  - e. \*\*Professional Id2 (**optional**)
  - f. \*\*Payroll Id (**optional**)
  - g. Certification Template (**optional**): Select if there are a set of certification requirements specific to this employee.
  - h. Holiday Schedule (**required**): Dictates which days this employee is eligible for holiday pay.
  - i. Cost Center (**required**): The employee's home cost center.
  - j. \*Hire Date (**optional**): The date the employee was hired.
7. Click Next.
  8. Complete EVV Location form (**optional**): This is not necessary to complete for Employee Profiles at this time. Complete if desired, or click Next.
    - a. Copy from Profile Address (**optional**): Copy the address from the Basic Demographics Form.
    - b. EVV Location Name (**required if completing form**): The name of the location.
    - c. EVV Location Type (**required if completing form**): Select from dropdown.
    - d. Address (**required if completing form**): The location address.
    - e. Begin Date (**required if completing form**): The first date the location is approved for use.
    - f. End Date (**optional**): The last date the location is approved, if there is one.
    - g. Status (**required if completing form**): Select from dropdown.
    - h. Primary (**optional**): Select if this is the primary work location.
  9. Click Next.
  10. Complete Authentication Information form.
    - a. Username (**optional to change**): Will be used for all future logins by this employee.
    - b. Password (**required**): Will be used for all future logins by this employee. Hover over the white "i" for password requirements.
    - c. Confirm Password (**required**): Enter the same password as above to confirm.
    - d. Pin (**required**): Can be used in lieu of a password when logging in via a mobile device.
    - e. Employment Status (**required**): The employee's status with the organization.
    - f. Authentication Status (**required**): The status of the employee profile. Defaults to Active. Select disabled if the employee is no longer with the organization. Select locked to temporarily prevent the employee from logging in.
    - g. Permissions (**optional**): Select all tasks you wish the employee to perform for the entire system.
  11. Click Next.
  12. Review Employee Information and click Save.
  13. Click Yes on the confirmation window.

## Supervisor

Description: An employee profile that has been assigned the Supervisor role for a cost center. This role can manage employees, clients, service accounts, profile certifications, punches, attendance and absence entries, schedules, notes, and attachments.

Security Requirement: Superadmin User, or Employee Admin Permission *and* Role Admin Permission

Required Entities Prior to Creation:

- Cost Center
- Employee Profile

Steps to Create:

1. Follow steps listed under *Employee Profile* to create Supervisor Profile.
2. Click Settings.
3. Click Roles.
4. Click Actions.
5. Click Manage Role.
6. Type Employee's name in the Name Field and select when it appears.
7. Select "Supervisor" in Role field.
8. Type Supervisor's cost center in Cost Center field and select when it appears.
9. Click the Plus icon.
10. Click Save.
11. Click Yes on the confirmation window.

## Client Profile

Description: Profile in DCI representing a client receiving services. Users of this type can view their schedules and employee entries, and can request services.

Security Requirement: Superadmin User or Client Admin Permission

Required Entities Prior to Creation:

- Cost Center

Steps to Create:

1. Click Clients.
2. Click Actions.
3. Click Add New Client.
4. Complete the Basic Demographics form:
  - a. First Name **(required)**
  - b. Last Name **(required)**
  - c. Full Name **(optional)**
  - d. Address **(required)**: Client's physical address.
  - e. GNIS Code **(required)**: Click Search Location after entering the address. This will generate the GNIS Code.

- f. Phone **(required)**
  - g. \*Alternate Phone **(optional)**
  - h. Mobile **(optional)**
  - i. Email **(required)**: If EVV will be used, a valid and unique email address for the client must be entered.
  - j. DOB **(required)**
  - k. \*\*Profile reference **(optional)**
  - l. \*SSN **(optional)**
  - m. \*Verify SSN **(required if SSN was entered)**
  - n. Attach Photo **(optional)**: Required if facial recognition will be used for EVV.
5. Click Next.
  6. Complete the Client Information form:
    - a. Client Id **(required)**: Unique Id usually provided by the funding source.
    - b. Medicaid No **(optional)**
    - c. Insurance Group No **(optional)**
    - d. Insurance Plan No **(optional)**
    - e. Insurance Payer No **(optional)**
    - f. Certification Template **(optional)**: Select if there are a set of certification requirements for employees working with this client.
    - g. Cost Center **(required)**: Select the cost center associated with the program supporting this client.
    - h. Language **(optional)**: Select the language spoken by the client.
    - i. \*Received Date **(optional)**: The date the client entered the company's services.
    - j. \*Packet Mailed **(optional)**: The date the company completed and returned to the funding source all required documentation in order for the client to enter its services.
    - k. Client Status: Defaults to active.
    - l. Discharge Date **(optional)**: Enter at time of client's discharge.
    - m. \*\*Code **(optional)**
    - n. \*Region **(optional)**: The region in which the client receives services as designated by the funding source.
    - o. \*Guardian **(optional)**: Client's guardian name if the client is not his or her own guardian.
    - p. \*Fee **(optional)**: Not applicable for most Service Providers.
    - q. \*Diagnosis Code **(optional)**: The code that enables the client's eligibility for service, as required by some funding sources.
    - r. \*Cost Share **(optional)**: Not applicable for more Service Providers.
    - s. Enable Caregiver Rating Emails **(optional)**: If this box is checked, the client will receive emails to rate their experience with their caregiver.
  7. Click Next.
  8. Complete EVV Location form **(optional)**: EVV Locations can be added to the profile at a later date. Complete if desired, or click Next.
    - a. Copy from Profile Address **(optional)**: Copy the address from the Basic Demographics Form.
    - b. EVV Location Name **(required if completing form)**: The name of the location.
    - c. EVV Location Type **(required if completing form)**: Select from dropdown.

- d. Address **(required if completing form)**: The location address.
  - e. Begin Date **(required if completing form)**: The first date the location is approved for use.
  - f. End Date **(optional)**: The last date the location is approved, if there is one.
  - g. Status **(required if completing form)**: Select from dropdown.
  - h. Primary **(optional)**: Select if this is the primary location to receive services.
9. Click Next.
  10. Complete the Authentication Information Form
    - a. Enable Client Login **(optional)**: Required if Client Portal Sign-Off will be used for EVV, or if client wishes to request hourly services or view his or her schedule. If checked:
      - i. Password **(required)**: Enter a temporary password. The client will be prompted to change their password when they first log in.
      - ii. Confirm Password **(required)**: Enter same as above to confirm.
      - iii. Pin **(required)**: Can be used in lieu of a password on mobile devices.
    - b. Username **(optional to change)**: Will be used by the client for all future logins.
    - c. Authentication Status: Defaults to Active if “Enable Client Login” is checked. Defaults to disabled if “Enable Client Login” is not checked.
  11. Click Next.
  12. Review Client Information and click Save.
  13. Click Yes on the confirmation window.

## Funding Source

Description: Entity that pays the agency to provide the service, defines specifications for those services, and issues authorizations for clients to receive said services.

Security Requirement: Superadmin user or Funding Source Admin Permission

Required Entities Prior to Creation:

- Cost Center

Steps to Create:

1. Click Settings.
2. Click Funding Sources.
3. Click Actions .
4. Click Add New Funding Source.
5. Complete the form:
  - a. Name **(required)**
  - b. Type **(Required)**
  - c. Address **(required)**
  - d. Cost Center **(required)**: Typically this is an administrative or overhead cost center.
  - e. Phone **(required)**
  - f. \*Alternate Phone **(optional)**
  - g. Supports Automated Authorization Download: Currently only available in Oregon and Arizona for government funding sources.

- h. Email **(required)**
  - i. \*Sleep Shift Start and End **(optional)**: Enter if the funding source authorizes a defined sleep shift.
  - j. \*\*Provider Id **(optional)**
  - k. \*\*Profile Reference **(optional)**
  - l. Status: Defaults to active. Select inactive when this is no longer a valid funding source.
6. Click Save.
  7. Click Yes on the confirmation window.

## Service Code

Description: Service a client is receiving with specifications of how it should be provided and billed by the funding source.

Security Requirement: Superadmin user or Funding Source Admin Permission

Required Entities Prior to Creation:

- Cost Center
- Funding Source

Steps to Create:

1. Click Settings.
2. Click Funding Sources.
3. Use filters to find desired Funding Source and click Search.
4. Click anywhere in Funding Source row to open the Funding Source Details Page.
5. Click Actions.
6. Click Add New Service Code.
7. Complete the form:
  - a. Account Type **(required)**: The type of program or service correlated with this Service Code.
    - i. If Hourly or Client Transportation:
      1. EVV Required: Select “Yes” if EVV is required for this service.
      2. In Home Only: Select “Yes” if this service can only be provided in the client’s home. (Not available for Client Transportation)
      3. Payable: If “No,” the employee will not be paid for time clocked against this service.
      4. Overtime Exempt: If “Yes” is selected, hours punched against this Service Code will not count towards the employee’s weekly hours accumulation towards overtime.
  - b. Service Code **(required)**: Service Code Name. Employees will need to be able to select this service code when adding a punch, so be sure the name is user friendly.
  - c. Description **(optional)**
  - d. EVV Required: If “Yes” is selected, Fob and Phone are enabled as options for time entry. For hourly services, client sign-off via web portal, signature, pin or password becomes required for all time entries.



- e. NonBillable: Defaults to “No.” Select yes if this is a billable service.
- f. Bill Code **(required)**: Unique identifier provided by the funding source.
- g. Billing Unit **(required)**: The increment in which the funding source requires for the service to be billed. Defaults to Miles for Client Transportation.
  - i. If Hourly:
    1. Default Pay Rate **(optional)**: Entering a pay rate here will autofill the pay rate in all service accounts created with this service code.
    2. Default Billing Modifier **(optional)**: Optional modifier
    3. Billing Multiplier **(optional)**: User if the funding source bills in less than hourly units. For example, is the funding source bills in 15 minute units, select hourly Billing Unit and quarter hourly for the Billing Multiplier.
- h. Enable Geofencing: If “Yes” is selected, this service can only be provided within an established radius from approved locations. Only available when “EVV Required” is “Yes” and the Account Type is Hourly, Group Service, or Parenting Program.
- i. Payable: If “Yes,” all employee time entries associated with this service code will appear on the payroll file.
- j. Overtime Exempt: If “Yes,” employee time entries associated with this service code will not count towards the accumulation of 40 hours to calculate overtime.
- k. Pay Rate Max Limit: Defaults to “No.” If marked “Yes,” this service code will have a max pay rate for any employee providing the service.
- l. Rounding Increment: Select “None” for no rounding, “15” to round by 15 minutes, etc. (Not available for Client Transportation)
- m. Rounding Type: Select “Round” to round to the nearest rounding increment. Select “Truncate” to always round down, and “Increment” to always round up. (Not available for Client Transportation)
- n. Has Daily Rate: Defaults to “Yes,” which means the funding source will switch to a daily rate for this service after a specified number of hours reached in a day. When “Yes” is checked, the following fields are visible and required:
  - i. Daily Max **(required)**: The maximum number of hours this service can be provided in a day before switching to the daily rate.
  - ii. Daily Bill Code **(required)**: Unique identifier provided by the funding source.
- o. Billing Rollup Type **(required)**: Designates how service entries will be summarized for the funding source. If “None” is selected, each individual entry will be visible on the billing report sent to the funding source.
- p. Has Published Spec: Defaults to “No.” If this Service Code has a standard Billing Rate, Daily Max, Weekly Max, and/or Monthly Max, mark “Yes” and complete the fields that are made visible. These fields are not required. All new authorizations under this service code will auto-fill these figures.
- q. Allow Diagnosis Code: Defaults to “Yes.” If “No” is selected, this field will not appear when an employee adds an entry for this Service Code.
- r. Default CPT Code and Default HCPCS Code **(optional)**: The default code for this service. Only one or the other can be entered. For example, if a Default CPT Code is entered, the Default HCPCS Code field will be uneditable.
- s. \*\*Service Code Reference 1, 2, and 3 **(optional)**

- t. Max Pay Rate **(optional)**: Required if Pay Rate Max limit is yes
  - u. \*Default Provider Service Location **(optional)**: Provider ID as recognized by the funding source.
  - v. GL Code **(required)**: Code that will link all associated time entries to the appropriate GL account for the customer.
  - w. Certification Template **(optional)**: Select if there are a set of certification requirements specific to this Service Code.
  - x. Hide Remaining Balance: If “Yes,” employees will not be able to see the authorization remaining balance when adding a time entry.
  - y. Status: Defaults to “Active.” Select “Inactive” when this is no longer a valid Service Code.
8. Click Save.
  9. Click Yes on the confirmation window.

## Service Code Groups

Description: Create a set of service codes to be included in Scrub settings.

Security Requirement: Superadmin user or Funding Source Admin Permission

Required Entities Prior to Creation:

- Cost Center
- Funding Source
- Service Codes

Steps to Create:

1. Click Settings
2. Click Funding Sources
3. Use filters to find desired Funding Source and click Search
4. Click anywhere in Funding Source row to open the Funding Source Details Page
5. Click Actions
6. Click Add New Service Code Group
7. Complete Form
8. Click Save.
9. Click Yes on the confirmation window.
10. On the Service Code Group Details page, click Actions
11. Click Add/Remove Service Codes
12. Add desired service codes using the arrows in the wizard
13. Click Save
14. Click Yes on the confirmation window

## Enable Scrubs

Security Requirement: Superadmin user or Funding Source Admin Permission

Required Entities Prior to Creation:

- Cost Center

- Funding Source
- Service Code

Steps to Enable:

1. Click Settings.
2. Click Funding Sources.
3. Use filters to find desired Funding Source and click Search.
4. Click anywhere in Funding Source row to open the Funding Source Details Page.
5. Scroll down to Service Codes Table.
6. Use filters to find the desired service code then click search.
7. Click anywhere in Service Code row to open the Service Code Details Page.
8. Scroll down and select the Scrubs tab.
9. Click desired scrub to open Scrub Details Page.
10. Click Actions.
11. Click Edit Scrub.
  - a. Select the checkbox next to Enable.
  - b. Enter parameters as needed.
12. Click Save.
13. Click Yes on the confirmation window.

NOTE: Scrubs are only available for Service Codes with an account type of Hourly.

## Region

Description: The region in which services from a particular funding source are provided.

Security Requirement: Superadmin user or Funding Source Admin Permission

Required Entities Prior to Creation:

- Cost Center
- Funding Source

Steps to Create:

1. Click Settings.
2. Click Funding Sources.
3. Use filters to find desired Funding Source and click Search.
4. Click anywhere in Funding Source row to open the Funding Source Details Page.
5. Click Actions.
6. Click Add New Region.
7. Complete the form:
  - a. Region Name (required)
  - b. Address (required)
  - c. Phone (required)
  - d. Email (required)
  - e. Contact Name (required)

- f. \*\*Region Reference (optional)
- g. Status: Defaults to Active.
8. Click Save.
9. Click Yes on the confirmation window.

## Caseworker Profile

Description: Profile in DCI representing a funding source worker. Users of this type can log into DCI and see authorizations and employee entries.

Security Requirement: Superadmin user or Caseworker Admin Permission

Required Entities Prior to Creation:

- Cost Center
- Funding Source

Steps to Create:

1. Click Case Workers
2. Click Actions
3. Click Add New Case Worker
4. Complete the Basic Demographics form:
  - a. First Name **(required)**
  - b. Last Name **(required)**
  - c. Address **(required)**
  - d. Phone **(required)**
  - e. \*Alternate Phone **(optional)**
  - f. Email **(required)**
  - g. Cost Center **(required)**
  - h. \*Funding Source **(optional)**
5. Click Next.
6. Complete the Authentication Information Form:
  - a. Enable Case Work Login: If checked,
    - i. Password **(required)**: Will be used for all future logins.
    - ii. Confirm Password **(required)**: Enter same as above to confirm.
  - b. Username **(optional to change)**: Will be used for all future logins.
7. Click Save.
8. Click Yes on the confirmation window.

## Client Funding Account

Description: Ledger or bucket where client authorizations, attendance, employee service and billing entries are placed.

Security Requirement: Superadmin user, Billing Role, or Authorization Role

Required Entities Prior to Creation:

- Cost Center
- Funding Source
- Service Code
- Client Profile

Steps to Create:

1. Click Authorization.
2. Click Funding Accounts.
3. Click Actions.
4. Click Add New Funding Account.
5. Complete the form:
  - a. Funding Source **(required)**
  - b. Account Type **(required)**: Select the account type associated with the appropriate service code.
    - i. Hourly or Client Transportation:
      1. Set location: Leave this box unchecked.
    - ii. If Residential or Parenting Program:
      1. Start and End Dates **(Required)**: The start and end date for this funding account.
    - iii. If Day Program or Group Service:
      1. Staff Ratio **(Required)**: The minimum staffing ratio required for this funding account. Hover over the white “i” for details.
  - c. Service Code **(required)**: All service codes associated with the account type and funding source selected will appear in the dropdown menu.
  - d. Client **(required)**: The client receiving the service.
  - e. Cost Center **(required)**: The cost center in which the service is being provided (this may differ from the cost center associated with the Funding Source).
  - f. \*Case Worker **(optional)**
  - g. \*Region **(optional)**
  - h. Staff Ratio **(optional)**: Enter only if there is a required staff to client ratio for this funding account. Hover over the white “i” for more information.
  - i. Billing Unit **(required)**: The field is auto-filled based on the Service Code.
  - j. \*\*Account Reference **(optional)**
  - k. Grace Period: Defaults to disabled. By clicking enabled, the Grace Period for a Certification Template that is linked to this Funding Account will be permitted.
    - i. Grace Period Expiration: The date the grace period will expire based on the time frame associated with the linked certification template.
  - l. Status: Defaults to “Active.” Switch to inactive when this is no longer a valid funding account.
  - m. Default CPT Modifiers and Default HCPCS Modifiers **(optional)**: these fields will be editable if a Default CPT Code or Default HCPCS Code is added on the Service Code. Up to four two-digit modifiers can be added.
6. Click Save.
7. Click Yes on the confirmation window.

## Authorization

Description: 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 service code and client.

Security Requirement: Superadmin user, Billing Role, or Authorization Role

Required Entities Prior to Creation:

- Cost Center
- Funding Source
- Service Code
- Client Profile
- Client Funding Account

Steps to Create:

1. Click Authorization.
2. Click Approved Authorizations.
3. Click Actions.
4. Click Add New Authorization.
5. Complete the form:
  - a. Client Name **(required)**
  - b. Account Type **(required)**: Select the account type associated with the appropriate service code.
  - c. Funding Source: System auto-fills this field
  - d. Service Code: Select from the drop down.
  - e. Cost Center: System auto-fills this field.
  - f. \*\*Authorization ID Reference **(optional)**
  - g. \*\*Authorization ID Reference 1-5 **(optional)**
  - h. Date **(required)**: Enter the start and end date during which time the service can be provided under this authorization.
  - i. Expiration Date **(required)**: Enter the date the authorization expires and a new authorization must be obtained in order to continue providing this service.
  - j. Eligibility Code **(optional)**: Code that denotes the client's eligibility for this service.
  - k. Billing Unit: System auto-fills this field based on the account type.
  - l. Initial Balance **(required)**: The total units of service you can provide under this authorization.
  - m. Monthly Max **(required)**: The maximum units of service you can provide per month.
  - n. Weekly Max **(required)**: The total units of service permitted per week.
  - o. Daily Max **(required)**: The total units of service permitted per day.
  - p. Billing Rate **(required)**: The rate per unit of service you are authorized to bill for as determined by the funding source.
  - q. Max Daily Billable Units **(optional)**: If this field is completed, billing will switch to daily (at the rate established on the associated service code) after the indicated units of service has been exceeded.

- r. Non billable (**optional**): Check Yes if you will not be billing your funding source for this service.
- 6. Click Save.
- 7. Click Yes on the confirmation window.
- 8. Click Pending Authorizations.
- 9. Use filters to find the desired authorization and click search.
- 10. Select the "A" in the Authorization row.
- 11. Click Yes on the confirmation window.

## Employee Service Account

Description: An account in which an employee is assigned to a client, program, or administration function in order to provide a specified service. This can be client or non client specific. Authorizes staff to make a punch for that service.

Security Requirement: Superadmin user, Supervisor Role

Required Entities Prior to Creation:

- Cost Center
- Employee Profile
- For Hourly and Client Transportation Service Accounts:
  - Funding Source
  - Service Code
  - Client Profile
  - Client Funding Account

Steps to Create:

1. Click Employees on the sidebar.
2. Search for the employee by typing their name in Type Employee Name and selecting their name when it comes up. Click Search.
3. Select the employee from the table by clicking anywhere in the row.
4. Click Actions.
5. Click Add New Service Account.
6. Complete the form:
  - a. Account Type (required): Select the account type associated with the appropriate service code.
    - i. Hourly/Client Transportation
      1. Client (**required**): The client to whom the employee will provide service.
      2. Service Code (**required**): System generates drop-down options based on the client name.
      3. Funding Source: System auto-filles based on the client name.
      4. Cost Center (**required**): The cost center in which the employee will provide the service.
      5. Employee Number (**optional**): Recommended for use when an employee has a unique Employee Number for each service provided.

6. 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.
7. Daily Pay Max **(optional)**: Enter if pay rate will switch to daily after a set number of hours.
8. Daily Rate **(optional)**: Required if a Daily Pay Max is entered.
9. Min Units Per Punch **(optional)**: Enter if a minimum number of billing units must be used when the employee clocks in under this service account.
10. Max Units Per Punch **(optional)**: Enter if the employee may not exceed a maximum number of billing units in one shift.
11. Start Date **(optional)**: If a date is entered, the employee will not be able to make a punch before this date.
12. End Date **(optional)**: If a date is entered, the employee will not be able to make a punch after this date.
13. Payroll Modifier **(optional)**
14. \*\*Account Reference **(optional)**
15. 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.
  - a. Grace Period Expiration: The date the grace period will expire based on the time frame associated with the linked certification template.
16. EVV Frequency Type **(Hourly Only)**: If the Service Code is set to require EVV, this field is required.
17. Status: Defaults to Active. Switch to inactive when this is no longer a valid service account.
  - a. Administration/Drive/Training/Vacation/Sick/Holiday
    - i. Cost Center **(required)**
    - ii. Pay Rate **(optional)**: Defaults to 0. This number can be changed if there is a unique pay rate for this service account.
    - iii. Min Units Per Punch **(optional)**: Enter if a minimum number of billing units must be used when the employee clocks in under this service account.
    - iv. Max Units Per Punch **(optional)**: Enter if the employee may not exceed a maximum number of billing units in one shift.
    - v. Start Date **(optional)**: If a date is entered, the employee will not be able to make a punch before this date.
    - vi. End Date **(options)**: If a date is entered, the employee will not be able to make a punch after this date.
    - vii. \*\*Account Reference **(optional)**



- viii. 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.
      - 1. Grace Period Expiration: The date the grace period will expire based on the time frame associated with the linked certification template.
    - ix. Status: Defaults to Active. Switch to inactive when this is no longer a valid service account.
  - b. Residential Program/Day Program/Group Service/Parenting Program
    - i. All fields from Administration/Drive/Training/Vacation/Sick/Holiday, and:
    - ii. Payroll Modifier (**optional**): Use of this service account has a unique pay rate multiplier rather than a unique flat rate.
  - c. PTO
    - i. All fields from Administration/Drive/Training/Vacation/Sick/Holiday, and:
    - ii. PTO Increment (**optional**): Enter if PTO can only be entered in a set increment (i.e. 8 hours).
  - d. Mileage
    - i. All fields from Administration/Drive/Training/Vacation/Sick/Holiday, and:
    - ii. Payability: Defaults to Payable. Change to Not Payable if you will not pay the employee for this service.
- ii. Click Save.
- iii. Click Yes on the confirmation window.

## Client Service Account

Description: An account in which a client is linked to an employee or a program in order to receive a specified service.

Security Requirement: Superadmin user, Supervisor Role

Required Entities Prior to Creation:

- Cost Center
- Funding Source
- Service Code
- Client Funding Account
- Program Profile or Employee Profile (depending on type of account)

### Steps to Create:

1. Click Clients on the sidebar
2. Search for the client by typing the name in Type Client Name and selecting the name when it comes up. Click Search.
3. Select the client from the table by clicking anywhere in the row.
4. Click Actions.
5. Click New Service Account.
6. Complete the form - This form may be completed in the same manner as an Employee Service Account. When creating a Client Service Account, the following account types are available:
  - a. Hourly
  - b. Residential Program
  - c. Day Program
  - d. Group Service
  - e. Parenting Program
  - f. Transportation
  - g. Client Transportation
7. Click Save.
8. Click Yes on the confirmation window.

## Program Profile

Description: A profile specific to a program in which a client receives services. A program profile links to one specific cost center and may serve multiple clients. With the exception of Group Services, employees log into program profiles in order to add punches, view entries, and view the program schedule.

Security Requirement: Superadmin user or Program Admin permission

### Required Entities Prior to Creation:

- Cost Center

### Steps to Create a Residential Program:

1. Click Residential Programs on the sidebar.
2. Click Actions.
3. Click Add New Residential Program.
4. Complete the Basic Demographics form:
  - a. Name **(required)**: Must be at least 6 characters.
  - b. Address **(required)**
  - c. GNIS Code **(required)**: Click Search Location after entering the address to generate the GNIS Code.
  - d. Phone **(required)**
  - e. Alternative Phone **(optional)**
  - f. Email **(required)**
  - g. Cost Center **(required)**

- h. Weekly Default Hours (**optional**): Enter only if the program does not operate 24x7.
  - i. Provider Service Location (**optional**): Unique location identifier (i.e. program license number).
  - j. \*\*Profile Reference (**optional**)
  - k. On Call Ratio (**optional**): Number of employees who can be scheduled as on-call for any given shift.
  - l. Allow Sleep Shift: Defaults to Yes. Select No if sleep shifts will not be permitted.
  - m. EVV Required: Defaults to Yes. Select No if you do not wish to require EVV location, or allow Phone Clock In.
  - n. Sleep Shift Start and End: Visible and required if you select “Yes” for “Allow Sleep Shift.”
5. Click Next.
  6. Complete EVV Location form (**optional**): EVV Locations can be added to the profile at a later date. Complete if desired, or click Next.
    - a. Copy from Profile Address (**optional**): Copy the address from the Basic Demographics Form.
    - b. EVV Location Name (**required if completing form**): The name of the location.
    - c. EVV Location Type (**required if completing form**): Select from dropdown.
    - d. Address (**required if completing form**): The location address.
    - e. Begin Date (**required if completing form**): The first date the location is approved for use.
    - f. End Date (**optional**): The last date the location is approved, if there is one.
    - g. Status (**required if completing form**): Select from dropdown.
    - h. Primary (**optional**): Select if this is the primary location to provide services.
  7. Click Next.
  8. Complete the Authentication Information form.
    - a. IP Address (**optional**): Enter the IP address of the program device if you wish to restrict employees to only clock in and out from this device.
    - b. Username (**optional to change**): Employees will use this for all future program logins.
    - c. Password (**required**): Employees will use this for all future program logins.
    - d. Confirm Password (**required**): Enter same as above to confirm.
    - e. Pin (**required**): Will be used to login to this program account from a mobile device (available in a future release).
    - f. Status: Defaults to Active. Switch to inactive when this is no longer a valid program.
  9. Click Next.
  10. Confirm summary details.
  11. Click Save.
  12. Click Yes on the confirmation window.

Steps to Create a Day Program:

1. Click Day Programs on the sidebar.
2. Click Actions.
3. Click Add New Day Program.
4. Complete the Basic Demographics form:
  - a. Name (**required**): Must be at least 6 characters.

- b. Address **(required)**
  - c. GNIS Code **(required)**: Click Search Location after entering the address to generate the GNIS Code.
  - d. Phone **(required)**
  - e. Alternative Phone **(optional)**
  - f. Email **(required)**
  - g. Holiday Schedule **(required)**: Select the Holiday Schedule from the drop down that applies to this program.
  - h. Cost Center **(required)**
  - i. Provider Service Location **(optional)**: Unique location identifier (i.e. program license number).
  - j. \*\*Profile Reference **(optional)**
  - k. On Call Ratio **(optional)**: Number of employees who can be scheduled as on-call for any given shift.
  - l. Operational Hours **(required)**: The hours this program is open and serving clients.
  - m. EVV Required: Defaults to Yes. Select No if you do not wish to require EVV Location or allow clock in via phone.
  - n. Attach Logo **(optional)**
5. Click Next.
  6. Complete EVV Location form **(optional)**: EVV Locations can be added to the profile at a later date. Complete if desired, or click Next.
    - a. Copy from Profile Address **(optional)**: Copy the address from the Basic Demographics Form.
    - b. EVV Location Name **(required if completing form)**: The name of the location.
    - c. EVV Location Type **(required if completing form)**: Select from dropdown.
    - d. Address **(required if completing form)**: The location address.
    - e. Begin Date **(required if completing form)**: The first date the location is approved for use.
    - f. End Date **(optional)**: The last date the location is approved, if there is one.
    - g. Status **(required if completing form)**: Select from dropdown.
    - h. Primary **(optional)**: Select if this is the primary location to provide services.
  7. Click Next.
  8. Complete the Authentication Information form.
    - a. IP Address **(optional)**: Enter the IP address of the program device if you wish to restrict employees to only clock in and out from this device.
    - b. Username **(optional to change)**: Employees will use this for all future program logins.
    - c. Password **(required)**: Employees will use this for all future program logins.
    - d. Confirm Password **(required)**: Enter same as above to confirm.
    - e. Pin **(required)**: Will be used to login to this program account from a mobile device (available in a future release).
    - f. Status: Defaults to Active. Switch to inactive when this is no longer a valid program.
  9. Click Next.
  10. Confirm summary details.
  11. Click Save.

12. Click Yes on the confirmation window.

#### Steps to Create a Group Service:

1. Click Group Services on the sidebar.
2. Click Actions.
3. Click Add New Group Service.
4. Complete the Basic Demographics form:
  - a. Name **(required)**: Must be at least 6 characters.
  - b. Address **(required)**
  - c. GNIS Code **(required)**: Click Search Location after entering the address to generate the GNIS Code.
  - d. Phone **(required)**
  - e. Alternative Phone **(optional)**
  - f. Email **(required)**
  - g. Cost Center **(required)**
  - h. \*\*Profile Reference **(optional)**
  - i. Status: Defaults to Active. Switch to inactive when this is no longer a valid program.
  - j. EVV Required: Defaults to Yes. Select No if you do not wish to require EVV Location on punches.
  - k. Enable Geofencing: Defaults to No. Select Yes if you wish to enable geofencing for this program.
  - l. Requires Multiple Clients Per Punch. Select Yes if you wish to require employees to select more than one client upon punch creation.
5. Click Next.
6. Complete EVV Location form **(optional)**: EVV Locations can be added to the profile at a later date. Complete if desired, or click Next.
  - a. Copy from Profile Address **(optional)**: Copy the address from the Basic Demographics Form.
  - b. EVV Location Name **(required if completing form)**: The name of the location.
  - c. EVV Location Type **(required if completing form)**: Select from dropdown.
  - d. Address **(required if completing form)**: The location address.
  - e. Begin Date **(required if completing form)**: The first date the location is approved for use.
  - f. End Date **(optional)**: The last date the location is approved, if there is one.
  - g. Status **(required if completing form)**: Select from dropdown.
  - h. Primary **(optional)**: Select if this is the primary location to provide services.
7. Click Next.
8. Click Save.
9. Click Yes on the confirmation window.

#### Steps to Create a Parenting Program:

1. Click Parenting Programs on the sidebar.
2. Click Actions.
3. Click Add New Parenting Program.

4. Complete the Basic Demographics form:
  - a. Name **(required)**: Must be at least 6 characters.
  - b. Address **(required)**
  - c. Phone **(required)**
  - d. Alternative Phone **(optional)**
  - e. Email **(required)**
  - f. Cost Center **(required)**
  - g. Weekly Default Hours **(optional)**: The default number of hours of service required to provide.
  - h. Provider Service Location **(optional)**: Unique location identifier (i.e. program license number).
  - i. \*\*Profile Reference **(optional)**
  - j. EVV Required: Defaults to Yes. Select No if you do not wish to require EVV location or allow clock in via phone.
  - k. Enable Geofencing: Defaults to No. Select Yes if you wish to enable geofencing for this program.
5. Click Next.
6. Complete EVV Location form **(optional)**: EVV Locations can be added to the profile at a later date. Complete if desired, or click Next.
  - a. Copy from Profile Address **(optional)**: Copy the address from the Basic Demographics Form.
  - b. EVV Location Name **(required if completing form)**: The name of the location.
  - c. EVV Location Type **(required if completing form)**: Select from dropdown.
  - d. Address **(required if completing form)**: The location address.
  - e. Begin Date **(required if completing form)**: The first date the location is approved for use.
  - f. End Date **(optional)**: The last date the location is approved, if there is one.
  - g. Status **(required if completing form)**: Select from dropdown.
  - h. Primary **(optional)**: Select if this is the primary location to provide services.
7. Click Next.
8. Complete the Authentication Information form.
  - a. IP Address **(optional)**: Enter the IP address of the program device if you wish to restrict employees to only clock in and out from this device.
  - b. Username **(optional to change)**: Employees will use this for all future program logins.
  - c. Password **(required)**: Employees will use this for all future program logins.
  - d. Confirm Password **(required)**: Enter same as above to confirm.
  - e. Pin **(required)**: Will be used to login to this program account from a mobile device (available in a future release).
  - f. Status: Defaults to Active. Switch to inactive when this is no longer a valid program.
9. Click Next.
10. Confirm summary details.
11. Click Save.
12. Click Yes on the confirmation window.