



Maica Client Delivery Release Notes V.0.146

Ticket #	Ticket Title	Description
CC-566	Add Date Range to Total Committed Quick Action	Enhancement: Total Committed Date Range Overview In version 0.139, a new feature was introduced in Maica to enhance Service Agreement management by calculating the Total Committed value. This value estimates and projects the financial cost of future Appointment records for a Participant, assisting in budget tracking and ensuring sufficient funding remains under their Service Agreement. As part of this release, the Quick Action was extended to enable users to preview this calculation for a selected date range without altering any stored values. What's Changed? • New "Calculate Total Committed Date Range" feature available within the user interface of the Calculate Total Committed Quick Action buttons available on both Service Agreement and Agreement Item records. • Allows users to define a date range for calculation based on Appointment

		Scheduled Start Date. • Calculates the <i>Total Committed</i> value using the same logic as the existing batch jobs. • The result is displayed only in the UI – it is not stored in the database or saved to the Total Committed field. • Existing "Calculate Total Committed" Quick Action remains unchanged and continues to store the calculated value when settings permit.
CC-551	Planner – Agenda View	New Feature: Agenda View The Agenda View has been added to the Maica Planner. This view displays Planner information in a list format, grouped by day, rather than on a grid. It provides a sequential agenda of Appointments, making it easier to review what is scheduled each day. What's Changed?

		● Agenda View Display: ○ Shows Appointments in a chronological list by date. ○ Expands each day to display all associated Appointments. ○ Displays details such as: ■ Time of the Appointment ■ Participant(s) allocated (if applicable) ■ Location recorded on the Appointment ● Key Characteristics: ○ Agenda View only displays Appointments (Shifts are excluded). ○ No toggle between Calendar or Timeline modes – Agenda is a standalone mode. ○ Drag & drop functionality is locked when using Agenda View. ● Configuration: ○ Information shown in Agenda View cells is configurable via Planner Management Settings, consistent with other Planner views. Example Scenarios ● A scheduler needs to quickly review all Appointments for a given week. ✓ Agenda View shows a daily list in chronological order. ● An Appointment is created or edited in Agenda View. ✓ It automatically appears in the correct order for the selected day. ● A user attempts to drag & drop an Appointment.
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		✔ Drag & drop is disabled in Agenda View; changes must be made directly in the record. For more information on the Agenda View, please refer to the following Knowledge Base article: Agenda View
CC-580	Order Participants Alphabetically in Planner Group Appointments	Enhancement: Alphabetical Ordering of Participants Participants within group Appointments in the Planner are now displayed in alphabetical order to make attendance verification easier. What's Changed? ● Alphabetical Ordering: ○ Participants in group Appointments are ordered by First Name. ○ If the First Name field is blank, the system uses the Last Name field instead. ● Consistency: ○ Applies to all group Appointment views in the Planner. ○ Ensures Participant lists are predictable and easier to cross-check against attendance sheets.
CC-518	Manage Travel Submission Logic –	Fixed: Manage Travel Submission Logic

	Duplicate TSE Creation and Incorrect Data Fix	This update resolves issues where Manage Travel submissions caused: • Duplicate Timesheet Entries (TSEs) when multiple Resources were assigned. • Travel time and distance values being overridden by the last submission instead of being recorded per Resource. The fix introduces a change to the data model, shifting Travel fields to the Appointment Resource level, ensuring each Resource has their own travel attributes. What's Changed?
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- **Appointment Resource Fields (new):**

- Travel (kms)
- Travel (mins)
- Travel Proportion (kms)
- Travel Proportion (mins)
- Travel Time (mins) (later removed as legacy)
- Selected Origin
- Selected Destination
- Origin Address
- Destination Address

- **Appointment Fields (updated):**

- Travel (kms) → rollup of all related Resource values
- Travel (mins) → rollup of all related Resource values
- Travel Proportion (kms) → average across Resources
- Travel Proportion (mins) → average across Resources

- **UI Updates:**

- Manage Appointment and Manage Travel modals updated to allow Origin/Destination per Resource.
- Resources see only their own travel values when logged in.
- Non-participant users see Appointment summary values.
- Manage Travel slider hidden for non-participant users.

- **Billing & Timesheet Logic:**

- Appointment summary values used for Billing (kms and minutes).
- Appointment Resource values used for Timesheet Entries.

		- Expense creation logic updated to create one record per Resource instead of one overall record. Example Scenarios - Two Resources check out of the same Appointment with different travel values. ✓ Each Resource's travel is recorded separately, and Appointment totals are rolled up correctly. - A scheduler updates an Appointment's location after creation. ✓ Related Resource travel attributes are updated automatically. - Billing outputs are generated. ✓ Delivery Activity quantities are based only on Resources that are Accepted, Checked In, and Checked Out.
CC-612	Appointment Breaks Cannot Be Recurring	Fixed: Appointment Breaks Cannot Be Recurring A fix has been applied to ensure Appointment Breaks cannot be created as recurring. Previously, the Recurring Unavailability toggle was visible in the Appointment Break modal, which incorrectly allowed Breaks to behave like recurring Unavailabilities. This has now been resolved. What's Changed? - The Recurring Unavailability toggle is hidden when creating Appointment Breaks. - Appointment Breaks are always single-instance and cannot repeat. - Unavailabilities retain their ability to be set as recurring, unaffected by this fix.

CC-615	Change Generate Invoice DA Link to Invoice Line Item	Fix: Generate Invoice Link Behaviour The Generate Invoice link from Delivery Activities has been updated to improve navigation. Previously, the link directed users to the related Invoice, requiring additional steps to locate the specific Invoice Line Item (ILI). The link now opens the associated Invoice Line Item directly. What's Changed? ● Generate Invoice link on Delivery Activities now points to the Invoice Line Item instead of the Invoice. ● Users can still navigate from the Invoice Line Item to the parent Invoice if required. ● Tooltip adjustments were made to avoid unnecessary duplication – the icon links directly without verbose tooltips.
CC-549	Mobile Care Worker Experience	New Feature: Mobile Care Worker Application The new Mobile Care Worker Experience has been released! This app is designed to give mobile staff a streamlined way to manage their schedules, record actions, and interact with Maica directly from their mobile device in a clear and UI friendly way As this is quite a significant feature, rather than reading detail here, please refer to the Knowledge Base articles below: ● Installing the Mobile App ● Homepage Overview

		• Appointments and Shifts Overview • Appointment and Shift Actions (includes all sub-pages of actions)
CC-625	Appointment Service – Support Category Number Field Length Update	Fix: Field Length Update for Support at Home Compliance Field length limits for Support at Home–related identifiers were preventing correct data entry. To resolve this, the following fields have been updated to support up to 255 characters: What’s Changed? • <code>Appointment_Service__c.Support_Category_Number__c</code> → field length increased to 255 • <code>Appointment_Service__c.Registration_Group_Number__c</code> → field length increased to 255 • <code>Registration_Group__c.Group_Number__c</code> → field length increased to 255 • Updated field descriptions to clarify: “The unique identifier assigned by the Funding Source, i.e. NDIS or Support at Home (Aged Care).”