



Maica Client Care Release Notes V.0.40

Ticket #	Ticket Title	Description
OEM-617	Schedule View – Hide Shifts & Unavailabilities	Enhancement: Schedule View Display Controls for Shifts and Unavailabilities A new enhancement has been introduced to improve clarity within the Maica Planner's Schedule view. Previously, both Shifts and Unavailabilities were shown alongside Appointments in Calendar view, leading to unnecessary clutter and poor usability at scale. This update introduces filtering and visibility improvements to ensure Schedule views remain clear and manageable. What's Changed? • New Manual Run Section: ◦ Shifts are now hidden in Calendar view by default. ◦ Shifts remain visible in Timeline view. ◦ A new "Show Shifts" filter allows users to toggle visibility of Shifts. ◦ In Calendar view, the logged-in user's own Shift can be displayed if the filter is enabled, but is hidden by default. • Unavailabilities Removal: ◦ Unavailabilities have been removed entirely from the Schedule Calendar view. ◦ Testing confirmed Unavailabilities remain hidden in Calendar view across scenarios. • Improved UI Clarity: ◦ Clear separation between Appointments and underlying Shifts. Default behaviour prevents clutter at scale, while filters allow targeted visibility when needed. Example Scenarios • A provider opens Calendar view to see upcoming Appointments. ✔ Only Appointments are shown; Shifts and Unavailabilities are hidden. • A scheduler switches to Timeline view and enables the "Show Shifts" filter. ✔ All underlying Shifts are displayed alongside Appointments for detailed workforce planning. • A staff member checks their personal Calendar view.

		✔ Their own Shift can be displayed when the filter is enabled, hidden otherwise.
OEM-623	Enable Dragging of Unfilled Appointments onto Resources in Resource/Timeline View	Enhancement: Drag-and-Drop Resource Allocation for Unfilled Appointments A new enhancement has been added to the Maica Planner to provide a more advanced rostering experience. Users can now drag unfilled Appointments or Shifts directly onto the whitespace of a Resource in the Schedule Timeline View to allocate them to the Appointment. This action automatically triggers Resource Validation, ensuring the re-allocation is processed in the same way as if it was completed manually within the Appointment or Shift record. What's Changed? • Drag-and-Drop Allocation: ○ Unfilled Appointments or Shifts can be dragged onto a Resource row in Timeline View. ○ Resource Validation is triggered automatically to confirm the allocation. • Availability Handling: ○ Any whitespace shown for a Resource in Timeline View is treated as available time. ○ Resource Unavailability is displayed, preventing allocation onto unavailable periods. • System Messages: ○ Success Message: <i>"You have successfully allocated the selected Resource to this Appointment/Shift."</i> ○ Failure Message: <i>"We have encountered a validation error whilst trying to allocate the selected Resource to this Appointment/Shift. Please try this manually by using the Resource Filters."</i> Example Scenarios • A scheduler drags an unfilled Appointment into an available time slot for a Resource. ✔ Resource is validated and successfully allocated. • A scheduler attempts to drop an Appointment onto a period marked as Unavailable. ✔ Allocation is blocked, and the failure message is displayed. • A Shift is dropped onto whitespace within a Resource's Timeline. ✔ Allocation succeeds if the Resource passes validation, fails with guidance otherwise.
OEM-624	Unavailability Enforcement	Enhancement: Unavailability Enforcement for Resource Allocation A new attribute, Unavailability Enforcement, has been introduced to strengthen control over how Unavailabilities affect the allocation of Resources to Appointments or Shifts. This feature allows Unavailabilities to be classified as either Hard Unavailability or Soft Unavailability, giving

		providers greater flexibility in workforce planning. What's Changed? • Hard Unavailability: ○ Resource allocation is strictly blocked. ○ Resources marked with a Hard Unavailability cannot be added to an Appointment or Shift. • Soft Unavailability: ○ Allocation is permitted but requires user confirmation. ○ Users are prompted with the message: <i>"This Resource is marked with a Soft Unavailability. Are you sure you want to add them to the Appointment/Shift?"</i> ○ This allows Resources to be assigned despite the unavailability, provided the user confirms. Example Scenarios • A Resource has a Hard Unavailability set for annual leave. ✔ Scheduler cannot allocate this Resource to any Appointment or Shift during that period. • A Resource has a Soft Unavailability for training. ✔ Scheduler is warned but can still assign the Resource if needed. • A scheduler attempts to override a Soft Unavailability and proceeds. ✔ Resource is successfully allocated, with confirmation logged. For more information on Unavailability Enforcement, please refer to the following Knowledge Base article: Manage Unavailability
OEM-645	Schedule Manager	New Feature: Schedule Manager The Schedule Manager has been introduced into Maica to provide a central place to manage Appointments and Shifts in bulk. This feature displays records in a data table to consolidate scheduling actions whilst adding bulk management options for more efficient updates. What's Changed? • Dedicated Interface: A new Schedule Manager section is available in the Maica Navigation. • Appointment and Shift Management: Supports direct creation, editing, and management of Appointments and Shifts. • Bulk Actions: Allows multiple records to be updated, reallocated, or managed at the same time.

		• Filtering and Controls: Includes and inherits all filters and actions from the current Planner. Further Information For a full breakdown of this feature, refer to the Knowledge Base articles: • Schedule Manager Overview • Schedule Manager Actions
OEM-625	Planner Start Day of Week Setting	Enhancement: Configure the First Day of the Planner View A new setting has been added to Planner Management to control which day the Planner calendar view begins on. Previously, weekly and fortnightly schedules always defaulted to start on Monday. With this update, administrators can configure the Start Day of Week setting to determine the first visible day when navigating weekly or fortnightly schedules. What's Changed? • New Setting – Start Day of Week: ◦ Available under Planner Management. ◦ Options include all days of the week (default Monday). • Behaviour: ◦ When Monday is selected, weekly and fortnightly schedules begin on Monday (current behaviour). ◦ When a different day is selected, the Planner uses whichever day the user selects as the first day of the displayed period. • Impact on Navigation: ◦ Affects how the Planner displays when users move between weeks or fortnights using the date picker. ◦ Allows greater flexibility for services that do not operate on a Monday-to-Sunday schedule. Example Scenarios • A provider sets Start Day of Week = Monday. ☒ Planner weeks always display Monday to Sunday. • A provider sets Start Day of Week = Wednesday in the Planner Management Settings. ☒ Planner displays Wednesday as the first day, with the following week or fortnight continuing from that day.

OEM-657	Next/Previous Appointment Selections – Appointment Resource Logic Updates	Enhancement: Appointment Resource Travel Logic Update The logic for determining previous/next Appointment travel options has been updated to use the assigned Appointment Resource, rather than the logged-in (running) user. This ensures accurate and consistent travel data when managing appointments across multiple resources. What's Changed? • Travel Source Update: ◦ Travel options now derive from the assigned Appointment Resource, not the logged-in user. ◦ This fixes inconsistencies when schedulers view or manage Appointments for Resources other than themselves. • Mapping Improvements: ◦ Corrects issues where Appointment Location equals Participant Location. ◦ Ensures the Recalculate Travel action (OEM-659 detailed below) reflects updated logic. • Consistent Travel Breakdowns: ◦ Travel breakdowns now display consistently for multi-resource Appointments. ◦ Removes dependency on scheduler's own resource data. • UI/Behaviour Adjustments: ◦ From/To (Origin/Final Destination) options are determined per Appointment Resource. Maica will: ■ Check that resource has a previous appointment within the configured time window before the current appointment. ■ Checking if that resource has a next appointment within the configured time window after the current appointment. ■ Use those appointments as the From/To options where available. ◦ If a Resource has no previous/next Appointment, fallback options (Home, Primary Location, Manual Address, etc.) are used. Example Scenarios • A scheduler reviews a Resource's next Appointment travel breakdown. ✓ Maica calculates based on the Resource's own schedule, not the scheduler's. • A multi-resource Appointment requires travel distances for each Resource. ✓ Travel is displayed correctly per Resource, avoiding inconsistent values. • A location equals the Participant Location. ✓ Travel mapping updates correctly, fixing prior mismatches.
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OEM-658

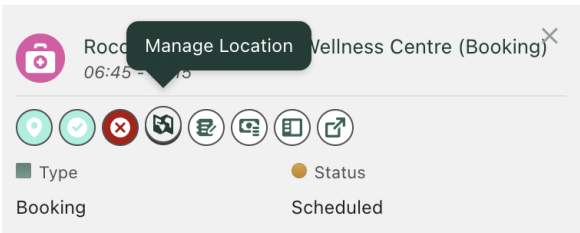
Manage Location – Quick Action & Modal

Enhancement: Manage Location Quick Action in Planner

A new **Manage Location** quick action has been added to the Planner to make it easier for schedulers and rostering team members to manage **Travel** and **Location** details directly from the Planner. This action reduces the need to open full records by launching a modal with the existing Location component.

What's Changed?

- **New Quick Action:**
 - A **Manage Location** option has been added to the single-click menu for Appointments and Shifts.
 - *Please note, it must be added in the Planner Management Settings under Quick Information Dialog Actions*
 - Available only for **incomplete Appointments** (not Cancelled or Completed).
 - The modal opens the existing **Location** component instantly, retaining its current functionality.



- **Usage Notes:**
 - Allows schedulers to quickly adjust Appointment Locations and recalculate travel times (integrating with Google Maps API).
 - Intended to reduce conflicts and streamline updates without leaving the Planner.

Example Scenarios

- A scheduler notices an incorrect location on an upcoming Appointment.
 - ✓ They open the single-click menu, select **Manage Location**, and update directly in the modal.
- Travel times need recalculating after a change of address.
 - ✓ The scheduler launches the **Manage Location** modal and triggers recalculation without opening the Appointment record.

OEM-659	Manage Location - Recalculate Travel	Enhancement: Recalculate Travel in Manage Location A new Recalculate Travel button has been added to the Manage Location modal. This enhancement allows users to refresh travel times and distances directly within the modal, without needing to update the Origin/Destination values or reload the modal. What's Changed? • UI Placement: ◦ A new Recalculate Travel button appears at the top of the Appointment Travel Time Breakdown section in the Manage Location modal, as shown below.
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Location

This Appointment is happening at a physical address



Location Participant Location Manual Entry

Location

City Wellness Centre

Accommodation

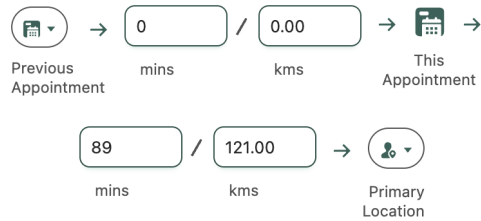
Select an Accommodation

Thatcher Rye

Recalculate Travel



Appointment Travel Time Breakdown



Leave now Depart at Arrive by

Departing from this Appointment to **926 Elizabeth St, Bendigo, 3350** at **2:45 pm**, the arrival time will be **4:14 pm**.

The total travel time for this Appointment will be **89 minutes** and **121 kms**.

Show on Google Maps

- **Behaviour:**

- On click, the button:
 - Calls out to the **Google Maps API**.
 - Recalculates travel times and kilometre distances.
 - Uses the currently selected **Origin** and **Destination** values in the modal.
 - Updates the displayed travel values with refreshed results.

		• Outcome: ○ Users can immediately see updated travel times and distances. ○ No reload or exit from the modal is required to update values. Example Scenarios • A participant's address is updated, and the scheduler needs to refresh travel times. ✓ Clicking Recalculate Travel updates the Appointment Travel Time Breakdown with the new results. • A scheduler reviews travel distances between multiple appointments. ✓ The button allows recalculation without leaving the Manage Location modal.
OEM-620	Unfilled Appointments in Resource/Timeline View	Enhancement: Updated Definition and Display of Unfilled Appointments/Shifts The definition and handling of Unfilled Appointments and Unfilled Shifts in the Planner has been updated to improve rostering visibility and consistency. Unfilled is now defined only by missing Resources, and Participants are disregarded when determining if an Appointment is unfilled. What's Changed? • Definition of Unfilled in Maica: ○ An Unfilled Appointment is any Appointment with fewer Resources assigned than the Ratio specifies. ○ Participant assignment is no longer considered when determining Unfilled status. • Planner Filter Updates: ○ Existing filter Show Unfilled Appointments/Shifts updated to show only records missing Resources. ○ New filter Show only Unfilled Appointments/Shifts added for finer control. ○ New filter Show only Appointments with missing Participants introduced, allowing separation of Resource-based vs Participant-based gaps. • Unfilled Row Behaviour: ○ The Unfilled row is always displayed in Timeline View, regardless of filters or grouping. ○ The row position is fixed (e.g. at the top or bottom) based on Settings and remains visible even when scrolling. Example Scenarios • A scheduler applies the Show Unfilled Appointments/Shifts filter. ✓ Only Appointments with missing Resources are shown. • A provider needs to identify Appointments missing Participants. ✓ The Show only Appointments with missing Participants filter highlights these cases

		separately.
OEM-656	Manage Price Book QA – Bucket Products	Fix: Agreement Item Rate Handling for Bucket Products A fix has been applied to prevent Agreement Item rates from being incorrectly overwritten during the Manage Price Book Quick Action process. This is due to the fact that the Price Book Entry for all Bucket Product records will have a Rate of \$0. The user sets the appropriate Rate on the Agreement Item record. Updating this in the QA process will erase whatever Rate was set on the Agreement Item. What's Changed? • Agreement Item records where Bucket = TRUE are excluded from rate updates in the Manage Price Book QA. • Bucket Product Price Book Entries always have a rate of \$0. • Users continue to set and manage the correct rate directly on the Agreement Item record. Example Scenarios • ☒ A user runs the Manage Price Book Quick Action for a Service Agreement containing Bucket Products. → The system skips rate updates for Agreement Items where Bucket = TRUE, preserving the manually entered rates. • ☒ A user updates non-Bucket Agreement Items via the same Quick Action. → Rates are updated as expected from the Price Book.
OEM-674	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)

Additional Package Resolutions

In addition to the enhancements outlined above, this release also includes a number of issue resolutions to improve stability and overall user experience.

- **OEM-688:** SaH - Appointment Service - Support Category Number Field Length Update
 - 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 per below:
 - Appointment_Service__c.Support_Category_Number__c → field length increased to 255
 - Appointment_Service__c.Registration_Group_Number__c → field length increased to 255
 - Registration_Group__c.Group_Number__c → field length increased to 255
 - Additionally, updated field descriptions to clarify: "The unique identifier assigned by the Funding Source, i.e. NDIS or Support at Home (Aged Care).
- **OEM-668:** Bug fixed in Planner Appointment QA
 - A fix has been applied to improve the **View in Planner** Quick Action for Appointments. Previously, Appointments did not always highlight correctly, did not scroll into view, and could be hidden if filters were applied.