Maica Client Care Release Notes V.0.42

<table>
<tr><th>Ticket #</th><th>Ticket Title</th><th>Description</th></tr>
<tr><td>OEM-707</td><td>Support at Home Claim – New Claiming Attributes</td><td>
<h3>Enhancement: Support at Home New Claim Fields</h3>
New fields have been added to the <code>Invoice Line Item</code> object to support updated claiming requirements under the Support at Home (SaH) framework. These fields capture additional information about service delivery, professional type, and assistive technology purchase details to ensure compliance with SaH data standards.
What’s Changed?
The following fields have been added to the <code>Invoice Line Item</code> object:
<table>
<tr><th>Field Name</th><th>Type</th><th>Description</th></tr>
<tr><td>Delivered by Third Party</td><td>Checkbox</td><td>Indicates whether the service linked to the Invoice Line Item was delivered by</td></tr>
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				a third-party provider rather than directly by your organisation.
		Health Professional Type	Picklist	Specifies the type of health professional who delivered the service (e.g. Physiotherapy, Occupational Therapy, Psychology, Allied Health Assistance, etc.).
		Health Professional Type - Other	Text (255)	Used to record a custom health professional type when the correct option is not available in the picklist.
		Prescribed Item	Picklist (Yes/No)	Indicates whether the service or item being invoiced is a prescribed item.
		Loaned By - Organisation Name	Text (255)	Records the name of the organisation or government scheme that loaned the assistive technology item.

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<tr><td>Loaned By - Invoice Number</td><td>Text (255)</td><td>Captures the reference or invoice number associated with the loaned item.</td></tr>
<tr><td>Purchase Method Type</td><td>Picklist (Purchased/Loaned)</td><td>Indicates whether the assistive technology item was purchased outright or loaned from another organisation.</td></tr>
<tr><td>Item First Payment</td><td>Checkbox</td><td>Identifies whether this Invoice Line Item represents the first payment for the item or service. This field is mandatory for Home Modification products.</td></tr>
</table>
Post-Install Steps
For existing installations, the new fields must be manually added to the <code>maica_cc__Invoice_Line_Item__c</code> Lightning Record Page.
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<tr>
<td>OEM-704</td>
<td>Care Worker App Enhancements</td>
<td>Enhancement: Instructions and Custom Fields Details Display in Mobile App
The Care Worker Mobile App has been updated to display Appointment Instructions and</td>
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</table>

		other **custom Appointment fields** defined in system settings. This ensures Care Workers can view key `Appointment` details directly from the app without relying on email or external communication.
		
		What's Changed?
		
		• **Appointment Instructions:**
		  ○ The field `Appointment Instructions` now displays under the **Service** section in `Appointment` details.
		
		• **Custom Fields:**
		  ○ Additional `Appointment` fields nominated in settings are displayed below the `Appointment` Instructions.
		  ○ Fields only appear if they contain a value, keeping the display clean and relevant. If there are no configured Custom Fields, this section will be hidden.
		
		• **UI Updates & Other Changes:**
		  ○ Added a divider line and consistent layout for additional custom fields, separating it from standard Appointment information.
		  ○ Removed **Search** from New Note creation and similar components.
		  ○ Updated **‹ Back** navigation icons in legacy mobile modals.
		  ○ Updated Appointment Summary logic to correctly calculate *Total Appointments + Hours*.
		
		Example Scenarios

		• ✅ A Care Worker opens an `Appointment` in the mobile app and sees the `Appointment Instructions` field beneath the **Service** details. • ✅ Any **custom fields** defined for `Appointment` are displayed below Instructions when populated.

OEM-705	Recurring Appointments – Handling Inactive Users	Fix: Owner Assignment for Recurring Appointment Batches
		
		Overview
		
		An issue was identified where `Recurring Appointments` could fail to generate correctly if the **Owner of the Master Appointment** was an **inactive** user. This update introduces logic to ensure that `Recurring Appointment` batches continue to run successfully even when the original record owner is **inactive**.
		
		What's Changed?
		
		• When generating Recurring Appointments via batch:
		  ○ Maica first checks whether the **Master Appointment Owner** is active.
		  ○ If the `Owner` is **active**, ownership of the cloned `Appointment(s)` is retained.
		  ○ If the `Owner` is **inactive**, ownership is reassigned to the **current running user** (the user executing the batch).
		  ○ **Note: If the running user isn't active the batch/scheduled job won't run at all**
		• This ensures all generated `Appointment` records are owned by an **active user**,

		preventing batch failures. • The same logic has been applied to the **Recurring Unavailability Batch**. Example Scenarios • ✅ The Master Appointment Owner is active → Recurring Appointments retain the same Owner. ✅ The Master Appointment Owner is inactive → Recurring Appointments are automatically reassigned to the running (active) user. • ⚠️ If the running user later becomes inactive, the batch will not execute until it is rescheduled by an active user via **Maica Settings › Scheduled Jobs**.
OEM-710	Invoice Line Item Trigger - Funding Item	### Enhancement: Automatic Funding Item Population for Invoice Line Items A new trigger has been introduced to automatically populate the `Funding Item` lookup field on the `Invoice Line Item` object. This ensures each `Invoice Line Item` is correctly linked to its associated `Funding Item` within the related `Service Agreement` `Funding`, improving financial traceability and budget utilisation reporting for **Support at Home** compliance. **What's Changed?** • Automatic Trigger on Create: ○ The trigger executes automatically whenever a new `Invoice Line Item` is created. • Relationship Traversal:

    - The trigger uses the `Agreement Item` on the `Invoice Line Item` to locate the related `Service Agreement` and then identify the associated `Funding`.
- Active Budget Matching:
    - From the identified `Funding`, the system filters to find a `Funding Item` record where `Status` **= Active**.
- Budget Type Matching (Standard Case):
    - If the `Invoice Line Item` already contains a `Budget Type`, the system searches for an **Active** `Funding Item` with the same `Budget Type`.
- Budget Type Inference (Fallback Case):
    - If the `Budget Type` field is blank, the trigger retrieves the **parent** `Product` linked to the `Invoice Line Item`.
    - It then reads the `Product` `Budget Type` value(s) and searches for a matching **Active** `Funding Item` for the related `Funding`.
- Populate Fields When Fallback Used:
    - When a match is found using the inferred `Budget Type`, the trigger populates both:
        - The `Funding Item` lookup field.
        - The `Budget Type` field on the `Invoice Line Item` (using the matched `Funding Item` value).
- Null Handling:
    - If no suitable `Funding Item` is found, the trigger leaves both fields blank.

Full Flow Process:

1. `Invoice Line Item` is created
2. Trigger fires
3. From the `Invoice Line Item`, retrieve the linked `Agreement Item`

		4. From the `Agreement Item`, retrieve the parent `Service Agreement` 5. From the `Service Agreement`, retrieve the related `Funding` 6. From the `Funding`, retrieve all related `Funding Item` records 7. Apply the following logic: ○ If the `Invoice Line Item` has a `Budget Type` value: ■ Filter retrieved `Funding Item` records where: ● `Status` = Active ● `Budget Type` = `Invoice Line Item` → `Budget Type` ■ If a matching `Funding Item` is found, assign it to the `Invoice Line Item` → `Budget Type` field. ○ If the `Invoice Line Item` → `Budget Type` is blank: ■ Retrieve the **parent** `Product` of the Invoice Line Item. ■ Obtain the available `Budget Type` value(s) from the `Product`. ■ Filter `Funding Item` records where: ● `Status` = Active ● `Budget Type` = `Product` → `Budget Type` ■ If a matching `Funding Item` is found: ● Assign it to the `Invoice Line Item` → `Budget Type` ● Write the matched `Budget Type` value from the `Funding Item` back to the `Invoice Line Item` → `Budget Type` field. 8. If no match is found: ○ Leave both `Funding Item` and `Budget Type` blank.