



## Maica Client Care Release Notes V.0.43

| Ticket # | Ticket Title                                    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
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| OEM-654  | Service Agreement – End and Update Appointments | <p>Enhancement: End Service Agreement Quick Action</p> <p>A new <b>End Agreement</b> Quick Action has been added to the <b>Service Agreement</b> record page. This feature allows authorised users to end a Service Agreement and automatically update related records, ensuring future Appointments and Delivery Activities are handled correctly.</p> <p>What's Changed?</p> <ul style="list-style-type: none"><li>● <b>New Quick Action: End Agreement</b><ul style="list-style-type: none"><li>○ Launches a guided <b>Screen Flow</b> that captures:<ul style="list-style-type: none"><li>■ <b>End Date</b> (required)</li><li>■ <b>Cancellation Reason</b> (required)</li><li>■ <b>Cancellation Reason – Other</b> (optional text area shown when “Other” is selected)</li></ul></li></ul></li></ul> |

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|  |  | <ul style="list-style-type: none"> <li>○ Access is controlled by the <b>Maica – Service Agreement – Cancellation</b> Permission Set.</li> <li>● <b>End Agreement Flow Behaviour:</b> <ul style="list-style-type: none"> <li>○ Updates the <b>End Date = today</b> and <b>Status = Cancelled</b> on the Service Agreement.</li> <li>○ Updates the <b>End Date</b> for all related <b>Agreement Items</b> to match the new Service Agreement End Date.</li> <li>○ Identifies and processes all <b>future Appointments</b> linked to the Participant: <ul style="list-style-type: none"> <li>■ <b>1:1 Appointments</b> → Appointment status set to <i>Cancelled</i> and <b>Cancellation Reason = Service Agreement Ended</b>.</li> <li>■ <b>Group Appointments</b> → Only the Participant's <b>Delivery Activity</b> records are cancelled; the Appointment remains active for other Participants.</li> </ul> </li> <li>○ Updates related <b>Delivery Activities</b>: <ul style="list-style-type: none"> <li>■ <b>Billing Status = Do Not Bill</b></li> <li>■ <b>Status = Cancelled</b></li> </ul> </li> <li>○ Displays counts of cancelled Appointments and Delivery Activities before confirmation.</li> </ul> </li> <li>● <b>New Fields:</b> <ul style="list-style-type: none"> <li>○ <b>Cancellation Reason (Picklist)</b> – captures reason for ending the Service Agreement.</li> <li>○ <b>Cancellation Reason – Other (Text Area)</b> – allows entry of additional details when “Other” is selected.</li> <li>○ Validation rule <b>VAL_SERVICE_AGREEMENT_0006</b> ensures <i>Cancellation</i></li> </ul> </li> </ul> |
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|  |  | <p><i>Reason – Other</i> is mandatory when applicable.</p> <ul style="list-style-type: none"> <li>• <b>Scheduled Flow – Service Agreement Cancellation Scheduler:</b> <ul style="list-style-type: none"> <li>○ Automatically marks a Service Agreement as <b>Cancelled</b> at midnight following the End Date.</li> <li>○ Ensures the Agreement remains active through the End Date (inclusive).</li> </ul> </li> <li>• <b>UI Enhancements:</b> <ul style="list-style-type: none"> <li>○ Updated text and confirmation screens to summarise: <ul style="list-style-type: none"> <li>■ End Date</li> <li>■ Cancellation Reason</li> <li>■ Number of Agreement Items, Appointments, and Delivery Activities affected.</li> </ul> </li> <li>○ New message displayed when the End Date is in the future:<br/> <i>“The Service Agreement will remain active until {End Date}, and will be cancelled automatically at midnight on that date.”</i> </li> </ul> </li> </ul> <p><b>Example Scenarios</b></p> <ul style="list-style-type: none"> <li>•  A user ends a Service Agreement with a future End Date. The Agreement remains active until that date, then automatically cancels at midnight.</li> <li>•  When cancelling an Agreement with one Participant, all their future Appointments are cancelled, and related Delivery Activities are marked Do Not Bill.</li> <li>•  In a group Appointment, only the Participant’s Delivery Activities are cancelled; the Appointment remains active for others.</li> </ul> |
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|         |                                             | <p><b>Post Install Steps</b></p> <p>The End Agreement Quick Action needs to be added to the Service Agreement Lightning Record Page</p>                                                                                                                                                                                                                                                                                                                                                         |
| OEM-685 | Update BPR Export File to exclude SaH Items | <p><b>Enhancement: Update BPR Export File</b></p> <p>The Bulk Payment Request (BPR) Export file logic has been updated as part of the Support at Home claiming enhancements in Maica. An additional filter was added to ensure that the BPR Export file includes only NDIS-related Payment Requests, excluding Support at Home.</p> <p>The filter added is:</p> <p><code>maica_cc__Invoice_Line_Item__r.maica_cc__Invoice__r.maica_cc__Funding_Type__c =</code><br/> <b>Support at Home</b></p> |
| OEM-724 | Validation Settings Update                  | <p><b>Enhancement: Update Validation Settings to include link to KB</b></p> <p><b>Overview</b></p> <p>The <b>Validation Management</b> settings page has been updated to include a new information banner, allowing users to easily access supporting documentation in the <b>Maica Knowledge Base</b>. This helps users understand how each setting operates and how the various validation controls interact.</p>                                                                             |

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|         |                                                 | <p>Within the <b>Knowledge Base</b>, a <b>Validation Matrix</b> has been added to display how each Validation Management setting influences or interacts with others. It aims to provide a clearer understanding of how system validation outcomes are determined based on different configurations.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| OEM-718 | Unavailability and Appointment Resource Overlap | <p><b>Fix: Appointment Resource Removal Logic</b></p> <p>A fix has been applied to prevent <b>Appointment Resources</b> from being incorrectly removed when an <b>Unavailability</b> record only <i>touches</i> but does not <i>overlap</i> an Appointment. Previously, if an Unavailability ended exactly at the Appointment start time—or started exactly at the Appointment end time—the Resource was incorrectly detached from the Appointment.</p> <p><b>What's Changed?</b></p> <ul style="list-style-type: none"> <li>• <b>Updated Overlap Logic:</b> <ul style="list-style-type: none"> <li>○ The system now uses a <b>half-open interval</b> rule for overlap detection: <ul style="list-style-type: none"> <li>■ Treats time ranges as <b>[Start, End)</b> (start inclusive, end exclusive).</li> <li>■ Overlap exists only if both conditions are true: <ul style="list-style-type: none"> <li>• <i>Unavailability.Start</i> &lt; <i>Appointment.End</i></li> <li>• <i>Unavailability.End</i> &gt; <i>Appointment.Start</i></li> </ul> </li> </ul> </li> <li>○ If either boundary simply touches (i.e. Unavailability ends at the Appointment start or starts at the Appointment end), the system no longer treats it as an overlap.</li> </ul> </li> <li>• <b>Trigger Update:</b> <ul style="list-style-type: none"> <li>○ Adjusted logic in the <b>UnavailabilityAppointments_MDTM</b> trigger to apply</li> </ul> </li> </ul> |

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|  |  | <p>the corrected rule during insert and update events.</p> <ul style="list-style-type: none"> <li>○ Bulk-safe and idempotent processing ensures no duplicate updates or deletions.</li> </ul> <ul style="list-style-type: none"> <li>● <b>Performance and Reliability Improvements:</b> <ul style="list-style-type: none"> <li>○ Optimised for large-volume operations with mixed overlap and boundary cases.</li> <li>○ Logic remains consistent across <b>time zones</b> and <b>daylight savings transitions</b>.</li> </ul> </li> </ul> <p>Example Scenarios:</p> <ul style="list-style-type: none"> <li>●  No overlap (start boundary):<br/>Appointment: 12:00–15:00<br/>Unavailability: 09:00–12:00<br/>Result: Resource remains assigned.</li> <li>●  No overlap (end boundary):<br/>Appointment: 09:00–12:00<br/>Unavailability: 12:00–15:00<br/>Result: Resource remains assigned.</li> <li>●  True overlap:<br/>Appointment: 12:00–15:00<br/>Unavailability: 11:00–13:00<br/>Result: Resource is removed from the Appointment.</li> <li>●  Full overlap:</li> </ul> |
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|  |  | <p>Appointment: 12:00–15:00</p> <p>Unavailability: 12:00–15:00</p> <p>Result: Resource is removed from the Appointment.</p> |
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