



Maica Client Delivery Release Notes V.0.150

Ticket #	Ticket Title	Description
CC-666	Remove Billable Participant Note Date Validation	<p data-bbox="721 691 1816 727">Enhancement: Remove Billable Participant Note Date Validation</p> <p data-bbox="721 783 981 815">What's Changed?</p> <p data-bbox="721 850 1935 927">When creating a Participant Note using the Maica Global Action, the restriction that prevented users from selecting a date in a previous month has been removed.</p> <p data-bbox="721 962 1973 1038">Users can now create Participant Notes for past dates where required (for example, to record retrospective information or correct historical notes).</p> <p data-bbox="721 1074 1227 1106">The only validation that remains is:</p> <ul data-bbox="770 1141 1435 1173" style="list-style-type: none">• The End Time must be after the Start Time

CC-667	Billable Participant Notes added under Contact > Planner are not being validated against AI funding	<p>Fix: Billable Participant Notes Funding Validation</p> <p>What's Changed?</p> <p>Maica now correctly validates Billable Participant Notes created from the Contact > Planner view against the Participant's Agreement Item funding at the time the note is created.</p> <p>Previously, when a Participant Note was pre-populated with default values (such as Appointment Service and Billable = TRUE), the funding validation did not always run immediately. This could allow notes to be saved successfully even when no valid funding was available.</p> <p>This has now been resolved.</p> <p>Updated Behaviour:</p> <ul style="list-style-type: none">● Funding validation now runs immediately when the Participant Note screen loads, even when values are pre-populated.● Users can no longer save a Billable Participant Note unless:<ul style="list-style-type: none">○ A valid Appointment Service is selected, and○ The Participant has appropriate Agreement Item funding available.● Validation behaviour is now consistent regardless of whether the user edits any fields or accepts the default values as-is.
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CC-673	Planner - Checklist items not complete but no error message indicator	<p>Fix: Planner Checklist Validation Errors Not Displaying</p> <p>A fix has been implemented to ensure validation errors are correctly displayed when attempting to complete an Appointment in the Planner while required checklist items remain incomplete.</p> <p>Previously, users could attempt to complete an Appointment with checklist items marked as <i>Not Complete</i>, but the action would fail silently with no visible error message, making it unclear why completion was blocked.</p> <p>This update ensures users receive clear, visible feedback explaining why the Appointment cannot be completed.</p> <p>What's Changed?</p> <ul style="list-style-type: none">● Improved Error Visibility in Planner UI:<ul style="list-style-type: none">○ Validation errors triggered by incomplete checklist items are now correctly displayed to the user.○ Users are clearly informed when checklist requirements prevent an Appointment from being completed.● Consistent Error Messaging Behaviour:<ul style="list-style-type: none">○ Error messages now surface correctly across Planner contexts rather than failing silently.○ Aligns error handling with expected behaviour seen in other Maica workflows.● UI Handling Updated:<ul style="list-style-type: none">○ The Planner now correctly renders validation feedback instead of
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suppressing it due to styling or component limitations.

Example Scenarios:

- A user attempts to complete an Appointment where one or more checklist items are still marked *Not Complete* → a clear error message is shown explaining why completion cannot proceed.
- A user reviews the checklist, completes the remaining items, and retries completion → the Appointment completes successfully.