



## Maica Client Management Release Notes V.0.367

Ticket #	Ticket Title	Description
NDIS-1001	Support at Home - Statement Generation Flow	<p data-bbox="721 691 1487 727">Enhancement: Support at Home Statements</p> <p data-bbox="721 772 1973 890">Service Agreement Statements support monthly statement generation for <b>Support at Home</b>, providing a structured and repeatable way to generate compliant statement records across defined periods.</p> <p data-bbox="721 935 1995 1145">This update extends Service Agreement Statement functionality to support Support at Home-specific requirements, including enhanced statement generation logic and alignment with Support at Home funding and agreement structures. The experience is designed to support bulk generation, reduce manual effort, and ensure statements are generated only where required for the selected period.</p> <p data-bbox="721 1190 1505 1227">The statement generation experience allows users to:</p> <ul data-bbox="770 1272 2009 1342" style="list-style-type: none"><li data-bbox="770 1272 2009 1342">• Generate Service Agreement Statements for a selected Service Provider and time period</li></ul>

		<ul style="list-style-type: none"> <li>• Ensure statements are only created for agreements that do not already have statements covering the selected period</li> <li>• Support Support at Home-specific statement types and funding structures</li> <li>• Form the foundation for downstream document generation and compliance reporting</li> </ul> <p>Full configuration details, behaviour explanations, and step-by-step guidance are available in the Knowledge Base. Please refer to the linked articles below for detailed information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Statement Management</a></li> </ul>
NDIS-1026	Claim Batch - Invoice Line Item Retrieval Conditions - Cancelled/Voided Line Items	<p><b>Fix: Excluded / Cancelled Invoice Line Items Removed from Claim Batches</b></p> <p>A fix has been implemented to ensure <b>cancelled, voided, or excluded Invoice Line Items</b> are no longer included when generating a Claim Batch.</p> <p>Previously, Invoice Line Items that met the general claim criteria could still be pulled into a Claim Batch even if they had been cancelled, voided, or explicitly marked as excluded. This could result in ineligible items being counted toward claim totals.</p> <p>This update ensures only <b>eligible Invoice Line Items</b> are included at the time a Claim Batch is generated.</p> <p><b>What's Changed?</b></p> <ul style="list-style-type: none"> <li>• <b>Updated Claim Batch Retrieval Logic:</b></li> </ul>

		<ul style="list-style-type: none"> <li>○ Invoice Line Items marked as <b>Excluded</b> are now ignored during Claim Batch generation.</li> <li>○ Cancelled or voided Line Items are no longer eligible to be added to a Claim Batch.</li> <li>● <b>Improved Claim Accuracy:</b> <ul style="list-style-type: none"> <li>○ Excluded Line Items: <ul style="list-style-type: none"> <li>■ Are not included in Claim Batch totals</li> <li>■ Do not contribute to the total claim amount</li> <li>■ Are not submitted to Services Australia</li> </ul> </li> </ul> </li> <li>● <b>Clear Application Timing:</b> <ul style="list-style-type: none"> <li>○ Exclusions are applied <b>at the time the Claim Batch is generated.</b></li> <li>○ Line Items already added to a Claim Batch are not retroactively removed if they are excluded afterward.</li> </ul> </li> </ul> <p><b>Example Scenarios</b></p> <ul style="list-style-type: none"> <li>● <input checked="" type="checkbox"/> A user generates a Claim Batch where an Invoice Line Item is already marked as <i>Excluded</i> → the Line Item is not included in the Claim Batch.</li> <li>● <input checked="" type="checkbox"/> A cancelled or voided Invoice Line Item meets other claim criteria → the Line Item is still excluded from the Claim Batch.</li> <li>● <input checked="" type="checkbox"/> A Claim Batch is generated first, and an Invoice Line Item is later marked as <i>Excluded</i> → the Line Item remains in the existing Claim Batch but will not be included in future batches.</li> </ul>
	Support at Home Claiming – Bug Fixes and	Support at Home Claiming – Bug Fixes and Improvements

	Improvements	<p>A series of updates and improvements have been delivered across the <b>Support at Home claiming process</b> to improve reliability, validation, and overall accuracy when generating and submitting claims.</p> <p>These updates include a combination of bug fixes, validation enhancements, and logic improvements across claim creation, batching, invoice handling, and payment request processing. Together, they ensure a more robust and predictable claiming experience, particularly for edge cases and complex claim scenarios.</p> <p>To view the <b>full, end-to-end Support at Home claiming process</b>, including updated behaviour and validation rules, please refer to the Knowledge Base articles below:</p> <ul style="list-style-type: none"> <li>• <a href="#">Support at Home Claiming Process: User Guide</a></li> <li>• <a href="#">Support at Home Claiming Process: Admin Guide</a></li> </ul>
NDIS-1041	Invoice Line Item Trigger - Plan Budget - Logic Updates	<p><b>Enhancement: Invoice Line Item Plan Budget Matching Logic Updates</b></p> <p>Improvements have been made to the logic that links <b>Invoice Line Items</b> to <b>Plan Budgets</b> to ensure the correct budget is selected in more complex Support at Home and legacy funding scenarios.</p> <p>This update refines how Plan Budgets are identified and prioritised when Invoice Line Items are created, improving accuracy and reducing the risk of incorrect budget allocation.</p> <p><b>What's Changed?</b></p> <ul style="list-style-type: none"> <li>• <b>Improved Plan Budget Matching Logic:</b></li> </ul>

		<ul style="list-style-type: none"> <li>○ When an Invoice Line Item is created, the system now applies clearer rules to determine the correct <b>active Plan Budget</b> to link.</li> <li>○ Matching is performed using the related Agreement Item, Service Agreement, and Plan structure.</li> <li>● <b>Budget Type Prioritisation:</b> <ul style="list-style-type: none"> <li>○ If the Invoice Line Item already has a <b>Budget Type</b>, only active Plan Budgets matching that Budget Type are considered.</li> <li>○ If the Invoice Line Item does <b>not</b> have a Budget Type: <ul style="list-style-type: none"> <li>■ The system derives available Budget Types from the related Product.</li> <li>■ <b>Legacy “HC” budgets are prioritised first</b> where applicable before considering other budget types.</li> </ul> </li> </ul> </li> <li>● <b>Automatic Data Alignment:</b> <ul style="list-style-type: none"> <li>○ When a Plan Budget is successfully matched: <ul style="list-style-type: none"> <li>■ The Plan Budget is linked to the Invoice Line Item.</li> <li>■ The matched Budget Type is written back to the Invoice Line Item for consistency.</li> </ul> </li> </ul> </li> <li>● <b>Graceful Handling When No Match Exists:</b> <ul style="list-style-type: none"> <li>○ If no suitable Plan Budget is found: <ul style="list-style-type: none"> <li>■ The Plan Budget and Budget Type fields are left blank.</li> <li>■ No errors are raised, preserving existing behaviour.</li> </ul> </li> </ul> </li> </ul>
NDIS-1050	Budget Sync - Populate Service Provider ID	Enhancement: Store Services Australia Service Provider ID from Support at

## Home Budget Sync

Maica's Support at Home care recipient budget sync has been enhanced to store the Service Provider ID returned by Services Australia directly on the Care Recipient's Contact record.

When a Support at Home budget is retrieved, Maica now captures the serviceProviderId from the budget payload and saves it to a new field on the Contact record. This ensures the Services Australia provider associated with the Care Recipient is persistently recorded in Maica.

### Key Behaviours

- The Support at Home budget sync reads the serviceProviderId returned by Services Australia.
- The value is stored directly on the Care Recipient's Contact record.
- The field is updated each time the budget sync is executed.

### Why this matters

- Preserves important provider context returned by Services Australia.
- Enables downstream processes, reporting, and validation to reference the Care Recipient's Service Provider ID.
- Reduces reliance on manual data entry and external tracking.
- Improves data completeness and traceability for Support at Home budgets and claiming.

<p>NDIS-1051</p>	<p>Care Management Component - Multiple Service Provider IDs</p>	<p><b>Enhancement: Multiple Service Provider IDs for Support at Home Care Management</b></p> <p>Enhancements have been introduced to the <b>Support at Home Care Management settings</b> to support organisations operating with <b>multiple Service Provider IDs</b>.</p> <p>This update introduces improved tooling to retrieve, store, and manage multiple Service Provider IDs associated with Care Recipients, allowing providers to more accurately reflect real-world service delivery structures within Maica. The enhancements improve visibility, reduce manual data entry, and ensure Service Provider information remains aligned with data returned from Services Australia.</p> <p>For full details on how this works, including setup, behaviour, and usage, please refer to the Knowledge Base article below:</p> <ul style="list-style-type: none"> <li>• <a href="#">Care Recipient Budget Sync</a></li> </ul>
<p>NDIS-1052</p>	<p>Generate Claim QA - Service Provider Filter</p>	<p><b>Enhancement: Service Provider ID Filtering for Support at Home Claim Generation</b></p> <p>Enhancements have been introduced to the <b>Support at Home claiming process</b> to improve accuracy and control when generating Claim Batches by allowing claims to be filtered by <b>Service Provider ID</b>.</p> <p>This update ensures that when generating a Claim Batch, only invoices associated with</p>

		<p>the selected Service Provider ID are included. This is particularly important for organisations operating with multiple Service Provider IDs, helping prevent incorrect invoices from being included in a claim and improving overall claim integrity.</p> <p>For full details on setup, behaviour, and how this fits into the end-to-end claiming workflow, please refer to the Knowledge Base articles below:</p> <ul style="list-style-type: none"> <li>• <a href="#">Support at Home Claiming Process: User Guide</a></li> <li>• <a href="#">Support at Home Claiming Process: Admin Guide</a></li> </ul>
NDIS-1040	SaH Claim - Claim Batch Summary LWC	<p><b>Enhancement: Claim Batch Financial Summary on Claim Batch Record</b></p> <p>A new <b>Claim Batch Financial Summary</b> has been added to the Claim Batch record to give users a clear, at-a-glance view of claim totals and outcomes after submission.</p> <p>This enhancement improves visibility into both the <b>submitted values</b> and the <b>claim results</b>, removing the need to navigate through related lists or reports to understand how a Claim Batch has performed.</p> <p><b>What's Changed?</b></p> <ul style="list-style-type: none"> <li>• <b>New Claim Batch Summary Section</b> <ul style="list-style-type: none"> <li>○ A financial summary is now displayed directly on the <b>Claim Batch record page</b> once a Claim Batch has been submitted.</li> <li>○ Shows the claim date range, total claim amount, and the number of Invoice Line Items included in the batch.</li> </ul> </li> </ul>

		<ul style="list-style-type: none"> <li>● <b>Claim Results Visibility:</b> <ul style="list-style-type: none"> <li>○ A dedicated <b>Claim Results Summary</b> section displays: <ul style="list-style-type: none"> <li>■ Total claimed amount</li> <li>■ Total unclaimed amount</li> <li>■ Number of successfully claimed Invoice Line Items</li> <li>■ Number of unsuccessfully claimed Invoice Line Items</li> </ul> </li> </ul> </li> <li>● <b>Live Status Awareness:</b> <ul style="list-style-type: none"> <li>○ While claim processing is still underway, results are displayed as zero with helper text indicating that processing is in progress.</li> <li>○ Results automatically update once processing is completed.</li> </ul> </li> <li>● <b>Direct Access to Payment Requests:</b> <ul style="list-style-type: none"> <li>○ Users can quickly navigate to a report showing <b>Payment Request records generated from the Claim Batch</b>, directly from the summary section.</li> </ul> </li> </ul>
NDIS-1075	SaH Claim - Plan creation logic updates	<p>Update: Update to Care Recipient Budget Sync (Support at Home)</p> <p>Improvements have been made to how <b>Support at Home Plans</b> are created and updated to ensure Plan dates accurately reflect the coverage defined by related <b>Classification records</b>.</p> <p>This update refines the logic used to calculate <b>Plan Start Date</b> and <b>Plan End Date</b>, ensuring consistent handling of open-ended classifications and preventing incorrect plan date ranges during sync.</p> <p>What's Changed?</p>

		<ul style="list-style-type: none"> <li>● <b>Classification-Driven Plan Dates:</b> <ul style="list-style-type: none"> <li>○ Plan dates are now derived exclusively from all related Support at Home Classification records.</li> <li>○ Budget data is no longer used to determine Plan Start or End Dates.</li> </ul> </li> <li>● <b>Plan Start Date Logic Updated:</b> <ul style="list-style-type: none"> <li>○ The Plan Start Date is set to the earliest Start Date across all related Classification records.</li> </ul> </li> <li>● <b>Plan End Date Logic Updated:</b> <ul style="list-style-type: none"> <li>○ If all Classification records have an End Date: <ul style="list-style-type: none"> <li>■ The Plan End Date is set to the latest End Date (furthest in the future).</li> </ul> </li> <li>○ If any Classification record has a null End Date: <ul style="list-style-type: none"> <li>■ The Plan End Date is left blank.</li> </ul> </li> <li>○ This ensures open-ended classifications always result in an open-ended Plan.</li> </ul> </li> <li>● <b>Consistent Plan Behaviour:</b> <ul style="list-style-type: none"> <li>○ Each Care Recipient continues to have a single Plan record.</li> <li>○ During every Support at Home sync, the existing Plan is created or updated and Plan dates are recalculated based on the current set of Classifications.</li> <li>○ Duplicate Plans are not created.</li> </ul> </li> </ul>
NDIS-1076	Plan Sync - Updated logic for PACE Plans	<p>Enhancement: Updated Plan Sync Logic for NDIS PACE Plans</p> <p>Improvements have been made to how <b>NDIS PACE plans</b> are synchronised into Maica to ensure plan updates are always applied correctly and duplicate PACE plans are never</p>

created.

Previously, Maica only updated an existing PACE plan if it was considered *active*. In some scenarios—such as when a PACE plan end date was extended—this could result in a new plan being created instead of updating the existing one.

This enhancement ensures PACE plans are treated as a **single, continuously updated plan** per Participant.

#### What's Changed?

- **Improved PACE Plan Matching Logic:**

- When a PACE plan is returned from the NDIS, Maica now looks for an existing PACE plan **regardless of active or inactive status**.
- If a PACE plan exists, it is always updated with the latest data from the NDIS.

- **Duplicate Prevention for PACE Plans:**

- Maica will **never create more than one PACE plan** for a Participant.
- If no existing PACE plan is found, a single new PACE plan is created.

- **More Reliable Plan Updates:**

- Updates such as extended end dates or amended plan details are now correctly applied even when the existing PACE plan is no longer active.
- Ensures downstream processes (budgets, scheduling, claiming) always reference the correct plan.

- **Non-PACE Plans Unchanged:**

- Sync behaviour for non-PACE plans remains the same and continues to match plans using the NDIS reference ID.

### Example Scenarios

- A Participant has an inactive PACE plan and the NDIS extends the plan end date → the existing PACE plan is updated with the new end date.
- A Participant already has an active PACE plan and the NDIS returns updated plan details → the same plan is updated, not duplicated.
- A Participant has no existing PACE plan → one new PACE plan is created.
- A Participant already has a PACE plan → no additional PACE plans are ever created during sync.