



## Maica Client Care Release Notes V.1.4

Ticket #	Ticket Title	Description
OEM-713	Timesheeting Pay Cycle Flexibility	<p data-bbox="721 691 1576 727"><b>Enhancement: Configurable Timesheet Pay Cycle</b></p> <p data-bbox="721 772 2040 847">This enhancement introduces configurable Timesheet pay cycles, replacing the previously fixed weekly (Monday–Sunday) structure.</p> <p data-bbox="721 892 1917 967">Organisations can now define how their Timesheet periods operate directly within Timesheet Management Settings.</p> <p data-bbox="721 1011 992 1048"><b>What's Changed?</b></p> <ul data-bbox="770 1093 1995 1326" style="list-style-type: none"><li data-bbox="770 1093 1995 1168">• Maica now allows configuration of the Timesheet pay period in Maica Settings → Timesheet Management.</li><li data-bbox="770 1190 1503 1326">• The following Frequency Options are available:<ul data-bbox="869 1241 1070 1326" style="list-style-type: none"><li data-bbox="869 1241 1021 1278">○ Weekly</li><li data-bbox="869 1294 1070 1326">○ Fortnightly</li></ul></li></ul>

- Monthly
- An Anchor Date can be configured to determine when the pay cycle begins.
- Timesheet Start and End Dates are now dynamically calculated based on:
  - The selected Frequency.
  - The configured Anchor Date.
- All automation that creates Timesheets (including Timesheet Entry creation on completed Appointments/Shifts and batch processes) now references this new configuration.
- Existing Timesheets are not retroactively modified when settings are updated.
- If settings are updated and an open Timesheet exists:
  - A new Timesheet may be created where required to align with the new period configuration.
- For Monthly frequency:
  - The Anchor Date defines the start of each monthly cycle.
  - Dates greater than the 28th are not supported to avoid irregular monthly edge cases.

**Outcome**

Organisations now have full flexibility to define their own pay cycle structure (Weekly, Fortnightly, or Monthly) while maintaining automatic Timesheet generation and ensuring accurate Start and End Dates across all creation logic.

		<p><b>Example Scenarios</b></p> <ul style="list-style-type: none"> <li>• Frequency = Weekly: <ul style="list-style-type: none"> <li>✓ Timesheet duration = 7 days.</li> </ul> </li> <li>• Frequency = Fortnightly: <ul style="list-style-type: none"> <li>✓ Timesheet duration = 14 days.</li> </ul> </li> <li>• Frequency = Monthly: <ul style="list-style-type: none"> <li>✓ Timesheet duration = from Anchor Date to the day before the next Anchor Date (calendar month logic applied).</li> </ul> </li> <li>• Updating Frequency or Anchor Date while an open Timesheet exists: <ul style="list-style-type: none"> <li>✓ A new Open Timesheet is created where required to align with the new configuration.</li> <li>✓ Submitted Timesheets are not modified.</li> </ul> </li> </ul>
OEM-747	Ability to add Custom Fields to Expense and Incident Screens in CW App	<p><b>Enhancement: Custom Fields on Expense &amp; Incident Screens in Care Worker App</b></p> <p>This enhancement introduces the ability to display custom fields on the New Expense and New Incident screens within the Care Worker (CW) Mobile App. Organisations can now extend these forms to capture additional data specific to their operational requirements.</p> <p><b>What's Changed?</b></p>

- Custom fields created on the Expense & Incident object can now be surfaced on the corresponding New Expense and New Incident screens in the CW App.
- Field visibility is controlled via:
  - Salesforce Field-Level Security
  - Page Layout configuration
- Supported field types behave consistently with standard mobile inputs (e.g. text, picklist, checkbox, date, number).
- Required fields are enforced on mobile in line with object-level configuration.
- Custom fields respect existing:
  - Validation rules
  - Record type logic
  - Permission sets

### **Outcome**

Organisations can now tailor Expense and Incident capture processes to align with internal compliance, reporting, and funding requirements – without requiring custom development.

### **Example Scenarios**

- An organisation wants to track a “Cost Centre” on Expenses:
  - ✓ A custom field is created and added to the layout.

		<ul style="list-style-type: none"> <li>✓ The field appears in the CW App when submitting a new Expense.</li> <li>• An organisation requires an “Incident Severity Rating” field: <ul style="list-style-type: none"> <li>✓ The custom field is configured as required.</li> <li>✓ Care Workers must complete the field before submitting the Incident.</li> </ul> </li> <li>• A field is hidden via Field-Level Security: <ul style="list-style-type: none"> <li>✓ The field does not appear in the CW App.</li> </ul> </li> </ul>
OEM-837	Too Many SOQL Queries Error Fix	<p>Fix: Too Many SOQLs</p> <p>This fix resolves a <b>“Too Many SOQL Queries”</b> error occurring during Recurring Appointment processing and Schedule splitting logic.</p> <p>Under certain scenarios, nested batch executions and duplicated query logic were causing Salesforce governor limit breaches, particularly when processing large volumes of Recurring Appointments.</p> <p><b>What was Fixed?</b></p> <ul style="list-style-type: none"> <li>• Removed nested batch execution chains that previously resulted in: <ul style="list-style-type: none"> <li>◦ <code>Database.executeBatch</code> being invoked from within another batch context.</li> </ul> </li> <li>• Refactored the Recurring Appointment processing flow so that: <ul style="list-style-type: none"> <li>◦ The commit batch now executes from the <b>finish</b> method rather than within another batch execution.</li> </ul> </li> <li>• Reworked the logic responsible for cloning Master Appointment data to ensure: <ul style="list-style-type: none"> <li>◦ Participant filtering is correctly applied.</li> <li>◦ Duplicate Delivery Activities are not created during Schedule splitting.</li> </ul> </li> </ul>

		<ul style="list-style-type: none"> <li>○ Relevant context (Participants, Resources, flags) is correctly passed into the commit batch.</li> <li>● Updated Schedule splitting logic to prevent unintended Delivery Activity duplication when Participants are removed.</li> <li>● Improved handling of high-volume Recurring Appointment generation to reduce SOQL consumption and avoid governor limit breaches.</li> </ul> <p><b>Outcome</b></p> <p>Recurring Appointment and Schedule processing now execute without triggering SOQL governor limit errors.</p> <p>This ensures:</p> <ul style="list-style-type: none"> <li>● Stable execution of Recurring Appointment batches.</li> <li>● Correct inheritance of Participants, Resources and related records.</li> <li>● No unintended duplication of Delivery Activities.</li> <li>● Improved reliability when processing large numbers of Appointments.</li> </ul> <p>The updated logic has been thoroughly tested across standard creation, Schedule updates, participant changes, and high-volume recurring scenarios prior to release.</p>
OEM-858	Manage Unavailability Button Visibility Fix	Fix: Manage Unavailability Button Visible Without Required Permissions

This fix resolves an issue where users without the required Unavailability permissions could still see and click the **Manage Unavailability** button, resulting in an access error.

Previously, users with an active Resource could see the button even if they did not have the necessary object-level permissions, leading to a poor user experience.

**What was Fixed?**

- The visibility of the Manage Unavailability button is now strictly controlled by Unavailability CRUD permission sets.
- Users must have one of the following Permission Sets assigned to see and use the button:
  - Maica - Unavailability - Read Only Access
  - Maica - Unavailability - Create Access
  - Maica - Unavailability - Edit Access
  - Maica - Unavailability - Delete Access
- These are contained within:
  - Maica - Global - Manage Unavailability & Object Permissions
- Having an active Resource alone no longer grants visibility to the Manage Unavailability button.
- Button visibility now aligns with actual object-level access, preventing users from initiating actions they cannot complete.

Now, Users without the required Unavailability permissions will no longer see the Manage Unavailability button.

OEM-902	PACE Plan Sync - Duplicate Budget Records	<p><b>Fix: PACE Plan Sync - Duplicate Budget Records</b></p> <p>This fix resolves an issue where duplicate <b>Plan Budget (Funding Item)</b> records were being created during PACE Plan Sync.</p> <p>Following recent updates to the Plan Sync logic, duplicate Budget records were generated, and in some cases an additional Budget record was created without a Start Date, End Date, or Funding reference.</p> <p><b>What was Fixed?</b></p> <ul style="list-style-type: none"><li>● Corrected the matching logic used during PACE Plan Sync to prevent duplicate Plan Budget (Funding Item) records from being created.</li><li>● Resolved an issue where an incomplete Plan Budget record could be created with:<ul style="list-style-type: none"><li>○ No Start Date</li><li>○ No End Date</li><li>○ No Funding reference</li></ul></li><li>● Ensured that Plan Budget records are properly aligned with their corresponding PACE Funding records during sync.</li><li>● Implemented post-install script to normalise existing PACE Funding Item NDIS References where required.</li></ul> <p><b>Outcome</b></p> <p>PACE Plan Sync now:</p> <ul style="list-style-type: none"><li>● Prevents duplicate Plan Budget records from being created.</li></ul>
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		<ul style="list-style-type: none"> <li>• Ensures all Budget records contain valid Start Date, End Date, and Funding values.</li> <li>• Maintains accurate alignment between PACE funding data and Maica Funding Item records.</li> </ul> <p>This restores data integrity for PACE Plan synchronisation and prevents incorrect or incomplete Budget records from being generated during future sync operations.</p>
OEM-913	Budget Usage Array	<p><b>Enhancement: Budget Usage Array</b></p> <p><b>Overview</b></p> <p>The Budget Usage integration extends Maica's Support at Home Budgets API synchronisation to retrieve, store, and manage budget usage data from Services Australia. This creates an authoritative record of which invoice line items have been claimed against which budgets, forming the foundation for statement generation and financial reconciliation.</p> <p><b>Purpose</b></p> <p>Budget Usage data tracks how participant budgets are consumed at the invoice line item level, ensuring Maica accurately reflects budget drawdown and maintains alignment with Services Australia as the source of truth for aged care claiming.</p>

### **When Budget Usage Syncs**

Budget Usage data is retrieved automatically whenever the Budgets API is called, through three trigger mechanisms:

1. On-demand sync - Using the "Sync Participant Budget" quick action on a participant record
2. Bulk synchronisation - Via the Admin Console bulk participant sync functionality
3. Event-driven sync - Automatically after successful claim approval during the "Check Status" quick action's Related Data Updates process

### **Data Model**

#### **Plan Budget Usage Object**

A junction object that records the relationship between Plan Budgets and Invoice Line Items, capturing budget drawdown information.

Object Description: Records the amount of budget drawdown applied to a Care Recipient's budget by a claimed Invoice Line Item. Each record links a Plan Budget to the Invoice Line Item that consumed it and stores the amount used, based on information provided by Services Australia.

#### **Object Relationships:**

- Lookup to Plan Budget (required)
- Lookup to Invoice Line Item (optional - may be null for pre-existing expenditure)

		<p><b>Key Fields:</b></p> <ul style="list-style-type: none"><li>• Name - System-generated sequential identifier (Auto Number)</li><li>• Plan Budget - The budget from which usage was drawn (Lookup)</li><li>• Invoice Line Item - The claimed invoice line item; optional and may be null when expenditure occurred with another provider (Lookup)</li><li>• Amount - Amount drawn down from the budget; stored as negative value representing drawdown (Currency - AUD)</li><li>• External ID - Composite key in format "budgetId-invoiceId-itemId" for record matching during synchronisation (Text, External ID, Unique)</li></ul> <p><b>Object Label:</b> Plan Budget Usage <b>Plural Label:</b> Plan Budget Usage</p> <p><b>Plan Budget Object Updates</b></p> <p><b>New Field:</b> Usage Amount (maica_Usage_Amount__c)</p> <ul style="list-style-type: none"><li>• Type: Currency (rollup or calculated field)</li><li>• Description: Total Amount of the Plan Budget used, based on the Budget Usage amounts. This value is calculated from related Plan Budget Usage records synced from Services Australia and reflects the amount of the budget that has been drawn down by claimed Invoice Line Items.</li></ul> <p><b>New Field:</b> Open Budget (maica_Open_Budget__c)</p> <ul style="list-style-type: none"><li>• Type: Formula (Checkbox)</li><li>• Description: This field automatically determines if the budget is open (TRUE) or</li></ul>
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closed (FALSE). For Aged Care budgets, they remain open for 90 days after their End Date to allow for final claims processing and budget reconciliation with Services Australia. Budgets without an End Date are always considered open. This field is used during budget synchronisation to filter which budgets should be included in the sync process.

### **Sync Process Logic**

### **Record Matching & Linking**

Budget Usage records are linked to Invoice Line Items using Budget Identifier, Invoice Identifier, and Item Identifier from Services Australia. The sync process uses the External ID field (format: "budgetId-invoiceId-itemId") for efficient record matching and preventing duplicate records.

### **Invoice Line Item Resolution**

When linking Budget Usage to Invoice Line Items:

- System attempts to match using Invoice Identifier and Item Identifier
- If no matching Invoice Line Item exists, the Budget Usage record is still created with a null Invoice Line Item reference
- This accommodates expenditure that occurred before the participant was in the provider's care, or when viewing budget usage from services provided by other providers

### **Budget Selection for Sync**

		<p>The sync process only retrieves Plan Budget records where Open Budget equals true. This ensures only active budgets are synchronised - specifically budgets within the 90-day grace period after their End Date, or budgets without an End Date. This filtering reduces data volume and improves performance as client usage grows over time.</p> <p><b>Deletion Handling</b></p> <p>No explicit deletion behaviour is implemented. If a previously synced usage record no longer appears in Services Australia's response, the existing Maica record is retained. Any reversal or adjustment is expected to be represented via updated or new usage rows from Services Australia.</p> <p><b>Downstream Usage</b></p> <p>Plan Budget Usage serves as a reference table for:</p> <ul style="list-style-type: none"> <li>● Statement generation</li> <li>● Budget reconciliation and reporting</li> <li>● Financial audit trails</li> <li>● Participant budget tracking</li> <li>● Historical expenditure analysis</li> </ul>
OEM-919	Planner Loading Fix	Fix: Planner Failing to Load with Filters Applied

### **Overview**

This fix resolves an issue where the Planner failed to load when filters were applied and the view was scoped to the current date.

### **What was Fixed?**

- Investigated and resolved a Planner loading failure occurring when date filters were applied, despite only a small number of Appointment records being present for the selected date.
- Identified the underlying cause of the load failure and applied a fix to ensure the Planner handles the relevant data or configuration condition without timing out or failing to render.

### **Outcome**

The Planner now loads correctly when filters are applied and scoped to the current date, regardless of the environment-specific data conditions that previously triggered the failure. As a result, the Planner now chops off the number of resources/participants to be 500 max if no resources are selected in the filters (for the orgs with a large number of resources or participants). The figure was determined after a comprehensive testing where 800 still works but the limit was downgraded to have a buffer.

### **Example Scenarios**

- A user opens the Planner and applies a date filter for the current day → the Planner loads successfully and displays the relevant Appointments.

		<ul style="list-style-type: none"><li>• <input checked="" type="checkbox"/> The Planner loads consistently across environments on the same package version.</li></ul>
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