



Maica Client Management Release Notes V.0.373

Ticket #	Ticket Title	Description
NDIS-1088	Generate Support at Home Statements - Automation Redevelopment	<p data-bbox="721 691 1921 778">Enhancement: Support at Home Statement Generation – Automation Redevelopment</p> <p data-bbox="721 826 1984 1034">The Support at Home Statement generation automation has been fully redeveloped to improve reliability, accuracy, and scalability. The previous flow-based implementation has been replaced with a new architecture. This ensures the process can handle large volumes of Plan Budget and Plan Budget Usage records without breaching Salesforce governor limits.</p> <p data-bbox="721 1082 1944 1153">This redevelopment also introduces a number of fixes and enhancements identified during internal testing, delivered as sub-tasks of this ticket.</p> <p data-bbox="721 1201 987 1233">What's Changed?</p> <ul data-bbox="775 1281 2040 1353" style="list-style-type: none">• Replaced the previous <code>Maica - Generate Support at Home Statements</code> flow and <code>GenerateSaHStatementsInvocable</code> with a new flow (<code>Maica - Generate Support</code>

		<p>at Home Statements - Plan Budget) and a new Invocable Apex class (GenerateSaHMonthlyStatementsInvocable) that handles all statement calculation logic including balance handling, prior-period Budget Usage, and Statement Line creation.</p> <ul style="list-style-type: none">• The Flow now acts solely as an orchestration layer, passing input parameters to the Invocable Apex and handling success and error responses.• Statement generation processes one Service Agreement per transaction, using the existing Maica Settings component as the entry point. This approach avoids governor limit risks associated with processing multiple Service Agreements in a single transaction.• Enforced calendar month validation for Support at Home – Monthly statements. Both the Settings component and the Apex layer now validate that the selected period is always a full calendar month, preventing incorrect opening and closing balances, usage misclassification, and non-compliance with out-of-scope budget handling rules.• Duplicate statement protection is maintained – an error is returned if a statement already exists for the selected Service Agreement and period.• Error logging has been added to the new Flow to capture failures during statement generation.• The following bugs identified during internal testing were resolved as part of this ticket:<ul style="list-style-type: none">○ NDIS-1107 – Negative Amount Handling: Incorrect handling of negative amounts caused financial figures on every generated statement to be incorrect.
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- NDIS-1108 – Balance Chain Broken for Quarterly Periods: Monthly balance continuity was broken, failing to meet the core requirement defined in spec Section 1.2.
- NDIS-1109 – Client-Side Date Validation Bypass: Client-side validation could be bypassed; server-side validation provides a safety net with a fix delivered in this iteration.
- NDIS-1110 – Total Claimable Expenditure: Enhancement to total claimable expenditure calculation.

Outcome

Support at Home Statement generation is now built on a more robust and scalable architecture, with accurate balance handling, enforced calendar month periods, and improved error visibility. Statements are generated reliably for the selected Service Agreement and month via Maica Settings, with protection against duplicates and improved handling of complex prior-period and out-of-scope Budget Usage scenarios.

Example Scenarios

- A user selects Support at Home – Monthly as the statement type and chooses a calendar month → the statement is generated correctly with accurate opening and closing balances.
- A user attempts to select a custom date range for a Support at Home – Monthly statement → the system displays a validation error and prevents generation.
- A statement already exists for the selected Service Agreement and period → the system returns an error and prevents a duplicate statement from being created.

		<ul style="list-style-type: none"> • <input checked="" type="checkbox"/> A Care Recipient commences services partway through a quarter → the statement generation process correctly handles the opening balance for the first applicable month.
NDIS-1094	SaH Claim - Permission Set	<p>Enhancement: Support at Home Claiming – Permission Set and Permission Set Group</p> <p>A dedicated Permission Set and Permission Set Group have been created in the Maica Client Management package to support the Support at Home claiming workflow.</p> <p>What's Changed?</p> <ul style="list-style-type: none"> • A new Permission Set, Maica – SaH Claiming, has been created and added to the Client Management package, granting the access required to execute the Support at Home claiming workflow. • A new Permission Set Group, Maica – SaH Claiming Group, has been created with the following scope: <ul style="list-style-type: none"> ○ Permission Set Group Name: Maica – SaH Claiming Group ○ Description: Grants access to all objects and functionality required to execute the Support at Home claiming workflow, including Claim Batch generation, Payment Request submission to Services Australia, and invoice and budget management. <p>Outcome</p>

		<p>Administrators can now assign the Maica – SaH Claiming Group Permission Set Group to users who need access to the Support at Home claiming workflow, ensuring appropriate and consistent access control across Claim Batch generation, Payment Request submission, and invoice and budget management.</p> <p>Example Scenarios</p> <ul style="list-style-type: none"> • <input checked="" type="checkbox"/> A user responsible for Support at Home claiming is assigned the Maica – SaH Claiming Group → they have access to all objects and functionality required to generate Claim Batches and submit Payment Requests to Services Australia. • <input checked="" type="checkbox"/> A user without the Permission Set Group assigned → they do not have access to the Support at Home claiming workflow. 		
NDIS-1111	Statement Generation - Permission Sets	<p>Enhancement: Statement Generation – Permission Set Updates</p> <p>As part of the Support at Home Statement Generation redevelopment (NDIS-1088), the relevant Maica Client Management Permission Sets have been updated to include access to new fields introduced for Statement Generation functionality.</p> <p>What's Changed?</p> <p>The following new fields have been added to the Read and Edit permission levels across the relevant Permission Sets:</p> <table border="1" data-bbox="725 1254 2036 1329"> <thead> <tr> <th data-bbox="725 1254 1382 1329">Field</th> <th data-bbox="1382 1254 2036 1329">Object</th> </tr> </thead> </table>	Field	Object
Field	Object			

maica__Is_Prior_Period__c	Service Agreement Statement
maica__Prior_Period_Budget_Type__c	Service Agreement Statement
maica__Total_Claimable_Services_Expenses__c	Service Agreement Statement
maica__Service_Agreement_Statement__c	Plan Budget Usage

The following Permission Sets were updated:

- **Maica – Read Access: All** – Read access added for all new fields.
- **Maica – Read Access: Agreement Management** – Read access added for Service Agreement Statement fields, reflecting existing permissions on that object.
- **Admin Profile** – Read and Edit access added for all new fields, supporting users who run the Statement Generation process.

Outcome

All relevant profiles and Permission Sets now have the appropriate access to view and manage the new Statement Generation fields, ensuring the Support at Home Statement Generation process can be executed without permission-related errors.

Example Scenarios

- A user with the Maica – Read Access: Agreement Management Permission Set views a Service Agreement Statement record → the new Prior Period and Total

		<p>Claimable Services Expenses fields are visible.</p> <ul style="list-style-type: none"> • <input checked="" type="checkbox"/> An admin user runs the Statement Generation process → all new fields on Service Agreement Statement and Plan Budget Usage records are accessible for read and edit operations. • <input checked="" type="checkbox"/> A user without the relevant Permission Set assigned → the new fields are not visible, consistent with existing access control behaviour.
NDIS-1095	Relationship object - Update Role Picklist	<p>Enhancement: Relationship Object – New Role Picklist Value</p> <p>A new picklist value has been added to the Role field on the Relationship object to support the identification of Approved Providers within a Care Recipient's relationship network.</p> <p>What's Changed?</p> <ul style="list-style-type: none"> • A new value, Approved Provider, has been added to the Role (<code>maica__Role__c</code>) picklist field on the Relationship (<code>maica__Relationship__c</code>) object. <p>Outcome</p> <p>Users can now record and identify Approved Provider relationships against a Care Recipient, enabling more accurate representation of the care network and supporting downstream processes that rely on provider relationship data.</p> <p>Example Scenarios</p> <ul style="list-style-type: none"> • <input checked="" type="checkbox"/> A user creates a new Relationship record for a Care Recipient and selects Approved Provider from the Role picklist → the record is saved successfully with the

		<ul style="list-style-type: none"> correct role assigned. ✓ Existing Relationship records are not affected by the addition of the new picklist value.
NDIS-1105	Manage Service Agreement - Parent -> Child Access	<p>Enhancement: Manage Service Agreement – Parent Product Access</p> <p>This enhancement extends the product validation logic within the Manage Service Agreement Quick Action to support parent-to-child product access. Previously, only Support Items explicitly listed as an Approved Service on a Care Recipient's Funding were made available in the modal. This update loosens that restriction so that if a Care Recipient has an Approved Service for a Parent Product, all Child Products under that parent are automatically made available – without requiring each child to be individually listed as an Approved Service record.</p> <p>What's Changed?</p> <ul style="list-style-type: none"> Updated the Manage Service Agreement Quick Action validation logic to check for Approved Service records at the Parent Product level, not only at the individual Support Item level. When a Care Recipient has an Approved Service for a Parent Product, all Child Products associated with that parent are now accessible in the modal, regardless of whether an explicit Approved Service record exists for each child. Existing behaviour is preserved where a Care Recipient has Approved Services only at the child level – these continue to function as before.

		<p>Outcome</p> <p>Care Recipients with a Parent Product Approved Service no longer require individual Approved Service records for each child product. This reduces administrative overhead and ensures the Manage Service Agreement Quick Action correctly reflects the full scope of a Care Recipient's approved services.</p> <p>Example Scenarios</p> <ul style="list-style-type: none">• <input checked="" type="checkbox"/> A Care Recipient has an Approved Service for a Parent Product (e.g. Home Modification products) → all Child Products under that parent are available in the Manage Service Agreement modal.• <input checked="" type="checkbox"/> A Care Recipient has no Approved Service for a Parent Product → only explicitly approved Support Items are displayed, consistent with existing behaviour.• <input checked="" type="checkbox"/> A Care Recipient has Approved Services at both parent and child levels → all relevant products remain accessible without duplication.
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