Maica Client Care Release Notes V.1.6

Ticket #	Ticket Title	Description
OEM-695	Over Time Validation and Override	 ## Enhancement: Overtime Validation and Override This enhancement introduces overtime validation for scheduling, ensuring that proposed Appointment Resource assignments are automatically evaluated against configurable overtime metrics defined on the Resource record. When a breach is detected, users are either blocked from proceeding or prompted to acknowledge and override the breach, depending on their permissions and the nature of the violation. **What's Changed?** • Overtime validation now runs automatically when creating or updating an Appointment Resource — including manual assignment, auto-fill, Shift Offer generation, drag-and-drop in the Planner, and any API or flow that creates or amends Appointment Resources.

		• Validation is evaluated against four configurable metrics defined on the Resource record:
		  ◦ **Maximum Hours Per Day** — Maximum hours a worker can be scheduled in any rolling 24-hour period, including paid travel time.
		  ◦ **Maximum Hours Per Fortnight** — Maximum hours in a fixed 14-day period aligned to a Monday-start fortnight.
		  ◦ **Minimum Gap Between Working Days** — Minimum required elapsed hours between the end of the last counted shift on one calendar day and the start of the first counted shift on the next. Only applies when the proposed shift is on a different calendar day.
		  ◦ **Maximum Consecutive Days On** — Maximum number of consecutive calendar days on which the worker is rostered for any counted work. A single day off resets the count.
		• Only Appointment Resources with statuses of Scheduled/Confirmed or Accepted are counted in overtime tallies. Withdrawn, Declined, and Cancelled statuses are excluded.
		• When a breach is detected, a modal titled "Overtime conditions breached" displays the details of each violated metric, including the current total, the threshold, and the amount breached.
		• Users without the **Overtime Override Permission Set** are blocked from proceeding when a breach exists. Users with the permission can **Acknowledge & Override**, which records the override and allows the Appointment Resource to be confirmed.
		• Breach details are stored on the `Overtime_Breaches__c` field of the Appointment

		Resource as a semicolon-separated list for audit purposes. • The fortnight anchor date is sourced from Timesheet Management settings where configured. **Outcome** Organisations can now enforce workforce compliance rules directly within the scheduling workflow, with clear visibility of overtime breaches at the point of assignment. Authorised users retain the ability to override breaches with an auditable acknowledgement, while users without override permissions are prevented from confirming breaching appointments. Example Scenarios • ✅ A resource has a 6-hour daily limit and already has 5.5 hours scheduled — a new 1-hour appointment is assigned → the overtime breach modal appears showing the daily hours limit has been exceeded, with Cancel and Acknowledge & Override options. • ✅ A user without the Overtime Override Permission Set attempts to confirm a breaching Appointment Resource → the system blocks the action with the message "You do not have permission to confirm when overtime conditions are breached." • ✅ A user with the Overtime Override Permission Set acknowledges the breach → the override is recorded and the Appointment Resource is confirmed.

		• ✅ A Cancelled or Declined Appointment Resource exists for the same resource on the same day → it is not counted in overtime tallies and does not contribute to a breach. • ✅ Two resources are assigned to the same appointment and only one would breach → the breach modal shows only the tab for the breaching resource.
OEM-930	Generate Support at Home Statements - Automation Redevelopment	### Enhancement: Generate Support at Home Statements - Automation Redevelopment The Support at Home Statement generation automation has been redeveloped and delivered into the Maica Client Care package. Budget Usage records sourced from Services Australia serve as the single source of truth for all statement content, and the process produces statement records that are fully ready for downstream document generation. **What's Changed?** • A new Flow (`Maica - Generate Support at Home Statements - Funding Item`) and Invocable Apex class (`GenSaHFundingItemStatementsInvocable`) have been implemented, with all core business logic handled by `GenSaHFundingItemStatementsProc`. The Flow acts solely as a lightweight orchestration layer. • Statement generation is invoked via Maica Settings → Claim Management → Other,

		processing one Service Agreement per transaction via the existing batch infrastructure. Errors are routed to Log records for review.
		• Statements follow a two-level structure:
		  ○ **Statement Header** — one record per participant per statement month, holding the period dates and Service Agreement link.
		  ○ **Statement Line** — one record per active Funding Item in scope for the period, holding the opening and closing balance and linking to all relevant Budget Usage records.
		• Budget Usage records are the authoritative source of statement content. A single Invoice Line Item charge can be attributed across multiple Funding Items, and the statement reflects this breakdown exactly as recorded by Services Australia.
		• The statement period must be a full calendar month. Both the Settings component (client-side) and the Invocable class (server-side) enforce this validation.
		• Duplicate statement protection is in place — the process will not generate a new statement for a Service Agreement and period where one already exists.
		• A sub-task, **OEM-931 — Statement Generation Permission Sets**, was completed as part of this release to ensure the relevant Permission Sets are updated with access to the new fields introduced for statement generation, this is detailed below.
		
		Outcome
		
		Support at Home Statement generation is now available in the Maica Client Care package, enabling organisations to generate accurate, Services Australia-aligned

		monthly statements for Support at Home participants directly from Maica Settings. Statements are generated reliably for the selected Service Agreement and month, with full balance tracking, Budget Usage linking, and error logging built in. Example Scenarios • ✅ A user selects a Service Agreement and a calendar month from Maica Settings → a Statement Header and one Statement Line per active Funding Item are created, with all relevant Budget Usage records linked. • ✅ A user attempts to select a custom date range that is not a full calendar month → the system displays a validation error and prevents generation. • ✅ A statement already exists for the selected Service Agreement and period → the system prevents a duplicate from being created. • ✅ A single Invoice Line Item has been attributed to multiple Funding Items by Services Australia → each attribution is reflected on the corresponding Statement Line via separate Budget Usage records.
OEM-931	Statement Generation - Permission Set Updates	## Enhancement: Statement Generation - Permission Set Updates As part of the Support at Home Statement Generation redevelopment for the Maica Client Care package (OEM-930), the relevant Permission Sets have been updated to include access to new fields and to ensure the Plan Budget Usage object has a full set of CRUD permission sets in the OEM package.

		What's Changed?
		
		• A full set of CRUD Permission Sets has been created for the **Plan Budget Usage** object, including the new Service Agreement Statement lookup field:
		  ◦ Maica — Plan Budget Usage — Read Access
		  ◦ Maica — Plan Budget Usage — Create Access
		  ◦ Maica — Plan Budget Usage — Edit Access
		  ◦ Maica — Plan Budget Usage — Delete Access
		• The existing **Service Agreement Statement** Permission Sets have been updated with the following new fields:
		  ◦ `Is Prior Period`
		  ◦ `Prior Period Budget Type`
		  ◦ `Total Claimable Services Expenses`
		• The Admin Profile has also been updated with access to all new fields.
		
		Outcome
		
		All relevant Permission Sets in the Maica Client Care package now have the appropriate access to support the Support at Home Statement Generation process, ensuring users and integration profiles can view and manage the new Statement Generation fields without permission-related errors.
		
		Example Scenarios
		
		• ✅ A user with the Plan Budget Usage Read Access Permission Set views a Budget Usage record → the Service Agreement Statement lookup field is visible.

		• ✅ 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. • ✅ A user without the relevant Permission Sets assigned → the new fields are not visible, consistent with existing access control behaviour.

OEM-885	Updated SaH Bulk Sync Budget options	## Enhancement: Maica Settings — Data Synchronisation Tab Restructure
		
		This enhancement introduces a restructured **Data Synchronisation** section within Maica Settings to provide clear, separate synchronisation options for both NDIS and Support at Home (Aged Care) participants. Previously, the Maica Client Care (OEM) package only exposed a single **NDIS Synchronisation** tab with no equivalent section for Support at Home bulk participant budget sync, leaving administrators unable to run SaH bulk syncs from Maica Settings.
		
		What's Changed?
		
		• The existing **NDIS Synchronisation** tab in Maica Settings has been replaced with a new **Data Synchronisation** section containing two sub-tabs:
		  ○ **NDIS** — contains the existing NDIS synchronisation options.
		  ○ **Aged Care** — introduces Support at Home bulk participant budget sync functionality, equivalent to the Services Australia Sync tab available in the Maica Client Management package.

		• The original standalone NDIS Synchronisation tab has been removed to eliminate confusion and consolidate all sync options under the new Data Synchronisation section. **Outcome** Administrators can now access Support at Home bulk participant budget sync directly from Maica Settings in the Maica Client Care (OEM) package, bringing the OEM package into alignment with the functionality available in Maica Client Management and eliminating the need to use workarounds for SaH sync operations. Example Scenarios • ✅ An administrator navigates to Maica Settings and opens the Data Synchronisation section → they see two sub-tabs: NDIS and Aged Care, each with their respective sync options. • ✅ An administrator needs to run a bulk Support at Home participant budget sync → they select the Aged Care tab and run the sync directly from Maica Settings. • ✅ The original NDIS Synchronisation tab is no longer present → administrators are directed to the new consolidated Data Synchronisation section for all sync operations.
OEM-762	Travel Management - Default Sequential Travel	## Enhancement: Travel Management — Default Sequential Travel This enhancement introduces a Default Sequential Travel configuration to the Travel Management settings, dramatically reducing scheduling administration by automatically

		determining travel origin and destination based on a worker's appointment sequence. When enabled, Maica automatically links consecutive appointments in a worker's day as travel legs, eliminating the need for schedulers to manually configure travel origins and destinations. **What's Changed?** ● A new **Enable Default Sequential Travel** toggle has been added to Travel Management Settings. When enabled, Maica automatically determines travel sequencing based on the following rules: ○ The first appointment in a sequence (no prior appointment found within the configured gap) has no origin — travel is not predicted or billed for travel to the first appointment. ○ Middle appointments have the previous appointment as origin and the next appointment as destination. ○ The last appointment in a sequence (no next appointment found within the configured gap) has no destination — travel is not predicted or billed from the last appointment. ○ When travel is marked as both Billable and Payable to and from, the split of travel KMs and time is always 50/50. ● A new **Maximum Time Between Sequential Services (Hours)** setting defines the maximum gap between scheduled services for Maica to consider them part of the same sequence. Services with a gap exceeding this threshold are treated as separate sequences. ● When sequential travel is enabled, the Travel Management UI locks the Origin/Destination selectors, travel time, KM inputs, and the Manage Travel split

		slider — preventing manual overrides of system-determined values. Individual appointments can still be opened to manually adjust travel values where required. • Backend trigger-driven recalculation (`AppointmentResourceSequentialTravel_MDTM`) automatically updates travel sequences when appointments are created, time-changed, reassigned to a different resource, cancelled, or deleted. All calculations are performed at the Appointment Resource level. • The `Maica_Calculate_Travel_Attributes` flow handles async travel calculation after sequence linking. • The Location tab in Manage Appointment now displays "Appointment is part of a travel sequence" (previously "part of a sequential travel") and the origin icon no longer appears clickable when it cannot be modified. **Outcome** Schedulers no longer need to manually configure travel origins and destinations for sequential appointments. Maica automatically manages the travel sequence as appointments are created, moved, or cancelled, ensuring travel data remains accurate in the Planner at all times and reducing the risk of missed or incorrect travel entries. Example Scenarios • ✅ A worker has three consecutive appointments (A → B → C) within the configured gap — Maica automatically sets A as origin for B, B as destination for A and origin for C, and C as destination for B. No manual travel configuration is required.

		• ✅ A new appointment is inserted between two existing appointments → Maica automatically removes the previous A→B travel prediction and recalculates A→new and new→B travel legs. • ✅ An appointment is cancelled → travel legs for the adjacent appointments in the sequence are automatically recalculated. • ✅ The gap between two appointments exceeds the configured maximum → the appointments are treated as separate sequences and no travel is predicted between them. • ✅ Sequential travel is enabled but a scheduler needs to adjust a specific appointment's travel → the individual appointment can still be opened in Travel Management to manually define or override values.