Business Rule Alerts

Presented By: Acumen Fiscal Agent

Acumen Fiscal Agent

Innovation • Opportunity • Freedom

OUR MISSION

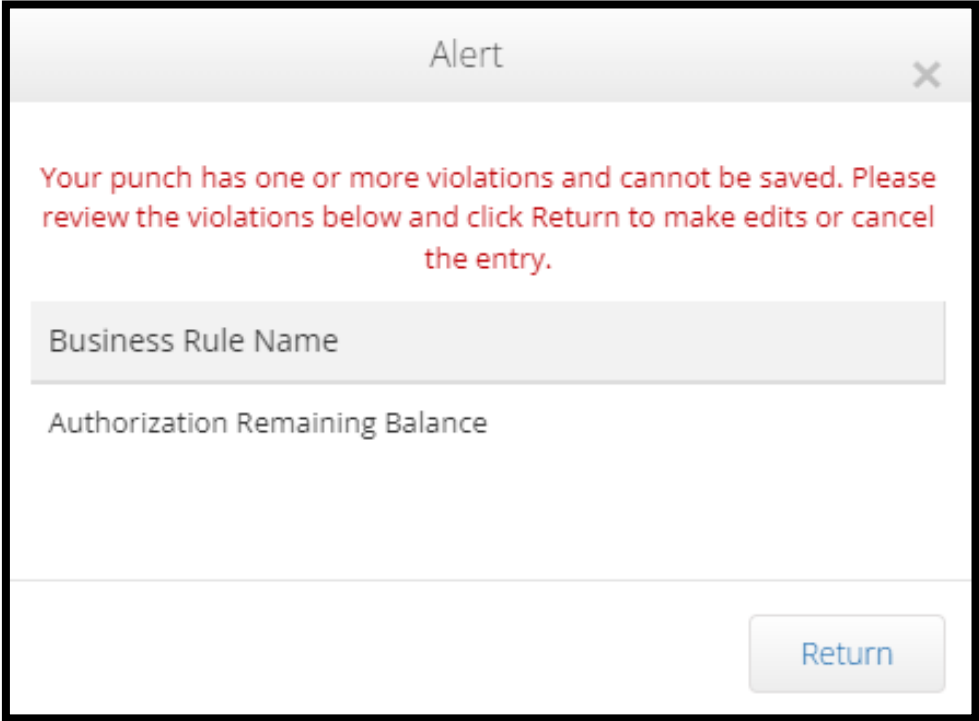*Acumen Fiscal Agent facilitates freedom, choice and opportunity through innovative fiscal agent solutions.*

Business Rule Alerts

Alerts

Business rules are a tool used by your organization to validate, by service code, specific requirements mandated by that service. When a punch violates a business rule, the employee will receive an alert explaining the violation and what action needs to be taken.

One of the most common business rules is the **Authorization Remaining Balance** rule. This rule checks to see that there are enough funds in the authorization/service plan to cover the punch.

Alert

Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry.
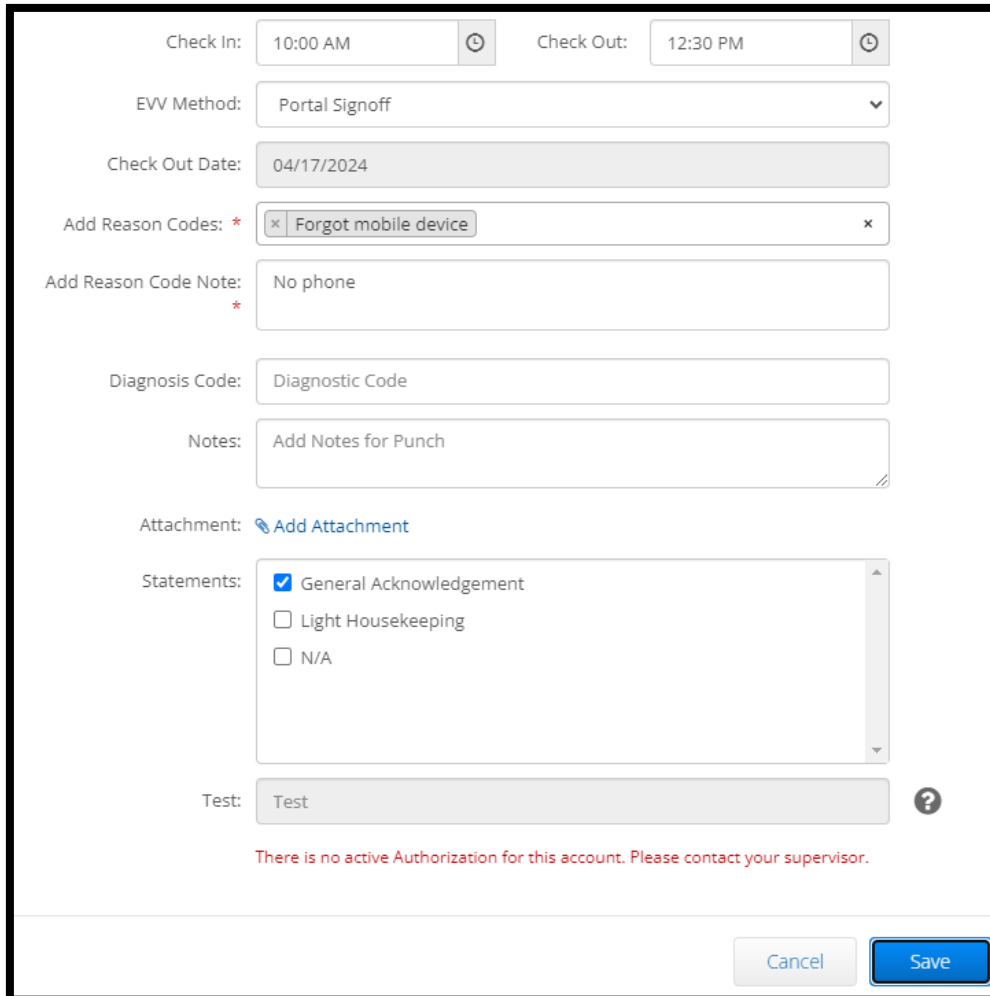
Business Rule Name

Authorization Remaining Balance

Return

- The employee will receive this alert and cannot save the punch
- They must edit the punch or cancel the entry
- The employer should review their unit utilization

Alerts

Many other business rules pertain to the authorization/service plan such as the **Authorization Expiration Date** rule.

- The employee will receive this alert when attempting to punch for a date after the authorization/service plan has expired

- They cannot save the punch

- The employee should contact the employer

- The employer should verify their authorization data in DCI

Alerts

Punches must be **entered AND approved** within a certain number of days of the date of service (program-determined). After that number of days has passed, the **Timely Filing Employees Punch Entry** or the **Timely Filing Employee Punch Approval** rules will prohibit the punch from being saved.

Alert

Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry.

Business Rule Name

Timely Filing Employees Punch Entry

Return

- The employee will receive this alert when attempting to punch for a date after the deadline
  - ➤ The Timely Filing Employee Punch Approval alert would show if the punch was created within the timeframe, but the employer was attempting to APPROVE the punch after the deadline.
- The employee cannot save the punch
  - ➤ Or, in the case of the Timely Filing Employee Punch Approval alert, the employer would be unable to approve the punch.
- No action can be taken

Alerts

Punches may only be entered for an <u>active</u> service account. If the employee attempts to enter a punch before the start date or after the end date of the service account, they cannot save the punch. This triggers either the **Employee Service Account Start Date Punch Entry** rule or the **Employee Service Account End Date Punch Entry** rule.
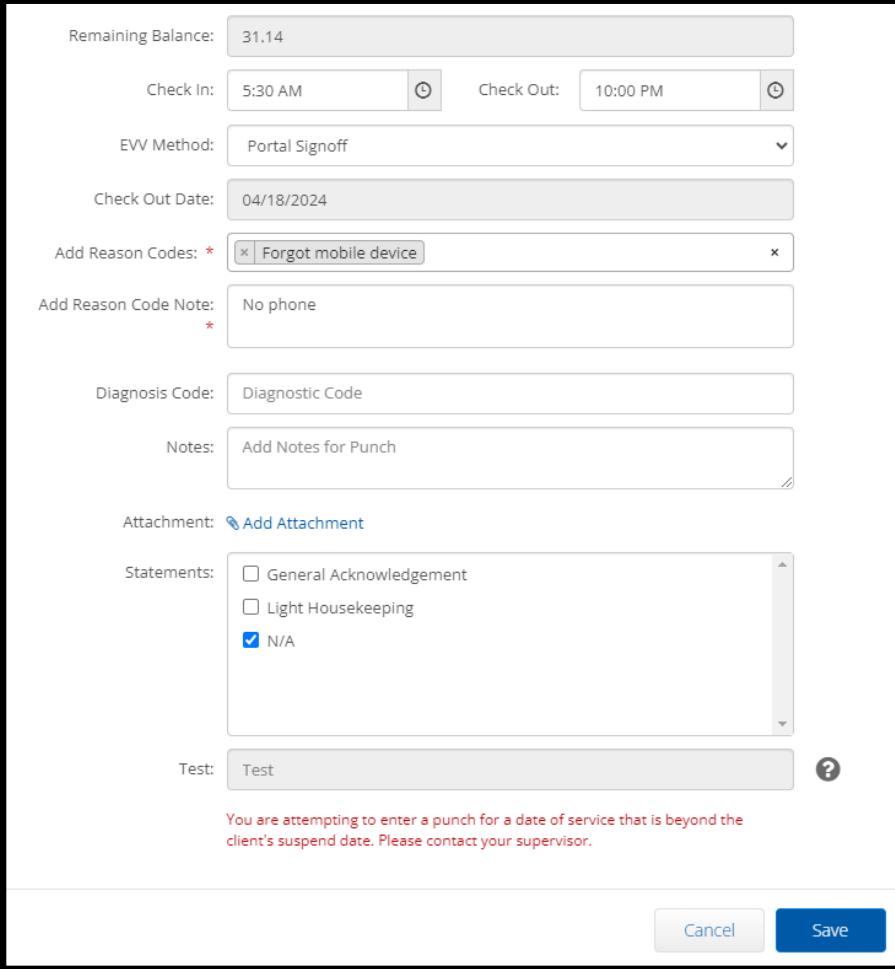
Alert ✕

Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry.
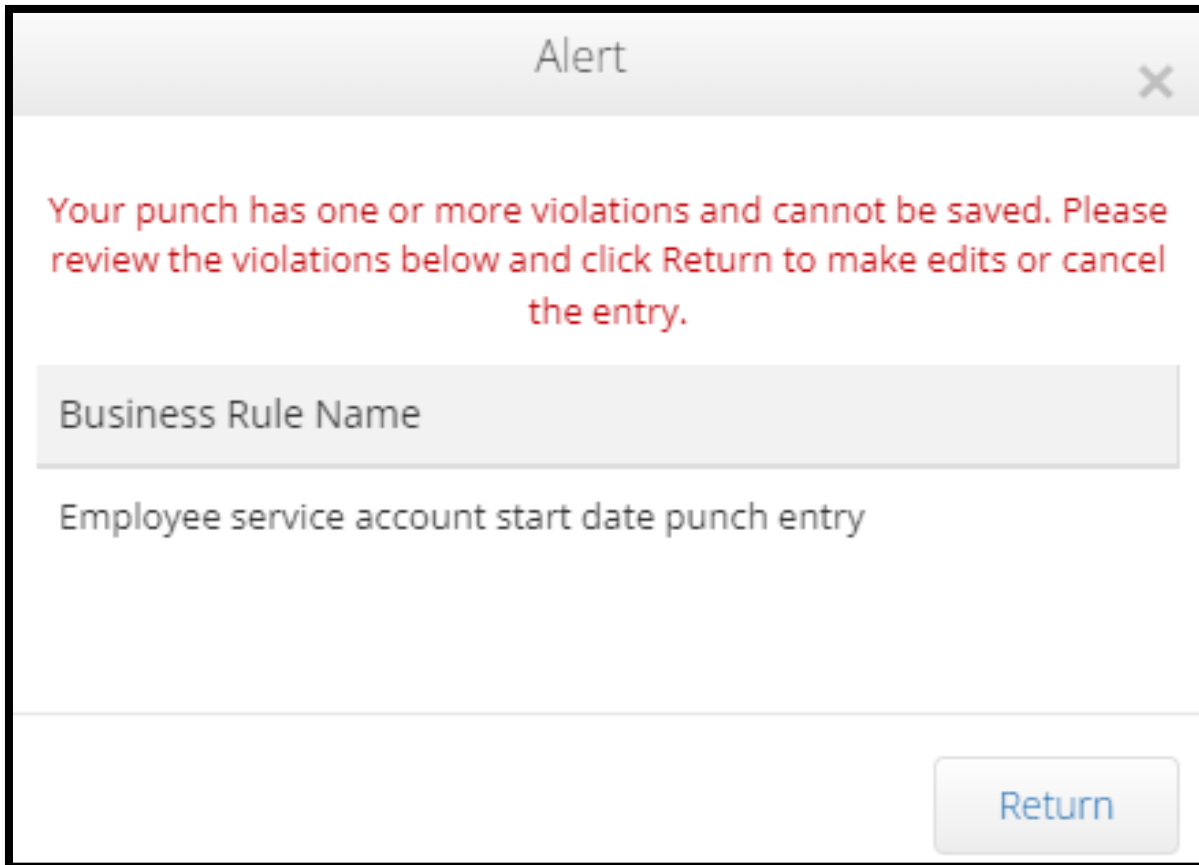
Business Rule Name

Employee service account start date punch entry

Return

- The employee cannot save the punch
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

Alerts

If enrollment is on hold, or the client cannot receive service, the client profile will be suspended.

Punch entries cannot be added after the suspension date.

Remaining Balance:	31.14
Check In:	5:30 AM
Check Out:	10:00 PM
EVV Method:	Portal Signoff
Check Out Date:	04/18/2024
Add Reason Codes: *	× Forgot mobile device
Add Reason Code Note: *	No phone
Diagnosis Code:	Diagnostic Code
Notes:	Add Notes for Punch
Attachment:	🔗 Add Attachment
Statements:	☐ General Acknowledgement ☐ Light Housekeeping ☑ N/A
Test:	Test

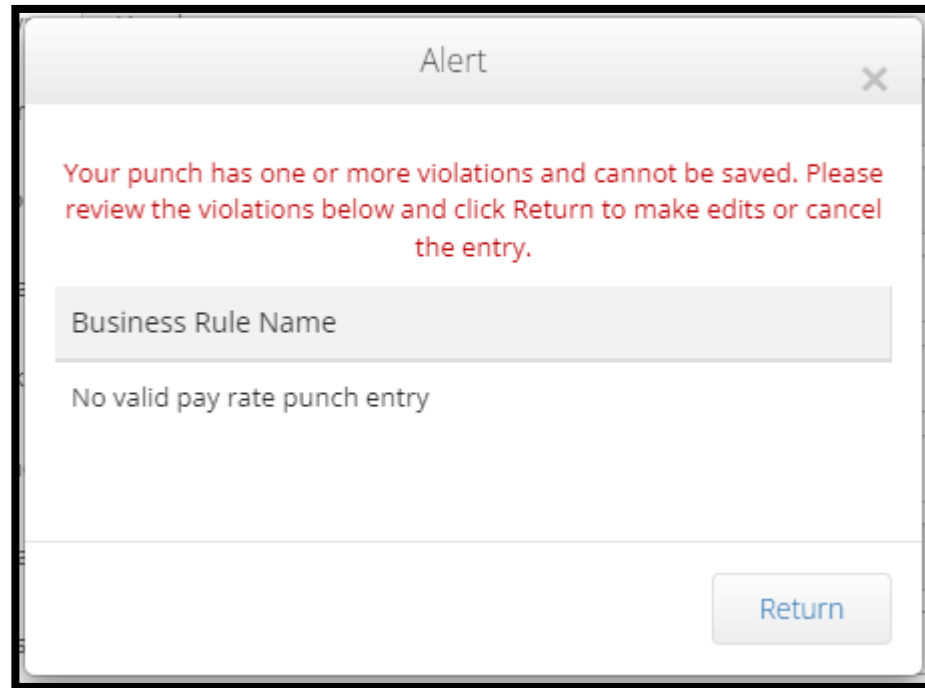You are attempting to enter a punch for a date of service that is beyond the client's suspend date. Please contact your supervisor.

Cancel   Save

- The employee cannot save the punch
  - ➢ While the system allows the employee to log in on the mobile app, they cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

Alerts

If enrollment was on hold, or the client couldn't receive service for a period of time, the employee would have no valid pay rate for that date range. The date of service the employee is attempting to enter a punch entry for has no valid pay rate.

Alert   ✕

Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry.

Business Rule Name

No valid pay rate punch entry

Return

- The employee cannot save the punch
  - ➢ While the system allows the employee to clock in on the mobile app, they cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

Alerts

If the punch causes the authorization remaining balance to drop below 75% of the initial balance, an alert displays at the time of approval. It does not stop the punch from being approved.

Alert

Are you sure you want to approve the punch for **0:23:00** hour(s) for **Steph Employee3** for **Steph Client3-7726** for **Aug 25, 2024**? By clicking Yes, you are confirming you have reviewed this punch and all required elements.

Business Rule Name	Message
Authorization Remaining Balance Threshold Alert	Warning: Authorization remaining balance has dropped below 75% of the initial balance

Cancel   Yes

Check Entries

If a punch entry violates the **Authorization Weekly Max** business rule, it can be saved but is later rejected when the business rule runs. <u>The employee does not receive an alert</u> but can see that the punch was rejected and that the business rule failed.

Entries

Export

Showing **30** out of **380** records

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
39492	Apr 14, 2024	12:00 AM	11:30 PM	Hourly		Steph Cost Center test - Steph Cost Center test	Steph Client1	RESPITE (Hourly)	0:23:30	Rejected
39491	Apr 15, 2024	12:00 AM	11:30 PM	Hourly		Steph Cost Center test - Steph Cost Center test	Steph Client1	RESPITE (Hourly)	0:23:30	Rejected

| Ref Entries | Notes | Attachments | Verifications | Map | Business Rules | Auto Approval | Custom Fields | History |

Business Rules

Business Rule Name	Business Rule Result
Employee service account start date punch entry	Pass
Authorization Weekly Max	Fail
Max Hours Per Week Per Client Per Funding Source	Pass
Authorization Expiration Date	Pass

1. The employee should always review their entries and check the status

2. Click on the **punch row** to review the punch details

3. Click the **Business Rules tab** to view the result

The employee should contact the employer

Alerts in Review

- Employees and employers should communicate as needed regarding alerts and the client's authorization/budget

- To review the authorization/budget for the client:
  - ✓ Run the Summary Report and/or Authorization Reports
  - ✓ Use the Authorizations widget on the Dashboard
- Use the tools in DCI to stay informed
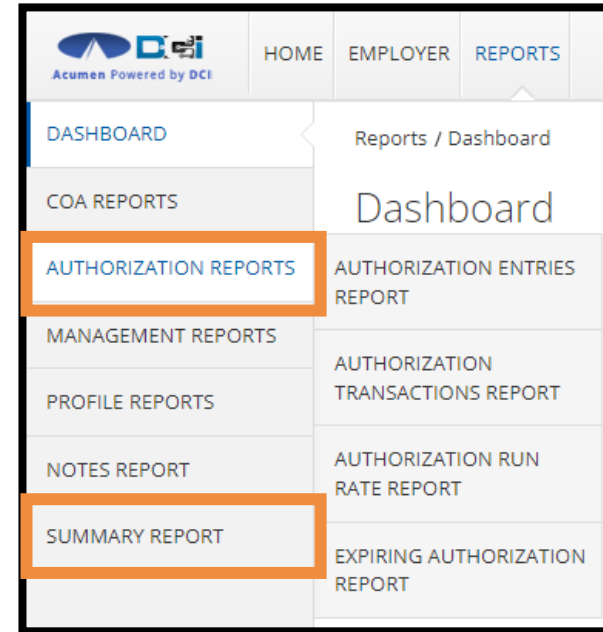
Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
SDFSS	09/01/2024	09/06/2025	1000.00 Dollars	1000.00 Dollars	706.21 Dollars	293.79 Dollars	1000.00 Dollars	1000.00 Dollars	1000.00 Dollars
PCS	02/01/2024	02/27/2029	1000.00 Units	1000.00 Units	60.00 Units	940.00 Units	1000.00 Units	40.00 Units	24.00 Units

Questions?

Thank you!

**Visit the Acumen Help Center
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