MatrixCare by ResMed

MatrixCare MyData for Home Care

Data Dictionary Reference Guide

Version: 2020 R3

MatrixCare® MyData for Home Care Dictionary Reference Guide

This document was written for use with MatrixCare Home Care 2020 R3 (V1.65) or greater.

MyAnalytics uses the following third-party libraries, which are copyrighted and licensed as follows:

Path	Library	License
2013/SharePoint	msvcr100.dll	BSD 3-Clasue License
2013/SharePoint	pidgenx.dll, setup.dll, ssetupui.dll, svrsetup.dll	Microsoft .NET Framework Redistributable EULA

Table of Contents

MyData – Home Care

This document outlines the Home Care data you can access via MatrixCare MyData. MyData provides access to the following tables:

- Activities
- Activities Categories
- Activity Entities
- Activity Results
- Activity Types
- Address Book
- Address Book Phones
- Address Book Type
- Admissions
- Admissions Discharge Reasons
- Admission Documents
- Assessment
- Attribute
- Attribute Class
- Authorization Dates
- Authorization Detail
- Availability Dates
- Bill Codes
- Bill Type
- Branches
- Branch Holidays
- Branch Margins
- Branch Taxes
- Branch Tax Groups
- Caregiver
- Caregiver Branches
- Caregiver Hiring
- Caregiver Phones
- Caregiver Referral Type
- Caregiver Skill
- Caregiver Values

- Entities
- Expense Types
- HHA Categories
- HHA Tasks
- Invoice Batch
- Invoice Batch Taxes
- Invoice Batch Tax Groups
- Invoice Details
- Invoice Header
- Invoice Process
- Margin Types
- Medications
- OT Exempt Types
- Payer Bill Codes
- Payer Branches
- Payer Phones
- Payer Services
- Payer Status
- Payer Type
- Payers
- Payment Posting
- Payment Posting Type
- Payment Register
- Payment Register Types
- Payment Types
- Payroll Adjustment
- Region
- Referral Entities
- Region
- Region Entities
- Referral Facilities

- Client
- Client Attributes
- Client Branches
- Client Date Status
- Client Date Types
- Client Dates
- Client Documents
- Client Inpatient Tracking
- Client Inquiry
- Client Inquiry Field List Items
- Client Inquiry Fields
- Client Inquiry Phones
- Client Inquiry Rating
- Client Inquiry Relation
- Client Inquiry Values
- Client Payers
- Client Type
- Diagnosis
- Diagnosis Categories
- Emergency Types
- Payroll Adjustment Code
- Payroll Batch
- Payroll Details
- Payroll Details OT
- Phone Type
- Physician
- Physician Phones
- Physician Status
- Plan of Care
- Plan of Care Diagnosis
- Plan of Care Documents
- Report Groups
- Schedules
- Schedules Tasks
- Service Code

- Referral Facilities Branches
- Referral Facilities Status
- Referral Facilities Documents
- Referral Facility Documents Share levels
- Referral Join
- Referral Non Admission Reasons
- Referral Rating
- Referral Staff Join
- Referral Territories
- Referral Types
- Referral By
- Referral By Status
- Plan of Care Medications
- Plan of Care Mod Orders
- Plan of Care Orders
- Race
- Rate Bill Shifts
- Rate Schedule Last Changes
- Rates
- Rates Override Type
- Rates type
- Record Type
- Report Group Types
- Schedule Expenses
- Schedule Payers
- Schedule Recurrence
- Schedule Shift
- Schedule Shift Payers
- Service Plans
- Skill Categories
- Tax Types
- TelephonyCalls
- Telephony Call Tasks
- Users

Configuring MyData for Home Care

For guidance on how to configure and set up MyData, refer to the MyData User Guide. Contact Home Care Support for additional information.

Activities

📧 [dbo].[T_Activities]

Description

Contains data for Activity records for Related Entities.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
🔑 PK C	act_ID *System generated unique identifier for Activity record.* *UI Location: Clients > Client Activities > ID*	bigint	8	False	1 - 1	
🔑 FK (2) 📧	act_BranchID *Branch ID of the related Branch. ID is used to pull office name to drop down control in the UI.* *Relates to T_Branches.br_ID.* *UI Location: Clients > Client Activities > Details tab > Office*	int	4	False		
🔗	act_StartTime *Start Date/Time of the Activity. The default is the current date and time.* *UI Location: Clients > Client Activities > Details tab > Start* *and UI Location: Clients > Client Activities > Start Time*	datetime	8	False		
	act_EndTime *End Date/Time of the Activity. End time defaults to the current date/time plus 15 minutes.* *UI Location: Clients > Client Activities > Details tab > End* *and UI Location: Clients > Client Activities > End Time*	datetime	8	False		
🔑 FK	act_ActivityCategoryID *Activity category ID of the related ActivityCategory. ID is used to pull activity category name to drop down control in the UI.* *Categories are setup on DDM > Activity Categories.* *Relates to T_ActivityCategories.actcat_ID.* *UI Location: Clients > Client Activities > Details tab > Category*	int	4	False		

	and UI Location: Clients > Client Activities > Category					
FK🔑	**act_ActivityTypeID** *Activity Type ID of the related ActivityType. ID is used to pull activity type name to drop down control in the UI.* *Types are different for each Category. The Type will show in the Reminders as the Description. For more information.* *Activity Category selection filters Activity Type options in the UI.* *If act_ActivityTypeID is set to 3 then the record shows in communication screen not in the activity screen.* *Category types are setup on DDM > Activity Types.* *Relates to T_ActivityTypes.acttype_ID.* *UI Location: Clients > Client Activities > Details tab > Type* *and UI Location: Clients > Client Activities > Type*	int	4	False		
FK🔑	**act_ActivityResultID** *Activity Result ID of the related ActivityResult. ID is used to pull activity results to drop down control in the UI.* *Activity results are setup on DDM > Activity Results.* *Activity Category selection filters Activity Results options in the UI.* *Relates to T_ActivityResults.actrslt_ID.* *UI Location: Clients > Client Activities > Details tab > Result* *and UI Location: Clients > Client Activities > Results*	int	4	False		
	act_Subject *Subject/Description of the Activity that shows in the Activity tab.* *UI Location: Clients > Client Activities > Details tab > Subject* *and UI Location: Clients > Client Activities > Subject*	nvarchar(256)	512	True		
	act_Notes *Additional notes for the Activity. If Display on Calendar is checked, the notes will appear on the Schedule Calendar and can be modified there also. Any changes made from the Schedule Calendar will be noted on the History tab of the activity. There is no character limit in this field.* *If act_ActivityTypeID is set to 3 then the record shows in communication screen not in the activity screen.* *UI Location: Clients > Client Activities > Details tab > Notes* *and UI Location: Clients > Client Activities > Notes*	nvarchar(max)	max	True		

	and UI Location: Clients > Client Activities > Communications > Notes					
FK🔑	**act_ActivityShareLevelID** *Share Level ID of the related ShareLevel. ID is used to pull share level name to drop down control in the UI.* *Choose to select the needed Share Level for the activity. The default is Everyone. For more information, see DDM Activity Share Level.* *Relates to T_ActivityShareLevels.actslvl_ID.* *UI Location: Clients > Client Activities > Details tab > Share Level* *and UI Location: Clients > Client Activities > Share Level*	int	4	False		((1))
FK🔑	**act_RecurrenceId** *Recurrence ID of the related Recurrence.* *Relates to T_ActivityRecurrence.actrec_ID.*	bigint	8	True		
	act_IsRecurringAppointmentRoot *True if a recurring appointment. Does not display on the User Interface.*	bit	1	False		((0))
	act_CreatedDate *The date the Activities record was created. UTC date updated by SQL Server's current UTC date.* *UI Location: Clients > Client Activities > Created On*	datetime	8	False		(getutcdate())
	act_CreatedUser *The user logged in to the system when the Activities record was created.* *UI Location: Clients > Client Activities > Created By*	nvarchar(50)	100	False		
	act_ModifiedDate *The date when the Activities record was last modified. UTC date updated by SQL Server's current UTC date.* *UI Location: Clients > Client Activities > Modified On*	datetime	8	False		(getutcdate())
	act_ModifiedUser *The user logged in to the system when the Activities record was last modified.* *UI Location: Clients > Client Activities > Modified By*	nvarchar(50)	100	False		
	act_TS *The time stamp of the Activities record.*	timestamp	8	False		
⛓	**act_FollowupDate** *Reminder date for the Activity.* *A date for follow up action. This date represents the date the activity should begin to display in the user's Reminders.* *UI Location: Clients > Client Activities > Details tab > Reminder* *and UI Location: Clients > Client Activities > Reminder*	datetime	8	True		

	act_LegacyID *Not used.*	int	4	True		
	act_Dismiss *Not used.*	bit	1	False		((0))
	act_ReminderNotes *Not used.*	nvarchar(2048)	4096	True		
	act_AssociatedCosts *The cost associated with the activity performed, if needed.* *UI Location: Clients > Client Activities > Details tab > Cost* *and UI Location: Clients > Client Activities > Cost*	smallmoney	4	False		((0))
FK	act_LetterID *ID of the Letter that generated this Activity.* *Null if not generated by a Letter. If this activity was generated from Letters, ID is used to pull letter name to the control in the UI.* *Relates to T_Letters.let_ID.* *UI Location: Clients > Client Activities > Details tab > Letter*	int	4	True		
	act_DisplayOnCalendar *True if activity should be shown on the calendar as a scheduled event.* *If true, pushes and displays the current activity to the Schedule Calendar of the entity as well as all Related Entities. This checkbox provides the ability to push an activity directly to an entity's schedule calendar. When the activity record is saved, that record will populate to the schedule calendar of the selected entity and all related entities. Schedule Conflict Checks will not run against these schedules. If checked, and the Activity Start/End Dates span multiple months, the Activity only dipslays on the month of the Start Date (will NOT span across two months on the Monthly Schedule Calendar display).* *UI Location: Clients > Client Activities > Details tab > Display On Calendar*	bit	1	False		((0))
	act_StartOffset *The number of minutes used to calculate local time based on UTC time for the activity starting time.*	smallint	2	True		
	act_EndOffset *The number of minutes used to calculate local time based on UTC time for the activity ending time.*	smallint	2	True		
	act_TimeZoneID *The ID of the timezone at the office location.*	smallint	2	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_Activities	act_ID	True	80
	IX_T_Activities_BranchID_FollowupDate	act_BranchID, act_FollowupDate		
	IX_T_Activities_act_BranchID_act_StartTime	act_BranchID, act_StartTime		80

Foreign Keys

Name	No Check	Columns
FK_T_Activities_T_ActivityCategories		act_ActivityCategoryID->[dbo].[T_ActivityCategories].[actcat_ID]
FK_T_Activities_T_ActivityRecurrence		act_RecurrenceId->[dbo].[T_ActivityRecurrence].[actrec_ID]
FK_T_Activities_T_ActivityResults		act_ActivityResultID->[dbo].[T_ActivityResults].[actrslt_ID]
FK_T_Activities_T_ActivityShareLevels	True	act_ActivityShareLevelID->[dbo].[T_ActivityShareLevels].[actslvl_ID]
FK_T_Activities_T_ActivityTypes		act_ActivityTypeID->[dbo].[T_ActivityTypes].[acttype_ID]
FK_T_Activities_T_Branches		act_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_Activities_T_Letters		act_LetterID->[dbo].[T_Letters].[let_ID]

Activity Categories

🗒 [dbo].[T_ActivityCategories]

Description

Contains data for Activity records for Categories.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	actcat_ID	Int		False	10001,1	
	actcat_Active	Bit		False		((1))
	actcat_CreatedDate	datetime		False		(getutcdate())
	actcat_CreatedUser	nvarchar(50)		False		
	actcat_ModifiedDate	datetime		False		(getutcdate())
	actcat_ModifiedUser	nvarchar(50)		False		
	actcat_TS	timestamp		False		
	actcat_Name	nvarchar(50)		False		('')
	actcat_ListItemType	tinyint		False		((0))
FK	actcat_RptGroupID	int		False		((1))
FK	actcat_BranchID	int		True		
FK	actcat_OverrideID	int		True		
	actcat_Description	nvarchar		True		
	actcat_DisplayOnCalendar	bit		False		((0))

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_ActivityCategories	actcat_ID	True	80
	IX_T_ActivityCategories_BranchOverrideName	actcat_BranchID, actcat_OverrideID, actcat_Name	True	80
	IX_T_ActivityCategories_Name	actcat_Name	False	80
	IX_T_ActivityCategories_RptGroupID	actcat_RptGroupID	False	

Foreign Keys

Name	Columns
FK_T_ActivityCategories_T_ActivityCategories	actcat_OverrideID-> [dbo].[T_ActivityCategories] ([actcat_ID])
FK_T_ActivityCategories_T_ActivityCategoriesRG	actcat_RptGroupID-> [dbo].[T_ReportGroups] ([rptgrp_ID])
FK_T_ActivityCategories_T_Branches	actcat_BranchID-> [dbo].[T_Branches] ([br_ID])

Activity Entities

[dbo].[T_ActivityEntities]

Description

Maps Activity records to an entity.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	actent_ID *Unique Identifier for the ActivityEntity*	bigint	8	False	1 - 1	
	actent_RecordType *Specifies the Entity Type:* *None = 0* *Caregiver = 1* *Client = 2* *Physician = 3* *Payers = 4* *Admission = 5* *ReferralSource = 6* *SalesRep = 7* *GlobalSettings = 10* *OfficeSettings = 11* *UserSettings = 12* *ReferralContact = 17* *AddressBook = 73* *Staff = 75* *ClientInquiry = 76*	tinyint	1	False		
	actent_RecordID *Unique identifier for the entity of a specific type.*	bigint	8	False		
(2) FK	actent_ActivitiesID *Activity ID of the associated Activity.*	bigint	8	False		
	actent_Notify *Specifies whether the related entity should be notified.*	bit	1	False		((0))
	actent_Print	bit	1	False		((0))
	actent_Dismiss	bit	1	False		

	actent_ReminderDismissedBy *User that dismissed the reminder.*	nvarchar(50)	100	True		
	actent_ReminderDismissDate *Date the reminder was dismissed.*	datetime	8	True		
⬚	actent_FollowupDate *Reminder date for the entity.*	datetime	8	True		
	actent_CreatedDate	datetime	8	False		(getutcdate())
	actent_CreatedUser	nvarchar(50)	100	False		
	actent_ModifiedDate	datetime	8	False		(getutcdate())
	actent_ModifiedUser	nvarchar(50)	100	False		
	actent_TS	timestamp	8	False		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK🔑C	PK_T_ActivityEntities	actent_ID	True	80
	IX_T_ActivityEntities_ActivitiesID	actent_ActivitiesID		80
	IX_T_ActivityEntities_Dismiss_FollowupDate	actent_Dismiss, actent_FollowupDate		
	IX_T_ActivityEntities_actent_Record-Type_actent_RecordID	actent_RecordID, actent_RecordType, actent_ActivitiesID		80

Foreign Keys

Name	Delete	Columns
FK_T_ActivityEntities_T_Activities	Cascade	actent_ActivitiesID->[dbo].[T_Activities].[act_ID]

Activity Results

⊞ [dbo].[T_ActivityResults]

Description

Contains data for Activity records for Results.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	actrslt_ID	int		False	10001,1	
FK	actrslt_ActivityCategoryID	int		False		
	actrslt_Active	bit		False		((1))
	actrslt_CreatedDate	datetime		False		
	actrslt_CreatedUser	nvarchar		False		
	actrslt_ModifiedDate	datetime		False		
	actrslt_ModifiedUser	nvarchar		False		
	actrslt_TS	timestamp		False		
	actrslt_Name	nvarchar(50)		True		('')
	actrslt_ListItemType	tinyint		False		((0))
FK	actrslt_RptGroupID	int		False		((7))
FK	actrslt_BranchID	int		True		
FK	actrslt_OverrideID	int		True		
	actrslt_Description	nvarchar		True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_ActivityResults	actrslt_ID	True	80
	IX_T_ActivityResults_actrslt_ActivityTypeID	actrslt_ActivityCategoryID	False	80
	IX_T_ActivityResults_BranchID_OverrideID_CategoryID_Name	actrslt_BranchID, actrslt_OverrideID, actrslt_ActivityCategoryID, actrslt_Name	True	80

Foreign Keys

Name	Columns
FK_T_ActivityResults_T_ActivityCategories	`actrslt_ActivityCategoryID-> [dbo].[T_ActivityCategories] ([actcat_ID])`
FK_T_ActivityResults_T_ActivityResults	`actrslt_OverrideID-> [dbo].[T_ActivityResults] ([actrslt_ID])`
FK_T_ActivityResults_T_Branches	`actrslt_BranchID-> [dbo].[T_Branches] ([br_ID])`
FK_T_ActivityResults_T_ReportGroups	`actrslt_RptGroupID-> [dbo].[T_ReportGroups] ([rptgrp_ID])`

Activity Types

🖼 [dbo].[T_ActivityTypes]

Description

Contains data for Activity records for Types.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	acttype_ID	int		False	10001,1	
FK	acttype_ActivityCategoryID	int		False		
	acttype_Active	bit		False		((1))
	acttype_CreatedDate	datetime		False		(getutcdate())
	acttype_CreatedUser	nvarchar(50)		False		
	acttype_ModifiedDate	datetime		False		
	acttype_ModifiedUser	nvarchar(50)		False		
	acttype_TS	timestamp		False		
	acttype_Name	nvarchar(50)		True		('')
	acttype_ListItemType	tinyint		False		((0))
FK	acttype_RptGroupID	int		False		((24))
FK	acttype_BranchID	int		True		
FK	acttype_OverrideID	int		True		
	acttype_Description	nvarchar(1000)		True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_ActivityTypes	acttype_ID	True	80
	IX_T_ActivityTypes_acttype_Activity CategoryID_acttype_Name	acttype_ActivityCategoryID, acttype_Name	False	80
	IX_T_ActivityTypes_BranchID_Overri deID_CategoryID_Name	acttype_BranchID, acttype_OverrideID, act type_ActivityCategoryID, acttype_Name	True	80

Foreign Keys

Name	Columns
FK_T_ActivityTypes_T_ActivityCategories	`acttype_ActivityCategoryID-> [dbo].[T_ActivityCategories] ([actcat_ID])`
FK_T_ActivityTypes_T_ActivityTypes	`acttype_OverrideID-> [dbo].[T_ActivityTypes] ([acttype_ID])`
FK_T_ActivityTypes_T_Branches	`acttype_BranchID-> [dbo].[T_Branches] ([br_ID])`
FK_T_ActivityTypes_T_ReportGroups	`acttype_RptGroupID-> [dbo].[T_ReportGroups] ([rptgrp_ID])`

Address Book

🖼 [dbo].[T_AddressBook]

Description

Address Book Records

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK 🔑 C	addbk_ID *Unique identifier for AddressBook record*	bigint	8	False	1 - 1	
🔀(2) FK 🔑	addbk_BranchID *br_ID of the related Branch.*	int	4	False		
🔀(2)	addbk_FirstName *First Name*	nvarchar(50)	100	True		
🔀(2)	addbk_LastName *Last Name*	nvarchar(50)	100	True		
🔀	addbk_CompanyName *Company Name*	nvarchar(60)	120	True		
	addbk_Title *Title*	nvarchar(60)	120	True		
	addbk_ContactName *Contact Name*	nvarchar(50)	100	True		
	addbk_Position *Position*	nvarchar(50)	100	True		
	addbk_BirthDate *Birth Date*	datetime	8	True		
FK 🔑	addbk_TypeID *addbktyp_ID of AddressBook record Type.*	int	4	True		
	addbk_Notes *Notes*	nvarchar(max)	max	True		
	addbk_Address1 *Address Line 1*	nvarchar(255)	510	True		
	addbk_Address2 *Address Line 2*	nvarchar(60)	120	True		
	addbk_City *City*	nvarchar(50)	100	True		
	addbk_StateOrProvince *State or Province*	nvarchar(20)	40	True		
	addbk_PostalCode *Postal Code*	nvarchar(20)	40	True		

	addbk_County *County*	nvarchar(50)	100	True		
	addbk_Country *Country*	int	4	True		((240))
	addbk_Email *Primary Email*	nvarchar(50)	100	True		
	addbk_Email2 *Secondary Email*	nvarchar(50)	100	True		
	addbk_CreatedUser	nvarchar(50)	100	False		
	addbk_CreatedDate	datetime	8	False		(getutcdate())
	addbk_ModifiedDate	datetime	8	False		(getutcdate())
	addbk_ModifiedUser	nvarchar(50)	100	False		
	addbk_TS	timestamp	8	False		
	addbk_AllowMassEmail *True if the Contact can be mass emailed.*	bit	1	False		((0))
	addbk_LegacyID	int	4	True		
FK	addbk_SalutationID *salut_ID of the Salutation*	int	4	True		
	addbk_Hobbies *Hobbies*	nvarchar(256)	512	True		
	addbk_LegacyBranchID	int	4	True		
	addbk_ContactTypeBitwise *0: AddressBook* *1: ReferrralSource* *2: ReferralContact* *4: Client* *8: Caregiver* *16 Physician* *32 Payers* *64: Staff* *128: UserSettings*	tinyint	1	False		((0))
	temp_ID	bigint	8	True		
	temp_Table	nvarchar(50)	100	True		
	addbk_TextMessage *Phone Number for Text Notifications*	nvarchar(50)	100	True		
FK	addbk_RegionID *reg_ID of the Region*	int	4	True		
	addbk_Website *Website*	nvarchar(192)	384	True		

17

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_AddressBook	addbk_ID	True	80
	IX_T_AddressBook_BranchID	addbk_BranchID		80
	IX_T_AddressBook_CompanyName	addbk_CompanyName		
	IX_T_AddressBook_FirstNAme	addbk_FirstName		80
	IX_T_AddressBook_LastName	addbk_LastName		80
	IX_T_AddressBook_Unique	addbk_BranchID, addbk_LastName, addbk_FirstName		80

Foreign Keys

Name	Columns
FK_T_AddressBook_T_AddressBookType	addbk_TypeID->[dbo].[T_AddressBookType].[addbktyp_ID]
FK_T_AddressBook_T_Branches	addbk_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_AddressBook_T_Region	addbk_RegionID->[dbo].[T_Region].[reg_ID]
FK_T_AddressBook_T_Salutation	addbk_SalutationID->[dbo].[T_Salutation].[salut_ID]

Address Book Phones

[dbo].[T_AddressBookPhones]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	adbkph_ID	bigint		False	(1,1)	
FK	adbkph_AddressBookID	bigint		False		
	adbkph_Phone	[nvarchar](30)	30	False		
FK	adbkph_PhoneType	int		False		
	adbkph_Note	[nvarchar](256)	256	True		
	adbkph_Sequence	smallint		False		1

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_AddressBookPhones	adbkph_ID	True	80
	IX_T_AddressBookPhones_Unique	adbkph_AddressBookID, adbkph_Sequence	True	

Foreign Keys

Name	Columns
FK_T_AddressBookPhones_T_AddressBook	adbkph_AddressBookID-> [dbo].[T_AddressBook] ([addbk_ID])
FK_T_AddressBookPhones_T_PhoneType	adbkph_PhoneType-> [dbo].[T_PhoneType] ([pht_ID])

Address Book Type

[dbo].[T_AddressBookType]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	addbktyp_ID *Unique identifier for AdressBookType*	int		False	(10001,1)	
	addbktyp_Name *Name of AddressBookType*	[nvarchar](50)	50	False		
	addbktyp_Active *True if the AdressBookType option is selectable for new AddressBook records*	bit		False		1
	addbktyp_CreatedDate	datetime		False		(getutcdate())
	addbktyp_CreatedUser	[nvarchar](50)	50	False		
	addbktyp_ModifiedDate	datetime		False		(getutcdate())
	addbktyp_ModifiedUser	[nvarchar](50)	50	False		
	addbktyp_TS	timestamp		False		
	addbktyp_ListItemType *Specifies the scope of the Address Book Types* *0 = System, 1 = Branch, 2 = Override,* *3 = Branch No Global*	tinyint		False		0
FK	addbktyp_RptGroupID *rptgrp_ID of the Report Group that the Share Level is associated with*	int		False		110
FK	addbktyp_BranchID *br_ID of the related Branch*	int		False		
FK	addbktyp_OverrideID *addbktyp_ID of* *the AdressBookType to Override.*	int		False		
	addbktyp_Description Description of AdressBookType	[nvarchar](1000)	1000	False		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_AddressBookType	addbktyp_ID	True	80
	IX_T_AddressBookType_BranchOverrideName	addbktyp_BranchID, addbktyp_OverrideID, addbktyp_Name	True	80

Foreign Keys

Name	Columns
FK_T_AddressBookType_T_AddressBookType	addbktyp_OverrideID-> [dbo].[T_AddressBookType] ([addbktyp_ID])
FK_T_AddressBookType_T_Branches	addbktyp_BranchID]-> [dbo].[T_Branches] ([br_ID])
FK_T_AddressBookType_T_ReportGroups	addbktyp_RptGroupID-> [dbo].[T_ReportGroups] ([rptgrp_ID])

Admission Documents

[dbo].[T_AdmissionDocuments]

Description

Admission Documents/Attachments.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	admdoc_ID *Unique identifier for Admission-Document.*	bigint	8	False	1 - 1	
FK	admdoc_AdmissionID *adm_ID of the Admission the attachment is attached to.*	bigint	8	False		
FK	admdoc_TypeID *doctyp_ID of the Type of attachment.*	int	4	False		
	admdoc_Data *Binary data of attachment*	image	max	False		
	admdoc_Format *File extension of attahchment*	nvarchar(50)	100	False		
	admdoc_FileName *Name of the attachment.*	nvarchar(256)	512	False		
	admdoc_FileSize *File size of attachment*	bigint	8	True		
	admdoc_Thumbnail *Data for thumnbail if attachment is an image.*	image	max	True		
	admdoc_Notes *Notes*	nvarchar(4000)	8000	True		
FK	admdoc_Sharelevel *admdocslvl_ID of the Share Level*	int	4	False		
	admdoc_CreatedDate	datetime	8	False		(getutcdate())
	admdoc_CreatedUser	nvarchar(50)	100	False		
	admdoc_ModifiedDate	datetime	8	False		(getutcdate())
	admdoc_ModifiedUser	nvarchar(50)	100	False		
	admdoc_TS	timestamp	8	False		
	admdoc_isCompressed *True if the file was compressed.*	bit	1	False		((0))

	admdoc_SubTypeID *docstyp_ID of the Subtype, if any.*	int	4	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_AdmissionDocuments	admdoc_ID	True	80
	IX_T_AdmissionDocuments	admdoc_AdmissionID		80

Foreign Keys

Name	Columns
FK_T_AdmissionDocuments_T_Admission	admdoc_AdmissionID->[dbo].[T_Admissions].[adm_ID]
FK_T_AdmissionDocuments_T_AdmissionDocument-ShareLevels	admdoc_Sharelevel->[dbo].[T_AdmissionDocumentShare-Levels].[admdocslvl_ID]
FK_T_AdmissionDocuments_T_DocumentSubTypes	admdoc_SubTypeID->[dbo].[T_DocumentSubTypes].[docstyp_ID]
FK_T_AdmissionDocuments_T_DocumentTypes	admdoc_TypeID->[dbo].[T_DocumentTypes].[doctyp_ID]

Admissions

🗔 [dbo].[T_Admissions]

Description

Records for Clients' Admissions.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
🔑	adm_ID *System generated unique identifier for the admission record.* *UI Location: From Navigation menu > Clients > Client List tab > Admission ID (List View) and from Navigation menu > Clients > Client List tab > Admission > ID*	bigint	8	False	1 - 1	
🔑	adm_BranchID *ID of the branch related to the admission. Used to pull office name and show in the UI.* *Relates to T_Branches.br_ID* *UI Location: Navigation menu > Clients > Client List tab > Admission > Admission tab > Office*	int	4	False		
(2) 🔑	adm_ClientID *ID of the client related to the admission. Used to pull client name to show in the UI.* *Relates to T_Client.cli_ID* *and from Navigation menu > Clients > Client List tab > Admission > Client*	bigint	8	False		
	adm_MedicalRecordNumber *Internal medical record number used to identify this admission, as entered on the primary Admission tab.* *UI Location: From Navigation menu > Clients > Client List tab > MR Number and from Navigation menu > Clients > Client List tab > Admission > Admission tab > Medical Record Number*	nvarchar(50)	100	True		
	adm_ReferralDate *Referral date of the admission, as entered on Admission Referral.* *Non-UTC date.*	datetime	8	True		

	UI Location: From Navigation menu > Clients > Client List tab > Admission tab > Referral Date (List View) *and from Navigation menu > Clients > Client List tab > Admission > Referral tab > Referral Date (through ReferralEditor1 Method)*					
	adm_ReferralTakenBy *Not used.*	nvarchar(50)	100	True		
FK	**adm_ReferralTypeID** *ID of the referral entity related to the admission. Used to pull entity type name.* *Relates to T_ReferralTypes.reftyp_ID*	int	4	True		
FK	**adm_NonAdmissionReasonID** *ID of the related referral non-admission reason for the record. Used to pull non-admission reason name to show in the UI. This allows the agency to track why a client did not come onto service. For more information, see DDM Referral Non-Admission Reasons.* *Relates to T_ReferralNonAdmission-Reasons.refnar_ID* *UI Location: from Navigation menu > Clients > Client List tab > Admission > Referral tab > Reason for Non-Admission*	int	4	True		
FK	**adm_StatusID** *ID of the related admission status for the admission record. Used to pull status name which shows in the UI.* *Relates to T_AdmissionStatus.admsts_ID* *UI Location: From Navigation menu > Clients > Client List tab > Admission Status (List View)* *and from Navigation menu > Clients > Client List tab > Admission > Status*	int	4	False		
FK	**adm_InternalCaseMgrID** *ID of the related caregiver that is the case manager in the admission record. Used to pull the case manager name through the search box to show in the UI. The Case Manager for this admission. Each employee must be designated as a Case Manager on the Caregiver HR tab (or Staff HR tab) in order to be selected here. Search for Caregivers or Staff configured to be a Case Manager. Click the icon to go to the record for the Case Manager.* *Relates to T_Caregiver.car_ID* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > Case Manager*	bigint	8	True		
	adm_VerbalSOCDate *The verbal Start of Care date for this admission.*	datetime	8	True		

	Non-UTC date. *UI Location: From Navigation menu > Clients* *> Client List tab > VSOC Date (Hidden)* *and from Navigation menu > Clients > Client* *List tab > Admission > Admission tab >* *Verbal SOC Date*					
	adm_VerbalSOCTakenBy *The name of the staff member who took the* *verbal Start of Care date.* *UI Location: From Navigation menu > Clients* *> Client List tab > Admission > Admission tab* *> Verbal SOC Taken By*	nvarchar(50)	100	True		
FK	**adm_SourceID** *ID of the related admission source for the* *admission record. Used to pull source of* *admission name. The appropriate Source of* *Admission. Medicare uses this to correctly* *establish and track home health episodes.* *The Reason Code displays below the* *selected source.* *Relates to T_AdmissionsSources.admsrc_ID* *UI Location: From Navigation menu > Clients* *> Client List tab > Admission > Admission tab* *> Source of Admission*	int	4	True		
	adm_ActualSOCDate *The Start of Care date of this Admission. If* *the client record was converted from a Client* *Inquiry, the SOC date will pull from the Client* *Inquiry Service Call tab.* *Non-UTC date.* *UI Location: From Navigation menu > Clients* *> Client List tab > SOC Date* *and from Navigation menu > Clients > Client* *List tab > Admission > SOC*	datetime	8	True		
	adm_PrimaryDiagnosis *The primary diagnosis for the admission.* *UI Location: From Navigation menu > Clients* *> Client List tab > Admission > Admission tab* *> Primary Diagnosis*	nvarchar(1024)	2048	True		
	adm_DiagnosisNotes *Additional diagnosis notes for the admission.* *UI Location: From Navigation menu > Clients* *> Client List tab > Admission > Admission tab* *> Diagnosis Notes*	nvarchar(1024)	2048	True		
	adm_ExcludeBillingFlag *True if this admission should not be included* *in the billing process.* *UI Location: From Navigation menu > Clients* *> Client List tab > Admission > Exclude from* *Billing*	bit	1	False		((0))
	adm_DischargeDate *The date the client was discharged.* *Non-UTC date.*	datetime	8	True		

	UI Location: From Navigation menu > Clients > Client List tab > Discharge Date *and from Navigation menu > Clients > Client List tab > Admission > Discharge tab > Discharge Date*					
FK P	**adm_DischargeReasonID** *ID of the related discharge reason for the admission record. Used to pull discharge reason name to show in the UI. Once selected, the discharge reason code displays the right of the D/C Reason field. For more information, see DDM Admission Discharge Reasons.* *Relates to T_AdmissionsDischarge-Reasons.admdcr_ID* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Discharge tab > D/C Reason*	int	4	True		
	adm_DischargeRecordedDate *The date the discharge was recorded, if different from the Discharge Date.* *Non-UTC date.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Discharge tab > Discharge Recorded Date*	datetime	8	True		
	adm_LastServiceDate *The last service date for this admission.* *Non-UTC date.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Discharge tab > Last Service Date*	datetime	8	True		
	adm_DischargeSummaryReason *Summary of the discharge reason for this admission.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Discharge tab > Discharge Reason*	nvarchar(255)	510	True		
	adm_DischargeSummaryEvaluationOfGoals *Evaluation Goals for Discharge. Summary of the evaluation of goals for the Client.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Discharge tab > Evaluation Goals*	nvarchar(255)	510	True		
	adm_DischargeSummaryConditionOfClient *Condition of Client after Discharge. Summary of the condition of the Client.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Discharge tab > Condition of Client*	nvarchar(255)	510	True		
	adm_DischargeSummaryDispositionOfClient *Disposition of Client after Discharge. Summary of the disposition of the Client.*	nvarchar(255)	510	True		

UI Location: From Navigation menu > Clients > Client List tab > Admission > Discharge tab > Disposition Notes					
adm_OtherDischargeNotes_InternalUse *Other discharge notes for internal use only.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Discharge tab > Other D/C Notes (Internal Use)*	nvarchar(255)	510	True		
adm_CreatedDate *The date the admission record was created. UTC date updated by SQL Server's current UTC date.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > Created On (through ModifiedRecord1 method)*	datetime	8	False		(getutcdate()))
adm_CreatedUser *The user logged in to the system when the admission record was created* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > Created By (through ModifiedRecord1 method)*	nvarchar(50)	100	False		
adm_ModifiedDate *The date when the admission record was last modified. UTC date updated by SQL Server's current UTC date* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > Modified On (through ModifiedRecord1 method)*	datetime	8	False		(getutcdate()))
adm_ModifiedUser *The user logged in to the system when the admission record was last modified.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > Modified By (through ModifiedRecord1 method)*	nvarchar(50)	100	False		
adm_TS *The timestamp of the admission record.*	timestamp	8	False		
adm_NonAdmitDate *Date of Non-Admittance of the admission record.* *Non-UTC date.* *UI Location: from Navigation menu > Clients > Client List tab > Admission > Referral tab > Non Admit Date*	datetime	8	True		
adm_HHASpecialInstructions *Any special instructions, as needed. This information pulls to the Service Plan report on the Admission Reports.*	nvarchar(512)	1024	True		

	UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission Service Plan > Special Instructions					
	adm_HHAActivities *Any activities, as needed. This information pulls to the Service Plan report on the Admission Reports.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission Service Plan > Activities*	nvarchar(512)	1024	True		
	adm_HHAOtherInstructions *Any other instructions, as needed. This information pulls to the Service Plan report on the Admission Reports and POC Reports tabs.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission Service Plan > Other Instructions*	nvarchar(512)	1024	True		
🖼	adm_RelInfo *Release information. Select from Informed Consent (I), No Release on File (N) -or- Signed Release on File (Y).* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > Release Information*	nchar(1)	2	False		('N')
🖼	adm_AssignBenefits *Assign Benefits. Assignment on File or No Assignment on File.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > Assign Benefits*	nchar(1)	2	True		
🔑	adm_ReferralEntityTypeID *ID of the referral entity type related to the admission. Used to pull entity type name to show in the UI.* *Relates to T_ReferralEntities.refent_ID* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Referral tab > Entity Type (through ReferralEditor1 Method)*	tinyint	1	True		
🔗	adm_ReferralEntityID *ID of the referral entity related to the admission.*	bigint	8	True		
	adm_ReferralNotes *Any notes related to the admission referral record.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Referral tab > Notes (through ReferralEditor1 Method)*	nvarchar(max)	max	True		
🔑	adm_ReferralCampaignID *ID of the referral campaign. Used to pull campaign name to show in the UI. If the agency sponsors Marketing Campaigns and the referral was the result of a campaign, select the option from the Campaign list. All*	int	4	True		

	active campaigns are available for selection. For further information, see DDM Referral Campaigns. *Relates to T_ReferralCampaigns.refcamp_ID* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Referral tab > Campaign (through ReferralEditor1 Method)*					
FK🔑	**adm_ReferralContactJoinID** *Relates to T_ReferralJoin.refjoin_ID*	bigint	8	True		
	adm_StaffID *ID of the related marketing staff on the admission record.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Referral tab > Marketing Staff (through ReferralEditor1 Method)*	bigint	8	True		
FK🔑	**adm_OasisPhysicianID** *ID of the related physician that will be included on the Oasis export on the admission record.* *Relates to T_Physician.phys_ID*	bigint	8	True		
FK🔑	**adm_AdmissionsDispositionReasonsID_NAR** *ID of the related admission disposition reason for the admission record. Used to pull disposition name to show in the UI. When a client is discharged or determined to be a non admit, it is recommended to track the disposition reason as well as the discharge or non admit reason. Disposition Reasons help to define the state of the client, or where the client went after leaving the agency. Disposition Reasons are not required. For more information, see DDM Admission Disposition Reasons.* *Relates to T_AdmissionsDisposition-Reasons.admdispr_ID* *UI Location: from Navigation menu > Clients > Client List tab > Admission > Referral tab > Disposition Reason*	int	4	True		
	adm_NonAdmitNotes *Any needed notes relate to non-admit of the admission record.* *UI Location: from Navigation menu > Clients > Client List tab > Admission > Referral tab > Notes*	nvarchar(255)	510	True		
FK🔑	**adm_AdmissionsDispositionReasonsID_-DChg** *ID of the related admission disposition discharge reason for discharge on the admission record. Used to pull admission disposition discharge reason name.* *Relates to T_AdmissionsDisposition-Reasons.admdispr_ID*	int	4	True		

FK🔑	**adm_ReferralTakenByID** *ID of the caregiver that referred the client for this admission record. Used to pull the referral name.* *Relates to T_Caregiver.car_ID* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Referral tab > Taken By (through ReferralEditor1 Method)*	bigint	8	True		
	adm_CAHPSParticipationDeclined *Exclusion indicator for client survey participation. Checking the box indicates the client should be included in the Total Number of Patients count only. Detailed client data is not included in the data file. Admission.CAHPS permission is required to access this option tab.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission CAHPS > Client Declines Survey Participation*	bit	1	False		((0))
	adm_CAHPSReceivingHospice *Exclusion indicator for client receiving hospice services. Checking the box indicates the client should be included in the Total Number of Patients count only. Detailed client data is not included in the data file. Admission.CAHPS permission is required to access this option tab.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission CAHPS > Client is Receiving Hospice Services*	bit	1	False		((0))
	adm_CAHPSReceivingPediatric *Exclusion indicator for client receiving pediatric services. Checking the box indicates the client should be included in the Total Number of Patients count only. Detailed client data is not included in the data file. Admission.CAHPS permission is required to access this option tab.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission CAHPS > Client is Receiving Pediatric Services*	bit	1	False		((0))
	adm_CAHPSReceivingMaternity *Exclusion indicator for client receiving maternity services. Checking the box indicates the client should be included in the Total Number of Patients count only. Detailed client data is not included in the data file. Admission.CAHPS permission is required to access this option tab.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission CAHPS > Client is Receiving Maternity Services*	bit	1	False		((0))

	adm_F2FEncounter *The Face to Face Encounter date for the Start of Care Episode for this admission. Part of PPS 2011 regulatory changes with Medicare and cannot drop a final claim without this information. One F2F Encounter is needed for each Admission. This field is not required and may be modified at any time. Read the Face to Face Encounter Reference Sheet for information and documentation requirements.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > F2F Encounter*	date	3	True		
	adm_ReceivingInsulinInjectionServices *Check the box if the client is receiving these services. Enter additional Notes in the field if needed (1000 character max). The default is set to unchecked when creating new Admissions.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > Receiving Insulin Injection Services*	bit	1	False		((0))
	adm_ReceivingHospiceServices *Check the box if the client is receiving these services. Enter additional Notes in the field if needed (1000 character max). The default is set to unchecked when creating new Admissions.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > Receiving Hospice services*	bit	1	False		((0))
	adm_ReceivingInsulinServicesNotes *Notes related to insulin injection services.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > unlabeled box under checkbox*	nvarchar(1000)	2000	True		
	adm_ReceivingHospiceServicesNotes *Notes about hospice services.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > unlabeled box under checkbox*	nvarchar(1000)	2000	True		
FK	adm_CertPhysicianID *The ID of the certifying physician assigned to a the admission. Used to pull certifying physician name through the search box to show in the UI. the physician who will sign the F2F (Face to Face Encounter). The PPS Final Claim requires reporting of the Certifying Physician for certification periods starting on or after 07/01/2014. It is no longer required to save the Admission. If the Physician is not already in the database, add using the Physicians module under Operations from the Navigation Menu.*	bigint	8	True		

	Relates to T_Physician.phys_ID *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > Certifying Physician*					
	adm_SupervisorID *The ID of the supervisor for the admission. Used to pull supervisor name through the search box to show in the UI. Select a Supervisor for this admission. Each employee must be designated as a Supervisor on the Caregiver HR tab (or Staff HR tab) in order to be selected here. Search for Caregivers or Staff configured to be a Supervisor. Click the icon to go to the record for the Supervisor.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > Supervisor*	bigint	8	True		
	adm_CoordinatorID *The ID of the coordinator for the admission. Used to pull coordinator name through the search box to show in the UI. Select a Coordinator for this admission. Each employee must be designated as a Coordinator on the Caregiver HR tab (or Staff HR tab) in order to be selected here. Search for Caregivers or Staff configured to be a Coordinator. Click the icon to go to the record for the Coordinator.* *UI Location: From Navigation menu > Clients > Client List tab > Admission > Admission tab > Coordinator*	bigint	8	True		
	adm_Features *This is a bitfield for controlling feature flags at the admission level.* *0=no features enabled* *1=Medication Module Enabled*	bigint	8	False		((0))

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_Admissions	adm_ID	True	80
	IX_T_Admissions_AdmID_ClientID	adm_ID, adm_ClientID	True	80
	IX_T_Admissions_ActualSOCDate	adm_ActualSOCDate		80
	IX_T_Admissions_BranchID	adm_BranchID		80
	IX_T_Admissions_ClientID	adm_ClientID		80
	IX_T_Admissions_ReferralCampaignsID	adm_ReferralCampaignID		80
	IX_T_Admissions_ReferralEntityTypeID_Referral-EntityID	adm_ReferralEntityTypeID, adm_Referral-EntityID		80

Foreign Keys

Name	Columns
FK_T_Admissions_T_AdmissionsDischarge-Reasons	adm_DischargeReasonID->[dbo].[T_AdmissionsDischarge-Reasons].[admdcr_ID]
FK_T_Admissions_T_AdmissionsDisposition-Reasons_Discharge	adm_AdmissionsDispositionReasonsID_DChg->[dbo].[T_Admissions-DispositionReasons].[admdispr_ID]
FK_T_Admissions_T_AdmissionsDisposition-Reasons_NonAdmitRsn	adm_AdmissionsDispositionReasonsID_NAR->[dbo].[T_Admissions-DispositionReasons].[admdispr_ID]
FK_T_Admissions_T_AdmissionsSources	adm_SourceID->[dbo].[T_AdmissionsSources].[admsrc_ID]
FK_T_Admissions_T_AdmissionStatus	adm_StatusID->[dbo].[T_AdmissionStatus].[admsts_ID]
FK_T_Admissions_T_Branches	adm_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_Admissions_T_Caregiver	adm_InternalCaseMgrID->[dbo].[T_Caregiver].[car_ID]
FK_T_Admissions_T_Caregiver_ReferralTaken-By	adm_ReferralTakenByID->[dbo].[T_Caregiver].[car_ID]
FK_T_Admissions_T_Client	adm_ClientID->[dbo].[T_Client].[cli_ID]
FK_T_Admissions_T_Physician_CertPhysicianID	adm_CertPhysicianID->[dbo].[T_Physician].[phys_ID]
FK_T_Admissions_T_Physician_OasisPhysician	adm_OasisPhysicianID->[dbo].[T_Physician].[phys_ID]
FK_T_Admissions_T_ReferralCampaigns	adm_ReferralCampaignID->[dbo].[T_ReferralCampaigns].[refcamp_ID]
FK_T_Admissions_T_ReferralEntities	adm_ReferralEntityTypeID->[dbo].[T_ReferralEntities].[refent_ID]
FK_T_Admissions_T_ReferralJoin	adm_ReferralContactJoinID->[dbo].[T_ReferralJoin].[refjoin_ID]
FK_T_Admissions_T_ReferralTypes	adm_ReferralTypeID->[dbo].[T_ReferralTypes].[reftyp_ID]
FK_T_Admissions_T_RefferalNonAdmission-Reasons	adm_NonAdmissionReasonID->[dbo].[T_ReferralNonAdmission-Reasons].[refnar_ID]

Admissions Discharge Reasons

📇 [dbo].[T_AdmissionsDischargeReasons]

Description

Admission Discharge Reasons

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK 🔑 C	admdcr_ID *Unique identifier for Discharge Reason*	int	4	False	10001 - 1	
	admdcr_CreatedDate	datetime	8	False		(getutcdate())
	admdcr_CreatedUser	nvarchar(50)	100	False		
	admdcr_ModifiedDate	datetime	8	False		(getutcdate())
	admdcr_ModifiedUser	nvarchar(50)	100	False		
	admdcr_TS	timestamp	8	False		
	admdcr_Code	nvarchar(50)	100	True		
🔠	admdcr_Name *Name of Discharge Reason*	nvarchar(50)	100	False		('')
📇	admdcr_ListItemType *Specifies the scope of the Reason.* *0 = System, 1 = Branch, 2 = Override, 3 = Branch No Global*	tinyint	1	False		((0))
FK 🔑	admdcr_RptGroupID *rptgrp_ID of the Report Group that the Discharge Reason is associated with.*	int	4	False		((31))
🔠 FK 🔑	admdcr_BranchID *br_ID of the related Branch.*	int	4	True		
🔠 FK 🔑 📇	admdcr_OverrideID *admdcr_ID of the Discharge Reason to Override.*	int	4	True		
	admdcr_Active *True if the Discharge Reason is selectable for new Admission records.*	bit	1	False		
	admdcr_Description *Description of the Discharge Reason*	nvarchar(1000)	2000	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_AdmissionsDischargeReasons	admdcr_ID	True	80
	IX_T_AdmissionsDischargeReasons	admdcr_BranchID, admdcr_OverrideID, admdcr_Name	True	

Foreign Keys

Name	Columns
FK_T_AdmissionsDischargeReasons_T_Admissions-DischargeReasons	admdcr_OverrideID->[dbo].[T_AdmissionsDischarge-Reasons].[admdcr_ID]
FK_T_AdmissionsDischargeReasons_T_Branches	admdcr_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_AdmissionsDischargeReasons_T_ReportGroups	admdcr_RptGroupID->[dbo].[T_ReportGroups].[rptgrp_ID]

Assessment

[dbo].[T_Assessment]

Note: Detailed documentation is pending.

Attribute

📧 **[dbo].[T_Attribute]**

Note: Detailed documentation is pending.

Attribute Class

📇 **[dbo].[T_AttributeClass]**

Note: Detailed documentation is pending.

Authorization

[dbo].[T_Authorization]

Note: Detailed documentation is pending.

Authorization Dates

[dbo].[T_AuthorizationDates]

Note: Detailed documentation is pending.

Authorization Detail

[dbo].[T_AuthorizationDetail]

Note: Detailed documentation is pending.

Availability Dates

[dbo].[T_AvailabilityDates]

Description

Caregiver date ranges for schedule availability.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Default
PK C FK	avdt_CaregiverID *Caregiver ID for the availability dates record.* *Relates to [T_Caregiver].[car_ID].*	bigint	8	False	
FK	avdt_RecID *The ID of the related recurrence for the availability dates record.* *Relates to [T_AvailabilityRecurrence].[avrec_ID].*	bigint	8	False	
PK C	avdt_StartTime *Starting day and time of the availability period on the current record.* *UI Location: Schedule Calendar > Select > Caregiver > Availability tab > Availability Recurrence window > Schedule Time > Start (time portion)* *UI Location: Schedule Calendar > Select > Caregiver > Availability tab > Availability Recurrence window > Schedule Time > Range of Recurrence > Start (date portion)*	datetime	8	False	
PK C	avdt_EndTime *Ending day and time of the availability period on the current record.* *UI Location: Schedule Calendar > Select > Caregiver > Availability tab > Availability Recurrence window > Schedule Time > End (time portion)* *UI Location: Schedule Calendar > Select > Caregiver > Availability tab > Availability Recurrence window > Schedule Time > Range of Recurrence > End by (date portion)*	datetime	8	False	
PK C	avdt_Status *Availability status of the caregiver during the period in the current record.* *UI Location: Schedule Calendar > Select > Caregiver > Availability tab > Availability Recurrence window > Status* *Values: 0 = Unavailable, 1 = Available*	tinyint	1	False	((0))

Indexes

Key	Name	Key Columns	Data Type	Unique
PK	PK_T_AvailabilityDates	avdt_CaregiverID, avdt_StartTime, avdt_EndTime, avdt_Status		True
	ID_T_AvailabilityDates_Start-EndCar	avdt_Status, avdt_StartTime, avdt_EndTime	avdt_-CaregiverID	
	IX_T_AvailabilityDates	avdt_RecID		

Foreign Keys

Name	Delete	Columns
FK_T_AvailabilityDates_T_AvailabilityRecurrence	Cascade	avdt_RecID->[dbo].[T_AvailabilityRecurrence].[avrec_ID]
FK_T_AvailabilityDates_T_Caregiver		avdt_CaregiverID->[dbo].[T_Caregiver].[car_ID]

Bill Codes

[dbo].[T_BillCodes]

Note: Detailed documentation is pending.

Bill Type

[dbo].[T_BillType]

Note: Detailed documentation is pending.

Branch Holidays

📇 [dbo].[T_BranchHolidays]

Description

Details about holidays for the branch.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
🔑 PK C	brhol_ID *The ID of the BranchHoliday record.*	bigint	8	False	1 - 1	
🔑 FK 📇	brhol_BranchID *The branch ID for the record.* *Relates to [T_Branches].[br_ID].* *UI Location: Office > Holidays tab > ID*	int	4	False		
	brhol_Name *The name of the holiday.* *UI Location: Office > Holidays tab > Holiday column*	nvarchar(50)	100	False		
🔗	brhol_StartDate *Start date and time of the holiday. The start time defaults to 12:00 am.* *UTC date updated by SQL server based on office time zone.* *UI Location: Office > Holidays tab > Start Date/Time column*	datetime	8	False		
	brhol_EndTime *End date and time of the holiday. The end time defaults to 12:00 am.* *UTC date updated by SQL server based on office time zone.* *UI Location: Office > Holidays tab > End Date/Time column*	datetime	8	False		
📇	brhol_Multiplier *The multiplier to be used against the established bill rates for the holiday rate calculations. The default value is 1.00. Leave this value if no multiplier is to be used. The multiplier for time and a half is 1.50.* *UI Location: Office > Holidays tab > Bill Multiplier column*	decimal(8,2)	5	False		((0))
	brhol_Addition *The additional amount to be added to the established hourly bill rates for the holiday rate calculations. The*	smallmoney	4	False		((0))

	default value is 0.00. Leave this value if no Add-On is to be used. *UI Location: Office > Holidays tab > Bill Hourly Add-On column*					
	brhol_CreatedDate *The date the record was created.* *UTC date updated by SQL Server's current UTC date.*	datetime	8	False		(getutcdate())
	brhol_CreatedUser *The user who created the record.*	nvarchar(50)	100	False		
	brhol_ModifiedDate *The date the record was modified.* *UTC date updated by SQL Server's current UTC date.*	datetime	8	False		(getutcdate())
	brhol_ModifiedUser *The user who made the most recent record modification.*	nvarchar(50)	100	False		
	brhol_TS *The time stamp for the record.*	timestamp	8	False		
	brhol_PayMultiplier *The multiplier to be used against the established pay rates for the holiday rate calculations. The default value is 1.00. Leave this value if no multiplier is to be used. The multiplier for time and a half is 1.50.* *UI Location: Office > Holidays tab > Pay Multiplier column*	decimal(8,2)	5	False		((0))
	brhol_PayAddition *The additional amount to be added to the established hourly pay rates for the holiday rate calculations. The default value is 0.00. Leave this value if no Add-On is to be used.* *UI Location: Office > Holidays tab > Pay Hourly Add-On column*	smallmoney	4	False		((0))
	brhol_PayVisitAddition *The additional amount to be added to the established visit pay rates for the holiday rate calculations. The default value is 0.00. Leave this value if no Add-On is to be used.* *UI Location: Office > Holidays tab > Pay Visit Add-On column*	smallmoney	4	False		((0))
	brhol_BillVisitAddition *The additional amount to be added to the established visit bill rates for the holiday rate calculations. The default value is 0.00. Leave this value if no Add-On is to be used.* *UI Location: Office > Holidays tab > Bill Visit Add-On column*	smallmoney	4	False		((0))

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_BranchHolidays	brhol_ID	True	80
	IX_T_BranchHolidays_Unique	brhol_BranchID, brhol_StartDate	True	80

Foreign Keys

Name	Columns
FK_T_BranchHolidays_T_Branches	brhol_BranchID->[dbo].[T_Branches].[br_ID]

Branch Margins

[dbo].[T_BranchMargins]

Description

Gross Margin table with entries for liabilities that affect Gross Margin.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	brmarg_ID *The ID field of the BranchMarginsInfo object.* *This is a system generated ID number for the branch margin record.* *UI Location: Settings > Office > Office Settings > Gross Margin > brmarg_ID (Hidden)*	bigint	8	False	1 - 1	
FK	brmarg_BranchID *The BranchID field of the BranchMarginsInfo object.* *This is a system generated branch ID number in the branch margin record.* *UI Location: Settings > Office > Office Settings > Gross Margin > BranchID (Hidden)*	int	4	False		
FK	brmarg_TypeID *The TypeID field of the BranchMarginsInfo object.* *This is a system generated branch margin type ID number in the branch margin record.* *UI Location: Settings > Office > Office Settings > Gross Margin > brmarg_TypeID (Hidden)*	int	4	False		
	brmarg_Name *The Name field of the BranchMarginsInfo object.* *The name of the branch margin.* *UI Location: Settings > Office > Office Settings > Gross Margin > Name*	nvarchar(50)	100	False		
	brmarg_Desc *The Desc field of the BranchMarginsInfo object.* *The description of the branch margin.* *UI Location: Settings > Office > Office Settings > Gross Margin > Description*	nvarchar(100)	200	True		
	brmarg_Percent *The Percent field of the BranchMarginsInfo object.* *The percentage number amount. The sum of all brmarg_Percent is called Payroll-Margin, BranchMargin, PayrollMargin.*	decimal(5,4)	5	True		

	UI Location: Settings > Office > Office Settings > Gross Margin > %					
📇	brmarg_FixedAmt *The FixedAmt field of the BranchMarginsInfo object.* *The sum of all brmarg_FixedAmt is called Payroll-MarginFixedAmt.* *UI Location: Settings > Office > Office Settings > Gross Margin > Fixed Amount*	money	8	True		
	brmarg_EffectiveStart *The EffectiveStart field of the BranchMarginsInfo object.* *UTC date updated by SQL server based on office time zone.* *Beginning date for the current record to apply.* *UI Location: Settings > Office > Office Settings > Gross Margin > Effective From*	datetime	8	False		
	brmarg_EffectiveEnd *The EffectiveEnd field of the BranchMarginsInfo object.* *UTC date updated by SQL server based on office time zone.* *Ending date for the current record to apply.* *UI Location: Settings > Office > Office Settings > Gross Margin > Effective To*	datetime	8	False		
	brmarg_CreatedDate *The Date the BranchMargins Record was Created.* *UTC date updated by SQL server's current UTC date.* *The date the branch margin record was created.* *Also called CreatedDate.* *UI Location: Settings > Office > Office Settings > Gross Margin > Created On*	datetime	8	False		(getutcdate())
	brmarg_CreatedUser *The CreatedUser field of the BranchMarginsInfo object.* *The used logged in to the system when the branch margin record was created.* *Also called CreatedUser.* *UI Location: Settings > Office > Office Settings > Gross Margin > Created By*	nvarchar(50)	100	False		
	brmarg_ModifiedDate *The Date the BranchMargins Record was last Modified.* *UTC date updated by SQL server's current UTC date.* *The date when the branch margin record was last modified.* *Also called ModifiedDate.*	datetime	8	False		(getutcdate())

UI Location: Settings > Office > Office Settings > Gross Margin > Modified On						
brmarg_ModifiedUser *The ModifiedUser field of the BranchMarginsInfo object.* *The used logged in to the system when the branch margin record was last modified.* *Also called ModifiedUser.* *UI Location: Settings > Office > Office Settings > Gross Margin > Modified By*	nvarchar(50)	100	False			
brmarg_TS *The TS field of the BranchMarginsInfo object.* *The timestamp field of the branch margin record.*	timestamp	8	False			

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK 🔑 C	PK_T_BranchMargins	brmarg_ID	True	80

Foreign Keys

Name	Columns
FK_T_BranchMargins_T_Branches	brmarg_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_BranchMargins_T_MarginTypes	brmarg_TypeID->[dbo].[T_MarginTypes].[margtyp_ID]

Branch Taxes

[dbo].[T_BranchTaxes]

Description

Defines the relationship between different Tax Types and Tax Groups that are associated with an Office. The Tax Types are defined in Dropdown Maintenance and the Tax Groups are associated with an Office and defined in the Tax Groups tab of Office. A Branch Tax record must be created when a new Tax Groups record is created and additional Branch Tax records can be added to an existing Branch Tax Group record.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	brtx_ID *System generated unique ID for the Branch Tax record.*	int	4	False	1 - 1	
FK	brtx_GroupID *The id of the associated Branch Tax Group record. Not shown in the UI; only the description is shown in the UI.*	int	4	False		
FK	brtx_TaxTypeID *The id of the associated Tax Type record. Not shown in the UI; only the description is shown in the UI.*	int	4	False		
	brtx_Desc *The description of this Branch Tax. Entered on the Office>Tax Groups form. Called Description in the Branch Tax grid in the UI.*	nvarchar(100)	200	True		
	brtx_Percent *The percentage value of the tax for this Branch Tax record. Entered on the Office>Tax Groups form, in the Branch Tax grid. Called % in the UI. The percentage of the Invoice Detail amount that will be added to the taxes of an applicable Invoice Detail.*	decimal(10,6)	9	True		
	brtx_FixedAmt *The fixed amount value of the tax for this Branch Tax record. Entered on the Office>Tax Groups form, in the Branch Tax grid. Called Fixed Amount in the UI. This is a fixed amount is an amount that will be added to the taxes of an applicable Invoice Detail.*	money	8	False		
	brtx_EffectiveStart *The Effective Start date for this Branch Tax record. It is UTC and is updated by SQL Server based on the office time zone. Called Effective From in Office>Tax Groups and only the Date component is shown on the UI.*	datetime	8	False		

	brtx_EffectiveEnd *The Effective End date for this Branch Tax record. It is UTC and is updated by SQL Server based on the office time zone. Called Effective To in Office>Tax Groups and only the Date component is shown on the UI.*	datetime	8	False		
	brtx_CreatedDate *The Date the Branch Tax record was created. It is a UTC date and is updated by the SQL Server current UTC date. This date is converted to the user's computer's timezone in the UI. Called Created On in Office>Tax Groups form, shown in the Branch Tax grid.*	datetime	8	False		
	brtx_CreatedUser *The user logged in the system when this Branch Tax record was created. Called Created By in Office>Tax Groups form, in the Branch Tax grid.*	nvarchar(50)	100	False		
	brtx_ModifiedDate *The date that this record was last modified. It is a UTC date and is updated by the SQL Server current UTC date. This date is converted to the user's computer's timezone in the UI. Called Modified On in Office>Tax Groups form, showin in the Branch Tax grid.*	datetime	8	False		
	brtx_ModifiedUser *The last user to modify this Branch Tax record. Called Modified By in Office>Tax Groups form, in the Branch Tax grid.*	nvarchar(50)	100	False		
	brtx_TS *The TS field of the Branch Tax record.*	timestamp	8	False		
	brtx_HCPCS *The HCPCS code, if required by a payer. If different payers require different HCPCS Codes then add a Tax Group for each payer. Called HCPCS Code in the UI, shown in the Branch Tax grid.*	nchar(25)	50	True		
FK	brtx_AcctID *The FK to the T_AcctsCharts table. The default acctID is set to 1 (Default Account). This is called Accounting Chart in the Branch Tax grid in the UI.*	int	4	True		((1))
	brtx_AcctCode *The Account Code of the associated Accounting Chart, if it exists. Called Account Code in the UI.*	nvarchar(50)	100	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_BranchTaxes	brtx_ID	True	80
	IX_T_BranchTaxes_GroupID	brtx_GroupID		80

Foreign Keys

Name	Delete	Columns
FK_T_BranchTaxes_T_BranchCharts		brtx_AcctID->[dbo].[T_AcctCharts].[acct_ID]
FK_T_BranchTaxes_T_BranchTaxGroups	Cascade	brtx_GroupID->[dbo].[T_BranchTaxGroups].[brtg_ID]
FK_T_BranchTaxes_T_TaxTypes		brtx_TaxTypeID->[dbo].[T_TaxTypes].[taxtyp_ID]

Branch Tax Groups

📇 [dbo].[T_BranchTaxGroups]

Description

Defines the relationship between the office and tax groups. Entries are defined in Office>Tax Groups in the UI. The system provides the ability to add taxes to invoices for specified services that are set up at the Office level.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
🔑 PK C	brtg_ID *System generated unique ID for the Branch Tax Groups record.*	int	4	False	1 - 1	
🔑 FK	brtg_BranchID *The ID of the Branch that this Branch Tax Group record is associated with. Flows from [T_-Branches].[br_id]*	int	4	False		
	brtg_Name *Name of the Tax Group. Called Tax Group in Office>Tax Groups form.*	nvarchar(50)	100	False		
	brtg_CreatedDate *The Date the Branch Tax Group record was created. UTC date. Updated by SQL Server's current UTC date. Called Created On in Office>Tax Groups form.*	datetime	8	False		
	brtg_CreatedUser *The user logged in the system when the record was created. Called Created By in Office>Tax Groups form.*	nvarchar(50)	100	False		
	brtg_ModifiedDate *The user logged in the system when the record was last modified. UTC date. Updated by SQL Server's current UTC date. Called Modified On in Office>Tax Groups form.*	datetime	8	False		(getutcdate())
	brtg_ModifiedUser *The user logged in the system when the record was last modified. Called Modified By in Office>Tax Groups form.*	nvarchar(50)	100	False		
	brtg_TS *The TS field of the Branch Tax Group record.*	timestamp	8	False		
	brtg_Description *The description of the Branch Tax Group*	nvarchar(1000)	2000	True		

| | | record. *Called Description in Office>Tax Groups form.* | | | | | |

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK/C	PK_T_BranchTaxGroups	brtg_ID	True	80
	IX_T_BranchTaxGroups_BranchID	brtg_BranchID		80

Foreign Keys

Name	Columns
FK_T_BranchTaxGroups_T_Branches	brtg_BranchID->[dbo].[T_Branches].[br_ID]

Branches

🗔 [dbo].[T_Branches]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK 🔑 C 🖧	**br_ID** *The ID field of the BranchSettingsInfo, BranchList-ItemInfo, PayerBranchAreaPayRatesInfo, Payer-BranchAreaBillRatesInfo, BranchSettingsMainInfo and DuplicateSSNInfo objects.* *This is a system generated number.* *Also called entityID, BranchID, cBranchID.* *UI Location: Settings > Office > Office Settings > ID*	int	4	False	1 - 1	
	br_FormalName *The FormalName field of the BranchSettingsMain-Info and BranchListItemInfo objects.* *Name of the Office as it should appear on invoices. Also called FranchiseName, Provider-Name, BranchFormalName, OfficeFormalName, BranchName.*	nvarchar(128)	256	False		
🖧	**br_Name** *The Name field of the BranchesInfo, ClientListItem, BranchListItemInfo, PhysicianListItem, Caregiver-ListItem and DuplicateSSNInfo objects.* *Name of the Office as it should appear in the drop down for Office. Also called FranchiseNumber, EntityName, Name, BranchName, UserPriBranch, office, OfficeNickName.*	nvarchar(50)	100	False		
	br_DBA *The DBA field of the BranchSettingsMainInfo object.* *This is another name that the company is doing business as. This is only informational and will not appear on invoices.* *UI Location: Settings > Office > Office Settings > Main > DBA*	nvarchar(128)	256	True		
	br_CompanyID *The CompanyID field of the BranchSettingsMain-Info object.* *Used in lines of business where the agency has internal IDs for each company. Also called CompanyNumber.* *UI Location: Settings > Office > Office Settings > Main > Company ID*	nvarchar(50)	100	True		

	br_CompanyAgreementStartDate *The CompanyAgreementStartDate field of the BranchSettingsMainInfo object.* *Date the Office started doing business.* *UI Location: Settings > Office > Office Settings > Main > Start Date*	datetime	8	True		
	br_CompanyAgreementExpirationDate *The CompanyAgreementExpirationDate field of the BranchSettingsMainInfo object.* *Date the Office stopped doing business. This only shows that the Office is no* *longer in business and does not inactivate it. An Office End Date (along with the existence of a Client Inquiry Portal Script and/or Caregiver Inquiry Portal Script) is used to determine if the Office should be available for selection on your agency's website. If DO NOT want Client Inquiries coming into the system from the Portal and have created Client Inquiry Portal Scripts for those offices, then set the End Date on the Office record. If the Office End Date is less than or equal to the current date, the Office will not display for selection on the Client Inquiry Portal. See Client Inquiry Portal for full details on utilizing the Client Inquiry Portal feature and* *Caregiver Inquiry Portal for full details on utilizing the Caregiver Inquiry Portal feature.* *UI Location: Settings > Office > Office Settings > Main > End Date*	datetime	8	True		
	br_BusinessType *The BusinessType field of the BranchSettingsMain-Info object.* *Type of business for this office: Corporation, LLC, Partnership, S Corporation, or Sole Proprietorship.* *UI Location: Settings > Office > Office Settings > Main > Business Type*	nvarchar(50)	100	True		(N'Corporation')
	br_PotentialClients *The PotentialClients field of the BranchSettings-MainInfo object.* *This is currently only used in the Potential Client Dashboard.* *UI Location: Settings > Office > Office Settings > Main > Potential Client Base*	int	4	True		
	br_DateEstablished *The DateEstablished field of the BranchSettings-MainInfo object.* *Date when the Office was established.* *Also called StartDate.* *UI Location: Settings > Office > Office Settings > Main > Date Established*	datetime	8	True		
⛁	br_LocationID *The LocationID field of the BranchesInfo and BranchListItemInfo objects.*	int	4	False		

⬥	**br_ParBranchID** *The ParBranchID field of the BranchesInfo and BranchListItemInfo objects.*	int	4	True		
	br_Address1 *The Address1 field of the BranchesInfo and BranchListItemInfo objects.* *Also called ProviderAddress1.* *Part of the physical address of the company. Used for Office address at top of the Invoice and Invoice Statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Remit to Address (on the Office Billing tab) will show on the receipt stub at bottom of invoices and invoice statements.*	nvarchar(50)	100	True		
	br_Address2 *The Address2 field of the BranchesInfo and BranchListItemInfo objects.* *Part of the physical address of the company. Used for Office address at top of the Invoice and Invoice Statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Remit to Address (on the Office Billing tab) will show on the receipt stub at bottom of invoices and invoice statements..*	nvarchar(50)	100	True		
	br_City *The City field of the BranchSettingsMainInfo and BranchListItemInfo objects.* *Also called City, ProviderCity.* *Part of the physical address of the company. Used for Office address at top of the Invoice and Invoice Statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Remit to Address (on the Office Billing tab) will show on the receipt stub at bottom of invoices and invoice statements.*	nvarchar(50)	100	True		
	br_StateOrProvince *The StateOrProvince field of the BranchSettings-MainInfo and BranchListItemInfo objects.* *Also called State, ProviderStateOrProvince* *Part of the physical address of the company. Used for Office address at top of the Invoice and Invoice Statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Remit to Address (on the Office Billing tab) will show on the receipt stub at bottom of invoices and invoice statements.*	nvarchar(20)	40	True		
	br_PostalCode *The PostalCode field of the BranchSettingsMain-Info and BranchListItemInfo objects.* *Also called ProviderPostalCode, BranchAddress, Zip.* *Part of the physical address of the company. Used for Office address at top of the Invoice and Invoice Statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Remit to*	nvarchar(20)	40	True		

	Address (on the Office Billing tab) will show on the receipt stub at bottom of invoices and invoice statements.					
	br_County *The County field of the BranchSettingsMainInfo object.* *Part of the physical address of the company. Used for Office address at top of the Invoice and Invoice Statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Remit to Address (on the Office Billing tab) will show on the receipt stub at bottom of invoices and invoice statements.*	nvarchar(50)	100	True		
	br_Country *The Country field of the BranchSettingsMainInfo object.* *Part of the physical address of the company. Used for Office address at top of the Invoice and Invoice Statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Remit to Address (on the Office Billing tab) will show on the receipt stub at bottom of invoices and invoice statements.*	int	4	False		((240))
	br_UTCOffsetHours *The UTCOffsetHours field of the BranchSettings-MainInfo object.*	int	4	False		
	br_AgencyLicenseNumber *The AgencyLicenseNumber field of the Branch-SettingsMainInfo and EFTInfo objects.* *This number will appear at the top of all Standard Invoices, below the office name, address and Tax ID number. If left blank, then the Outstanding Invoice Statement for a Client, the Outstanding Invoice Statement for a Payer, and the Outstanding Invoice Statements for all Clients and Payers will not display this field label.* *UI Location: Settings > Office > Office Settings > Main > Agency License*	nvarchar(50)	100	True		
▤▤	**br_SchedulingWeekStartDay** *The SchedulingWeekStartDay field of the Branch-SettingsSchedulingInfo and BranchListItemInfo objects.* *The payroll week for the Office is defined on this tab, and you can choose the Week Start Day and Time. This setting does not necessarily reflect the start of the company work week. It is a definition of the payroll week, which allows you to calculate payroll on a weekly basis. The first interval ends at the end of the scheduling week and then every 7 days thereafter. The Work Week is defined by the 'Week Start Day' configured on this tab.* *UI Location: Settings > Office > Office Settings > Payroll > Week Start Day*	tinyint	1	False		((0))

🖾	**br_SchedulingWeekStartTime** *The SchedulingWeekStartTime field of the Branch-SettingsSchedulingInfo object.* *The payroll week for the Office is defined on this tab, and you can choose the Week Start Day and Time. This setting does not necessarily reflect the start of the company work week. It is a definition of the payroll week, which allows you to calculate payroll on a weekly basis. The first interval ends at the end of the scheduling week and then every 7 days thereafter. The Work Week is defined by the 'Week Start Day' configured on this tab.* *UI Location: Settings > Office > Office Settings > Payroll > Week Start Time*	smalldatetime	4	False		(((1)/(1))/(1900))
	br_DefaultTravelTime *The DefaultTravelTime field of the BranchSettings-SchedulingInfo and BranchListItemInfo objects.* *Number of minutes to allow in between visits.* *UI Location: Settings > Office > Office Settings > Scheduling > Travel Time*	tinyint	1	False		((0))
	br_SchedulingConflictsOverride *The SchedulingConflictsOverride field of the BranchSettingsSchedulingInfo and BranchListItem-Info objects.* *User override the number of minutes to allow in between visits.* *Override Level:* *User Override - The default behavior for the level of conflict checking can be overridden in the next area of the system (Global to Office to User).* *No Override - The default behavior for level of conflict checking cannot be overridden by settings in the next area of the system (Global to Office to User).Do Not Check - Bypasses running any conflict checks.* *UI Location: Settings > Office > Office Settings > Scheduling > Travel Time*	tinyint	1	False		((0))
🖾	**br_SchedulingScheduleConflictsAllow** *The SchedulingScheduleConflictsAllow field of the BranchSettingsSchedulingInfo and BranchListItem-Info objects.* *Select whether to check for conflicting dates/times for the Caregiver. (For example, the Caregiver has schedules for the same date/time for two different Clients.)* *Conflict Check Level:* *Default - Takes the level set at the next highest level (whether Global or Office).* *Disallow - Runs the conflict check, warns the user, and does not allow them to save the record. For more information, see Schedule Conflict Warning.* *Warn Only - Runs the conflict check and warns the user, but allows them to Ignore the warning and*	tinyint	1	False		((0))

	save the record. For more information, see Schedule Conflict Warning. *UI Location: Settings > Office > Office Settings > Scheduling > Scheduling Conflicts*					
	br_SchedulingScheduleConflictsOverride *The SchedulingScheduleConflictsOverride field of the BranchSettingsSchedulingInfo and BranchList-ItemInfo objects.* *User override schedule conflicts.* *Override Level:* *User Override - The default behavior for the level of conflict checking can be overridden in the* *next area of the system (Global to Office to User).* *No Override - The default behavior for level of conflict checking cannot be overridden by settings in the next area of the system (Global to Office to User).* *UI Location: Settings > Office > Office Settings > Scheduling > Scheduling Conflicts*	tinyint	1	False		((0))
▦	**br_SchedulingAvailabilityConflictsAllow** *The SchedulingAvailabilityConflictsAllow field of the BranchSettingsSchedulingInfo and BranchListItem-Info objects.* *Select whether to check for conflicting pre-configured availability for the Caregiver. (For example, the Caregiver is vailable/unavailable to work on specific dates/times.)* *Conflict Check Level:* *Default - Takes the level set at the next highest level (whether Global or Office).* *Disallow - Runs the conflict check, warns the user, and does not allow them to save the record. For more information, see Schedule Conflict Warning.* *Warn Only - Runs the conflict check and warns the user, but allows them to Ignore the warning and save the record. For more information, see Schedule Conflict Warning.* *UI Location: Settings > Office > Office Settings > Scheduling > Availability Conflicts*	tinyint	1	False		((0))
	br_SchedulingAvailabilityConflictsOverride *The SchedulingAvailabilityConflictsOverride field of the BranchSettingsSchedulingInfo and BranchList-ItemInfo objects.* *User override availability conflicts.* *Override Level:User Override - The default behavior for the level of conflict checking can be overridden in the next area of the system (Global to Office to User).No Override - The default behavior for level of conflict checking cannot be overridden by settings in the next area of the system (Global to Office to User).* *UI Location: Settings > Office > Office Settings > Scheduling > Availability Conflicts*	tinyint	1	False		((0))

	br_SchedulingDNUConflictsAllow *The SchedulingDNUConflictsAllow field of the BranchSettingsSchedulingInfo and BranchListItem-Info objects.* *Select whether to check for Do Not Use, Restrictions, or Orientation conflicts* *while scheduling. For more information, see Client Matching or Caregiver Matching.* *Conflict Check Level:* *Default - Takes the level set at the next highest level (whether Global or Office).* *Disallow - Runs the conflict check, warns the user, and does not allow them to save the record. For more information, see Schedule Conflict Warning.* *Warn Only - Runs the conflict check and warns the user, but allows them to Ignore the warning and save the record. For more information, see Schedule Conflict Warning.* *UI Location: Settings > Office > Office Settings > Scheduling > DNU Conflicts*	tinyint	1	False		((0))
	br_SchedulingDNUConflictsOverride *The SchedulingDNUConflictsOverride field of the BranchSettingsSchedulingInfo and BranchListItem-Info objects.* *User Override DNU conflicts.* *Override Level:User Override - The default behavior for the level of conflict checking can be overridden in the next area of the system (Global to Office to User).No Override - The default behavior for level of conflict checking cannot be overridden by settings in the next area of the system (Global to Office to User).* *UI Location: Settings > Office > Office Settings > Scheduling > DNU Conflicts*	tinyint	1	False		((0))
	br_SchedulingAuthorizationConflictsAllow *The SchedulingAuthorizationConflictsAllow field of the BranchSettingsSchedulingInfo and BranchList-ItemInfo objects.* *Conflict Check Level:* *Default - Takes the level set at the next highest level (whether Global or Office).* *Disallow - Runs the conflict check, warns the user, and does not allow them to save the record. For more information, see Schedule Conflict Warning.* *Warn Only - Runs the conflict check and warns the user, but allows them to Ignore the warning and save the record. For more information, see Schedule Conflict Warning.* *UI Location: Settings > Office > Office Settings > Scheduling > Authorization Conflicts*	tinyint	1	False		((0))
	br_SchedulingAuthorizationConflictsOverride *The SchedulingAuthorizationConflictsOverride field of the BranchSettingsSchedulingInfo and Branch-ListItemInfo objects.*	tinyint	1	False		((0))

	User override authorization conflicts.Override Level:User Override - The default behavior for the level of conflict checking can be overridden in the next area of the system (Global to Office to User).No Override - The default behavior for level of conflict checking cannot be overridden by settings in the next area of the system (Global to Office to User).UI Location: Settings > Office > Office Settings > Scheduling > Authorization Conflicts					
	br_SchedulingCaregiverExpirationsAllow *The SchedulingCaregiverExpirationsAllow field of the BranchSettingsSchedulingInfo and BranchList-ItemInfo objects.* *Conflict Check Level:* *Default - Takes the level set at the next highest level (whether Global or Office).* *Disallow - Runs the conflict check, warns the user, and does not allow them to save the record. For more information, see Schedule Conflict Warning.* *Warn Only - Runs the conflict check and warns the user, but allows them to Ignore the warning and save the record. For more information, see Schedule Conflict Warning.* *UI Location: Settings > Office > Office Settings > Scheduling > Caregiver Expirations*	tinyint	1	False		((0))
	br_SchedulingCaregiverExpirationsOverride *The SchedulingCaregiverExpirationsOverride field of the BranchSettingsSchedulingInfo and Branch-ListItemInfo objects.* *User override caregiver expirations.Override Level:User Override - The default behavior for the level of conflict checking can be overridden in the next area of the system (Global to Office to User).No Override - The default behavior for level of conflict checking cannot be overridden by settings in the next area of the system (Global to Office to User).* *UI Location: Settings > Office > Office Settings > Scheduling > Caregiver Expirations*	tinyint	1	False		((0))
	br_SchedulingCheckForOvertime *The SchedulingCheckForOvertime field of the BranchSettingsSchedulingInfo and BranchListItem-Info objects.* *Conflict Check Level:* *Default - Takes the level set at the next highest level (whether Global or Office).* *Disallow - Runs the conflict check, warns the user, and does not allow them to save the record. For more information, see Schedule Conflict Warning.* *Warn Only - Runs the conflict check and warns the user, but allows them to Ignore the warning and save the record. For more information, see Schedule Conflict Warning.*	tinyint	1	False		((0))

	UI Location: Settings > Office > Office Settings > Scheduling > Check for Overtime					
	br_SchedulingCheckForOvertimeOverride *The SchedulingCheckForOvertimeOverride field of the BranchSettingsSchedulingInfo and BranchList-ItemInfo objects.* *User override check for overtime.* *Override Level:User Override - The default behavior for the level of conflict checking can be overridden in the next area of the system (Global to Office to User).No Override - The default behavior for level of conflict checking cannot be overridden by settings in the next area of the system (Global to Office to User).* *UI Location: Settings > Office > Office Settings > Scheduling > Check for Overtime*	tinyint	1	False		((0))
🖽	**br_ScheduleListMaxDays** *The ScheduleListMaxDays field of the Branch-SettingsSchedulingInfo and BranchListItemInfo objects.* *The value in this field controls the maximum number of days that can be searched* *as the date range in Office Schedules and Office Activities. The maximum value* *that can be entered into this field is 62.* *UI Location: Settings > Office > Office Settings > Scheduling > Schedule/Activity List Max Days*	tinyint	1	False		((30))
	br_RemitAddress1 *The RemitAddress1 field of the BranchesInfo and BranchListItemInfo objects.* *Remit To or billing address information that should appear on the* *receipt stubs at the bottom of invoices and invoice statements for Standard* *Invoice, Payer Invoice, and Invoice Statement reports. The Office physical* *address (on the Office Main tab) will show on* *the top portion of invoices and invoice statements.*	nvarchar(50)	100	True		
	br_RemitAddress2 *The RemitAddress2 field of the BranchesInfo and BranchListItemInfo objects.* *Remit To or billing address information that should appear on the receipt stubs at the bottom of invoices and invoice statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Office physical address (on the Office Main tab) will show on the top portion of invoices and invoice statements.*	nvarchar(50)	100	True		
	br_RemitCity *The RemitCity field of the BranchesInfo and BranchListItemInfo objects.* *Remit To or billing address information that should appear on the receipt stubs at the bottom of invoices and invoice statements for Standard*	nvarchar(50)	100	True		

	Invoice, Payer Invoice, and Invoice Statement reports. The Office physical address (on the Office Main tab) will show on the top portion of invoices and invoice statements.					
	br_RemitStateOrProvince *The RemitStateOrProvince field of the Branches-Info and BranchListItemInfo objects.* *Remit To or billing address information that should appear on the receipt stubs at the bottom of invoices and invoice statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Office physical address (on the Office Main tab) will show on the top portion of invoices and invoice statements.*	nvarchar(20)	40	True		
	br_RemitPostalCode *The RemitPostalCode field of the BranchesInfo and BranchListItemInfo objects.* *Remit To or billing address information that should appear on the receipt stubs at the bottom of invoices and invoice statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Office physical address (on the Office Main tab) will show on the top portion of invoices and invoice statements.*	nvarchar(20)	40	True		
	br_RemitCounty *The RemitCounty field of the BranchesInfo and BranchListItemInfo objects.* *Remit To or billing address information that should appear on the receipt stubs at the bottom of invoices and invoice statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Office physical address (on the Office Main tab) will show on the top portion of invoices and invoice statements.*	nvarchar(50)	100	True		
	br_RemitCountry *The RemitCountry field of the BranchesInfo and BranchListItemInfo objects.* *Remit To or billing address information that should appear on the receipt stubs at the bottom of invoices and invoice statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Office physical address (on the Office Main tab) will show on the top portion of invoices and invoice statements.*	int	4	False		((240))
	br_RemitPostalCodeID *The RemitPostalCodeID field of the BranchesInfo and BranchListItemInfo objects.* *Remit To or billing address information that should appear on the receipt stubs at the bottom of invoices and invoice statements for Standard Invoice, Payer Invoice, and Invoice Statement reports. The Office physical address (on the Office Main tab) will show on the top portion of invoices and invoice statements.*	int	4	False		((1))

br_RemitPhone *The RemitPhone field of the BranchesInfo and BranchListItemInfo objects.* *Remit To or billing address information.* *Also called PhoneCountryCode, ProviderPhone, ServicePrvdrPhone. Remit Phone.* *UI Location: Settings > Office > Office Settings > Billing > Phone*	nvarchar(30)	60	True		
br_RemitFax *The RemitFax field of the BranchesInfo and BranchListItemInfo objects.* *Remit To or billing address information.* *Also called ProviderFax, Remit Fax.* *UI Location: Settings > Office > Office Settings > Billing > Fax*	nvarchar(30)	60	True		
br_RemitContactName *The RemitContactName field of the Branch-SettingsBillingInfo, BranchListItemInfo and CMS1500BillingDefaultsInfo objects.* *Remit To or billing address information.* *UI Location: Settings > Office > Office Settings > Billing > Contact Name*	nvarchar(60)	120	True		
br_RemitEmail *The RemitEmail field of the BranchSettingsBilling-Info object.* *Remit To or billing address information.* *Also called Remit Email. UI Location: Settings > Office > Office Settings > Billing > Email*	nvarchar(50)	100	True		
br_InvoiceNote *The InvoiceNote field of the BranchSettingsBilling-Info object.* *This will appear at the bottom of all Standard, Basic, and* *Payer Invoices for the office. A Client specific Invoice Note can also be entered on the individual Clients record (on the Client Advanced tab). (Max. character limit of 1000)* *UI Location: Settings > Office > Office Settings > Billing > Invoice Note*	varchar(1000)	1000	True		
br_InvoiceTagLine *The InvoiceTagLine field of the BranchSettings-BillingInfo object.* *This will appear at the top of all Standard Invoices, beneath the Office name.* *UI Location: Settings > Office > Office Settings > Billing > Invoice Tag Line*	nvarchar(80)	160	True		
br_InvoiceDueDays *The InvoiceDueDays field of the BranchSettings-BillingInfo object.* *The Invoice Due Days will calculate out a Due Date from the Invoice Date and display that date on all Standard Invoices. A value of 0 in this field will*	tinyint	1	False		((0))

display the words Upon Receipt on the invoice in the Due Date field. *UI Location: Settings > Office > Office Settings > Billing > Invoice Due Days*					
br_BankAccountType *The office's bank account type. (Values: C or S)* *UI Location: Settings > Office > Office Settings > Owners > AccountType*	nvarchar(2)	4	True		
br_EDIAdditionalID *The EDIAdditionalID field of the BranchSettings-BillingInfo object.* *This is used when a Payer specifies a specific ID for Loop 20100AA (Billing Provider Name) on the Payer EDI Settings tab. Enter that ID here. In the Payer EDI Settings tab, Loop 20100AA must be set to Office Additional.* *UI Location: Settings > Office > Office Settings > Billing > Additional ID*	nvarchar(20)	40	True		
br_EDIAdditionalIDType *The EDIAdditionalIDType field of the Branch-SettingsBillingInfo object.* *This is used when a Payer specifies a specific Type for Loop 20100AA. Enter that Type here. In the Payer EDI Settings tab, Loop 20100AA must be set to Office Additional.* *UI Location: Settings > Office > Office Settings > Billing > Additional Type*	nvarchar(3)	6	True		
br_OasisIFEnabledFlag *The OasisIFEnabledFlag field of the Branch-SettingsBillingInfo and BranchListItemInfo objects.*	bit	1	False		((0))
br_NPI *The NPI field of the BranchSettingsBillingInfo, PlanOfCareAdmissionInfo and BranchListItemInfo objects.* *Also called ProviderNPI. This is the national provider identification number.* *Enter the office NPI number in order to pull the data to Provider Information locators when NPI is selected in the Payer EDI Settings tab.* *UI Location: Settings > Office > Office Settings > Billing > NPI*	nvarchar(10)	20	True		
br_FedTaxID *The FedTaxID field of the BranchSettingsBillingInfo object.* *Enter the Tax ID number for the company as it should appear on invoices. The* *drop down box allows the user to select either EIN or SSN as appropriate. If* *processing H1500s, UB04s, or PPS batches, select EIN to pull the Tax ID number* *to Provider Information locators when EIN is selected in the Payer EDI Settings tab. If left*	nvarchar(15)	30	True		

blank, then the Outstanding Invoice Statement for a Client, the Outstanding *Invoice Statement for a Payer, and the Outstanding Invoice Statements for all* *Clients and Payers WILL NOT display this field label.* *Also called Fed Tax ID. UI Location: Settings > Office > Office Settings > Billing > Tax ID Number*					
br_Taxonomy *The Taxonomy field of the BranchSettingsBilling-Info object.* *Enter the Taxonomy Code from the NPPES Registry Form. The Home Health Taxonomy Code in PC Ace is 251E0000X. This code shows on the 837.* *UI Location: Settings > Office > Office Settings > Billing > Taxonomy*	nvarchar(15)	30	True		
br_Shift1Desc *The Shift1Desc field of the BranchListItemInfo and BranchSettingsPayrollInfo objects.* *The Office Shifts offers the ability to configure shifts for pay and bill* *rates at the Office level, eliminating the need to create specific codes to* *handle payroll and billing issues. Each office can define up to six shifts. Type the name of each shift in the* *shift description boxes.* *UI Location: Settings > Office > Office Settings > Billing > Shifts*	nvarchar(25)	50	True		(N'Shift 1')
br_Shift2Desc *The Shift2Desc field of the BranchListItemInfo and BranchSettingsPayrollInfo objects.* *The Office Shifts offers the ability to configure shifts for pay and bill rates at the Office level, eliminating the need to create specific codes to handle payroll and billing issues. Each office can define up to six shifts. Type the name of each shift in the shift description boxes.* *UI Location: Settings > Office > Office Settings > Billing > Shifts*	nvarchar(25)	50	True		
br_Shift3Desc *The Shift3Desc field of the BranchListItemInfo and BranchSettingsPayrollInfo objects.* *The Office Shifts offers the ability to configure shifts for pay and bill rates at the Office level, eliminating the need to create specific codes to handle payroll and billing issues. Each office can define up to six shifts. Type the name of each shift in the shift description boxes.* *UI Location: Settings > Office > Office Settings > Billing > Shifts*	nvarchar(25)	50	True		

	br_Shift4Desc *The Shift4Desc field of the BranchListItemInfo and BranchSettingsPayrollInfo objects.* *The Office Shifts offers the ability to configure shifts for pay and bill rates at the Office level, eliminating the need to create specific codes to handle payroll and billing issues. Each office can define up to six shifts. Type the name of each shift in the shift description boxes.* *UI Location: Settings > Office > Office Settings > Billing > Shifts*	nvarchar(25)	50	True		
	br_Shift5Desc *The Shift5Desc field of the BranchListItemInfo and BranchSettingsPayrollInfo objects.* *The Office Shifts offers the ability to configure shifts for pay and bill rates at the Office level, eliminating the need to create specific codes to handle payroll and billing issues. Each office can define up to six shifts. Type the name of each shift in the shift description boxes.* *UI Location: Settings > Office > Office Settings > Billing > Shifts*	nvarchar(25)	50	True		
	br_Shift6Desc *The Shift6Desc field of the BranchListItemInfo and BranchSettingsPayrollInfo objects.* *The Office Shifts offers the ability to configure shifts for pay and bill rates at the Office level, eliminating the need to create specific codes to handle payroll and billing issues. Each office can define up to six shifts. Type the name of each shift in the shift description boxes.* *UI Location: Settings > Office > Office Settings > Billing > Shifts*	nvarchar(25)	50	True		
🔲	br_OTDayRateType *The OTDayRateType field of the BranchesInfo0 and BranchListItemInfo objects.* *Blended or Disabled. The rate type of Blended will use the total pay amount for* *the caregiver and divide it by the total hours worked to calculate the regular* *pay rate.* *UI Location: Settings > Office > Office Settings > Payroll > Rate Type (Under Daily Overtime)*	tinyint	1	False		((1))
	br_OTDayHours *The OTDayHours field of the BranchesInfo0 and BranchListItemInfo objects.* *Also called DayOTThreshold.* *This defines the regular pay limit per day, and when exceeded the overtime calculations will be applied.* *UI Location: Settings > Office > Office Settings > Payroll > Hours (Under Daily Overtime)*	tinyint	1	False		((8))

	br_OTDayMultiplier *The OTDayMultiplier field of the BranchesInfo0 and BranchListItemInfo objects.* *This defines the multiplying value to be used when calculating the overtime pay.* *Also called DayOTMultiplier.* *UI Location: Settings > Office > Office Settings > Payroll > Multiplier (Under Daily Overtime)*	decimal(5,2)	5	False		((1.0))
	br_OTWeekRateType *The OTWeekRateType field of the BranchesInfo0 and BranchListItemInfo objects.Blended or Disabled.�The rate type of Blended will use the total pay amount for the caregiver and divide it by the total hours worked to calculate the regular pay rate. 0 ��Blended(the overtime will be calculated as Blended rate* *1 Disabled(No overtime will be caculated for the Branch)* *UI Location: Settings > Office > Office Settings > Payroll > Rate Type (Under Weekly Overtime)*	tinyint	1	False		((1))
	br_OTWeekHours *The OTWeekHours field of the BranchesInfo0 and BranchListItemInfo objects.* *Also called WeekOTThreshold.* *This defines the regular pay limit per week, and when exceeded the overtime* *calculations will be applied.UI Location: Settings > Office > Office Settings > Payroll > Hours (Under Weekly Overtime)*	tinyint	1	False		((40))
	br_OTWeekMultiplier *The OTWeekMultiplier field of the BranchesInfo0 and BranchListItemInfo objects.* *This defines the multiplying value to be used when calculating the overtime pay.* *Also called WeekOTMultiplier.* *UI Location: Settings > Office > Office Settings > Payroll > Multiplier (Under Weekly Overtime)*	decimal(5,2)	5	False		((1.5))
	br_PayrollCompanyCode *The PayrollCompanyCode field of the Branch-SettingsPayrollInfo and BranchListItemInfo objects.* *The payroll company code.* *Also called PrCoID, PRCompCode, Payroll Co. Code, CompanyCode, UI Location: Settings > Office > Office Settings > Payroll > Company Code*	nvarchar(10)	20	True		
	br_MappingToolsID *The MappingToolsID field of the BranchSettings-MainInfo and BranchListItemInfo objects.* *Select the Mapping Type from drop down box choosing either MapQuest, Open Street Maps, or Yahoo Maps for output when using mapping features and Drive Lists. Select 'Open Street Map' to use the stored GEO codes for entity's being*	int	4	False		((2))

mapped with Drive Lists and Maps. 'Open Street Map' will always be used for *Address Verification. See Caregiver Search: Address Verification & GPS for details on this feature.* *UI Location: Settings > Office > Office Settings > Advanced > Mapping Types*						
br_UseMapPoint *The UseMapPoint field of the BranchSettingsMain-Info and BranchListItemInfo objects.* *Check this box to use MapPoint in the Scheduling module.* *UI Location: Settings > Office > Office Settings > Advanced > Use MapPoint in the Scheduling module (Check Box)*	bit	1	False		((0))
br_MapPointUserName *The MapPointUserName field of the Branch-SettingsMainInfo and BranchListItemInfo objects.* *UI Location: Settings > Office > Office Settings > Advanced > User name (Under Mapping Information)*	nvarchar(50)	100	True		
br_MapPointPassword *The MapPointPassword field of the Branch-SettingsMainInfo and BranchListItemInfo objects.* *UI Location: Settings > Office > Office Settings > Advanced > Password (Under Mapping Information)*	nvarchar(50)	100	True		
br_ReplicationServerID *Not used.*	nvarchar(32)	64	True		
br_ReplicationUserName *Not used.*	nvarchar(64)	128	True		
br_TimeZoneID *Time zone ID number for the Branches record. Also called TzoneID.*	smallint	2	False		((70))
br_CreatedDate *The Date the Branches Record was created.* *UTC date. Updated by SQL Server's current UTC date.* *Also called CreatedDate.*	datetime	8	False		(getutcdate())
br_CreatedUser *The user logged in the system when the record was created. Also called CreatedUser.*	nvarchar(50)	100	False		
br_ModifiedDate *The date the Branches record was last modified.* *UTC date. Updated by SQL Server's current UTC date.* *Also called ModifiedDate.*	datetime	8	False		(getutcdate())
br_ModifiedUser *The user logged in the system when the record was last modified.*	nvarchar(50)	100	False		

	Also called ModifiedUser.					
	br_TS *The TS field of the BranchSettingsInfo object.* *The timestamp field of the Branches record.* *Also called TS.*	timestamp	8	False		
	br_PayrollDivisionCode *The PayrollDivisionCode field of the Branch-SettingsPayrollInfo and BranchListItemInfo objects.* *Payroll Company Division code of the branch.* *UI Location: Settings > Office > Office Settings > Payroll > Division Code*	nvarchar(10)	20	True		
	br_LegacyBranchID *Not used.*	int	4	True		
	br_AcctSystem *The AcctSystem field of the BranchSettingsBilling-Info object.* *The system to use extracted data. Ex: When extracting to QuickBooks, enter QB here.* *Also called Acct System.* *UI Location: Settings > Office > Office Settings > Billing > System*	nvarchar(50)	100	True		
	br_AcctAccrual *The AcctAccrual field of the BranchSettingsBilling-Info object.* *Choose Accrual (value 0), Cash (value 1 default), Details (value 2), MIP/Accrual (value 5). Accrual recognizes revenue using the service date as the transaction date, whereas Cash recognizes revenue using the payment posting date to the invoice as the transaction date. Revenue is created once services are billed for both types of accounting. Add MIP/Accrual is for clients using MIP for their accounting.* *UI Location: Settings > Office > Office Settings > Billing > Type (Radio Buttons)*	tinyint	1	False		((2))
	br_BankAccountNumber *The BankAccountNumber field of the BranchesInfo object.* *The branch's bank account number. Encrypted in database.* *UI Location: Settings > Office > Office Settings > Owners > Account Number*	varbinary(255)	255	True		
	br_BankRoutingNumber *The BankRoutingNumber field of the BranchesInfo object.* *The branch's bank account routing number. Encrypted in database.*	varbinary(255)	255	True		

UI Location: Settings > Office > Office Settings > Owners > Routing Number						
br_AcctName *The AcctName field of the BranchSettingsBilling-Info object.* *When extracting to QuickBooks, enter the name of the Customer Name as created in QuickBooks.* *Also called acctName, Acct Name.* *UI Location: Settings > Office > Office Settings > Billing > Client Name*	nvarchar(50)	100	True		((1))	
br_PCEFileExtractPrefix *The PCEFileExtractPrefix field of the Branch-SettingsPayrollInfo and BranchListItemInfo objects.* *The prefix for the payroll extract file naming convention.* *UI Location: Settings > Office > Office Settings > Payroll > File Extract Prefix*	nvarchar(3)	6	True			
br_PCEUseCompanyCode *The PCEUseCompanyCode field of the Branch-SettingsPayrollInfo and BranchListItemInfo objects.* *Check the box to include the Company Code in the file naming* *convention.* *UI Location: Settings > Office > Office Settings > Payroll > Use Company Code*	bit	1	False		((0))	
br_PCECompanyCodeChars *The PCECompanyCodeChars field of the Branch-SettingsPayrollInfo and BranchListItemInfo objects.* *The number of characters for the Company Code.* *UI Location: Settings > Office > Office Settings > Payroll > Characters*	tinyint	1	False		((0))	
br_PCEUseBatchID *The PCEUseBatchID field of the BranchSettings-PayrollInfo and BranchListItemInfo objects.* *Check the box to include the Payroll Batch ID number in the file naming* *convention.* *UI Location: Settings > Office > Office Settings > Payroll > Use Batch ID in File Name*	bit	1	False		((0))	
br_PCEBatchIDNums *The PCEBatchIDNums field of the BranchSettings-PayrollInfo and BranchListItemInfo objects.* *Enter the number of digits from the Payroll Batch ID to be used in the file* *naming convention. These will be the last 2 digits of the Batch ID. If the Batch* *ID is less than the number entered, the ID will be padded with leading zeroes to* *reach the number of digits entered.*	tinyint	1	False		((0))	

	UI Location: Settings > Office > Office Settings > Payroll > Digits					
	br_PCEFileExtension *The PCEFileExtension field of the BranchSettings-PayrollInfo and BranchListItemInfo objects.* *Enter the file extension name (csv). Leave blank to save payroll extract* *files without an extension to accommodate third party payroll applications that* *cannot import files with extensions.* *UI Location: Settings > Office > Office Settings > Payroll > File Extension*	nvarchar(3)	6	True		
	br_PCEDefaultPath *The PCEDefaultPath field of the BranchSettings-PayrollInfo and BranchListItemInfo objects.* *The default path location to save the Payroll Extract file.* *UI Location: Settings > Office > Office Settings > Payroll > Default File Path*	nvarchar(240)	480	True		
🪪	**br_FedTaxIDType** *The FedTaxIDType field of the BranchSettings-BillingInfo object.* *Enter the Tax ID number for the company as it should appear on invoices. The* *drop down box allows the user to select either EIN or SSN as appropriate. If* *processing H1500s, UB04s, or PPS batches, select EIN to pull the Tax ID number* *to Provider Information locators when EIN is selected in the Payer EDI Settings tab. If left* *blank, then the Outstanding Invoice Statement for a Client, the Outstanding* *Invoice Statement for a Payer, and the Outstanding Invoice Statements for all* *Clients and Payers WILL NOT display this field label.* *UI Location: Settings > Office > Office Settings > Billing > Tax ID Number*	char(1)	1	False		('E')
	br_OTWeekEarnCode *The OTWeekEarnCode field of the BranchSettings-PayrollInfo object.* *Earn Code if required by a customized payroll extract file.* *UI Location: Settings > Office > Office Settings > Payroll > Earn Code (Under Weekly Overtime)*	nvarchar(50)	100	True		
	br_TelephonyLoginName *The TelephonyLoginName field of the Branches-Info object.* *The assigned login name to log into the telephony account.* *UI Location: Settings > Office > Office Settings > Telephony > Login name*	nvarchar(200)	400	True		

br_TelephonyUploadRunInterval *The TelephonyUploadRunInterval field of the BranchesInfo object.* *The number of minutes to wait between data uploads. 15 minute interval is recommended.* *UI Location: Settings > Office > Office Settings > Telephony > Upload Interval*	int	4	False		((0))	
br_TelephonyDownloadRunInterval *The TelephonyDownloadRunInterval field of the BranchesInfo object.* *The number of minutes to wait between data downloads. 5 minute interval is recommended.* *UI Location: Settings > Office > Office Settings > Telephony > Download Interval*	int	4	False		((0))	
br_TelephonyUploadRange *The TelephonyUploadRange field of the Branches-Info object.* *Not used with Telephony. If other, enter the number of days into the future that schedules should be uploaded to the telephony provider.* *UI Location: Settings > Office > Office Settings > Telephony > Upload Range*	int	4	False		((0))	
br_TelephonyLogXmlDown *The TelephonyLogXmlDown field of the Branches-Info object.* *Used to store additional diagnostics during the implementation phase or when requested.* *UI Location: Settings > Office > Office Settings > Telephony > Log XML Down*	bit	1	False		((0))	
br_TelephonyLogXmlUp *The TelephonyLogXmlUp field of the BranchesInfo object.* *Used to store additional diagnostics during the implementation phase or when requested.* *UI Location: Settings > Office > Office Settings > Telephony > Log XML UP*	bit	1	False		((0))	
br_TelephonyPassword *The TelephonyPassword field of the BranchesInfo object.* *The assigned password to log into the telephony account.* *UI Location: Settings > Office > Office Settings > Telephony > Password*	nvarchar(100)	200	True			
br_TelephonyAccountId *The TelephonyAccountId field of the BranchesInfo and BranchListItemInfo objects.* *MatrixCare assigned Telephony Account ID.*	nvarchar(50)	100	True			

	UI Location: Settings > Office > Office Settings > Telephony > Account ID					
FK	br_DefaultServiceCodeId *The TelephonyAccountId field of the BranchesInfo and BranchListItemInfo objects.* *Not used with Telephony. If other, select the default service* *code for any visits created in the system by the telephony* *provider Interface. This pertains to visits that were completed by the Caregiver* *but no previous scheduled visit existed in the system.* *UI Location: Settings > Office > Office Settings > Telephony > Service Code*	int	4	True		
FK	br_DefaultMileageId *The ID of the default service code (where is-Expense = true) to use in Web2 for mileage during schedule completion. Not currently used in Telephony.* *UI Location: Settings > Office > Office Settings > Telephony > Mileage Code*	int	4	True		
	br_OTDayEarnCode *The OTDayEarnCode field of the BranchSettings-PayrollInfo object.* *Earn Code if required by a customized payroll extract file.* *UI Location: Settings > Office > Office Settings > Payroll > Earn Code (Under Daily Overtime)*	nvarchar(50)	100	True		('0A')
	br_EmailSenderAddress *The EmailSenderAddress field of the Branch-SettingsMainInfo and BranchListItemInfo objects.* *The e-mail address to attach to any outgoing e-mails.* *UI Location: Settings > Office > Office Settings > Advanced > Email Address*	nvarchar(50)	100	True		
	br_EmailHostName *The EmailHostName field of the BranchSettings-MainInfo and BranchListItemInfo objects.* *The name of the server that will be sending e-mails.* *UI Location: Settings > Office > Office Settings > Advanced > Server Name*	nvarchar(100)	200	True		
	br_EmailHostPort *The EmailHostPort field of the BranchSettings-MainInfo and BranchListItemInfo objects.* *The port that outgoing e-mails will be sent across (generally port 25).* *UI Location: Settings > Office > Office Settings > Advanced > Port*	int	4	True		

	br_EmailHostUsesSSL *The EmailHostUsesSSL field of the Branch-SettingsMainInfo and BranchListItemInfo objects.* *Check this box if e-mails are sent securely over SSL.* *UI Location: Settings > Office > Office Settings > Advanced > Server Requires SSl (Check box)*	bit	1	False		((0))
	br_EmailHostUserName *The EmailHostUserName field of the Branch-SettingsMainInfo and BranchListItemInfo objects.* *The name of the server that will be sending e-mails.* *UI Location: Settings > Office > Office Settings > Advanced > Server Name*	nvarchar(50)	100	True		
	br_EmailHostPassword *The EmailHostPassword field of the Branch-SettingsMainInfo and BranchListItemInfo objects.* *The password to authenticate with the mail server.* *UI Location: Settings > Office > Office Settings > Advanced > Password*	varbinary(255)	255	True		
	br_EmailHostDomain *The EmailHostDomain field of the BranchSettings-MainInfo and BranchListItemInfo objects.* *The domain of the mail server.* *UI Location: Settings > Office > Office Settings > Advanced > Domain*	nvarchar(50)	100	True		
FK	br_OASIS_Medicare_Payer_ID *The OASIS_Medicare_Payer_ID field of the BranchSettingsMainInfo object.* *This is a system generated Medicare payer ID number for the branches record.*	bigint	8	True		
FK	br_OASIS_Medicaid_Payer_ID *The OASIS_Medicaid_Payer_ID field of the BranchSettingsMainInfo object.* *This is a system generated Medicaid payer ID number for the branches record.*	bigint	8	True		
	br_OASIS_M0016_Branch_ID *The OASIS_M0016_Branch_ID field of the Branch-SettingsMainInfo object.* *This is the unique branch ID assigned to this office, obtained from CMS. If you* *are transitioning this office from another system, the branch ID from the old* *system must match this value. If entered, this field is subject to the following* *constraint: it must either start with a P or an N followed by nine spaces, or* *contain uppercase letters/numbers in the first 2 positions, a Q, 4 uppercase* *letters/numbers, and 3 numbers.* *UI Location: Settings > Office > Office Settings > Advanced > Branch ID (M0016)*	nvarchar(10)	20	True		

br_TelephonySetC *The TelephonySetC field of the BranchesInfo and BranchListItemInfo objects.* *Check the box for the schedule status to move directly to 'C' Completed* *status when a departure call for the schedule exists. Uncheck the box for the* *schedule status to move to Telephony Completed (will need to manually Complete* *the schedules for payroll and billing processing).* *UI Location: Settings > Office > Office Settings > Telephony > Set telephony-completed schedules directly to schedule status of complete (Check box)*	bit	1	False		((0))
br_CompanyUri *The CompanyUri field of the BranchSettingsMain-Info and BranchListItemInfo objects.* *Also called Website, WebAddress.* *The value entered here will pull to the Caregiver Name Badges Report with* *the option of Always use Office URL is selected. Enter your* *Office's web address in this field to add this data to your Caregiver* *Badges.* *UI Location: Settings > Office > Office Settings > Advanced > Company URL*	nvarchar(256)	512	True		
br_OASIS_IgnoreFatalEdits *The OASIS_IgnoreFatalEdits field of the Branch-SettingsMainInfo, AssessmentInfo and BranchList-ItemInfo objects.* *If checked yes, timing edits are not run for recerts if no SOC assessment exists. Used for new implmentations that have to start clients in mid stream. When transitioning from an older system this checkbox allows you to create recert assessments even if the initial assessment does not exist. If this is not* *checked, this would generate an error.* *UI Location: Settings > Office > Office Settings > Advanced > Relax Recert Timing Rules*	bit	1	False		((0))
br_AvgEpisodeDays *The AvgEpisodeDays field of the BranchSettings-BillingInfo object.* *Used to set the average episode closing days (default 45) and is used to defer* *revenue for PPS invoices.* *UI Location: Settings > Office > Office Settings > Billing > Avg Episode Days*	smallint	2	False		((45))
br_AcctExtractOnClose *The AcctExtractOnClose field of the Branch-SettingsBillingInfo and BranchListItemInfo objects.* *Used to determine whether an account extract will be generated when a period is*	bit	1	False		((0))

closed. By default, this value is not checked. When checked and a period is *closed, an accounting extract will be generated. This accounting extract record* *will include all invoices, postings and payment accounting extract records that* *are closed in the period and have not been extracted so far. When this setting* *is checked, the option to manually create an account extract from the account* *extract form will be disabled.* *UI Location: Settings > Office > Office Settings > Billing > Create accounting extract on closing*					
br_AcctExtractGrpGLDate *The AcctExtractGrpGLDate field of the Branch-SettingsBillingInfo object.* *Used to determine whether GL entries created for an accounting extract will be* *grouped by the GL date. If checked, the GL entries will be grouped by GL date* *(service date, posting date, deposit date) and the account chart ID. If not* *checked, GL entries will be dated using the account extract date and therefore* *all GL with the same Account Chart will be grouped together.* *UI Location: Settings > Office > Office Settings > Billing > Group GL by date*	bit	1	False		((1))
br_PCELimitBatchIDInFile *The PCELimitBatchIDInFile field of the Branch-SettingsPayrollInfo and BranchListItemInfo objects. Check the box to limit the Payroll Batch ID within the extract file to a* *specified number of digits.* *UI Location: Settings > Office > Office Settings > Payroll > Limit Batch ID in Extract File*	bit	1	False		((0))
br_PCEBatchIDInFileNums *The PCEBatchIDInFileNums field of the Branch-SettingsPayrollInfo and BranchListItemInfo objects.* *Enter the number of digits from the Payroll Batch ID to be used in the file* *naming convention. These will be the last 2 digits of the Batch ID. If the Batch* *ID is less than the number entered, the ID will be padded with leading zeroes to* *reach the number of digits entered.* *UI Location: Settings > Office > Office Settings > Payroll > Digits*	tinyint	1	False		((0))
br_TelephonyTypeID *The TelephonyTypeID field of the BranchesInfo and BranchListItemInfo objects.*	int	4	True		

The telephony provider you use from the drop down box. *UI Location: Settings > Office > Office Settings > Telephony > Telephony Provider*					
br_OASISExtractDefaultPath *The OASISExtractDefaultPath field of the Branch-SettingsMainInfo and BranchListItemInfo objects.* *This allows you to set a default path to the folder where the CMS extract file* *should be saved.* *UI Location: Settings > Office > Office Settings > Advanced > Default Extract File Path*	nvarchar(240)	480	True		
br_OASIS_HHA_Agency_Id *The OASIS_HHA_Agency_Id field of the Branch-SettingsMainInfo object. The medicare id for the entire HHA. This can sometimes be the federal tax id.* *This is the agency ID assigned to this office, obtained from CMS. The value* *entered stamps in the header record of the OASIS assessment at the time the* *assessment is created. This data is also displayed in the body of the* *assessment. It is recommended that this should be entered in the office record* *prior to creating any OASIS assessments.* *UI Location: Settings > Office > Office Settings > Advanced > HHA Agency ID*	nvarchar(16)	32	True		
br_OTWeekDeductEarn *The OTWeekDeductEarn field of the Branch-SettingsPayrollInfo object.* *The D/E Code if required by a customized payroll extract files.* *UI Location: Settings > Office > Office Settings > Payroll > D/E Code (Under Weekly Overtime)*	nvarchar(5)	10	False		(N'E')
br_OTDayDeductEarn *The OTDayDeductEarn field of the BranchSettings-PayrollInfo object.* *The D/E Code if required by a customized payroll extract files.* *UI Location: Settings > Office > Office Settings > Payroll > D/E Code (Under Daily Overtime)*	nvarchar(5)	10	False		(N'E')
br_TelephonyLogLevel *The TelephonyLogLevel field of the BranchesInfo object.* *0: None* *1: Error Only* *2: Warnings and Errors* *3: All*	tinyint	1	False		((2))
br_ElectronicPmtProcessEnabled *The ElectronicPmtProcessEnabled field of the*	bit	1	False		((0))

BranchListItem and BranchSettingsElectPmt-ProcessInfo objects. *If BranchSettingsElectPmtProcess isnot nothing br_ElectronicPmtProcessEnabled is enabled.*					
br_ElectronicPaymentProcessingTypesID *The ElectronicPaymentProcessingTypesID field of the BranchesInfo and BranchListItemInfo objects.* *Payment processing type. 'FlashBanc-Authorize.net' or 'PayRight'* *UI Location: Settings > Office > Office Settings > Elect Pmt Process > Processing Type*	int	4	True		
br_ElectronicPmtProcessLogin *The ElectronicPmtProcessLogin field of the BranchesInfo and BranchListItemInfo objects.* *User Name and Password are provided to you by the Payment Gateway (FlashBanc or PayRight).* *NOTE: The Payment Gateway may refer to the User Name and Password as the API* *Login ID and Transaction Key for Flashbanc. For PayRight, the User Name is the Consumer Key and Password is the Consumer Secret. The AIM and CIM logins will be identical when* *using FlashBanc and PayRight.* *UI Location: Settings > Office > Office Settings > Elect Pmt Process > User Name (Under Authorizations)*	varbinary(255)	255	True		
br_ElectronicPmtProcessPassword *The ElectronicPmtProcessPassword field of the BranchesInfo and BranchListItemInfo objects.* *User Name and Password are provided to you by the Payment Gateway (FlashBanc or PayRight).* *NOTE: The Payment Gateway may refer to the User Name and Password as the API Login ID and Transaction Key for Flashbanc. For PayRight, the User Name is the Consumer Key and Password is the Consumer Secret. The AIM and CIM logins will be identical when using FlashBanc and PayRight.* *UI Location: Settings > Office > Office Settings > Elect Pmt Process > Password (Under Authorizations)*	varbinary(255)	255	True		
br_ElectronicPmtCustInfoMgtLogin *The ElectronicPmtCustInfoMgtLogin field of the BranchesInfo and BranchListItemInfo objects.* *User name to access customer management only. No payment processing.* *UI Location: Settings > Office > Office Settings > Elect Pmt Process > User Name (Customer Information Management)*	varbinary(255)	255	True		
br_ElectronicPmtCustInfoMgtPassword *The ElectronicPmtCustInfoMgtPassword field of the BranchesInfo and BranchListItemInfo objects.* *Password to access customer management only. No payment processing.*	varbinary(255)	255	True		

	UI Location: Settings > Office > Office Settings > Elect Pmt Process > Password (Customer Information Management)					
	br_IncludePrevPayDates *The IncludePrevPayDates field of the Branch-SettingsPayrollInfo and BranchListItemInfo objects.* *0 : Equal to Pay Date. When this option is selected, completed payable schedules with a schedule Pay Date equal to the payroll batch Pay Date are pulled into the batch.* *1 : Less or Equal to Pay Date. This is the default setting on new office records. When this option is selected,* *completed payable schedules with a schedule Pay Date less than or equal* *to the payroll batch Pay Date will be pulled into the batch. Where the* *schedule Pay Date does not match the Payroll Batch Pay Date, the schedule Pay* *Date will be updated to match when the batch is finalized. Works with the NPD* *Payroll Batching process.* *UI Location: Settings > Office > Office Settings > Payroll > Pay Date Options (Radio Button)*	bit	1	False		((1))
	br_ElectronicPmtValidation *The ElectronicPmtValidation field of the BranchList-ItemInfo and BranchSettingsElectPmtProcessInfo objects.* *True = liveMode, False = none*	bit	1	False		((0))
	br_TelephonyTimeSource *The TelephonyTimeSource field of the Branches-Info and BranchListItemInfo objects.* *The recommended setting is 'Use Call Time'. Use Call Time uses the actual* *call in/out times and units for payroll and billing. Actual times and units are* *displayed on invoices.* *'Keep Sch. Time and Units - the originally scheduled time and units* *will stay on the schedule. This setting could make sense if your caregivers are* *salaried and clients have strict expectations of what their bill should say,* *regardless of what work was actually performed. (For example: Schedule A is* *expected from 8:00-9:00am. Calls come in at 8:03 and 9:45am. Schedule Time will* *continue to say 8:00-9:00am, and bill/pay units will stay at 1.0. Invoice will* *display 8:00-9:00am.)* *0: Use Actual Times* *1: Use Schedule Times*	tinyint	1	False		((0))

	UI Location: Settings > Office > Office Settings > Telephony > Telephony Time Source					
	br_InvParm_DisplayBrLogo *The InvParm_DisplayBrLogo field of the Branches-Info object.* *Select either True or False to determine whether the Office Logo should display* *on the invoice.* *0: False, 1: True* *UI Location: Settings > Office > Office Settings > Billing Rpt Parms > Display Office Logo*	tinyint	1	False		((0))
	br_InvParm_DisplayCrBalances *The InvParm_DisplayCrBalances field of the BranchesInfo object.* *Select Display Only, Display and Deduct, or Do Not Display to determine* *whether any credit balances should display or display with deductions on the* *invoice.Display Only displays the sum of the credit balance(s) -* *will not deduct the amount from the total amount due on the invoice.Display and Deduct displays the sum of the credit balance(s)* *and deducts that amount from the total amount due on the invoice for display* *purposes only.Do Not Display will not pull the sum of the credit balance(s) and will not display.Default displays only on the Payer record.UI Location: Settings > Office > Office Settings > Billing Rpt Parms > Display Credit Balance*	tinyint	1	False		((0))
	br_InvParm_DisplayCarFistNameOnly *The InvParm_DisplayCarFistNameOnly field of the BranchesInfo object.* *Select Full Name, First Name Only, or No Name to determine how to display the* *Caregiver's name, if at all, on the invoice.* *Full Name displays the Caregiver's First and Last Name in* *the 'Caregiver' column on the invoice.* *First Name Only displays the Caregiver's First Name in the* *'Caregiver column on the invoice.* *No Name hides the 'Caregiver' column on the invoice.* *Default uses the setting from the Office record.UI Location: Settings > Office > Office Settings > Billing Rpt Parms > Display Caregiver Name*	tinyint	1	False		((0))
	br_InvParm_DisplayRecentPmts *The InvParm_DisplayRecentPmts field of the BranchesInfo object.*	tinyint	1	False		((0))

	Select either True or False to determine whether to display recent payments. *0: False, 1: True* *UI Location: Settings > Office > Office Settings > Billing Rpt Parms > Display Recent Payments*					
	br_InvParm_DisplayOutstandingInv *The InvParm_DisplayOutstandingInv field of the BranchesInfo object.* *Select either True or False to determine whether to display any outstanding* *invoices* *0: False, 1: True* *UI Location: Settings > Office > Office Settings > Billing Rpt Parms > Display Outstanding Invoices*	tinyint	1	False		((0))
	br_InvParm_DisplayDepositBalances *The InvParm_DisplayDepositBalances field of the BranchesInfo object* *Select either True or False to determine whether deposit balances should display* *on invoices.* *0: False, 1: True* *UI Location: Settings > Office > Office Settings > Billing Rpt Parms > Display Outstanding Invoices*	tinyint	1	False		((0))
	br_InvParm_PmtWithinDays *The InvParm_PmtWithinDays field of the BranchesInfo object.* *Payment Postings with a posting date within a number of days from the current* *date. The default setting is 90 days (sums the Payment Postings with a posting* *date 90 days back from the current date). Also called PaymentWithinDays. UI Location: Settings > Office > Office Settings > Billing Rpt Parms > Display Payments Within Days*	tinyint	1	False		((90))
FK	**br_PayrollExtractTypeID** *The PayrollExtractTypeID field of the BranchList-ItemInfo and BranchSettingsPayrollInfo objects.* *This is a system generated ID number for the extract type of the braches record.*	int	4	False		((2))
	br_TelephonyTimeBeforeArrivalLimit *The TelephonyTimeBeforeArrivalLimit field of the BranchesInfo and BranchListItemInfo objects.* *The allowable minutes before Caregivers scheduled arrival time to be considered* *valid for the call-in time.* *UI Location: Settings > Office > Office Settings > Telephony > Time Threshold before arrival*	int	4	False		((0))
	br_TelephonyTimeAfterArrivalLimit *The TelephonyTimeAfterArrivalLimit field of the BranchesInfo and BranchListItemInfo objects.* *The allowable minutes after Caregivers scheduled arrival time to be considered*	int	4	False		((0))

	valid for the call-in time. Arrival Calls display in Yellow during this period. *UI Location: Settings > Office > Office Settings > Telephony > Time Threshold after arrival*					
	br_TelephonyTimeBeforeDepartureLimit *The TelephonyTimeBeforeDepartureLimit field of the BranchesInfo and BranchListItemInfo objects.* *The allowable minutes before Caregivers scheduled departure time to be* *considered valid for the call-out time.* *UI Location: Settings > Office > Office Settings > Telephony > Time Threshold before departure*	int	4	False		((0))
	br_TelephonyTimeAfterDepartureLimit *The TelephonyTimeAfterDepartureLimit field of the BranchesInfo and BranchListItemInfo objects.* *The allowable minutes after Caregivers scheduled departure time to be considered* *valid for the call-out time. Departure Calls display in Yellow during this* *period.* *UI Location: Settings > Office > Office Settings > Telephony > Time Threshold after departure*	int	4	False		((0))
	br_TelephonyCreateNewSchOnNoMatch *The TelephonyCreateNewSchOnNoMatch field of the BranchesInfo and BranchListItemInfo objects.* *If unchecked, will not be able to create a schedule from calls.* *UI Location: Settings > Office > Office Settings > Telephony > Allow creation of a new schedule if downloaded schedule does not match an existing one*	bit	1	False		((0))
	br_TelephonyRoundUp *The TelephonyRoundUp field of the BranchesInfo and BranchListItemInfo objects.* *Check the box to round the call times. All unit types (15min, 30min, hourly)* *are eligible for rounding.* *UI Location: Settings > Office > Office Settings > Telephony > Round Call Times when imported into schedules*	bit	1	False		((0))
	br_TelephonyRoundIncrement *The TelephonyRoundIncrement field of the BranchesInfo and BranchListItemInfo objects.* *Enter the number of minutes to be used for rounding. Available for all unit* *types.* *UI Location: Settings > Office > Office Settings > Telephony > Round call times to how many minutes*	int	4	False		((0))
	br_TelephonyEmailDestTypeOnMissedVisit *The TelephonyEmailDestTypeOnMissedVisit field of the BranchesInfo object.*	tinyint	1	False		((0))

br_TelephonyEmailAddrOnMissedVisit *The TelephonyEmailAddrOnMissedVisit field of the BranchesInfo object.* *Alternative email address for email notification to be sent for Missed CheckIn and/or Missed Check-Out. Multiple email addresses may be entered, separated by a semicolon (;). It is recommended to add the addresses in after Telephony has been turned on to reduce the number of notifications received. Notifications will not be sent for schedules in the past (where the created on date/time of the schedule is greater than the start date/time of the schedule). Notifications will not be sent for Clients or Caregivers who have the 'Upload Telephony' setting unchecked.* *UI Location: Settings > Office > Office Settings > Telephony > To*	nvarchar(200)	400	True		
br_TelephonyParentID *The TelephonyParentID field of the BranchesInfo and BranchListItemInfo objects.* *The Parent Office for the account; if applicable. The Parent Office can* *be different than the selected Office if multiple Offices sharing one telephony* *account.* *UI Location: Settings > Office > Office Settings > Telephony > Tel. Parent Office*	int	4	True		
br_485Box5Default *This field is used in both the plan of care and the assessment screens to determine the branch identifier. It determines if the NPI or Provider# should pull to Box 5 of the OASIS C/485 Assessment, the Plan of Care > Intake 2 Tab and the 485 Report. The existing field on OASIS C/485 Assessments has been relabeled to 485 Box (5) Identifier. Note: This table setting is at the office level, and controls which identifier is used at the time OASIS C/485 Assessments are created, the Plan of Care > Intake2 Tabs are viewed, and the 485 Reports are drafted or finalized for the office.* *0 = Use br_NPI on T_Branches. Pulls the office NPI to Box 5, this is the default setting.* *1 = Go to the primary payer on the patient's admission, join to T_Payers, and pull the value from pay_AgencyProviderNum.* *2 = Use no identifier, simply insert a single space ' '.*	tinyint	1	False		((0))
br_MinWage *The MinWage field of the BranchSettingsPayroll-Info object.* *Your state's minimum wage amount if applicable. This field will be used for OT processing of New York payroll.* *Also called BRMinWage*	smallmoney	4	False		((0))

	UI Location: Settings > Office > Office Settings > Payroll > Minimum Wage					
	br_TelephonyNotificationMaxHoursAgo *The TelephonyNotificationMaxHoursAgo field of the BranchesInfo object.*	int	4	False		((24))
	br_FTPPayrollSettings *Also called FTPPayrollSettingsData.*	varbinary(max)	max	True		
	br_TreatmentWeekStartDay *The TreatmentWeekStartDay field of the Branch-ListItem and BranchSettingsSchedulingInfo objects. Choose your Treatment Week start day from the drop down box for the day of* *the week you use for your agency. Specifies the day your agency's Treatment Week* *begins. Treatment Weeks can be used when entering frequencies in Authorizations, Plan of Care Orders and MOD* *Orders. For example, if a Client is scheduled for services for 8 weeks* *starting on a Thursday, but the Treatment Week begins on Monday, the first week* *of the plan of care will be from Thursday to Sunday (4 days) so that the* *remaining weeks in the plan of care match the Treatment Week.* *UI Location: Settings > Office > Office Settings > Advanced > Treatment Week Start Day*	tinyint	1	False		((0))
	br_OAReqForClients *The OAReqForClients field of the BranchListItem and BranchSettingsMainInfo objects.* *Also called DisplayOfficeArea.* *UI Location: Settings > Office > Office Settings > Advanced > Is Office Area Required for Clients*	bit	1	False		((0))
	br_TelephonyServiceChangeFlagBehavior *The TelephonyServiceChangeFlagBehavior field of the BranchSettingsTelephonyInfo object.* *Choose 'Allow None' to have no service changes pass through automatically.* *Choose 'Allow If Same Category' to allow the service code override only if the* *service code falls within the same service code category of the service code* *originally scheduled. Choose 'Allow All' to allow all service code overrides* *unconditionally.* *UI Location: Settings > Office > Office Settings > Telephony > Automatic Schedule Service Change Behavior*	smallint	2	True		
	br_TelephonyCheckInResetThreshold *The TelephonyCheckInResetThreshold field of the BranchSettingsTelephonyInfo object.*	smallint	2	True		((30))

	If a schedule already had a missed check-in/out notification sent, but the *visit is moved to a different time, this setting determines if the schedule* *should be eligible for another missed check-in/out notification. Enter the* *number of minutes required to trigger a reset: 30 minutes is the default;* *Blank=never reset; 0=reset on any change.* *UI Location: Settings > Office > Office Settings > Telephony > Notification Reset Threshold*					
	br_InvParm_DisplaySchTime *The InvParm_DisplaySchTime field of the Branch-BillingRptParmsInfo object.* *Select either True or False to determine whether to display schedule start and* *end times on invoices. The default is True. Determines whether to display Start and End Times on Invoice Details on (all versions) of the Standard Invoice, Payer Invoice, and Basic Invoice* *0: False* *1: True* *UI Location: Settings > Office > Office Settings > Billing Rpt Parms > Display Schedule Start/End Times*	tinyint	1	False		((1))
FK 🔑	**br_BillTypeID** *The BillTypeID field of the BranchSettingsBilling-Info and BranchListItemInfo objects.* *Select the default Bill Type for new Payer records. This setting affects newly* *created Payer records only. Newly created Payers that have the office as the* *"Belongs To' office will default to this Bill Type. If you leave this setting* *blank, new Payer records will be created with the bill type of Standard* *Invoice. See Also Standard Invoice Bill* *Type Sample and Basic Invoice Bill Type* *Sample and Payer Invoice Bill Type Sample.* *The default Bill Type for new payer records with this belongs to office.* *UI Location: Settings > Office > Office Settings > Billing > Invoice Default Bill Type*	int	4	True		
	br_AutoPost *The AutoPost field of the BranchSettingsBillingInfo and BranchListItemInfo objects.* *Default is unchecked. When checked, an option of 'Auto Post' defaults on the* *'Payment and Postings' form, and any new payments apply automatically to* *outstanding invoices. Automatically apply Payments to Invoices. Default value of FALSE.*	bit	1	False		((0))

	UI Location: Settings > Office > Office Settings > Billing > Automatically Apply Payments to Invoices					
	br_AddressVerification *The AddressVerification field of the Branch-SettingsMainInfo and BranchListItemInfo objects.* *Select the Address Verification method from the drop down box by* *choosing:* *Manual (the default) - verification will run only when take action of clicking the verification button on the entity's address. Must* *have permission to edit addresses to manually run verification.* *Forced - verification will automatically run when an address is saved or when a change to an existing address is saved. Do not need* *to perform the action of clicking the verification button for the process to* *run. Also have the option of clicking the button and manually running the* *verification if needed.UI Location: Settings > Office > Office Settings > Advanced > Address Verification*	smallint	2	True		
	br_InvParm_DisplaySchNote *Determines whether to display Schedule Notes (sch_Description) on the Standard and Payer Invoice.* *Select either True or False to determine whether to display any notes that exist* *on the Notes tab of schedules at the time invoices are finalized on the Standard* *and Payer invoice types. The default is False. If set to True, the notes that* *exist on the Notes tab of Schedule* *Calendar Details at time invoice is finalized will display on Standard and* *Payer invoice types. Changes made to the schedule notes after the invoice is finalized will not be* *included on the invoice reports. If the Schedule crosses multiple invoice detail* *records (due to office shifts or holiday shifts) the Note will repeat on each* *invoice detail line on the reports.* *VALUES* *0: False* *1: True* *DEFAULT* *0: False* *UI Location: Settings > Office > Office Settings > Billing Rpt Parms > Display Schedule Notes*	tinyint	1	False		((0))

91

br_TelephonyEmailFromAddrOnMissedVisit *The TelephonyEmailFromAddrOnMissedVisit field of the BranchSettingsTelephonyInfo object.* *From email address for 'Missed Check-In Notifications. Specify the email* *From address for notifications. If address entered, provides the recipient with* *an email address to reply back to (in the event the recipient is mistakenly* *receiving these and need to contact the office sending emails out). Not required* *- if null a default value will be provided and CANNOT be replied back to.* *UI Location: Settings > Office > Office Settings > Telephony > From*	nvarchar(200)	400	True		
br_MgmtInterfPassword	varbinary(255)	255	True		
br_AllowSMSTextMessaging *True means the office permits users to send SMS Text messages in interactive screens like Caregiver Search. Does not apply to telephony.* *Check this box to enable sending SMS text messages and/or emails to* *Caregivers directly from the Caregiver Search. On the Caregiver>Main tab must also check off the 'Txt'* *box within the phone grid for the number to receive SMS text messages from the* *system. See Sending SMS Text Messages and Email Notifications to* *Caregivers for complete details.* *UI Location: Settings > Office > Office Settings > Advanced > Allow Text Messages*	bit	1	True		
br_Aalic *Field used to auto apply licenses when rolling named user license project to prod.*	bit	1	False		((1))
br_SchedulingSkillGroupCheckAllow *Select whether to check for Skill Groups from the Caregiver Skill Codes tab.* *Default, Disallow, Warn Only, or Do Not Check with optional Override options for* *Skill Groups. Works in conjunction with settings on the Caregiver>Skill* *Codes tab for schedule conflict checking.* *Conflict Check Level:* *Default - Takes the level set at the next highest level (whether Global or Office).* *Disallow - Runs the conflict check, warns the user, and does not allow them to save the record. For more information, see Schedule Conflict Warning.* *Warn Only - Runs the conflict check and warns the user, but allows them to Ignore the warning and*	tinyint	1	True		

	save the record. For more information, see Schedule Conflict Warning. *UI Location: Settings > Office > Office Settings > Scheduling > Skill Groups*				
	br_SchedulingSkillGroupCheckOverride *User override check for Scheduling Skill Group.* *Override Level:User Override - The default behavior for the level of conflict checking can be overridden in the next area of the system (Global to Office to User).No Override - The default behavior for level of conflict checking cannot be overridden by settings in the next area of the system (Global to Office to User).* *UI Location: Settings > Office > Office Settings > Scheduling > Skill Groups (2nd field)*	tinyint	1	True	
	br_TimeAndAttendLocationThreshold *Distance (in miles) that is maximum acceptable range. If outside range, system will show QA flag to alert users and not auto-complete schedule.* *UI Location: Settings > Office > Office Settings > Telephony > Time & Attendance: Location Threshold*	decimal(7,4)	5	True	
	br_TimeAndAttendLocationMinAccuracy *Accuracy (in miles) that is maximum acceptable range. If outside range, system will show QA flag to alert users and not auto-complete schedule.* *UI Location: Settings > Office > Office Settings > Telephony > Time & Attendance: Minimum Accuracy*	decimal(7,4)	5	True	
	br_TimeAndAttendPortalEnabled *True means the office can participate in Time And Attendance collection on the SonetoWeb Portal.*	bit	1	True	
	br_AdministratorEmail *Office administrator email.* *UI Location: Settings > Office > Office Settings > Advanced > Admin Email*	nvarchar(200)	400	True	
	br_PCE_FileNameSuffix *If "Use Extract Date in File name (MMDDYY)" is checked, file name suffix will be "{MMDDYY}".* *Use Extract Date in File name (MMDDYY) UI Location: Settings > Office > Office Settings > Payroll > Use Extract Date in File name (MMDDYY) (Check box)*	nvarchar(20)	40	True	
	br_SchedulingCGStatusConflictsAllow *Select whether to check for the status of the Caregiver for scheduling. (For example, the Caregiver is Inactive or Terminated). If select 'User Override' for this Conflict Check on this setting, then can change the default behavior on the User>Scheduling tab. When scheduling, the conflict check runs if scheduling settings set to 'Warn Only' or 'Disallow'. Caregiver Status Check. Conflict notification setting for Caregiver Status at the office level.*	tinyint	1	False	((0))

Conflict Check Level: *Default - Takes the level set at the next highest level (whether Global or Office).* *Disallow - Runs the conflict check, warns the user, and does not allow them to save the record. For more information, see Schedule Conflict Warning.* *Warn Only - Runs the conflict check and warns the user, but allows them to Ignore the warning and save the record. For more information, see Schedule Conflict Warning.* *UI Location: Settings > Office > Office Settings > Scheduling > Caregiver Status*						
br_SchedulingCGStatusConflictsOverride *Conflict override setting for Caregiver Status at the office level.* *Override Level:User Override - The default behavior for the level of conflict checking can be overridden in the next area of the system (Global to Office to User).No Override - The default behavior for level of conflict checking cannot be overridden by settings in the next area of the system (Global to Office to User).UI Location: Settings > Office > Office Settings > Scheduling > Caregiver Status (2nd field)*	tinyint	1	False		((1))
br_MaxWeekHours *The maximum weekly hours setting from 1 -168.* *UI Location: Settings > Office > Office Settings > Payroll > Max Hour Check*	tinyint	1	False		((168))
br_SchedulingCheckForMaxHours *Select 'Yes', 'No', or 'Default' (with User Override or No Override). Provides a warning box if a caregiver exceeds the weekly maximum hours. Works in conjunction with OT conflict checks.* *Caregiver Status Check. Conflict notification setting for Caregiver Status at the office level.* *Conflict Check Level:* *Default - Takes the level set at the next highest level (whether Global or Office).* *Disallow - Runs the conflict check, warns the user, and does not allow them to save the record. For more information, see Schedule Conflict Warning.* *Warn Only - Runs the conflict check and warns the user, but allows them to Ignore the warning and save the record. For more information, see Schedule Conflict Warning.* *UI Location: Settings > Office > Office Settings > Scheduling > Check for Max Hours*	tinyint	1	False		((0))
br_SchedulingCheckForMaxHoursOverride *Conflict override setting for Check Max Hours at the office level.* *Override Level:User Override - The default behavior for the level of conflict checking can be overridden in the next area of the system (Global to Office to User).No Override - The default behavior for level of conflict checking cannot be overridden*	tinyint	1	False		((0))

	by settings in the next area of the system (Global to Office to User).UI Location: Settings > Office > Office Settings > Scheduling > Check for Max Hours (2nd field)					
	br_EDISFLAdditionalID *The EDISFLAdditionalID field is used as an additional ID for the Service Facility Location.* *The facility ID.* *UI Location: Settings > Office > Office Settings > Billing > Facility ID*	nvarchar(20)	40	True		
	br_EDISFLAdditionalIDType *The EDISFLAdditionalIDType field is used as an additional ID Type for the Service Facility Location.* *This is used when a Payer specifies a specific Type for Loop 20100AA. Enter that* *Type here. In the Payer EDI Settings tab, Loop 20100AA must be set to Office* *Additional.* *UI Location: Settings > Office > Office Settings > Billing > Additional Type*	nvarchar(3)	6	True		
	br_PayrollTravelTimeThreshold *br_PayrollTravelTimeThreshhold stores the max number of minutes between schedules that will result in the automatic creation of Travel Time for Payroll purposes. At least initially this value will be used as the duration of the automatically generated Payroll Travel Time. The default value will be 0 which will prevent the automatic creation of Travel Time. The maximum value allowed will be 1440 minutes, which seems reasonably large and should accomodate even the least reasonable situations.* *UI Location: Settings > Office > Office Settings > Billing > Travel Time Threshold*	int	4	False		((0))
	br_OperationsFeatures *A bit flag used to record various operations level features that are to be enabled for this office.* *None = 0* *ServicePlanVersioning = 1* *MedicationModule = 2*	bigint	8	False		((0))
	br_BillPayKey *The BillPayKey field of the BranchSettingsMainInfo object.* *The API key to send in the payload to make payments to vendor with. UI Location: Settings > Office > Office Settings > Advanced > Bill/Pay Key*	nvarchar(50)	100	True		
	br_BillPayLocationID *Unique identifier used in combination with br_Bill-PayKey to make payments through PayRight. Automatically generated on record creation and should not be changed.*	uniqueidentifier	16	False		(newid())
	br_IsHolidayOTEligible *Is Office Holiday OT Eligible. When the value = 1*	bit	1	False		((1))

	then Holiday Pay is included in Regular Rate OT Calculation.					
	br_InvoiceEmailBody *The InvoiceEmailBody field of the BranchSettings-BillingInfo object. If entered, this will appear in the email body of emailed invoices. (Max. character limit of 1000)* *UI Location: Settings > Office > Office Settings > Billing > Invoice Email*	nvarchar(1000)	2000	True		
	br_ElectronicProcessingMerchantID *Electronic Processing Merchant ID*	nvarchar(40)	80	True		
	br_FtpEftSettings *Ftp settings for the Royalty Extract to upload the file to a ftp location. Encrypted in database.*	varbinary(max)	max	True		
	br_TelephonyAllowShorterSch	bit	1	False		[(0)}

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_Branches	br_ID	True	80
	IX_T_Branches_Name	br_Name	True	80
	IX_T_Branches_PayrollExtractType	br_PayrollExtractTypeID, br_ID		
	IX_T_LocationID	br_LocationID		80
	IX_T_Par_Branch_ID	br_ParBranchID		80

Foreign Keys

Name	Columns
FK_T_Branches_T_BillType	br_BillTypeID->[dbo].[T_BillType].[biltyp_ID]
FK_T_Branches_T_Payers_OASIS_Medicaid	br_OASIS_Medicaid_Payer_ID->[dbo].[T_Payers].[pay_ID]
FK_T_Branches_T_Payers_OASIS_Medicare	br_OASIS_Medicare_Payer_ID->[dbo].[T_Payers].[pay_ID]
FK_T_Branches_T_PayrollExtractTypes	br_PayrollExtractTypeID->[dbo].[T_PayrollExtractTypes].[prolle_ID]
FK_T_ServiceCode_T_Branches_DefaultMileage	br_DefaultMileageId->[dbo].[T_ServiceCode].[svcc_ID]
FK_T_ServiceCode_T_Branches_DefaultServiceCode	br_DefaultServiceCodeId->[dbo].[T_ServiceCode].[svcc_ID]

Caregiver

🖼 [dbo].[T_Caregiver]

Description

Caregiver personal and professional information.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C 🔑 ⛓	car_ID *System generated unique ID for the caregiver record. Used to pull caregiver name to show in the UI.* *UI Location: Search box results in various locations > ID,* *Schedule Calendar > List View > Caregiver* *and Caregiver > ID*	bigint	8	False	1 - 1	
⛓	car_LastName *Caregiver's last name.* *UI Location: Search box results in various locations > Last Name,* *Schedule Calendar > List View > Caregiver (Last, First),* *Caregiver > Last* *and Training Register > Last Name*	nvarchar(50)	100	False		
⛓	car_FirstName *Caregiver's first name.* *UI Location: Search box results in various locations > First Name,* *Schedule Calendar > List View > Caregiver (Last, First),* *Caregiver > First* *and Training Register > First Name*	nvarchar(50)	100	False		
	car_MiddleName *The middle name of the caregiver.* *UI Location: Caregiver > Middle*	nvarchar(50)	100	True		
⛓ (2) FK 🔑	car_StatusID *The status ID of the caregiver. Pulls the status name and show in the UI.* *Relates to [T_CaregiverStatus].[carstat_ID]. Some examples of statuses are Active, On Leave, Retired, etc.* *For more information, see DDM > Caregiver Status*	int	4	False		

	UI Location: Search box results in various locations > ID *and Caregiver > Status*					
⬚ (3) FK 🔑 📇	car_BranchID *Office ID where the caregiver belongs to. Used to pull office name to UI.* *Relates to [T_Branches].[br_ID].* *UI Location: Caregiver > Office > Belongs to Office*	int	4	False		
FK 🔑	car_RegionID *Office ID where the caregiver belongs to. Used to pull office name to UI.* *Relates to [T_Branches].[br_ID].* *UI Location: Search box results in various locations > Office* *and Caregiver > Office*	int	4	True		
	car_InternalID *The caregiver's optional internal ID.* *UI Location: Caregiver > Main > Internal ID*	nvarchar(20)	40	True		
	car_Phone *Not used. Moved to T_CaregiverPhones.*	nvarchar(30)	60	True		
	car_PhoneType *Not used. Moved to T_CaregiverPhones.*	int	4	True		
	car_Title *The caregiver's title.* *UI Location: Caregiver > Main > Title*	nvarchar(50)	100	True		
⬚ FK 🔑	car_SkillCd *The skill category ID of the caregiver. The primary skill category of the caregiver. Once saved, the Skill Category can only be changed on the Skill Codes screen. For further information, see DDM Skill Categories or Caregiver Skill Codes. Used to pull skill category name to the UI.* *Relates to [T_SkillCategories].[skillc_ID]. Some examples of skill categories are C.N.A, HHA, RN, etc.* *For more information, see DDM > Skill Categories* *UI Location: Search box results in various locations > Skill Category* *and Caregiver > Main > Title*	int	4	True		
	car_Address1 *Holds the main address information.* *UI Location: Caregiver > Main > Address1 (through AddressList object)*	nvarchar(255)	510	True		
	car_Address2 *Optional address field.* *UI Location: Caregiver > Main > Address2 (through AddressList object)*	nvarchar(60)	120	True		
	car_City *City of the entity.*	nvarchar(50)	100	True		

	UI Location: Caregiver > Main > City (through AddressList object)					
	car_StateOrProvince *State of the entity.* *UI Location: Caregiver > Main > State (through AddressList object)*	nvarchar(20)	40	True		
	car_PostalCode *Postal code of the entity. The system accepts +4 postal codes. The +4 postal code will display on all correspondence (letters, envelopes, labels and invoices) and reports that utilize postal codes (including the Caregiver Name Badge report). The non-numeric value (dash) will be stripped from the OASIS extract file, the CAHPS extract file, and the 837 electronic billing files.* *UI Location: Caregiver > Main > Postal Code (through AddressList object)*	nvarchar(20)	40	True		
	car_County *County of the entity.* *UI Location: Caregiver > Main > County (through AddressList object)*	nvarchar(50)	100	True		
FK	**car_Country** *Country of the entity.* *Relates to [T_Countries].[ctry_ID].* *UI Location: Caregiver > Main > Country (through AddressList object)*	int	4	False		((240))
	car_Email1 *Country of the entity.* *Relates to [T_Countries].[ctry_ID].* *UI Location: Caregiver > Main > Country (through AddressList object)*	nvarchar(50)	100	True		
	car_Email2 *Caregiver secondary e-mail address.* *UI Location: Caregiver > Main > Email 2*	nvarchar(50)	100	True		
	car_TextMessage *Future use.* *UI Location: Caregiver > Main > Text Message*	nvarchar(50)	100	True		
	car_Birthdate *Caregiver's birth date.* *UI Location: Caregiver > Payroll > Birth Date*	datetime	8	True		
	car_SpouseName *The caregiver's spouse name.* *UI Location: Caregiver > Main > Spouse Name*	nvarchar(50)	100	True		
	car_Notes *Optional notes about the caregiver.* *UI Location: Caregiver > Main > Notes*	nvarchar(4000)	8000	True		
	car_ADPFileNum *Read Only field. Utilized if an agency has a customized payroll extract file which requires this information. Payroll file number of the Caregiver's*	nvarchar(50)	100	True		

	'Belongs To' office. Modify the payroll file number(s) on the Caregiver>Offices tab. A single agency may have multiple offices in the application, and may share caregivers across offices. Payroll companies often require a different payroll file number for each office the caregiver provides payable services for. Share one caregiver record across multiple offices with different payroll file numbers for each of those offices. *UI Location: Caregiver > Payroll > Payroll File Number*					
🖽	**car_NPI** *Caregiver's NPI number.* *UI Location: Caregiver > Payroll > NPI*	nvarchar(10)	20	True		
	car_EmpSubCod_UD *Utilized if an agency has a customized payroll extract file which requires this information.* *UI Location: Caregiver > Payroll > Department Code*	nvarchar(15)	30	True		
FK🔑	**car_Group** *The group with which the Caregiver should be associated. The Group selected controls the type of Payroll Batch the caregiver or staff will pull into. The Group is not a required field, and if left blank the Caregiver will only pull into payroll batches where the Group is also left blank.* *Relates to [T_CaregiverGroup].[carg_ID].* *UI Location: Caregiver > Payroll > Group*	int	4	True		
	car_EmpOTFlag *When checked or value = 1, excludes the Caregiver from the OT pay rate calculations.* *UI Location: Caregiver > Payroll > OT Exempt*	bit	1	False		((0))
🔀	**car_TelephonyID** *Optional field for caregiver's telephony ID number. If telephony number is not provided then the system automatically updates the filed tp be car_ID field value.* *UI Location: Caregiver > HR > Telephony ID#*	nvarchar(36)	72	False		
	car_Supervisor *The ID of the supervisor of the caregiver. Selected through the search box and displayed in the UI in the txtSupervisor box.* *UI Location: Caregiver > HR > Supervisor*	bigint	8	True		
	car_Manager *The ID of the manager of the caregiver. Selected through the search box and displayed in the UI in the txtManager box.* *UI Location: Caregiver > HR > Manager*	bigint	8	True		
	car_InternalCaseMgr *Bitwise mask of flags to indicate caregiver responsibilities: CaseManager = 1, Supervisor = 2, Coordinator = 4*	tinyint	1	False		((0))

	UI Location: Caregiver > HR > Case Manager, Caregiver > HR > Case Supervisor and Caregiver > HR > Case Coordinator					
	car_ShiftDiffFlag *Not used.*	bit	1	False		((0))
	car_PayType *The Pay Type controls whether the caregiver's completed schedules will be stamped with a Pay Date. If the Pay Type of Salary is selected, and scheduled visits are completed for that caregiver, the Pay Date will not automatically stamp on the schedule records. To pass a Salary caregiver through the payroll batching process, the user must manually set the Pay Date on the schedule item. Values are 0: Non Salary, 1: Salary.* *UI Location: Caregiver > Payroll > Pay Type*	tinyint	1	False		((0))
	car_WageChartID *The ID of the caregiver's wage chart. Used to pull wage chart name to UI which is a read only field which displays the wage chart as specified on the Caregiver Office tab.* *Relates to [T_BranchChartGroups].[brcg_ID].* *UI Location: Caregiver > Payroll > Wage Chart*	int	4	True		
	car_PayRate *The caregiver's salary amount - for informational purposes only.* *UI Location: Caregiver > Payroll > Salary*	money	8	False		((0))
	car_NumAllowances *Total Number of Federal Allowances you are claiming. Utilized for the Infiniti payroll extract - otherwise this is informational. (Max. Value of 99)* *UI Location: Caregiver > Payroll > Fed Allowances*	tinyint	1	False		((0))
	car_WithHold *Additional Federal Withholding to be held from each paycheck. Utilized for the Infiniti payroll extract - otherwise this is informational.* *UI Location: Caregiver > Payroll > Fed Withhold*	money	8	False		((0))
	car_PayPreference *Caregiver's pay preference - for informational purposes only.* *UI Location: Caregiver > Payroll > Pay Preference*	nvarchar(2)	4	True		('CK')
	car_VacationHours *The vacation hours assigned to the Caregiver - for informational purposes only.* *UI Location: Caregiver > Payroll > Vacation Hours*	decimal(5,2)	5	True		
	car_DDBankAcctType *Caregiver's account type. Checking or Savings - for informational purposes only.* *UI Location: Caregiver > Payroll > Account Type*	char(1)	1	True		
	car_ExcludeHoliday *When checked or value = 1, excludes this individual Caregiver from the Holiday pay rate calculation.*	bit	1	False		((0))

	UI Location: Caregiver > Payroll > Exclude Holiday					
	car_CreatedDate *Date and time the record was created.* *UTC date updated by SQL Server's current UTC date.* *UI Location: Caregiver > Main > Created On (through ModifiedRecord1 object)*	datetime	8	False		(getutcdate())
	car_CreatedUser *User who created the record.* *UI Location: Caregiver > Main > Created By (through ModifiedRecord1 object)*	nvarchar(50)	100	False		
	car_ModifiedDate *Date and time the record was last modified.* *UTC date updated by SQL Server's current UTC date.* *UI Location: Caregiver > Main > Modified On (through ModifiedRecord1 object)*	datetime	8	False		(getutcdate())
	car_ModifiedUser *User who last modified the record.* *UI Location: Caregiver > Main > Modified By (through ModifiedRecord1 object)*	nvarchar(50)	100	False		
	car_TS *The time stamp of the caregiver record.*	timestamp	8	False		
📇	car_Role *Defines the caregiver's role. Caregiver role is for individuals who cares for clients and needs to be scheduled with clients, Caregiver/Staff role is for individuals that cares for and gets scheduled with clients but also works internally in the office, or Staff for staff that work only internally in the office and do not need to be scheduled with clients. Records assigned to the caregiver role displays in Caregiver, records assigned to the Caregiver/Staff role display in both Caregiver and Staff, and records assigned to the Staff role display in the Staff module. One last distinction is scheduling, as Caregiver and Caregiver/Staff can be scheduled but Staff cannot.* *1: Caregiver, 2: OfficeStaff, 3: CaregiverOfficeStaff* *UI Location: Search box results in various locations > Role,* *Caregiver > Main > Role* *and Training Register > Roles*	tinyint	1	False		((1))
	car_LegacyID *An alternative numeric caregiver or staff ID, if needed.* *UI Location: Caregiver > Main > Alt. ID*	int	4	True		
	car_LegacyBranchID *Not used.*	int	4	True		
	car_EmpSSN *The Caregiver's Social Security number. This is an encrypted column.*	varbinary(255)	255	True		

	UI Location: Caregiver > Payroll > Social Security #					
	car_DDBankRoutingNum *The Caregiver's bank routing number - for informational purposes only. This is an encrypted column.* *UI Location: Caregiver > Payroll > Bank Routing Number*	varbinary(255)	255	True		
	car_DDBankAcctNum *The Caregiver's bank account number - for informational purposes only. This is an encrypted column.* *UI Location: Caregiver > Payroll > Bank Account Number*	varbinary(255)	255	True		
⊿	**car_CalcUniqueSSN** *Used to check for duplicate SSN#. Encrypted field.*	varbinary(255)	255	True		
	car_BonusPointsThershold *The points threshold the Caregiver is to achieve for the designated period, as appropriate.* *UI Location: Caregiver > Payroll > Points Threshold*	decimal(4,2)	5	False		((0))
FK🔑	**car_EmpSexID** *The sex ID of the caregiver. Used to pull sex name to UI.* *Relates to [T_Gender].[gndr_ID].* *UI Location: Caregiver > Main > Sex*	int	4	True		
FK🔑	**car_MaritalStatID** *The ID of the marital status of the caregiver. Used to pull maritus status name to the UI.* *Relates to [T_MaritalStatus].[marit_ID].* *UI Location: Caregiver > Main > Marital Status*	int	4	True		
FK🔑	**car_EmpSalutID** *Salutation ID for the caregiver. Used to pull salutation name to the UI. The Salutation is used when running a mail merge or printing labels or envelopes in Letters. For further information see DDM Salutations and Letters.* *Relates to [T_Salutation].[salut_ID]* *UI Location: Caregiver > Main > Salutation*	int	4	True		
	car_Nickname *The nickname of the caregiver.* *UI Location: Caregiver > Main > Nickname*	nvarchar(32)	64	True		
	car_AllowMassEmail *When selected or value is 1, allows letters and other items to be sent to this Caregiver from within the system.* *UI Location: Caregiver > Main > Allow MatrixCare to Email this Caregiver*	bit	1	False		((0))
FK🔑	**car_ReferralTerritoryID** *The territory to which the caregiver should be associated. This is also for informational purposes only at this time. For further information, see DDM Referral Territories.*	int	4	True		

	Relates to [T_ReferralTerritories].[refter_ID]. *UI Location: Caregiver > Main > Territory*					
	car_UploadTelephony *When box is checked or value = 1, it enables upload telephony for the caregiver.* *UI Location: Caregiver > HR > Upload Telephony*	bit	1	False		((1))
	car_WSNumAllowances *Total Number of Work State Allowances the caregiver is claiming. Utilized for the Infiniti payroll extract - otherwise this is informational. (Max. Value of 99)* *UI Location: Caregiver > Payroll > Work St Allowances*	tinyint	1	True		
	car_WSWithHold *Additional Work State Withholding to be held from each paycheck. Utilized for the Infiniti payroll extract - otherwise this is informational.* *UI Location: Caregiver > Payroll > Work St Withhold*	money	8	True		
	car_SUISDI_TaxJurisdiction *State Unemployment Insurance/State Disability Insurance Tax Jurisdiction (from T_StateProvinces). Utilized for the Infiniti payroll extract - otherwise this is informational.* *UI Location: Caregiver > Payroll > SUI/SDI State*	nvarchar(50)	100	True		
	car_FedFilingStatus *Utilized for the Infiniti payroll extract - otherwise this is informational.* *1: Single, 2: Married, 3: Married at Single Rate* *UI Location: Caregiver > Payroll > Fed File Status*	tinyint	1	True		
FK	**car_WSFilingStatus** *Work State Filing Status (from T_StateFilingStatus). Utilized for the Infiniti payroll extract - otherwise this is informational.* *Relates to [T_StateFilingStatus].[sfs_ID].* *UI Location: Caregiver > Payroll > Work St File Status*	int	4	True		
	car_WorkState *Utilized for the Infiniti payroll extract - otherwise this is informational.* *UI Location: Caregiver > Payroll > Work State*	nvarchar(50)	100	True		
	car_RSNumAllowances *Total Number of Residential State Allowances the Caregiver is claiming. Utilized for the Infiniti payroll extract - otherwise this is informational. (Max. Value of 99)* *UI Location: Caregiver > Payroll > Res St Allowances*	tinyint	1	True		
	car_RSWithHold *Additional Residential State Withholding to be held from each paycheck. Utilized for the Infiniti payroll extract - otherwise this is informational.* *UI Location: Caregiver > Payroll > Res St Withhold*	money	8	True		

FK🔑	car_RSFilingStatus *Residential State Filing Status. Utilized for the Infiniti payroll extract - otherwise this is informational.* *Relates to [T_StateFilingStatus].[sfs_ID].* *UI Location: Caregiver > Payroll > Res St File Status*	int	4	True		
	car_TelephonyAllowCaregiverPhone *When selected or value = 1, enables to use caregiver cell phone number (configured on the Caregiver>Main tab) for telephony arrival and departure calls if the Client does not have a phone, has a rotary phone that cannot use IVR system or lives in a facility. Coordinates with the checkbox under the Telephony Settings box on the Client > Advanced tab.* *UI Location: Caregiver > HR > Tel. Complete with Caregiver Phone*	bit	1	False		((0))
	car_EDIAdditionalID *The ID specified by the Payer. Pulls to 24J top on 1500 invoices. [For NJ Medicaid, the ID will be the Caregiver's Certified Home Health Aide Number]* *UI Location: Caregiver > Payroll > Additional ID*	nvarchar(20)	40	True		
	car_EDIAdditionalIDType *The Qualifier specified by the Payer. Pulls to 24I top on 1500 invoices. [For NJ Medicaid, the Qualifier will be 0B]* *UI Location: Caregiver > Payroll > Additional Type*	nvarchar(3)	6	True		
FK🔑	car_RaceID *The caregiver's race. Selections available originate from DDM Races List.* *Relates to [T_Race].[rce_ID].* *UI Location: Caregiver > Main > Race*	int	4	True		
	car_EmpMHFlag *When selected or value = 1, excludes this individual Caregiver from the weekly maximum hours conflict check.* *UI Location: Caregiver > Payroll > Bypass Max Hrs*	bit	1	False		((0))

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_Caregiver	car_ID	True	80
	IX_T_Caregiver_BranchID_TelephonyID	car_BranchID, car_TelephonyID	True	80
	IX_T_Caregiver_UniqueSSN	car_CalcUniqueSSN, car_BranchID	True	80
	IX_T_Caregiver_BranchID	car_BranchID, car_StatusID, car_ID		80
	IX_T_Caregiver_CarFirstName	car_FirstName		80
	IX_T_Caregiver_CarSkillCode	car_SkillCd		80
	IX_T_Caregiver_LastName	car_LastName		80
	IX_T_Caregiver_StatusID	car_StatusID		80

Foreign Keys

Name	Columns
FK_T_Caregiver_T_BranchChartGroups	car_WageChartID->[dbo].[T_BranchChartGroups].[brcg_ID]
FK_T_Caregiver_T_Branches	car_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_Caregiver_T_CaregiverGroup	car_Group->[dbo].[T_CaregiverGroup].[carg_ID]
FK_T_Caregiver_T_CaregiverStatus	car_StatusID->[dbo].[T_CaregiverStatus].[carstat_ID]
FK_T_Caregiver_T_Countries	car_Country->[dbo].[T_Countries].[ctry_ID]
FK_T_Caregiver_T_Gender	car_EmpSexID->[dbo].[T_Gender].[gndr_ID]
FK_T_Caregiver_T_MaritalStatus	car_MaritalStatID->[dbo].[T_MaritalStatus].[marit_ID]
FK_T_Caregiver_T_Race	car_RaceID->[dbo].[T_Race].[rce_ID]
FK_T_Caregiver_T_ReferralTerritories	car_ReferralTerritoryID->[dbo].[T_ReferralTerritories].[refter_ID]
FK_T_Caregiver_T_Region	car_RegionID->[dbo].[T_Region].[reg_ID]
FK_T_Caregiver_T_Salutation	car_EmpSalutID->[dbo].[T_Salutation].[salut_ID]
FK_T_Caregiver_T_SkillCategories	car_SkillCd->[dbo].[T_SkillCategories].[skillc_ID]
FK_T_Caregiver_T_StateFilingStatus_RS	car_RSFilingStatus->[dbo].[T_StateFilingStatus].[sfs_ID]
FK_T_Caregiver_T_StateFilingStatus_WS	car_WSFilingStatus->[dbo].[T_StateFilingStatus].[sfs_ID]

Caregiver Branches

📇 [dbo].[T_CaregiverBranches]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	carbr_ID *System generated unique ID for the Caregiver Branches record.*	bigint	8	False	1 - 1	
(2) FK	carbr_CaregiverID *The ID of the Caregiver that this Caregiver Branches record is associated with. Flows from [T_Caregiver].[car_id]*	bigint	8	False		
(2) FK	carbr_Branch_ID *The ID of the Branch that this Caregiver Branches record is associated with. Flows from [T_Branches].[br_id]. Shown in the Caregiver/Offices form as the Office Description.*	int	4	False		
	carbr_CreatedUser *The user logged in the system when the record was created. Called Created By in the Caregiver>Offices form.*	nvarchar(50)	100	False		
	carbr_CreatedDate *The Date the Caregiver Branches record was created. UTC date. Updated by SQL Server's current UTC date. Called Created On in the Caregiver>Offices form.*	datetime	8	False		(getutcdate())
	carbr_ModifiedUser *The user logged in the system when the record was last modified. Called Modified By in the Caregiver>Offices form.*	nvarchar(50)	100	False		
	carbr_ModifiedDate *The date that this record was last modified. It is a UTC date and is updated by the SQL Server current UTC date. This date is converted to the user's computer's timezone in the UI. Called Modified On in the Caregiver>Offices form, show in the Offices grid.*	datetime	8	False		(getutcdate())
	carbr_TS *The TS field of the Caregiver Branches record.*	timestamp	8	False		
FK	carbr_WageChartID *The ID of the Branch Chart Groups Wage Chart record that this Caregiver Branches record is associated with. [T_BranchChartGroups].[brcg_ID]*	int	4	True		
	carbr_ADPFileNum *The Payroll File Number for the Caregiver office*	nvarchar(50)	100	True		

level. Called Payroll File Number in the Caregiver/Offices form, shown in the Offices grid.				

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK🔑C	PK_T_CaregiverBranches	carbr_ID	True	80
	IX_T_CaregiverBranches_Unique	carbr_CaregiverID, carbr_Branch_ID	True	80
	IX_T_CaregiverBranches_BranchID	carbr_Branch_ID		80
	IX_T_CaregiverBranches_CaregiverID	carbr_CaregiverID		80

Foreign Keys

Name	Delete	Columns
FK_T_CaregiverBranches_T_BranchCharts		carbr_WageChartID->[dbo].[T_BranchChartGroups].[brcg_ID]
FK_T_CaregiverBranches_T_Branches		carbr_Branch_ID->[dbo].[T_Branches].[br_ID]
FK_T_CaregiverBranches_T_Caregiver	Cascade	carbr_CaregiverID->[dbo].[T_Caregiver].[car_ID]

Caregiver Dates

[dbo].[T_CaregiverDates]

Description

Records for Caregiver Dates.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	carbt_ID *System generated unique identifier for the Caregiver Dates record.*	bigint		False	1,1	
FK	carbt_CaregiverID *The ID of the Caregiver for the Caregiver Dates record. Relates to [T_-Caregiver].[car_ID] Caregiver details tab > ID'*	bigint	8	False		
FK	carbt_Date *The expiration date of document or certification associated with this record. UI Location: Caregiver details tab > Expirations > Expiration Date'*	datetime		True		
FK	cardt_TypeID *The caregiver dates type ID for the Caregiver Dates record. Pulls the date type name to show in the UI.* *Caregiver dates are set up on Drop Down Maintenance tab > Caregiver Dates* *Caregiver Dates types refer to the document or certification with expiration date. Ex: ACLS, CPR Certification, Drivers License, Drug Screening, Auto Liability Insurance, etc.* *Relates to [T_CaregiverDateTypes].[cardttyp_ID]. Called Date_Type.* *UI Location: Caregiver details tab > Expirations > Date Type'*	int		False		
	cardt_Notes *Any notes associated to this record UI Location: Caregiver details tab > Expirations > Notes'*	[nvarchar](4000)	4000	True		

	cardt_CreatedDate	datetime		False		(getutcdate())
	The date the Caregiver Dates record was created. UTC date updated by SQL Server"s current UTC date. *UI Location: Caregiver details tab > Expirations > Created On'*					
	cardt_CreatedUser	[nvarchar](50)	50	False		
	The user who created the Caregiver Dates record. *UI Location: Caregiver details tab > Expirations > Created By'*					
	cardt_ModifiedDate	datetime		False		(getutcdate())
	The date when the Caregiver Dates record was last modified. UTC date updated by SQL Server"s current UTC date. *UI Location: Caregiver details tab > Expirations > Modified On'*					
	cardt_ModifiedUser	[nvarchar](50)	50	False		
	The user logged in to the system when the Caregiver Dates record was last modified *UI Location: Caregiver details tab > Expirations > Modified By'*					
	cardt_TS	[timestamp]		False		
	The timestamp for the Caregiver Dates record.					

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_CaregiverDates	cardt_ID	True	80
	IX_T_CaregiverDates_CaregiverID	cardt_CaregiverID	False	80
	IX_T_CaregiverDates_CaregiverID_TypeID	cardt_CaregiverID, cardt_TypeID	True	80
	IX_T_CaregiverDates_TypeID	cardt_TypeID	False	80

Foreign Keys

Name	Columns
FK_T_CaregiverDates_T_Caregiver	cardt_CaregiverID-> [dbo].[T_Caregiver] ([car_ID])
FK_T_CaregiverDates_T_CaregiverDateTypes	cardt_TypeID-> [dbo].[T_CaregiverDateTypes] ([cardttyp_ID])

Caregiver Date Types

📇 [dbo].[T_CaregiverDateTypes]

Description

Records for Caregiver Date Types.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	**cardttyp_ID** *System generated unique identifier for caregiver date types. Starts at 10001.*	int		False	10001,1	
	cardttyp_Name *Documents/Certification Names for the Expiration tab on the caregiver screen.*	[nvarchar](50)	50	True		
	cardttyp_Warn *Setting that will warn a user about caregiver expired documents or certifications during scheduling.*	bit		False		
	cardttyp_Active *Active Status that can be set in the drop down maintenance screen.*	bit		False		
	cardttyp_CreatedDate *Date and time the record was created.*	datetime		False		(getutcdate())
	cardttyp_CreatedUser *User that created the record.*	[nvarchar](50)	50	False		
	cardttyp_ModifiedDate *Date and time the record was last modified.*	datetime		False		(getutcdate())
	cardttyp_ModifiedUser *User that last modified the record.*	[nvarchar](50)	50	False		
	cardttyp_TS *The timestamp field of the record*	timestamp		False		
	cardttyp_ListItemType	tinyint		False		

	The list type of the record for the DropDown List control. 0 = Global, 1 = Office, 2 = Override					
FK	`cardttyp_RptGroupID` *rptgrp_ID of the Report Group that the Type is associated with to help group records in a general category*	`int`		False		
FK	`cardttyp_BranchID` *br_ID of the related to specific Branch. Null if the ListItemType is 0 (System).*	`int`		True		
FK	`cardttyp_OverrideID` *ID for the parent record that will be overriden. Override List Item Types are used when an Office wishes to have different settings on an existing Global List Item. The Override List Item will have the same Name as the Global List Item, but will be configured with different settings.*	`int`		True		
	`cardttyp_Description` *Description of for the record (Optional)*	`[nvarchar](1000)`	1000	True		
	`cardttyp_ReminderItem` *Setting to determine if the record should show up as a part of the reminders for a user*	`bit`		False		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_CaregiverDateTypes	`cardttyp_ID`	True	80
	IX_T_CaregiverDateTypes_active	`cardttyp_Active`	False	80

	IX_T_CaregiverDateTypes_BranchOverrideName	`cardttyp_BranchID,`
		 `cardttyp_OverrideID,`
		 `cardttyp_Name`
			True	80

Foreign Keys

Name	Columns
FK_T_CaregiverDateTypes_T_Branches	`cardttyp_BranchID-> [dbo].[T_Branches] ([br_ID])`
FK_T_CaregiverDateTypes_T_CaregiverDateTypes	`cardttyp_OverrideID-> [dbo].[T_CaregiverDateTypes]` `([cardttyp_ID])`
FK_T_CaregiverDateTypes_T_ReportGroups	`cardttyp_RptGroupID-> [dbo].[T_ReportGroups] ([rptgrp_ID])`

Caregiver Documents

	[dbo].[T_CaregiverDocuments]

Description

Records for Caregiver Documents.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	cardoc_ID *System generated unique identifier for the record.*	bigint		False	1,1	
FK	cardoc_CaregiverID *Caregiver ID for the document record.*	bigint		False		
FK	cardoc_TypeID *main document type id for the file linked to the caregiver linked to the T_DocumentTypes.doctyp_ID field.*	int		False		
	cardoc_Data *field that stores the file (blob field type)*	image		False		
	cardoc_Format *The file format of the attachment. (Record Picture type attachments should be the format type of .jpg or the image does not display on reports)*	[nvarchar](50)	50	False		
	cardoc_FileName *The original location of the attachment. Once the attachment is captured, the document is stored in the database. This field is for reference only.*	[nvarchar](256)	256	False		
	cardoc_FileSize *The file size of the attachment. (Max. file size is 6MB)*	bigint		True		
	cardoc_Thumbnail	image		True		

	A preview image of the attachment.					
	cardoc_Notes *Notes for the attachment record*	`[nvarchar](4000)`	4000	True		
🔑FK	**cardoc_Sharelevel** *Set the permission for viewing this attachment. The default permission level is everyone. On the Office level, the permission levels are set in DDM Branch Document Share Levels.*	`int`		False		
	cardoc_CreatedDate *Date and time the record was created.*	`datetime`		False		`(getutcdate())`
	cardoc_CreatedUser *User that created the record.*	`[nvarchar](50)`	50	False		
	cardoc_ModifiedDate *Date and time the record was last modified.*	`datetime`		False		`(getutcdate())`
	cardoc_ModifiedUser *User that last modified the record.*	`[nvarchar](50)`	50	False		
	cardoc_TS *The timestamp field of the record.*	`timestamp`		False		
	cardoc_isCompressed *Is the file compressed. File will not be compressed if the extention is ".tif", ".gif", ".jpg", ".mp3", ".mpg", ".zip", ".gzip", ".pdf"*	`Bit`		False		`((0))`
🔑FK	**cardoc_SubTypeID** *Subcategory document type id for the file linked to the caregiver. It is linked to T_DocumentSubTypes.*	`int`		True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
🔑PK C	PK_T_CaregiverDocuments	`cardoc_ID`	True	
	IX_T_CaregiverDocuments	`cardoc_CaregiverID`		

Foreign Keys

Name	Columns
FK_T_CaregiverDocuments_T_Caregiver	`cardoc_CaregiverID-> [dbo].[T_Caregiver] ([car_ID])`
FK_T_CaregiverDocuments_T_CaregiverDocumentShareLevels	`cardoc_Sharelevel-> [dbo].[T_CaregiverDocumentShareLevels] ([cardocslvl_ID])`
FK_T_CaregiverDocuments_T_DocumentSubTypes	`cardoc_SubTypeID-> [dbo].[T_DocumentSubTypes] ([docstyp_ID])`
FK_T_CaregiverDocuments_T_DocumentTypes	`cardoc_TypeID-> [dbo].[T_DocumentTypes] ([doctyp_ID])`

Caregiver Group

📖 [dbo].[T_CaregiverGroup]

Description

Records for Caregiver Group.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	carg_ID *Caregiver group Id*	int		False	(10001,1)	
	carg_Name *Caregiver group name*	[nvarchar](50)	50	True		
	carg_Active *Indicates if Caregiver is Active (0 - False, 1 - True)*	bit		False		
	carg_CreatedUser *Created By User*	[nvarchar](50)	50	False		
	carg_CreatedDate *Created Date*	datetime		False		(getutcdate())
	carg_ModifiedUser *Modified By User*	[nvarchar](50)	50	False		
	carg_ModifiedDate *Modified Date*	datetime		False		(getutcdate())
	carg_TS *Timestamp*	timestamp		False		
	carg_ListItemType *The list type of the record for the DropDown List control. 0 = Global, 1 = Office, 2 = Override*	tinyint		False		
FK	carg_RptGroupID *rptgrp_ID of the Report Group that the Type is associated with to help group records in a general category.*	int		False		
FK	carg_BranchID *br_ID of the related to specific Branch. Null if the ListItemType is 0 (System).*	int		True		

	carg_OverrideID	int		True		
	ID for the parent record that will be overriden. Override List Item Types are used when an Office wishes to have different settings on an existing Global List Item. The Override List Item will have the same Name as the Global List Item, but will be configured with different settings.					
	carg_Description	[nvarchar](1000)	1000	True		
	Description					
	carg_IsContractor	bit		False		
	Indicates whether the Caregiver is a Contractor (0 - False, 1 - True)					
	carg_AutoCalcTravel	bit		False		
	Indicates whether a Caregiver is eligible for Auto Calculated Travel Time (0 - False, 1 - True).					

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_CaregiverGroup	carg_ID	True	80
	IX_T_CaregiverGroup_BranchOverrideName	carg_BranchID, carg_OverrideID, carg_Name	True	80

Foreign Keys

Name	Columns
FK_T_CaregiverGroup_T_Branches	carg_BranchID-> [dbo].[T_Branches] ([br_ID])
FK_T_CaregiverGroup_T_CaregiverGroup	carg_OverrideID-> [dbo].[T_CaregiverGroup] ([carg_ID])
FK_T_CaregiverGroup_T_ReportGroups	carg_RptGroupID-> [dbo].[T_ReportGroups] ([rptgrp_ID])

Caregiver Hiring

[dbo].[T_CaregiverHiring]

Description

Caregiver employment information.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	carhr_ID *System generated unique ID for the Caregiver Hiring record.*	bigint	8	False	1 - 1	
FK	carhr_carID *The Caregiver ID for the Caregiver Hiring record.* *Related to [T_Caregiver].[car_ID].*	bigint	8	False		
	carhr_AppliedDate *Date the Caregiver applied with the agency. Non UTC date.* *UI Location: Caregivers > Caregiver Details > HR tab > Applied Date*	datetime	8	True		
	carhr_InterviewDate *Date the Caregiver interviewed with the agency. Non UTC date.* *UI Location: Caregivers > Caregiver Details > HR tab > Interview Date*	datetime	8	True		
	carhr_HireDate *Date the agency hired the Caregiver. When Hire Dates exist on the Hire History records, the First Service Date and Last Service Date values that display in the Caregiver List are those from the most recent Hire History record for the Caregiver. Non UTC date.* *UI Location: Caregivers > Caregiver Details > HR tab > Hire Date*	datetime	8	True		
	carhr_StartDate *Date the Caregiver began working for the agency. Non UTC date.* *UI Location: Caregivers > Caregiver Details > HR tab > Start Date*	datetime	8	True		
	carhr_OrientationDate *Date the Caregiver successfully completed orientation. Non UTC date.* *UI Location: Caregivers > Caregiver Details > HR tab > Orientation Date*	datetime	8	True		

	carhr_Position *Position the Caregiver holds/held.* *UI Location: Caregivers > Caregiver Details > HR tab* *> Position*	nvarchar(50)	100	True		
	carhr_SeparationDate *Date the Caregiver left the agency. Non UTC date.* *UI Location: Caregivers > Caregiver Details > HR tab* *> Separation Date*	datetime	8	True		
	carhr_SeparationReason *The reason the Caregiver left the agency. For more* *information, see DDM Caregiver Separation Reasons.* *UI Location: Caregivers > Caregiver Details > HR tab* *> Separation Notes*	nvarchar(255)	510	True		
	carhr_CreatedDate *The date the Caregiver Hiring record was created.* *UTC date updated by SQL Server current UTC date.* *UI Location: Caregivers > Caregiver Details > HR tab* *> Created On*	datetime	8	False		(getutcdate())
	carhr_CreatedUser *The user logged in to the system when the Caregiver* *Hiring record was created.* *UI Location: Caregivers > Caregiver Details > HR tab* *> Created By*	nvarchar(50)	100	False		
	carhr_ModifiedDate *The date when Caregiver Hiring record was last* *modified. UTC date updated by SQL Server current* *UTC date* *UI Location: Caregivers > Caregiver Details > HR tab* *> Modified On*	datetime	8	False		(getutcdate())
	carhr_ModifiedUser *The user logged in to the system when the Caregiver* *Hiring record was last modified.* *UI Location: Caregivers > Caregiver Details > HR tab* *> Modified By*	nvarchar(50)	100	False		
	carhr_TS *The time stamp of the Caregiver Hiring record.*	timestamp	8	False		
FK	carhr_InterviewStaffID *The ID of the caregiver who ran the interview; it pulls* *the caregiver name to display in the UI. Selected* *though a drop down search box.* *Related to [T_Caregiver].[car_ID].* *UI Location: Caregivers > Caregiver Details > HR tab* *> Interviewed By*	bigint	8	True		
FK	carhr_InterviewScheduled_ActivityID *The Activity ID for the Caregiver Hiring record.* *Related to [T_Activities].[act_ID].*	bigint	8	True		
	carhr_ReferralDate *Date the Caregiver inquired about the agency. Non* *UTC date.* *UI Location: Caregivers > Caregiver Details > HR tab* *> Inquiry Date*	datetime	8	True		

	carhr_ReferralTakenBy *Replaced by carhr_ReferralTakenByID. Not used.*	nvarchar(50)	100	True		
FK🔑	carhr_ReferralEntityTypeID *The ID of the entity type that referred the Caregiver to the agency; it pulls the entity type name to show in the UI. Selected through a drop down menu.* *Related to [T_ReferralEntities].[refent_ID].* *UI Location: Caregivers > Caregiver Details > HR tab > Referral Entity Types*	tinyint	1	True		
	carhr_ReferralEntityID *The ID of the referral entity; it pulls the referral entity name to show in the UI. When the Referral Entity Type is selected, the appropriate Entity name drop down search box will appear in Entity Name so the user can select the appropriate name of the referring entity.* *UI Location: Caregivers > Caregiver Details > HR tab > Entity Name*	bigint	8	True		
FK🔑	carhr_ReferralContactJoinID *The ID of the caregivers referral contact; it pulls the referral contact name to show in the UI. If Referral Source is selected as the Referral Entity Type, this field is active and allows the user to select a Referral Contact associated with the Referral Entity.* *Related to [T_ReferralJoin].[refjoin_ID].* *UI Location: Caregivers > Caregiver Details > HR tab > Contact Name*	bigint	8	True		
FK🔑	carhr_ReferralCampaignID *The ID of the marketing campaign which referred the Caregiver to the agency; it pulls the campaign name to show in the UI. Selected through the drop down list. For further information, see DDM Referral Campaigns.* *Related to [T_ReferralCampaigns].[refcamp_ID].* *UI Location: Caregivers > Caregiver Details > HR tab > Campaign*	int	4	True		
FK🔑	carhr_StaffID *The ID of the marketing staff member if the referral was the result of that Staffs marketing efforts; it pulls the marketing staff member name to show in the UI. Selected through drop down search box.* *Related to [T_Caregiver].[car_ID].* *UI Location: Caregivers > Caregiver Details > HR tab > Marketing Staff*	bigint	8	True		
	carhr_ReferralNotes *Stores any notes as needed.* *UI Location: Caregivers > Caregiver Details > HR tab > Notes*	nvarchar(max)	max	True		
FK🔑	carhr_ReferralTypeID *The ID of the referral type; it pulls the referral type name to show in the UI. It is populated from the record of the Entity Name when chosen.* *Related to [T_ReferralTypes].[reftyp_ID].*	int	4	True		

	UI Location: Caregivers > Caregiver Details > HR tab > Type					
FK	carhr_CaregiverSeparationReasonID *The reason the Caregiver left the agency. For more information, see DDM Caregiver Separation Reasons.* *Related to [T_CaregiverSeparation-Reasons].[carsepr_ID].* *UI Location: Caregivers > Caregiver Details > HR tab > Separation Reason*	int	4	True		
FK	carhr_ReferralTakenByID *The ID of the staff member who took the inquirys information. The link between Staff member and user is set on User Security. The ID is used to pull the name of the staff member to show in the UI. Selected through the drop down search box.* *Related to [T_Caregiver].[car_ID].* *UI Location: Caregivers > Caregiver Details > HR tab > Taken By*	bigint	8	True		
	carhr_FirstServiceDate *Date the Caregiver completed his/her first service for the agency. A stored field. The Service Date values are updated by a nightly SQL Job that updates the caregivers Completed Service Hours. Non UTC date.* *UI Location: Caregivers > Caregiver Details > HR tab > First Service Date*	datetime	8	True		
	carhr_LastServiceDate *A system stored field, reflecting the last service date falling between the Hire Date and Separation Date, or between the Hire Date and the current date where no Separation Date exists. The Service Date values are updated by a nightly SQL Job that updates the caregivers Completed Service Hours. You can configure the schedule statuses that are included in the SQL Job, using the Is Active Caregiver setting. It is recommended to set C (Completed) and T (Telephony Completed) status schedules for Is Active Caregiver. Non UTC date.* *UI Location: Caregivers > Caregiver Details > HR tab > Last Service Date*	datetime	8	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_CaregiverHiring	carhr_ID	True	80
	IX_T_CaregiverHiring_carID_HireDate	carhr_carID, carhr_HireDate		80

Foreign Keys

Name	Columns
FK_T_CaregiverHiring_T_Activities	carhr_InterviewScheduled_ActivityID->[dbo].[T_Activities].[act_ID]
FK_T_CaregiverHiring_T_Caregiver	carhr_carID->[dbo].[T_Caregiver].[car_ID]
FK_T_CaregiverHiring_T_Caregiver_Interview-StaffID	carhr_InterviewStaffID->[dbo].[T_Caregiver].[car_ID]
FK_T_CaregiverHiring_T_Caregiver_Referral-TakenBy	carhr_ReferralTakenByID->[dbo].[T_Caregiver].[car_ID]
FK_T_CaregiverHiring_T_Caregiver-SeparationReasons	carhr_CaregiverSeparationReasonID->[dbo].[T_CaregiverSeparation-Reasons].[carsepr_ID]
FK_T_CaregiverHiring_T_CaregiverStaff	carhr_StaffID->[dbo].[T_Caregiver].[car_ID]
FK_T_CaregiverHiring_T_ReferralCampaigns	carhr_ReferralCampaignID->[dbo].[T_ReferralCampaigns].[refcamp_ID]
FK_T_CaregiverHiring_T_ReferralEntities	carhr_ReferralEntityTypeID->[dbo].[T_ReferralEntities].[refent_ID]
FK_T_CaregiverHiring_T_ReferralJoin	carhr_ReferralContactJoinID->[dbo].[T_ReferralJoin].[refjoin_ID]
FK_T_CaregiverHiring_T_ReferralTypes	carhr_ReferralTypeID->[dbo].[T_ReferralTypes].[reftyp_ID]

Caregiver Phones

[dbo].[T_CaregiverPhones]

Description

Records for Caregiver Phones.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	cph_ID *System generated ID for the record.*	bigint	8	False	1 - 1	
FK	cph_CaregiverID *The caregiver ID for the record.* *Relates to [T_Caregiver].[car_ID].*	bigint	8	False		
	cph_Phone *Phone number for the current caregiver phone record.* *UI Location: Caregivers > Main tab > Phone No column*	nvarchar(30)	60	False		
FK	cph_PhoneType *The ID of the phone type. Ex: 1: Fax, 2: Home, 3: Work, 4: Mobile. Those are default phone types present in all databases.* *Any phone type over 10000 is a custom phone type specific to the database.* *Relates to [T_PhoneType].[pht_ID].* *UI Location: Caregivers > Main tab > Type column*	int	4	False		
	cph_Note *Notes for the current phone record.* *UI Location: Caregivers > Main tab > Note column*	nvarchar(256)	512	True		
	cph_Sequence *The order records were entered. Used to order queries. The number marked as primary always has the sequence number 1.*	smallint	2	False		((1))
	cph_MsgType *Bitwise flag to indicate how line can be used. Values: 1: Tel, 2: Txt and 3: Tel and Txt* *UI Location: Caregivers > Main tab > Tel and Txt columns checkboxes*	int	4	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK	PK_T_CaregiverPhones	cph_ID	True	80
	IX_T_CaregiverPhones_Unique	cph_CaregiverID, cph_Sequence	True	80

Foreign Keys

Name	Delete	Columns
FK_T_CaregiverPhones_T_Caregiver	Cascade	cph_CaregiverID->[dbo].[T_Caregiver].[car_ID]
FK_T_CaregiverPhones_T_PhoneType		cph_PhoneType->[dbo].[T_PhoneType].[pht_ID]

Caregiver Referral Type

[dbo].[T_CaregiverReferralType]

Description

Records for Caregiver Referral Type.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	carreft_ID *System generated unique identifier for the record.*	int		False	(10001,1)	
	carreft_Name *Name of the field type for the record.*	[nvarchar](50)	50	True		
	carreft_Active *Active status for the record to show or not show in the dropdown field.*			False		0
	carreft_CreatedDate *Date and time the record was created.*			False		
	carreft_CreatedUser *User that created the record*	[nvarchar](50)	50	False		
	carreft_ModifiedDate *Date and time the record was modified.*			False		
	carreft_ModifiedUser *User that last modified the record.*	[nvarchar](50)	50	False		
	carreft_TS *The timestamp field of the record.*			False		
	carreft_ListItemType *The list type of the record for the DropDown List control. 0 = Global, 1 = Office, 2 = Override*			False		0
FK	carreft_RptGroupID *rptgrp_ID of the Report Group that the Type is*	int		False		54

	carreft_BranchID *br_ID of the related to specific Branch. Null if the ListItemType is 0 (System).*	int		True		
	carreft_OverrideID *carreft_OverrideID - ID for the parent record that will be overriden. Override List Item Types are used when an Office wishes to have different settings on an existing Global List Item. The Override List Item will have the same Name as the Global List Item, but will be configured with different settings.*	int		True		
	carreft_Description *Description text for the record.*	[nvarchar](1000)	1000	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_CaregiverReferralType	carreft_ID	True	80
	IX_T_CaregiverReferralType_BranchOverrideName	carreft_BranchID, carreft_OverrideID, carreft_Name	True	80

Foreign Keys

Name	Columns
FK_T_CaregiverReferralType_T_Branches	carreft_BranchID-> [dbo].[T_Branches] ([br_ID])
FK_T_CaregiverReferralType_T_CaregiverReferralType	carreft_OverrideID-> [dbo].[T_CaregiverReferralType] ([carreft_ID])
FK_T_CaregiverReferralType_T_ReportGroups	carreft_RptGroupID-> [dbo].[T_ReportGroups] ([rptgrp_ID])

Caregiver Skill

📼 [dbo].[T_CaregiverSkill]

Description

Records for Caregiver Skill.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	carsk_ID *System generated unique identifier for the record.*	bigint		False	(1,1)	
FK	carsk_CaregiverID *Caregiver Record ID linked to the T_Caregiver table.*	bigint		False		
FK	carsk_SkillGroupID *skillg_ID from T_SkillGroup table. It is found on the skill codes tab on the caregiver screen.*	int		False		
	carsk_CreatedDate *Date and time the record was created*	datetime		False		(getutcdate())
	carsk_CreatedUser *User that created the record.*	[nvarchar](50)	50	False		
	carsk_ModifiedDate *Date and time the record was last modified.*	datetime		False		(getutcdate())
	carsk_ModifiedUser *User that last modified the record*	[nvarchar](50)	50	False		
	carsk_TS *The timestamp field of the record.*	timestamp		False		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_CaregiverSkill	`carsk_ID`	True	80
	IX_T_CaregiverSkill_CaregiverID	`carsk_CaregiverID`	False	80
	IX_T_CaregiverSkill_SkillID	`carsk_SkillGroupID`	False	80
	IX_T_CaregiverSkill_Unique	`carsk_CaregiverID,` `carsk_SkillGroupID`	True	80

Foreign Keys

Name	Columns
FK_T_CaregiverSkill_T_Caregiver	`carsk_CaregiverID-> [dbo].[T_Caregiver] ([car_ID])`
FK_T_CaregiverSkill_T_SkillLevel	`carsk_SkillGroupID-> [dbo].[T_SkillGroup] ([skillg_ID])`

Caregiver Values

[dbo].[T_CaregiverValues]

Description

Records for Caregiver Values.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
FK🔑	carv_RecordID *caregiver ID for the record.*	bigint		False		
FK🔑	carv_FieldID *ID related to the T_CaregiverFields.carf_ID table.*	int		False		
	carv_Value *Value for the custom tab field. Stored as a string.*	[nvarchar](max)		True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK🔑	PK_T_CaregiverValues	carv_RecordID, carv_FieldID	True	80
	IX_T_CaregiverValues_FieldID	carv_FieldID	False	80

Foreign Keys

Name	Columns
FK_T_CaregiverValues_T_Caregiver	carv_RecordID-> [dbo].[T_Caregiver] ([car_ID])
FK_T_CaregiverValues_T_CaregiverFields	carv_FieldID-> [dbo].[T_CaregiverFields] ([carf_ID])

Client

[dbo].[T_Client]

Description

Main client record.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	cli_ID *Unique system generated ID for the Client record.* *UI Location:* *- Clients (Form View) > Main > Select > Search Results > ID* *- Clients (Form View) > ID* *- Clients > Client List > ID*	bigint	8	False	1 - 1	
FK	cli_TypeID *The ID of the type of client. Used to pull client type name from related table. Types are set up on Drop Down Maintenance tab.* *Examples are: Values are: Direct Care, Facility Contract, Hospital Staff Relief, Sub Contract, Non-Patient, Elim Park Facility, Bed Rest-PEN, Patient-PEN, ALF Placement, Intermittent Care, Extended Care, Non-Peds, Peds, etc.* *Relates to [T_ClientType].[clt_ID]*	int	4	True		
	cli_LastName *Last name of client.* *UI Location:* *- Clients (Form View) > Main > Select > Search Results > Last Name* *- Clients (Form View) > Last* *- Clients > Client List > Last Name*	nvarchar(50)	100	False		
	cli_FirstName *First name of client.* *UI Location:* *- Clients (Form View) > Main > Select > Search Results > First Name* *- Clients (Form View) > First* *- Clients > Client List > Fist Name*	nvarchar(50)	100	False		
(3)	cli_BranchId *The ID of the office to which the client belongs. The default value will be the user's primary office. The office*	int	4	False		

FK 🔑 📇	selected defaults as the Belong To Office on Client Offices tab. Once saved, the Client Office assignment can be changed on Client Offices. Used to pull office name from related table. *Relates to [T_Branches].[br_ID]* *UI Location:* *- Clients (Form View) > Main > Select > Search Results > Office* *- Clients (Form View) > Main > Office* *- Clients > Client List > Office*					
	cli_MiddleName *The middle name of client.* *UI Location:* *- Clients (Form View) > Main >Middle Name* *- Clients > Client List > Office*	nvarchar(50)	100	True		
🔹 (2) FK 🔑	**cli_StatusID** *The ID of the status of the client. Used to pull client status name from related table. Statuses are set up on Drop Down Maintenance tab* *Examples are: Active, Inactive, Pending, Discharged Inquiry, Non Admit, Negotiating, etc.* *Relates to [T_ClientStatus].[cls_ID]* *UI Location:* *- Clients (Form View) > Main > Select > Search Results > Status* *- Clients (Form View) > Status* *- Clients > Client List > Status*	int	4	False		
🔹 FK 🔑	**cli_PayerID** *The ID of the client's payer. Used to pull client's payer name from related table.* *Filled in when a payer is created from the client record.* *Relates to [T_Payers].[pay_ID]*	bigint	8	True		
	cli_Address1 *Main physical address of the client such as the street and number.* *UI Location:* *- Clients (Form View) > Main > Address 1 (through AddressEditor)* *- Clients > Client List > Address 1 (through Address-Editor)*	nvarchar(255)	510	True		
	cli_Address2 *Additional physical address of the client like apartment number, etc.* *UI Location:* *- Clients (Form View) > Main > Address 2 (through AddressEditor)* *- Clients > Client List > Address 2 (through Address-Editor)*	nvarchar(60)	120	True		
	cli_City *The city of the client's physical address.*	nvarchar(50)	100	True		

	UI Location: *- Clients (Form View) > Main > City (through Address-Editor)* *- Clients > Client List > City (through AddressEditor)*					
	cli_StateOrProvince *The state or provice of of the client's physical address.* *UI Location:* *- Clients (Form View) > Main > State (through Address-Editor)* *- Clients > Client List > State (through AddressEditor)*	nvarchar(20)	40	True		
	cli_PostalCode *The postal code of of the client's physical address.* *UI Location:* *- Clients (Form View) > Main > Postal Code (through AddressEditor)* *- Clients > Client List > Postal Code (through Address-Editor)*	nvarchar(20)	40	True		
	cli_County *The county of of the client's physical address.* *UI Location:* *- Clients (Form View) > Main > County (through AddressEditor)* *- Clients > Client List > County (through AddressEditor)*	nvarchar(50)	100	True		
FK	cli_Country *The country of of the client's physical address. Pulled from related table.* *Relates to [T_Countries].[ctry_ID]* *UI Location:* *- Clients (Form View) > Main > Country (through AddressEditor)* *- Clients > Client List > Country (through AddressEditor)*	int	4	False		((240))
	cli_Phone *Not used. Legacy field moved to T_ClientPhones.*	nvarchar(30)	60	True		
	cli_PhoneTypeID *Not used. Legacy field moved to T_ClientPhones.*	int	4	True		
FK	cli_RaceID *The ID of the client's race. Used to pull race from related table. Races are set up on Drop Down Maintenance tab.* *Examples are: American Indian or Alaska Native, Asian, Black or African-American, Hispanic or Latino, Native Hawaiian or Pacific Islander, White, Unknown, Indian* *Relates to [T_Race].[rce_ID]* *UI Location:* *- Clients (Form View) > Advanced > Race*	int	4	True		
	cli_MaritalStatus *The client's marital status, pulled from T_MaritalStatus table.* *Examples are: Single, Married, Divorced, Widowed, Other, PDomestic Part* *UI Location:*	nvarchar(1)	2	True		

	- Clients (Form View) > Advanced > Marital Status					
	cli_Travel_Directions *Any travel directions to the client's house as needed.* *UI Location:* *- Clients (Form View) > Main > Travel Directions*	nvarchar(2000)	4000	True		
	cli_Email *Main client's email.* *UI Location:* *- Clients (Form View) > Main > Email 1* *- Clients > Client List > Email*	nvarchar(50)	100	True		
	cli_Email2 *Additional client's email.* *UI Location:* *- Clients (Form View) > Main > Email 2*	nvarchar(50)	100	True		
	cli_Notes *Internal notes for the client* *UI Location:* *- Clients (Form View) > Advanced > Additional Notes*	nvarchar(4000)	8000	True		
	cli_BirthDate *The client's birthday. The Client's age will calculate based on the birth year entered.* *Non-UTC date.* *UI Location:* *- Clients (Form View) > Advanced > Birth Date*	datetime	8	True		
	cli_Sex *The sex of the client.* *Examples are: Male, Female* *UI Location:* *- Clients (Form View) > Main > Sex* *- Clients > Client List > Sex*	nvarchar(1)	2	True		
	cli_Suffix *Client's suffix.* *UI Location:* *- Clients (Form View) > Suffix*	nvarchar(10)	20	True		
	cli_DisasterPlanCode *Internal disaster planning code with available Quick Notes. Drop down arrow button displays the Quickpick List - check item(s) from the list.* *Disaster planning codes are set up on Drop Down Maintenance tab > Quick Notes* *UI Location:* *- Clients (Form View) > Main > Disaster Code Plan*	nvarchar(20)	40	True		
	cli_DisasterPlanNotes *Disaster planning instructions with available Quick Notes. Drop down arrow button displays the Quickpick List - check item(s) from the list.* *Disaster planning codes are set up on Drop Down Maintenance tab > Quick Notes*	nvarchar(255)	510	True		

	UI Location: *- Clients (Form View) > Main > Disaster Planning*					
⚬	**cli_TelephonyID** *Defaults to match the System ID. Field can be modified.* *SSN should NOT be used as the telephony ID.* *Cannot have the same telephony ID in the same* *branch.UI Location:* *- Clients (Form View) > Advanced > Telephony ID* *- Clients > Client List > Tel ID*	nvarchar(36)	72	False		
	cli_AuthCheck *Not used.*	bit	1	False		((0))
FK⚬	**cli_RegionID** *The ID of the client's region. Used to pull office areas* *from related table. Office areas are set up on Drop* *Down Maintenance tab.* *Relates to [T_Region].[reg_ID]* *UI Location:* *- Clients (Form View) > Main > Office Area* *- Clients > Client List > Office Area*	int	4	True		
FK⚬	**cli_DefaultServiceCode** *Service code to schedule for this client when a visit is* *completed by the Santrax telephony interface. This* *value overrides anything set up at the Office* *level. (Note: Telephony does NOT use the Default* *Service field.). Pulled from related table. Service codes* *are set up on Drop Down Maintenance tab.* *Examples are: RN Visit, RN Hourly, RN SOC, HHA Visit,* *HHA Hourly, HHA Live-In, PT Daily Visit, etc.* *Relates to [T_ServiceCode].[svcc_ID]* *UI Location:* *- Clients (Form View) > Advanced > Default Service*	int	4	True		
	cli_MastSchedWeekCode *Not used.*	nvarchar(1)	2	True		
	cli_Mail_Date *Non-UTC date.*	datetime	8	True		
	cli_NOKName *Client's next of kin name.* *UI Location:* *- Clients (Form View) > Contacts > Name (under Next of* *Kin)*	nvarchar(50)	100	True		
	cli_NOKPhone1 *The primary phone number for the next of kin* *UI Location:* *- Clients (Form View) > Contacts > Phone 1 (under Next* *of Kin)*	nvarchar(30)	60	True		
	cli_NOKPhone2 *The alternate phone number for the next of kin.* *UI Location:* *- Clients (Form View) > Contacts > Phone 2 (under Next* *of Kin)*	nvarchar(30)	60	True		

	cli_NOKRelation *The relationship of the next of kin to the client.* *UI Location:* *- Clients (Form View) > Contacts > Relation (under Next of Kin)*	nvarchar(20)	40	True		
	cli_HEPatientLivesWith *The name of the person with whom the client lives.* *UI Location:* *- Clients (Form View) > Contacts > Client lives with (under Home Environment)*	nvarchar(50)	100	True		
	cli_HEPetsInHome *Lists any pets in the home.* *UI Location:* *- Clients (Form View) > Contacts > Pets in the home (under Home Environment)*	nvarchar(50)	100	True		
	cli_HESmokersInHome *Check the box if there are smokers in the client's home.* *UI Location:* *- Clients (Form View) > Contacts > Smokers in the home (under Home Environment)*	bit	1	False		((0))
	cli_LPAdvanceDirectives *Check the box if the client has advanced directives.* *UI Location:* *- Clients (Form View) > Contacts > Advanced Directives (under Legal Papers)*	bit	1	False		((0))
	cli_LPLocationOf *The location of the advanced directives. It is set up on Drop Down Maintenance tab > Quick Notes* *UI Location:* *- Clients (Form View) > Contacts > Location Of (under Legal Papers)*	nvarchar(400)	800	True		
	cli_LPCopyRequested *Check the box if the agency has requested a copy of the advanced directives.* *UI Location:* *- Clients (Form View) > Contacts > Copy Requested (under Legal Papers)*	bit	1	False		((0))
	cli_LPLivingWill *Check the box if the client has a living will.* *UI Location:* *- Clients (Form View) > Contacts > Living Will (under Legal Papers)*	bit	1	False		((0))
	cli_LPCopyObtained *Check the box if the agency has received a copy of the advanced directives.* *UI Location:* *- Clients (Form View) > Contacts > Copy Obtained (under Legal Papers)*	bit	1	False		((0))

cli_LPHCSurrogate *Check the box if the client has a health care surrogate.* *UI Location:* *- Clients (Form View) > Contacts > HC Surrogate (under Legal Papers)*	bit	1	False		((0))	
cli_ACIHName *Name of the second client in the home. If the client was converted from a Client Inquiry, this information will pull from the Client Inquiry Client tab.* *UI Location:* *- Clients (Form View) > Contacts > Name (under Additional Client In Home)*	nvarchar(50)	100	True			
cli_ACIHGreeting *Enter the Salutation for the second client in the home. For further information see DDM Salutations. Pulls from T_Salutations table.* *Salutations are set up on Drop Down Maintenance tab. Examples are: Mr., Mrs., Dr., Madam, Ms., Sir, Dear, Bishop, Evangelist, Pastor* *UI Location:* *- Clients (Form View) > Contacts > Salutation (under Additional Client In Home)*	nvarchar(50)	100	True			
cli_ACIHRelation *Relationship of the second client to the primary client. If the client was converted from a Client Inquiry, this information will pull from the Client Inquiry Client tab.* *UI Location:* *- Clients (Form View) > Contacts > Relation (under Additional Client In Home)*	nvarchar(20)	40	True			
cli_ACIHBirthDate *Birth Date of the second client in the home. If the client was converted from a Client Inquiry, this information will pull from the Client Inquiry Client tab.* *Non-UTC date.* *UI Location:* *- Clients (Form View) > Contacts > DOB (under Additional Client In Home)*	datetime	8	True			
cli_RequiresOrientation *Check this box to signify that each caregiver scheduled to this client must have an orientation. When checked, a scheduling message displays for any caregiver scheduled to the client where there is no Matching Orientation record created. The level of the scheduling check will be determined by the DNU Settings on either the Global, Office, or User Scheduling Settings.* *UI Location:* *- Clients (Form View) > Main > Requires Orientation*	bit	1	False		((0))	
cli_CreatedDate *Date and time the record was created.* *UTC date updated by SQL Server's current UTC date.* *UI Location:*	datetime	8	False		(getutcdate())	

	- Clients (Form View) > Main > Created On (through ModifiedRecord1) *- Clients > Client List > Created On (through Modified-Record1)*					
	cli_CreatedUser *User who created the record.* *UI Location:* *- Clients (Form View) > Main > Created By (through ModifiedRecord1)* *- Clients > Client List > Created By (through Modified-Record1)*	nvarchar(50)	100	False		
	cli_ModifiedDate *Date and time the record was last modified.* *UTC date updated by SQL Server's current UTC date.* *UI Location:* *- Clients (Form View) > Main > Modified On (through ModifiedRecord1)* *- Clients > Client List > Modified On (through Modified-Record1)*	datetime	8	False		(getutcdate())
	cli_ModifiedUser *User who last modified the record.* *UI Location:* *- Clients (Form View) > Main > Modified By (through ModifiedRecord1)* *- Clients > Client List > Modified By (through Modified-Record1)*	nvarchar(50)	100	False		
	cli_TS *The timestamp of the Client record.*	timestamp	8	False		
	cli_LegacyID *Alternate ID number or legacy ID number.* *Called ClientAltID.* *UI Location:* *- Clients (Form View) > Main > Alt. ID*	int	4	True		
	cli_LegacyBranchID *Not used.*	int	4	True		
⊹	**cli_OasisInterfaceID** *Not used.*	nvarchar(50)	100	True		
	cli_SSN *Client's social security number. Encrypted.* *UI Location:* *- Clients (Form View) > Advanced > SSN*	varbinary(255)	255	True		
⊹	**cli_CalcUniqueSSN** *Used for social security number encryption.*	varbinary(255)	255	True		
	cli_UploadTelephony *Determines whether the Client is eligible to be uploaded with the telephony vendor. The default setting is true (checked). Must be checked to upload Client to telephony and send a missed check-in notification.* *UI Location:*	bit	1	False		((1))

	- Clients (Form View) > Advanced > Upload Telephony					
	cli_AllowMassEmail *Check this box to allow letters and other items to be sent to this Client from within the system.* *Called CanEmail.* *UI Location:* *- Clients (Form View) > Main > Allow MatrixCare to Email this Client*	bit	1	False		((0))
	cli_InquiryDate *If the client was converted from a Client Inquiry record, the inquiry date will pull from that Client Inquiry record. The Client Inquiry icon next to the date is enabled, and allows you to jump back to the record if needed.* *Non-UTC date.* *UI Location:* *- Clients (Form View) > Inquiry Date*	datetime	8	True		
FK	**cli_Salut** *The client's salutation. Pulled from related table. Salutations are set up on Drop Down Maintenance tab. Examples are: Mr., Mrs., Dr., Madam, Ms., Sir, Dear, Bishop, Evangelist, Pastor* *Relates to [T_Salutation].[salut_ID]* *UI Location:* *- Clients (Form View) > Main > Salutation* *- Clients > Client List > Salutation*	int	4	True		
	cli_POLST *Check the box to indicate that the form has been used with the Client. A checked POLST box will display as Yes on the Plan of Care Information Sheet and with an X on the Service Provision Plan Report. The POLST form is currently used in the states of Washington, Oregon, and California. It contains information about an individual's end of life decisions, such as cardiopulmonary resuscitation (CPR). The most frequent use of the form is as a summary of an individual's advance directive decisions and information. According to the Department of Health, the form itself is not an advance directive.* *UI Location:* *- Clients (Form View) > Contacts > POLST (under Legal Papers)*	bit	1	False		((0))
	cli_TelephonyAllowCaregiverPhone *Check this box to use a caregivers cell phone number (configured on the Caregiver>Main tab) for telephony arrival and departure calls if the client does not have a phone, or has a rotary phone that cannot use IVR system or lives in a facility. Coordinates with the checkbox in the header above Hire History grid on the Caregiver>HR tab.* *UI Location:* *- Clients (Form View) > Advanced > Tel. Complete with Caregiver Phone*	bit	1	False		((0))

cli_DisplayOnCaregiverPortal *Free-form text area where office staff can write notes about the client to show on the caregiver's portal.* *Enter information specific to a client for the client's caregivers to see when logging into the Caregiver Portal. No duration for how long the information displays on the Caregiver Portal. Text entered here displays on the Portal. Message displays in the details of each schedule in the 'Note From Client Record' section in the Schedule Details at the bottom of the page. See Caregiver and Client Portals for full details on using the portals.* *UI Location:* *- Clients (Form View) > Advanced > Display on Caregiver Portal*	nvarchar(4000)	8000	True		
cli_HIC *Client's health insurance claim number. Encrypted.* *UI Location:* *- Clients (Form View) > Main > HIC #*	varbinary(255)	255	True		
cli_InvcPrintLine *Optional statement that prints on the Client invoice under the Client Note section and prints on the Standard Invoice and Standard Statement types. (Maximum character limit of 4000 - Note: Including a large amount of additional text on the Standard Invoice and Standard Invoice Statements can result in lengthy reports, with pages breaking between inserted sections (such as Outstanding Invoices) and the Notes sections).* *UI Location:* *- Clients (Form View) > Advanced > Prints on Client Invoice*	nvarchar(4000)	8000	True		
cli_BillingOTCalcType *Use the Billing Overtime option when the client has a payer, or multiple payers, that are billed overtime. This option benefits the single payer allocation, private pay and clients.* *Checking the Billing Settings Auto Bill OT checkbox at the Client level allows all payers to pay overtime automatically.* *If the client has payers that will not pay over time, then the agency must either turn the client Auto Bill OT setting off, or manually remove the Overtime Bill Units from the schedules of the payer that will not pay for overtime.* *UI Location:* *- Clients (Form View) > Advanced > Auto Bill OT*	tinyint	1	False		((2))
cli_Nickname *The nickname of the client.*	nvarchar(32)	64	True		
cli_CensusExclude *Describes whether this record is to be excluded from census type areas. Currently only describes inclusion in CareCommunity functionality (EMPI, Schedules).*	Bit	1	False		((0))

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_Client	cli_ID	True	80
	IX_T_Client_BranchID_TelephonyID	cli_BranchId, cli_TelephonyID	True	80
	IX_T_Client_UniqueSSN	cli_CalcUniqueSSN, cli_BranchId	True	80
	IX_T_Client_BranchID	cli_BranchId, cli_StatusID, cli_ID		80
	IX_T_Client_FirstName	cli_FirstName		80
	IX_T_Client_LastName	cli_LastName		80
	IX_T_Client_OasisInterfaceID	cli_OasisInterfaceID		80
	IX_T_Client_PayerID	cli_PayerID		80
	IX_T_Client_Status	cli_StatusID		80

Foreign Keys

Name	Columns
FK_T_Client_T_Branches	cli_BranchId->[dbo].[T_Branches].[br_ID]
FK_T_Client_T_ClientStatus	cli_StatusID->[dbo].[T_ClientStatus].[cls_ID]
FK_T_Client_T_ClientType	cli_TypeID->[dbo].[T_ClientType].[clt_ID]
FK_T_Client_T_Countries	cli_Country->[dbo].[T_Countries].[ctry_ID]
FK_T_Client_T_Payers	cli_PayerID->[dbo].[T_Payers].[pay_ID]
FK_T_Client_T_Race	cli_RaceID->[dbo].[T_Race].[rce_ID]
FK_T_Client_T_Region	cli_RegionID->[dbo].[T_Region].[reg_ID]
FK_T_Client_T_Salutation	cli_Salut->[dbo].[T_Salutation].[salut_ID]
FK_T_Client_T_ServiceCode	cli_DefaultServiceCode->[dbo].[T_ServiceCode].[svcc_ID]

Client Attributes

🗏 [dbo].[T_ClientAttributes]

Description

Table client attributes contains restrictions and attributes used for matching client with caregiver during scheduling process.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK 🔑 C	cliattr_ID *System generated ID for the Client Attributes record.* *UL Location: Staff > Matching > ID as ID (Hidden)*	bigint	8	False	1 - 1	
FK 🔑	cliattr_Cli_ID *Client ID in the Client Attributes record.*	bigint	8	False		
FK 🔑	cliattr_Atr_ID *Attribute ID in the Client Attributes record.* *Attributes are used to match client and caregiver during scheduling process based on professional skills, language and other factors.* *UL Location: Staff > Matching > Attribute as Atr_ID*	int	4	False		
🗏	cliattr_Score *Attribute score of the Client Attributes record. Ranges from 0 to 100.* *It denotes the weighted importance of the attribute when searching for matching Caregiver records for the Client.*	tinyint	1	True		
	cliattr_CreatedDate *Date Client Attributes record was created. SQL Server's current UTC date.* *UL Location: Staff > Matching > Created On by as CreatedDate*	datetime	8	False		(getutcdate())
	cliattr_CreatedUser *The user who created the Client Attributes record.* *UL Location: Staff > Matching > Created by as CreatedUser*	nvarchar(50)	100	False		
	cliattr_ModifiedDate *Date Client Attributes record's most recent modification. SQL Server's current UTC date.* *UL Location: Staff > Matching > Modified On as ModifiedDate*	datetime	8	False		(getutcdate())
	cliattr_ModifiedUser *User who made Client Attributes record's most recent modification.*	nvarchar(50)	100	False		

	UL Location: Staff > Matching > Modified by as ModifiedUser					
	cliattr_TS *Client Attributes record's timestamp field.* *UL Location: Staff > Matching > TS as TS (Hidden)*	timestamp	8	False		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK	PK_T_ClientAttributes	cliattr_ID	True	80
	IX_T_ClientAttributes_Atr_ID	cliattr_Atr_ID		80
	IX_T_ClientAttributes_Cli_ID	cliattr_Cli_ID		80

Foreign Keys

Name	Columns
FK_T_ClientAttributes_T_Attribute	cliattr_Atr_ID->[dbo].[T_Attribute].[atr_ID]
FK_T_ClientAttributes_T_Client	cliattr_Cli_ID->[dbo].[T_Client].[cli_ID]

Client Branches

[dbo].[T_ClientBranches]

Description

This table holds the branches where clients have relationships.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK	clibr_ID *System generated ID for the Client Branch record.*	bigint	8	False	1 - 1	
(2) FK	clibr_ClientID *Client ID in the Client Branch record.*	bigint	8	False		
(2) FK	clibr_Branch_ID *Branch ID in the Client Branch record.* *The first record is the main office for the client is associated. More offices can be added.*	int	4	False		
	clibr_CreatedUser *The user who created the Client Branch record.* *UI Location: Clients > Client icon > Created By column as CreatedUser*	nvarchar(50)	100	False		
	clibr_CreatedDate *Date Client Branch record was created. SQL Server's current UTC date.* *UI Location: Clients > Client icon > Created On column as CreatedDate*	datetime	8	False		(getutcdate())
	clibr_ModifiedUser *User who made Client Branch record's most recent modification.* *UI Location: Clients > Client icon > Modified By column as ModifiedUser*	nvarchar(50)	100	False		
	clibr_ModifiedDate *Date Client Branch record's most recent modification. SQL Server's current UTC date.* *UI Location: Clients > Client icon > Modified On column as ModifiedDate*	datetime	8	False		(getutcdate())
	clibr_TS *Client Branch record's timestamp field.*	timestamp	8	False		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_ClientBranch	clibr_ID	True	80
	IX_T_ClientBranch_Unique	clibr_Branch_ID, clibr_ClientID	True	80
	IX_T_ClientBranch_BranchID	clibr_Branch_ID		80
	IX_T_ClientBranch_ClientID	clibr_ClientID		80

Foreign Keys

Name	Delete	Columns
FK_T_ClientBranch_T_Branches		clibr_Branch_ID->[dbo].[T_Branches].[br_ID]
FK_T_ClientBranch_T_Client	Cascade	clibr_ClientID->[dbo].[T_Client].[cli_ID]

Client Date Status

[dbo].[T_ClientDateStatus]

Note: Detailed documentation is pending.

Client Date Types

[dbo].[T_ClientDateTypes]

Note: Detailed documentation is pending.

Client Dates

[dbo].[T_ClientDates]

Description

Data regarding tracking of important client's documents, whether they have been received, and when they expire.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	clidt_ID *System generated ID for the Client Dates record.* *Also called DocumentID.*	bigint	8	False	1 - 1	
FK	clidt_ClientID *The client ID of the Client Dates record.* *Flows from [T_Client].[cli_ID].*	bigint	8	False		
	clidt_DueDate *The date the document is due from the client.* *Also called DocumentDueDate.* *Non-UTC date. UI Location: Clients > Documents > Due Date*	datetime	8	True		
	clidt_RecievedDate *The date the document was received from the client.* *Non-UTC date.* *UI Location: Clients > Documents > Received Date*	datetime	8	True		
	clidt_Date *The date the client's document expires.* *Also called DocumentExpirationDate.* *Non-UTC date.* *UI Location: Clients > Documents > Expiration Date*	datetime	8	True		
	clidt_SentDate *The date the document was sent to the client.* *Non-UTC date.* *UI Location: Clients > Documents > Sent Date*	datetime	8	True		
FK	clidt_TypeID *The type of the client's document.* *Flows from [T_ClientDateTypes].[clidttyp_ID]. It is setup on Drop Down Maintenance > Client Date Types* *Some examples of document type are: Assignment of Benefits, Power of Attorney, Service Agreement, etc.* *UI Location: Clients > Documents > Document*	int	4	False		

FK clidt_StatusID *The status of the client's document.* *Flows from [T_ClientDateStatus].[clidstat_ID]. It is setup on Drop Down Maintenance > Client Document Date Status. Some examples of status are: N/A, Not available, Not sent, Not received, Not signed, etc.* *UI Location: Clients > Documents > Status*	int	4	True		
clidt_Notes *Any applicable notes pertaining the document.* *Also called DocumentNotes.* *UI Location: Clients > Documents > Notes*	nvarchar(4000)	8000	True		
clidt_CreatedDate *Date the Client Date record was created.* *UTC date updated by SQL Server's current UTC date.*	datetime	8	False		(getutcdate())
clidt_CreatedUser *The user who created the Client Dates record.*	nvarchar(50)	100	False		
clidt_ModifiedDate *Date Client Date record's most recent modification.* *UTC date updated by SQL Server's current UTC date.*	datetime	8	False		(getutcdate())
clidt_ModifiedUser *User who made Client Dates record's most recent modification.*	nvarchar(50)	100	False		
clidt_TS *Client Dates record's timestamp field.*	timestamp	8	False		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	*PK_T_ClientDates*	*clidt_ID*	*True*	*80*
	IX_T_ClientDates_ClientID	*clidt_ClientID*		*80*
	IX_T_ClientDates_TypeID	clidt_TypeID		80

Foreign Keys

Name	Columns
FK_T_ClientDates_T_Client	clidt_ClientID->[dbo].[T_Client].[cli_ID]
FK_T_ClientDates_T_ClientDateStatus	clidt_StatusID->[dbo].[T_ClientDateStatus].[clidstat_ID]
FK_T_ClientDates_T_ClientDateTypes	clidt_TypeID->[dbo].[T_ClientDateTypes].[clidttyp_ID]

Client Documents

📇 [dbo].[T_ClientDocuments]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	clidoc_ID	bigint	8	False	1 - 1	
FK	clidoc_ClientID	bigint	8	False		
FK	clidoc_TypeID	int	4	False		
	clidoc_Data	image	max	False		
	clidoc_Format	nvarchar(50)	100	False		
	clidoc_FileName	nvarchar(256)	512	False		
	clidoc_FileSize	bigint	8	True		
	clidoc_Thumbnail	image	max	True		
	clidoc_Notes	nvarchar(4000)	8000	True		
FK	clidoc_Sharelevel	int	4	False		
	clidoc_CreatedDate	datetime	8	False		(getutcdate())
	clidoc_CreatedUser	nvarchar(50)	100	False		
	clidoc_ModifiedDate	datetime	8	False		(getutcdate())
	clidoc_ModifiedUser	nvarchar(50)	100	False		
	clidoc_TS	timestamp	8	False		
	clidoc_isCompressed	bit	1	False		((0))
FK	clidoc_SubTypeID	int	4	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_ClientDocuments	clidoc_ID	True	80
	IX_T_ClientDocuments	clidoc_ClientID		80

Foreign Keys

Name	Columns
FK_T_ClientDocuments_T_ClientDocumentShare-Levels	clidoc_Sharelevel->[dbo].[T_ClientDocumentShareLevels].[clidocslvl_-ID]
FK_T_ClientDocuments_T_Clientes	clidoc_ClientID->[dbo].[T_Client].[cli_ID]
FK_T_ClientDocuments_T_DocumentSubTypes	clidoc_SubTypeID->[dbo].[T_DocumentSubTypes].[docstyp_ID]
FK_T_ClientDocuments_T_DocumentTypes	clidoc_TypeID->[dbo].[T_DocumentTypes].[doctyp_ID]

Client Inpatient Tracking

[dbo].[T_ClientInpatientTracking]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity
PK C	cinptr_ID	int	4	False	1 - 1
FK	cinptr_ClientID *Identity of the Client admitted to the Facility*	bigint	8	False	
	cinptr_AdmissionDate *Date the Client was Admitted to the Facility*	datetime	8	False	
	cinptr_AdmissionReason *Reason for Admission of the Client to the Facility*	int	4	False	
	cinptr_DischargeDate *Date the Client was Released from the Facility*	datetime	8	True	
	cinptr_DischargeDisposition *Reason the Client was Released from the Facility.* *Values are as follows:* *id: 4: "Discharged to ALF"* *id: 2: "Discharged to Home with Homecare"* *id: 0: "Discharged to Home with Hospice"* *id: 1: "Discharged to Home with Skilled Care"* *id: 5: "Discharged to LTAC"* *id: 3: "Discharged to SNF"* *id: 9999: "Other"*	int	4	True	
	cinptr_DischargeDisposition *Reason the Client was Released from the Facility*	int	4	True	
FK	cinptr_ReferralFacilityID *Identity of the Facility that the Client was admitted to*	bigint	8	False	
	cinptr_CreatedDate	datetime	8	False	
	cinptr_CreatedUser	nvarchar(50)	100	False	
	cinptr_ModifiedDate	datetime	8	False	
	cinptr_ModifiedUser	nvarchar(50)	100	False	
	cinptr_TS	timestamp	8	False	
	cinptr_AdmissionReasonComments *Comment Regarding the Admission Reason*	nvarchar(max)	max	True	
	cinptr_DischargeDispositionComments *Comment Regarding the Discharge Disposition*	nvarchar(max)	max	True	

Indexes

Key	Name	Key Columns	Unique
PK C	PK_T_ClientInpatientTracking	cinptr_ID	True
	IX_T_ClientInpatientTracking_ClientID	cinptr_ClientID	

Foreign Keys

Name	Columns
FK_T_ClientInpatientTracking_T_Client	cinptr_ClientID->[dbo].[T_Client].[cli_ID]
FK_T_ClientInpatientTracking_T_ReferralFacilities	cinptr_ReferralFacilityID->[dbo].[T_ReferralFacilities].[reffac_ID]

Client Inquiry

[dbo].[T_ClientInquiry]

Description

Records information regarding service inquiries for potential clients.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	cliinq_ID *System generated ID for the client inquiry record.* *UI Location: Client Inquiry > ID* *and Client Inquiry > Caller > Select > ID (search results)*	bigint	8	False	1 - 1	
	cliinq_BranchID *Branch ID of the client inquiry record. Used to pull branch name to UI. The office to which the inquiry belongs. The default value is the user's Working Office, as set on User Main.* *During the conversion from a client inquiry to an active client, cliinq_BranchID flows to T_Client.cli_-BranchID and T_Admissions.adm_BranchID.* *UI Location: Client Inquiry > Caller > Office* *and Client Inquiry > Caller >Select > Office (search results)*	int	4	False		
	cliinq_Date *The date of the inquiry call. Defaults to the current date.* *During the conversion from a client inquiry to an active client, cliinq_Date flows to T_Client.cli_Inquiry-Date.* *Non-UTC date.* *UI Location: Client Inquiry > Caller > Inquiry Date*	datetime	8	False		
FK	cliinq_CallerRelatonID *The ID of the caller relationship type of the client inquiry record. Used to pull client relationship type to UI.* *For further information, see DDM Client Inquiry Relations. If Self is chosen for this field, make sure to enter the email address and check the 'Allow Matrix-Care to Email This Caller' box prior to choosing Self for this info to copy forward to the Client Inquiry Client tab and eventually to the Clients Main tab (once the inquiry is converted to a Client). When Caller's 'Relation to Client' is not Self, a Contact record is*	int	4	True		

created with ContactType of 'Emergency', otherwise no Contact record is created when inquiry is converted to a Client record. When the caller's relationship is other than 'Self', during the convert process the Caller's Email Address will become a part of the Emergency Contact record. *Flows from T_ClientInquiryRelation.cliinqrel_ID.* *UI Location: Client Inquiry > Caller > Relation to Client*				
cliinq_CallerAddress1 *The main address information of the inquiring caller.* *During the conversion from a client inquiry to an active client, cliinq_CallerAddress1 flows to T_Client-Emergency.clc_Address1.* *UI Location: Client Inquiry > Caller > Address 1 (through AddressEditorCaller)*	nvarchar(50)	100	True		
cliinq_CallerAddress2 *The additional address information of the inquiring caller.* *During the conversion from a client inquiry to an active client, cliinq_CallerAddress2 flows to T_Client-Emergency.clc_Address2.* *UI Location: Client Inquiry > Caller > Address 2 (through AddressEditorCaller)*	nvarchar(60)	120	True		
cliinq_CallerCity *The city of the inquiring caller.* *During the conversion from a client inquiry to an active client, cliinq_CallerCity flows to T_Client-Emergency.clc_City.* *UI Location: Client Inquiry > Caller > City (through AddressEditorCaller)*	nvarchar(50)	100	True		
cliinq_CallerStateOrProvince *The state of the inquiring caller.* *During the conversion from a client inquiry to an active client, cliinq_CallerStateOrProvince flows to T_-ClientEmergency.clc_StateOrProvince.* *UI Location: Client Inquiry > Caller > State (through AddressEditorCaller)*	nvarchar(20)	40	True		
cliinq_CallerPostalCode *The postal code of the inquiring caller. May type in the +4 code for a 9 digit zip code. 9 digit zip codes will display on all correspondence (letters, envelopes, labels, invoices) and reports that utilize zip codes (including the Caregiver Name* *Badge). To create a 9 digit zip code, select the 5 digit zip code from the Zip list, type in the dash and the additional 4 digits and click Save.* *During the conversion from a client inquiry to an active client, cliinq_CallerPostalCode flows to T_-ClientEmergency.clc_PostalCode.* *UI Location: Client Inquiry > Caller > Postal Code (through AddressEditorCaller)*	nvarchar(20)	40	True		
cliinq_CallerCounty *The county of the inquiring caller.*	nvarchar(50)	100	True		

During the conversion from a client inquiry to an active client, cliinq_CallerCounty flows to T_Client-Emergency.clc_County. *UI Location: Client Inquiry > Caller > County* *(through AddressEditorCaller)*					
cliinq_CallerCountry *The country of the inquiring caller.* *During the conversion from a client inquiry to an active client, cliinq_CallerCountry flows to T_Client-Emergency.clc_Country.* *UI Location: Client Inquiry > Caller > Country* *(through AddressEditorCaller)*	int	4	False		((240))
cliinq_CallerPhone1 *The primary phone number of the inquiring caller.* *During the conversion from a client inquiry to an active client, cliinq_CallerPhone1 flows* *to T_ClientEmergency.clc_Phone1.* *UI Location: Client Inquiry > Caller > Phone 1 and Client Inquiry > Caller > Select > Phone (search results)*	nvarchar(30)	60	True		
cliinq_CallerPhone2 *The secondary phone number of the inquiring caller.* *During the conversion from a client inquiry to an active client, cliinq_CallerPhone2 flows* *to T_ClientEmergency.clc_Phone2.* *UI Location: Client Inquiry > Caller > Phone 2*	nvarchar(30)	60	True		
cliinq_ClientLastName *The last name of the client.* *During the conversion from a client inquiry to an active client, cliinq_ClientLastName flows to T_-Client.cli_LastName.* *UI Location: Client Inquiry > Caller > Caller Last Name* *and Client Inquiry > Caller > Select > Last Name (search results)*	nvarchar(50)	100	True		
cliinq_ClientFirstName *The first name of the client.* *During the conversion from a client inquiry to an active client, cliinq_ClientFirstName flows to T_-Client.cli_FirstName.* *UI Location: Client Inquiry > Caller > First Name* *and Client Inquiry > Caller > Select > First Name (search results)*	nvarchar(50)	100	True		
cliinq_ClientAddress1 *The main address information of the client.* *During the conversion from a client inquiry to an active client, cliinq_ClientAddress1 flows to T_-Client.cli_Address1.* *UI Location: Client Inquiry > Client > Address 1* *(through AddressEditorClient)*	nvarchar(50)	100	True		

cliinq_ClientAddress2 *The additional address information of the client.* *During the conversion from a client inquiry to an active client, cliinq_ClientAddress2 flows to T_-Client.cli_Address2.* *UI Location: Client Inquiry > Client > Address 2 (through AddressEditorClient)*	nvarchar(60)	120	True		
cliinq_ClientCity *The city of the inquired client.* *During the conversion from a client inquiry to an active client, cliinq_ClientCity flows to T_Client.cli_-City.* *UI Location: Client Inquiry > Client > City (through AddressEditorClient)*	nvarchar(50)	100	True		
cliinq_ClientStateOrProvince *The state of the inquired client.* *During the conversion from a client inquiry to an active client, cliinq_ClientStateOrProvince flows to T_Client.cli_StateOrProvince.* *UI Location: Client Inquiry > Client > State (through AddressEditorClient)*	nvarchar(20)	40	True		
cliinq_ClientPostalCode *The postal code of the inquired client.* *During the conversion from a client inquiry to an active client, cliinq_ClientPostalCode flows to T_Client.cli_PostalCode.* *UI Location: Client Inquiry > Client > Postal Code (through AddressEditorClient)*	nvarchar(20)	40	True		
cliinq_ClientCounty *The county code of the inquired client.* *During the conversion from a client inquiry to an active client, cliinq_ClientCounty flows to T_Client.cli_County.* *UI Location: Client Inquiry > Client > County (through AddressEditorClient)*	nvarchar(50)	100	True		
cliinq_ClientCountry *The country code of the inquired client.* *During the conversion from a client inquiry to an active client, cliinq_ClientCountry flows to T_Client.cli_Country.* *UI Location: Client Inquiry > Client > Country (through AddressEditorClient)*	int	4	False		((240))
cliinq_ClientBirthDate *The birth date of the inquired client.* *During the conversion from a client inquiry to an active client, cliinq_ClientBirthDate flows to T_-Client.cli_BirthDate.* *Non-UTC date.* *UI Location: Client Inquiry > Client > Birth Date (Client Information)*	datetime	8	True		

	cliinq_SecondClientName *The name of the second inquired client.* *During the conversion from a client inquiry to an active client, cliinq_SecondClientName flows to T_-Client.cli_ACIHName.* *UI Location: Client Inquiry > Client > Name (2nd Client In Home Information)*	nvarchar(50)	100	True		
	cliinq_SecondClientRelation *The caller relationship with the second inquired client.* *During the conversion from a client inquiry to an active client, cliinq_SecondClientRelation flows to T_-Client.cli_ACIHRelation.* *UI Location: Client Inquiry > Client > Relationship (2nd Client In Home Information)*	nvarchar(20)	40	True		
	cliinq_SecondClientBirthDate *The birth date of the second inquired client.* *During the conversion from a client inquiry to an active client, cliinq_SecondClientBirthDate flows to T_Client.cli_ACIHBirthDate.* *Non-UTC date.* *UI Location: Client Inquiry > Client > Birth Date (2nd Client In Home Information)*	datetime	8	True		
	cliinq_ReferralDate *The referral date of the client inquiry. The value entered is converted to the Admission Referral Date on the Client record.* *During the conversion from a client inquiry to an active client, cliinq_ReferralDate flows to T_-Admissions.adm_ReferralDate.* *Non-UTC date.* *UI Location: Client Inquiry > Referral > Referral Date (through ReferralEditor1)*	datetime	8	True		
FK	cliinq_ReferralTypeID *The referral type ID of the client inquiry. This information will auto populate from the record chosen in the Entity Selection.* *Flows from: T_ReferralTypes.reftyp_ID* *UI Location: Client Inquiry > Referral > Entity Type (through ReferralEditor1)*	int	4	True		
	cliinq_LocationIsClient *Not used.*	bit	1	False		((0))
	cliinq_ServiceCallAddress1 *The main address information of the service call contact.* *UI Location: Client Inquiry > Service Call > Address 1 (through AddressEditorServiceCall)*	nvarchar(50)	100	True		
	cliinq_ServiceCallAddress2 *The additional address information of the service call contact.* *UI Location: Client Inquiry > Service Call > Address 2 (through AddressEditorServiceCall)*	nvarchar(60)	120	True		

	cliinq_ServiceCallCity *The city of the service call contact.* *UI Location: Client Inquiry > Service Call > City* *(through AddressEditorServiceCall)*	nvarchar(50)	100	True		
	cliinq_ServiceCallStateOrProvince *The state of the service call contact.* *UI Location: Client Inquiry > Service Call > State* *(through AddressEditorServiceCall)*	nvarchar(20)	40	True		
	cliinq_ServiceCallPostalCode *The postal code of the service call contact.* *UI Location: Client Inquiry > Service Call > Postal* *Code (through AddressEditorServiceCall)*	nvarchar(20)	40	True		
	cliinq_ServiceCallCounty *The county of the service call contact.* *UI Location: Client Inquiry > Service Call > County* *(through AddressEditorServiceCall)*	nvarchar(50)	100	True		
	cliinq_ServiceCallCountry *The country of the service call contact.* *UI Location: Client Inquiry > Service Call > Country* *(through AddressEditorServiceCall)*	int	4	False		((240))
	cliinq_ServiceCallPhone1 *The primary phone number of service call contact.* *UI Location: Client Inquiry > Service Call > Phone 1*	nvarchar(30)	60	True		
	cliinq_ServiceCallPhone2 *The secondary phone number of service call contact.* *UI Location: Client Inquiry > Service Call > Phone 2*	nvarchar(30)	60	True		
	cliinq_Notes *Any notes as needed. Additional documentation for why the inquiry will not be converted - Not required but when entered pull to the Inquiry Non Conversions report. (Max. limit of 1000 characters)* *During the conversion from a client inquiry to an active client, cliinq_Notes flows to T_Client.cli_Notes and T_ClientEmergency.clc_Notes.* *UI Location: Client Inquiry > Caller > Notes*	nvarchar(4000)	8000	True		
FK	cliinq_NonAdmissionReasonID *If the Inquiry record was not converted to a Client record, select the reason for non conversion. For more information, see DDM Referral Non Admission Reasons.* *During the conversion from a client inquiry to an active client, cliinq_NonAdmissionReasonID flows to T_Admissions.adm_NonAdmissionReasonID.* *Flows from: T_ReferralNonAdmission-Reasons.refnar_ID* *UI Location: Client Inquiry > Caller > Reason*	int	4	True		
	cliinq_ActualSOCDate *Enter the date the services for the Client are to start. The value entered will be converted to the Client record's Admission Start of Care date.*	datetime	8	True		

	During the conversion from a client inquiry to an active client, cliinq_ActualSOCDate flows to T_Client-Payers.clipay_EffectiveDate, T_Admissions.adm_-VerbalSOCDate and T_Admissions.adm_Actual-SOCDate. *UI Location: Client Inquiry > Service Call > Start of Service*					
FK🔑	cliinq_PayerID *The client's payer ID of the client inquiry record. Used to pull payer name for the UI.* *Flows from: T_Payers.pay_ID* *During the conversion from a client inquiry to an active client, cliinq_PayerID flows to T_Client-Payers.clipay_PayerID.* *UI Location for the payer name: Client Inquiry > Service Call > Payer*	bigint	8	True		
FK🔑	cliinq_ConvertedClientID *System generated number to identify the new Client record. Click on the Client icon to the right of the Client ID to jump to the newly created Client record.* *Flows from: T_Client.cli_ID.* *UI Location: Client Inquiry > Service Call > Client ID*	bigint	8	True		
	cliinq_CreatedDate *The date the client inquiry record was created.* *UTC date updated by SQL Server's current UTC date.* *UI Location: Client Inquiry > Caller > Created On (through ModifiedRecord1)*	datetime	8	False		(getutcdate())
	cliinq_CreatedUser *The user logged in to the system when the client inquiry record was created.* *UI Location: Client Inquiry > Caller > Created By (through ModifiedRecord1)*	nvarchar(50)	100	False		
	cliinq_ModifiedDate *The date when the client inquiry record was last modified.* *UTC date updated by SQL Server's current UTC date.* *UI Location: Client Inquiry > Caller > Modified On (through ModifiedRecord1)*	datetime	8	False		(getutcdate())
	cliinq_ModifiedUser *The user logged in to the system when the client inquiry record was last modified.* *UI Location: Client Inquiry > Caller > Modifies By (through ModifiedRecord1)*	nvarchar(50)	100	False		
	cliinq_TS *The timestamp of the client inquiry record.*	timestamp	8	False		
🔲	cliinq_BillTo *Select Self if the Client will be billed for services; select Other if another payer source will be billed for services. If Self is selected, the Payer drop down will disable, and a Client Payer record will be created when the Convert to Client button is clicked.* *Values: 0 = Self, 1 = Other*	tinyint	1	False		((0))

	UI Location: Client Inquiry > Service Call > Bill to					
	cliinq_ConvertedClientDate *Date and time the inquiry record was converted to a Client record.* *Non-UTC date.* *UI Location: Client Inquiry > Service Call > Converted On*	datetime	8	True		
	cliinq_ConvertedClientUser *MatrixCare user who converted the Inquiry record a Client record.* *UI Location: Client Inquiry > Service Call > Converted By*	nvarchar(50)	100	True		
	cliinq_LegacyID *Not used.*	int	4	True		
	cliinq_CallerFirstName *First name of the caller.* *During the conversion from a client inquiry to an active client, cliinq_CallerFirstName flows to T_Client-Emergency.clc_FirstName.* *UI Location: Client Inquiry > First Name*	nvarchar(50)	100	True		
	cliinq_CallerLastName *Last name of the caller.* *During the conversion from a client inquiry to an active client, cliinq_CallerLastName flows to T_Client-Emergency.clc_LastName.* *UI Location: Client Inquiry > Caller Last Name*	nvarchar(50)	100	True		
FK	**cliinq_CaregiverID** *The caregiver ID of the client inquiry record.* *Flows from: T_Caregiver.car_ID*	bigint	8	True		
	cliinq_AmbulatoryFlag *Select check box to add comments. When converted to a Client, this information does not* *transfer to the Client record.* *UI Location: Client Inquiry > Service Plan > Ambulatory*	bit	1	False		((0))
	cliinq_AmbulatoryNotes *Notes box is enable when 'Ambulatory' check box is selected. When converted to a Client, this information does not transfer to the Client record.* *UI Location: Client Inquiry > Service Plan > Ambulatory*	nvarchar(max)	max	True		
	cliinq_MedicationsFlag *Select check box to add comments. When converted to a Client, this information does not transfer to the Client record.* *UI Location: Client Inquiry > Service Plan > Taking Medications*	bit	1	False		((0))
	cliinq_MedicationsNotes *Notes box is enable when 'Taking Medications' check box is selected. When converted to a Client, this information does not transfer to the Client record.*	nvarchar(max)	max	True		

	UI Location: Client Inquiry > Service Plan > Taking Medications					
	cliinq_IncontinentFlag *Select check box to add comments. When converted to a Client, this information does not transfer to the Client record.* *UI Location: Client Inquiry > Service Plan > Incontinent*	bit	1	False		((0))
	cliinq_IncontinentNotes *Notes box is enable when 'Incontinent' check box is selected. When converted to a Client, this information does not transfer to the Client record.* *UI Location: Client Inquiry > Service Plan > Incontinent*	nvarchar(max)	max	True		
	cliinq_AllowMassEmail *Checking this box allow letters and other items to be sent to this caller from* *within the system.* *UI Location: Client Inquiry > Caller > Allow MatrixCare to Email This Caller*	bit	1	False		((0))
	cliinq_CallerEmail *Email address for caller. If the email address is entered and the 'Allow MatrixCare to Email This Caller' box is checked prior to setting the above Relation to Client as Self, then the email will copy forward to the Client Inquiry Client tab and eventually to the Clients Main tab (once the inquiry is converted to a client). Can choose to view Caller Email column within custom layouts from the Layout Toolbar Column Chooser. When the caller's relationship is other than 'Self', during the convert process the Caller's Email Address will become a part of the Emergency Contact record (T_ClientEmergency.clc_-LastName)* *UI Location: Client Inquiry > Caller > Email*	nvarchar(50)	100	True		
	cliinq_LocationIsServiceCall *Not used.*	bit	1	False		((0))
	cliinq_CallerBrochureSent *For informational purposes only. Check to indicate that marketing materials have been sent to the caller.* *UI Location: Client Inquiry > Caller > Brochure Sent*	bit	1	False		((0))
	cliinq_ClientBrochureSent *For informational purposes only. Check to indicate that marketing materials have been sent to the client.* *UI Location: Client Inquiry > Client > Brochure Sent*	bit	1	False		((0))
	cliinq_ServiceCallBrochureSent *For informational purposes only. Check to indicate that marketing materials have been sent to the service call contact.* *UI Location: Client Inquiry > Service Call > Brochure Sent*	bit	1	False		((0))

FK 🔑	**cliinq_ReferralEntityTypeID** *Entity Type for the source of the referral. Used to pull referral entity name to UI.* *Flows from: T_ReferralEntities.refent_ID* *During the conversion from a client inquiry to an active client, cliinq_ReferralEntityTypeID flows to T_Admissions.adm_ReferralEntityTypeID and can flow to T_Admissions.adm_ReferralTypeID.* *UI Location: Client Inquiry > Referral > Entity Type (Through ReferralEditor1)*	tinyint	1	True		
🔗	**cliinq_ReferralEntityID** *System generated referral entity ID for the client inquiry record.* *During the conversion from a client inquiry to an active client, cliinq_ReferralEntityID flows to T_Admissions.adm_ReferralEntityID and can flow to T_Admissions.adm_ReferralTypeID.*	bigint	8	True		
	cliinq_ReferralNotes *Any notes related to referral.* *During the conversion from a client inquiry to an active client, cliinq_ReferralNotes flows to T_Admissions.adm_ReferralNotes.* *UI Location: Client Inquiry > Referral > Notes (Through ReferralEditor1)*	nvarchar(max)	max	True		
FK 🔑	**cliinq_ReferralCampaignID** *Referral campaign ID for the referral. Used to pull referral campaign name to UI.* *If the agency sponsors Marketing Campaigns and the referral was the result of a campaign, select the option from the Campaign list. All active campaigns will be available for selection. For further information, see DDM Referral Campaigns.* *Flows from: T_ReferralCampaigns.refcamp_ID* *During the conversion from a client inquiry to an active client, cliinq_ReferralCampaignID flows to T_Admissions.adm_ReferralCampaignID.* *UI Location: Client Inquiry > Referral > Entity Type (Through ReferralEditor1)*	int	4	True		
FK 🔑	**cliinq_ReferralContactJoinID** *Referral contact join ID for the client inquiry record.* *Flows from: T_ReferralJoin.refjoin_ID* *During the conversion from a client inquiry to an active client, cliinq_ReferralContactJoinID flows to T_Admissions.adm_ReferralContactJoinID.*	bigint	8	True		
	cliinq_StaffID *If the referral was the result of a marketing staff's efforts, select that staff in the Marketing Staff field. Used to pull staff name to UI.* *During the conversion from a client inquiry to an active client, cliinq_StaffID flows to T_Admissions.adm_StaffID.* *UI Location: Client Inquiry > Referral > Marketing Staff (Through ReferralEditor1)*	bigint	8	True		

	cliinq_OasisPhysicianID *Oasis physician ID for the client inquiry record.* *During the conversion from a client inquiry to an active client, cliinq_OasisPhysicianID flows to T_-Admissions.adm_OasisPhysicianID.*	bigint	8	True		
	cliinq_ReferralTakenBy *The Taken By field defaults to the mapped user of the user logged into the system. For more information, see User* *Security. The icon to open the Staff record will display on the field for either the Taken By user or the Admin user.* *UI Location: Client Inquiry > Referral > Taken by (Through ReferralEditor1)*	nvarchar(50)	100	True		
FK🔑	cliinq_ServiceCall_ActivityID *Used to get Service Call from Date of Activity if present.* *Flows from: T_Activities.act_ID*	bigint	8	True		
	cliinq_ClientAddressFrom *Select either 'Same as Caller' or 'Same as Service Call'. The default is 'Same as Caller'. When 'Same as Caller' is chosen, Phone1 from the Client Inquiry Caller tab will copy as the primary phone for the Client. The Note field will populate with the text Auto Added from Client Inquiry Caller tab. When 'Same as Service Call' is chosen, Phone1 from the Client Inquiry Service Call tab will copy as the primary phone for the Client. The Note field will populate with the text Auto Added from the Client Inquiry Service Call tab. In both cases, the phones will copy with the type of Home. If multiple phones are copied, Home will be the type for all of the records. After copying, modify the records and select the appropriate type if necessary.* *Values: 0: Same as Caller, 1: Same as Client, 2: Same as Service Call* *UI Location: Client Inquiry > Client > Client Address Information*	tinyint	1	True		
	cliinq_ServiceCallAddressFrom *Select either Same as Caller or Same as Service Call. The default is Same as Caller. When Same as Caller is chosen, Phone 1 and Phone2 from the Client Inquiry Caller tab will copy to Phone1 and Phone2 on the current tab. When Same as Client is chosen, Phone 1 and Phone2 from the Client Inquiry Client tab will copy to Phone1 and Phone2 on the current tab.* *Values: 0: Same as Caller, 1: Same as Client, 2: Same as Service Call* *UI Location: Client Inquiry > Service Call > Service Call Address Information*	tinyint	1	True		
FK🔑	cliinq_ClientSalutationID *Select the Salutation for the client. The Salutation is used when*	int	4	True		

	running a mail merge or printing labels or envelopes in Letters. For further *information see DDM Salutations and Letters.* *Flows from: T_Salutation.salut_ID* *UI Location: Client Inquiry > Client > Salutation*					
FK🔑	**cliinq_CallerSalutationID** *Select the Salutation for the caller. The Salutation is used when running a mail merge or printing labels or envelopes in Letters. For further information see DDM Salutations and Letters.* *Flows from: T_Salutation.salut_ID* *During the conversion from a client inquiry to an active client, cliinq_CallerSalutationID flows to T_-Client.cli_Salut.* *UI Location: Client Inquiry > Caller > Salutation*	int	4	True		
	cliinq_NonAdmissionNotes *Notes as needed regarding Non Conversion.* *UI Location: Client Inquiry > Caller > Notes (under Non Conversion)*	nvarchar(1024)	2048	True		
FK🔑	**cliinq_ReferralTakenByID** *Caregiver Referral Taken By ID for the client inquiry record. used to pull the referral taken by name for the UI.* *Flows from: T_Caregiver.car_ID* *During the conversion from a client inquiry to an active client, cliinq_ReferralTakenByID flows to T_-Admissions.adm_ReferralTakenByID.* *UI Location: Client Inquiry > Referral > Taken by (Through ReferralEditor1)*	bigint	8	True		
	cliinq_ClientEmail *Email address for Client. This will pull from the Client Inquiry Caller tab if the email address is entered on the Client Inquiry Caller tab and the Allow MatrixCare to email this caller box is checked prior to setting the Relation to Client as Self.* *During the conversion from a client inquiry to an active client, cliinq_ClientEmail flows to T_Client.cli_-Email.* *UI Location: Client Inquiry > Client > Email*	nvarchar(50)	100	True		
	cliinq_ClientAllowMassEmail *Check this box to allow letters and other items to be sent to this caller from* *within Matrixcare.* *During the conversion from a client inquiry to an active client, cliinq_ClientAllowMassEmail flows to T_-Client.cli_AllowMassEmail.* *UI Location: Client Inquiry > Client > Allow MatrixCare to Email This Client*	bit	1	False		((0))
FK🔑	**cliinq_ServiceCallScheduledByID** *The ID of the Service Call scheduled By. Used to pull the name of the staff and show in the UI.The Scheduled By will default to the Mapped To staff record for the user who is logged into the*	bigint	8	True		

	system. If the user is the Scheduled By user or the user is an Admin, the icon to open the Staff record will display on the field. For more information, see User Security. *Flows from: T_Caregiver.car_ID* *UI Location: Client Inquiry > Service Call > Schedule By*					
🔑 FK	cliinq_RegionID *Office Area for the Client Inquiry record.* *Flows from: T_Region.reg_ID* *During the conversion from a client inquiry to an active client, cliinq_RegionID flows to T_Client.cli_-RegionID.* *UI Location: Client Inquiry > Office Area*	int	4	True		
🔑 FK	cliinq_ClientInquiryRatingID *Assign a rating to the Client Inquiry. This allows you to quantify the type of lead the inquiry is using a customizable rating system. For more information, see DDM Client Inquiry Rating. You can clear the field by pressing Backspace or Delete.* *Flows from: T_ClientInquiryRating.cliinqrat_ID* *UI Location: Client Inquiry > Caller > Rating*	int	4	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
🔑 PK C	PK_T_ClientInquiry	cliinq_ID	True	80
	IX_T_ClientInquiry_ClientInquiryRatingID	cliinq_ClientInquiryRatingID		
	IX_T_ClientInquiry_ReferralCampaignID	cliinq_ReferralCampaignID		80
	IX_T_ClientInquiry_ReferralEnitityTypeID_-ReferralEntityID	cliinq_ReferralEntityTypeID, cliinq_Referral-EntityID		80

Name	Delete	Columns
FK_T_ClientInquiry_T_Activities		cliinq_ServiceCall_ActivityID->[dbo].[T_Activities].[act_ID]
FK_T_ClientInquiry_T_Caregiver		cliinq_CaregiverID->[dbo].[T_Caregiver].[car_ID]
FK_T_ClientInquiry_T_Caregiver_Referral-TakenBy		cliinq_ReferralTakenByID->[dbo].[T_Caregiver].[car_ID]
FK_T_ClientInquiry_T_Caregiver_ServiceCall-ScheduledBy		cliinq_ServiceCallScheduledByID->[dbo].[T_Caregiver].[car_ID]
FK_T_ClientInquiry_T_Client	Set-Null	cliinq_ConvertedClientID->[dbo].[T_Client].[cli_ID]
FK_T_ClientInquiry_T_ClientInquiryRating		cliinq_ClientInquiryRatingID->[dbo].[T_ClientInquiry-Rating].[cliinqrat_ID]
FK_T_ClientInquiry_T_ClientInquiryRelation		cliinq_CallerRelatonID->[dbo].[T_ClientInquiryRelation].[cliinqrel_ID]
FK_T_ClientInquiry_T_Payers		cliinq_PayerID->[dbo].[T_Payers].[pay_ID]
FK_T_ClientInquiry_T_ReferralCampaigns		cliinq_ReferralCampaignID->[dbo].[T_Referral-Campaigns].[refcamp_ID]
FK_T_ClientInquiry_T_ReferralEntities		cliinq_ReferralEntityTypeID->[dbo].[T_ReferralEntities].[refent_ID]
FK_T_ClientInquiry_T_ReferralJoin		cliinq_ReferralContactJoinID->[dbo].[T_ReferralJoin].[refjoin_ID]
FK_T_ClientInquiry_T_ReferralTypes		cliinq_ReferralTypeID->[dbo].[T_ReferralTypes].[reftyp_ID]
FK_T_ClientInquiry_T_RefferalNonAdmission-Reasons		cliinq_NonAdmissionReasonID->[dbo].[T_ReferralNonAdmission-Reasons].[refnar_ID]
FK_T_ClientInquiry_T_Region		cliinq_RegionID->[dbo].[T_Region].[reg_ID]
FK_T_ClientInquiry_T_Salutation		cliinq_ClientSalutationID->[dbo].[T_Salutation].[salut_ID]
FK_T_ClientInquiry_T_Salutation1		cliinq_CallerSalutationID->[dbo].[T_Salutation].[salut_ID]

Client Inquiry Field List Items

[dbo].[T_ClientInquiryFieldListItems]

Note: Detailed documentation is pending.

Client Inquiry Fields

[dbo].[T_ClientInquiryFields]

Note: Detailed documentation is pending.

Client Inquiry Phones

[dbo].[T_ClientInquiryPhones]

Note: Detailed documentation is pending.

Client Inquiry Rating

[dbo].[T_ClientInquiryRating]

Note: Detailed documentation is pending.

Client Inquiry Relation

[dbo].[T_ClientInquiryReleation]

Note: Detailed documentation is pending.

Client Inquiry Values

[dbo].[T_ClientInquiryValues]

Note: Detailed documentation is pending.

Client Payers

	[dbo].[T_ClientPayers]

Description

Information about clients, payers, and related payment types details.

Columns

Key	Name	Data Type	Computed	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	clipay_ID *Unique system generated ID for the client payers record.*	bigint		8	False	1 - 1	
(3) FK	clipay_ClientID *The ID of the client assigned when client is added to the system.* *Relates to [T_Client].[cli_ID]*	bigint		8	False		
(4) FK	clipay_PayerID *The ID of the payer assigned when payer is added to the system.* *Used to pull client payers record to Admission Payers, Client Payers and Schedule Details Payers tabs.* *Relates to [T_Payers].[pay_ID]*	bigint		8	False		
	clipay_SeqNo *This field is used in determining the primary payer for a client, which will determine the total charge for associated schedules. It does not determine the order in which payers are billed though. clipay_ChargeAllocationSeqNo is the field used to determine what order to bill client payers.* *UI Location: Client > Payers > Payer Sequence (Through ClientsPayersInfo class)*	int		4	False		((0))
	clipay_PolicyNumber *The policy number for the insurance company, if applicable. This appears on the Payer's invoice under the client's name and address.* *UI Location: Client > Payers > Policy (Through ClientsPayersInfo class)*	nvarchar(25)		50	True		
	clipay_EffectiveDate *Enter the beginning date to which the*	datetime		8	False		([dbo].[Get-Today]())

	current record applies. This is for informational purposes. *UI Location: Client > Payers > Effective From (Through ClientsPayersInfo class)*					
	clipay_ExpirationDate *Enter the ending date to which the current record applies. This is for informational purposes.* *UI Location: Client > Payers > Effective To (Through ClientsPayersInfo class)*	datetime		8	False	('12/31/9999')
🔲	clipay_BillSplitTypeID *Select the method that defines how the payment is be allocated to the payer(s).* *The choices are Balance, Daily Benefit, Hourly, Monthly Benefit, Split, Visit, and Weekly Benefit. See Payment Allocation Types for details on each type and applicable usage.* *B: Balance* *S: Split* *V: Visit* *T: Transfer* *C: COB Manage* *Time/Date Based Benefits* *H: Hourly* *I: Schedule Hourly* *D: Daily* *W:Weekly* *M:Monthly* *UI Location: Client > Payers > Pmt Allocation (Through ClientsPayersInfo class)*	char(1)		1	False	('B')
	clipay_DefaultFlag *If checked, the current record represents the default payer.* *UI Location: Client > Payers > Default (Through ClientsPayersInfo class)*	bit		1	False	((1))
	clipay_Amount *Dollar amount allowed per Pmt Allocation type. Not used in conjunction with Balance.* *For example, if a patient has a Daily Benefit amount of $100/day, the Pmt Allocation type would be Daily Benefit and the Pmt Allowance would be $100.* *UI Location: Client > Payers > Pmt Allowance (Through ClientsPayersInfo class)*	money		8	False	((0))
🔲	clipay_Percent *Percent allowed per Pmt Allocation type. For example, if the primary payer will pay 80% of the total bill, that payer*	decimal(5,4)		5	False	((0))

	would have a Pmt Allocation of Split and a Pmt Prcnt of 80%. *UI Location: Client > Payers > Pmt Prcnt (Through ClientsPayersInfo class)*						
	clipay_DiscountAmount *Enter the discount amount. Informational only, for internal tracking purposes.* *It is not used in the draft process itself.* *UI Location: Client > Payers > Disc amt (Through ClientsPayersInfo class)*	money		8	False		((0))
🈸	clipay_DiscountPercent *Enter the discount percent. Informational only, for internal tracking purposes.* *It is not used in the draft process itself.* *UI Location: Client > Payers > Disc Prcnt (Through ClientsPayersInfo class)*	decimal(5,4)		5	False		((0))
	clipay_Deductible *Policy deductible amount. Informational only, for internal tracking purposes.* *It is not used in the draft process itself.* *UI Location: Client > Payers > Pol Deduct (Through ClientsPayersInfo class)*	money		8	False		((0))
	clipay_DeductibleBalance *Policy deductible balance. Informational only, for internal tracking purposes.* *It is not used in the draft process itself.* *UI Location: Client > Payers > Deduct Bal (Through ClientsPayersInfo class)*	money		8	False		((0))
FK🔑	clipay_CopayerID *Not used.* *Relates to [T_Payers].[pay_ID]*	bigint		8	True		
	clipay_CopayAmount *Not used.*	money		8	False		((0))
🈸	clipay_CopayPercent *Not used.*	decimal(5,4)		5	False		((0))
🈸	clipay_CopayMultiplier *Not used.*	char(1)		1	False		('V')
	clipay_CopayInvoiceNote *Not used.*	nvarchar(255)		510	True		
	clipay_Notes *Notes for informational purposes.* *This for payer notes for this record.* *UI Location: Client > Payers > Notes (Through ClientsPayersInfo class)*	nvarchar(255)		510	True		
	clipay_BillNote *Notes for informational purposes.* *This for bill notes for this record.*	nvarchar(255)		510	True		

UI Location: Client > Payers > Bill Note (Through ClientsPayersInfo class)						
clipay_ActiveFlag *Indicates if the payer is active or inactive.* *UI Location: Client > Payers > Status (Through ClientsPayersInfo class)* *and Client > Admission > Payers > Status (Through AdmissionPayersInfo class)*	bit		1	False		((1))
clipay_ExcludeHoliday *When checkbox is checked, excludes Holiday Bill Rate Calculations for the payer record.* *UI Location: Client > Payers > Exclude Holiday (Through ClientsPayersInfo class)*	bit		1	False		((0))
clipay_CreatedDate *Date and time the record was created.* *UTC date updated by SQL Server's current UTC date.* *UI Location: Client > Payers > Created On (Through ClientsPayersInfo class)*	datetime		8	False		(getutcdate())
clipay_CreatedUser *User who created the record.* *UI Location: Client > Payers > Created By (Through ClientsPayersInfo class)*	nvarchar(50)		100	False		
clipay_ModifiedDate *Date and time the record was last modified.* *UTC date updated by SQL Server's current UTC date.* *UI Location: Client > Payers > Modified On (Through ClientsPayersInfo class)*	datetime		8	False		(getutcdate())
clipay_ModifiedUser *User who last modified the record.* *UI Location: Client > Payers > Modified By (Through ClientsPayersInfo class)*	nvarchar(50)		100	False		
clipay_TS *The timestamp of the record.*	timestamp		8	False		
clipay_AuthRequired *Not used.*	bit		1	False		((0))
clipay_AuthsUseServiceCategories *Check this box to use the Service Categories rather than the specific Service Codes when creating authorization records and when running authorization scheduling checks against scheduled services.* *Ex. Service Category=SN. The agency has configured the SN Category as the*	bit		1	False		((0))

	assigned category for the services of RN, RN SOC, RN ROC, etc. *The authorizations created using the category of SN will cover the schedules for any of the services assigned to that category.* *UI Location: Client > Payers > Auths Use Service Categories (Through Clients-PayersInfo class)*						
	clipay_AuthorizationConflictsAllow *Used when running the scheduling conflict checks. Select either 'Default' or 'Disallow'. Default means the settings have been pulled from the setting on the Payer Billing Info tab. Disallow will create a hard stop regarding Authorizations.* *This field will be locked down and cannot be overridden if the Payer level record is set to 'Disallow'.* *The level of conflict check configured at the payer level will apply to this client. If the Payer level record has a setting of 'User Override', then this field will be enabled and display the options of 'Default' or 'Disallow'.* *This allows the user to set the Client > Payer Authorization checks as a hard stop (Disallow) when the Payer level record may have been set to 'Default' and the User/Office/Global default setting is 'Warn Only'. For further information, see Payers Billing Info.* *UI Location: Client > Payers > Auth Conflicts (Through ClientsPayersInfo class)*	tinyint		1	False		((0))
FK🔑	clipay_AddressBookID *Enter entity from Address Book if needed, for informational purposes only.* *Relates to [T_AddressBook].[addbk_ID]*	bigint		8	True		
	clipay_ChargeAllocationSeqNo *Defaults from the Payer Sequence. Determines the sequence in which the charges get allocated to the payers for billing. This field is not used in determining the primary payer for that client. The field clipay_SeqNo is used to determine the primary payer, which is the payer who determines the total charge for associated schedules. Last allocation sequence should have Pmt Allocation of 'Balance'. See Charge Allocation Sequence Configurations for full details.* *UI Location: Client > Payers > Alloc (Through ClientsPayersInfo class)*	int		4	False		((0))

	clipay_ManageCOB *Not used.*	int	True	4	False		

Indexes

Key	Name	Key Columns	Unique
PK/C	PK_T_ClientPayers	clipay_ID	True
	IX_T_ClientPayers_ClientID_PayerID_PolicyNumber	clipay_ClientID, clipay_PayerID, clipay_PolicyNumber	True
	IX_T_ClientPayers_ID_PayerID	clipay_ID, clipay_PayerID	True
	IX_T_ClientPayersPayerID	clipay_PayerID	
	IX_T_ClientPayers_ClientID	clipay_ClientID	
	IX_T_ClientPayers_clipay_ClientIDPayerID	clipay_PayerID, clipay_ClientID	

Foreign Keys

Name	Columns
FK_T_ClientPayers_T_AddressBook	clipay_AddressBookID->[dbo].[T_AddressBook].[addbk_ID]
FK_T_ClientPayers_T_Client	clipay_ClientID->[dbo].[T_Client].[cli_ID]
FK_T_ClientPayers_T_Payers	clipay_PayerID->[dbo].[T_Payers].[pay_ID]
FK_T_ClientPayers_T_Payers_CopayerID	clipay_CopayerID->[dbo].[T_Payers].[pay_ID]

Client Type

🔳 [dbo].[T_ClientType]

Description

Defines the Client Types available in the application. Users can use the system (Global) Client Types, add their own Client Types at the Office level, or override the system (Global) Client Types.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK	clt_ID *System generated ID number for the Client Type record. Also called ID.*	int	4	False	10001 - 1	
	clt_Name *The Name of the Client Type.*	nvarchar(50)	100	True		('')
	clt_ListItemType *The list type of the client type for the DropDown List control. 0 = Global, 1 = Office, 2 = Override*	tinyint	1	False		((0))
FK	clt_BranchID *Branch ID for offices that have special client type requirements not covered by the system client types.*	int	4	True		
FK	clt_RptGroupID *Optional report group ID for reporting.*	int	4	False		((60))
FK	clt_OverrideID *ID of client type to be overridden with this client type.*	int	4	True		
	clt_Active *The status of the client type. 0 = inactive, 1 = active*	bit	1	False		((1))
	clt_CreatedDate *UTC date updated by SQL server's current UTC date. The date the client type record was created. Also called Created On in the Drop Down Maintenance grid.*	datetime	8	False		(getutcdate())
	clt_CreatedUser *The UserID of the user that created the client*	nvarchar(50)	100	False		

	type record. Also called Created By in the Drop Down Maintenance grid.					
	clt_ModifiedDate *UTC date updated by SQL server's current UTC date. The date when the client type record was last modified.* *Also called Modified On in the Drop Down Maintenance grid.*	datetime	8	False		(getutcdate())
	clt_ModifiedUser *The UserID of the user that last modified the client type record. Also called Modified By in the Drop Down Maintenance grid.*	nvarchar(50)	100	False		
	clt_TS *The timestamp field of the client type record. Also called TS.*	timestamp	8	False		
	clt_Description *The description of the client type.*	nvarchar(1000)	2000	True		('')

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK 🔑 C	PK_T_ClientType	clt_ID	True	80
	IX_T_ClientType_BranchOverrideName	clt_BranchID, clt_OverrideID, clt_Name	True	80

Foreign Keys

Name	Columns
FK_T_ClientType_T_Branches	clt_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_ClientType_T_ClientType	clt_OverrideID->[dbo].[T_ClientType].[clt_ID]
FK_T_ClientType_T_ReportGroups	clt_RptGroupID->[dbo].[T_ReportGroups].[rptgrp_ID]

Diagnosis

[dbo].[T_Diagnosis]

Note: Detailed documentation is pending.

Diagnosis Categories

⊞ **[dbo].[T_DiagnosisCategories]**

Note: Detailed documentation is pending.

Emergency Types

[dbo].[T_EmergencyTypes]

Note: Detailed documentation is pending.

Entities

[dbo].[T_Entities]

Note: Detailed documentation is pending.

Expense Types

[dbo].[T_ExpenseTypes]

Note: Detailed documentation is pending.

HHA Categories

[dbo].[T_HHACategories]

Note: Detailed documentation is pending.

HHA Tasks

[dbo].[T_HHATasks]

Note: Detailed documentation is pending.

Invoice Batch

[dbo].[T_InvoiceBatch]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C FK	invb_ID	bigint	8	False	1 - 1	
FK	invb_BranchID	int	4	False		
FK	invb_InvProcessID	int	4	False		((2))
	invb_StartDate	datetime	8	False		([dbo].[Get-Today]())
	invb_EndDate	datetime	8	False		([dbo].[get-Today]())
	invb_InvoiceDate	datetime	8	True		
FK	invb_PayerID	bigint	8	True		
FK	invb_ServiceCodeID	int	4	True		
	invb_FinalizedDate	datetime	8	True		
FK	invb_ServCategoryID	int	4	True		
	invb_LastDraftDate	datetime	8	True		
	invb_LastDraftUser	nvarchar(50)	100	True		
	invb_CreatedDate	datetime	8	False		(getutcdate())
	invb_CreatedUser	nvarchar(50)	100	False		
	invb_ModifiedDate	datetime	8	False		(getutcdate())
	invb_ModifiedUser	nvarchar(50)	100	False		

	invb_TS	timestamp	8	False	
FK🔑	invb_ClientID	bigint	8	True	
	invb_ReDraft *This field determines whether a batch pulls the most recently drafted results for an Invoice Batch or redrafts and pulls those results.* *IF invb_ReDraft == 0 (Do not ReDraft)* *AND record count of T_InvoiceDetailsDraft > 0* *THEN Do not ReDraft, Use the existing records* *ELSE ReDraft* *There's also an optional parameter in the draft process to force the redraft to happen regardless of the settings*	bit	1	False	((1))

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK🔑C	PK_T_InvoiceBatch	invb_ID	True	80
	IX_T_InvoiceBatch_BranchID	invb_BranchID		80
	IX_T_InvoiceBatch_ClientID	invb_ClientID		80
	IX_T_InvoiceBatch_FinalizedDate	invb_FinalizedDate		80
	IX_T_InvoiceBatch_PayerID	invb_PayerID		80

Foreign Keys

Name	Columns
FK_T_InvoiceBatch_T_Branches	invb_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_InvoiceBatch_T_Client	invb_ClientID->[dbo].[T_Client].[cli_ID]
FK_T_InvoiceBatch_T_InvoiceBatch	invb_ID->[dbo].[T_InvoiceBatch].[invb_ID]
FK_T_InvoiceBatch_T_InvoiceProcess	invb_InvProcessID->[dbo].[T_InvoiceProcess].[invPr_ID]
FK_T_InvoiceBatch_T_Payers	invb_PayerID->[dbo].[T_Payers].[pay_ID]
FK_T_InvoiceBatch_T_ServiceCode	invb_ServiceCodeID->[dbo].[T_ServiceCode].[svcc_ID]
FK_T_InvoiceBatch_T_ServiceCode1	invb_ServCategoryID->[dbo].[T_ServiceCode].[svcc_ID]

Invoice Batch Taxes

[dbo].[T_InvoiceBatchTaxes]

Description

Defines the relationship between different Tax Types and Invoice Batch Tax Groups. This table is used to determine Tax calculations for services that have Taxes that will be shown on an Invoice.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity
PK C	invbtx_ID *System generated unique ID for the Invoice Batch Tax record.*	int	4	False	1 - 1
FK	invbtx_InvBatchGroupID *The ID of the Invoice Branch Tax Group that this Invoice Batch Tax record is associated with.*	bigint	8	False	
FK	invbtx_TaxTypeID *The ID of the associated Tax Type record (T_TaxTypes). Not shown in the UI; only the description is shown in the UI.*	int	4	True	
FK	invbtx_TaxID *The ID of the system generated unique ID for the Branch Tax record (T_BranchTaxes).*	int	4	False	
	invbtx_Percent *The percentage value of the tax which comes from the Branch Tax record (T_BranchTaxes). The percentage of the Invoice Detail amount that will be added to the taxes of an applicable Invoice Detail.*	decimal(10,6)	9	True	
	invbtx_FixedAmt *The fixed amount value of the tax which comes from the Branch Tax record. This is a fixed amount that will be added to the taxes of an applicable Invoice Detail.*	money	8	False	
	invbtx_Description *The description of the Invoice Batch Tax. Comes from the btx_Desc field in T_BranchTaxes.*	nvarchar(100)	200	True	
	invbtx_EffectiveStart *The Effective Start date for this Invoice BatchTax record. It comes from brtx_EffectiveStart in the T_BranchTaxes table. It is UTC and is updated by SQL Server based on the office time zone.*	datetime	8	True	
	invbtx_EffectiveEnd *The Effective End date for this Invoice BatchTax record. It comes from brtx_EffectiveEnd in the T_BranchTaxes table. It is UTC and is updated by SQL Server based on the office time zone.*	datetime	8	True	
	invbtx_HCPCS *The HCPCS code, if required by a payer. If different payers require different HCPCS Codes then add a Tax Group for each payer in the*	nchar(25)	50	True	

	Branch Tax grid. This field comes from brtx_HCPCS in the T_-BranchTaxes table.				
	invbtx_Desc *This field does not appear to be used as there are no references to this field in the UI.*	nchar(100)	200	True	

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK__InvoiceBatchTaxes	invbtx_ID	True	80
	IX_T_InvoiceBatchTaxes_invbtx_InvBatchGroupID	invbtx_InvBatchGroupID		

Foreign Keys

Name	Delete	Columns
FK_T_InvoiceBatchTaxes_T_BranchTaxes		invbtx_TaxID->[dbo].[T_BranchTaxes].[brtx_ID]
FK_T_InvoiceBatchTaxes_T_InvoiceBatchTax-Groups	Cascade	invbtx_InvBatchGroupID->[dbo].[T_InvoiceBatchTax-Groups].[invbtg_ID]
FK_T_InvoiceBatchTaxes_T_TaxTypes		invbtx_TaxTypeID->[dbo].[T_TaxTypes].[taxtyp_ID]

Invoice Batch Tax Groups

🖽 [dbo].[T_InvoiceBatchTaxGroups]

Description

Defines the relationship between Invoice Batches and Tax Types for the Branch.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity
PK C 🔑	invbtg_ID *System generated unique ID for the Invoice Batch Tax Groups record.*	bigint	8	False	1 - 1
FK 🔑	invbtg_InvoiceBatchID *The ID of the Invoice Batch that this Invoice Batch Tax Group record is associated with. Flows from [T_InvoiceBatch].[invb_-ID]*	bigint	8	True	
FK 🔑	invbtg_TaxGroupId *The ID of the Branch Tax Group that this Invoice Batch Tax Group record is associated with. Flows from [T_BranchTax-Groups].[brtg_ID]*	int	4	False	
	invbtg_TaxGroupDescription *Invoice Tax Group Description which is shown on the Invoice Report from Finalized Invoices.*	nvarchar(1000)	2000	True	

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C 🔑	PK_T_InvoiceBatchTaxGroups	invbtg_ID	True	80
	IX_T_InvoiceBatchTaxGroups_InvBatchID	invbtg_InvoiceBatchID, invbtg_TaxGroupId		

Foreign Keys

Name	No Check	Delete	Columns
FK_T_InvoiceBatch_T_InvoiceBatchTaxGroups	True	Set-Null	invbtg_InvoiceBatchID->[dbo].[T_Invoice-Batch].[invb_ID]
FK_T_InvoiceBatchTaxGroups_T_BranchTax-Groups			invbtg_TaxGroupId->[dbo].[T_BranchTax-Groups].[brtg_ID]

Invoice Details

[dbo].[T_InvoiceDetails]

Description

Provides information on invoice items.

Columns

Key	Name	Data Type	Computed	Max Length (Bytes)	Allow Nulls	Identity	Default
	invd_ID *Invoice detail ID field of the invoice details.* *Each Invoice Detail record will show as a separate row under an Invoice in the Invoice Batching grid or Invoice Search screen. In most cases each Invoice Detail will show as a single line item on the printed/extracted Invoice. The Payer Entity has options that can cause multiple Invoice Detail records to be grouped into a single line item on the printed/extracted Invoice. The field invd_InvoiceGroupID determines which Invoice Details will be grouped together into a single line item on the printed/extracted Invoice.* *Payment Postings > Payment and Postings > Inv. Detail ID (Not hidden)* *CMS1500 > invd_ID (Hidden)* *Invoice Postings > invd_-ID (Hidden)* *UB04 > invd_ID (Hidden)* *UB04Invoice > invd_-ID (Hidden)* *UB92Invoice > invd_-ID (Hidden)*	bigint		8	False	1 - 1	
	invd_InvhID *Invoice ID field of the invoice details. Flows from T_Invoice-Header.invh_ID.*	bigint		8	False		

	This represents the Invoice that this Invoice Detail belongs to. In most cases the invoice detail record will show as a single line item on that Invoice. *CMS1500 > invd_Invh (Hidden)* *IDUB04 > invd_InvhID (Hidden)* *UB04Invoice > invd_InvhID (Hidden)* *UB92Invoice > invd_InvhID (Hidden)*						
🔑 FK	invd_SchedulePayerID *Schedule payer ID field of the invoice details.* *Each Schedule has a list of payers associated with it. This Schedule/Payer relationship is stored in T_Schedule-Payers. This ID points back to the Schedule Payer record that is being billed for this Invoice Detail. If a Schedule is split between multiple Invoice Details then each of those Invoice Details should point to the same Schedule Payer. For a single Invoice, every Schedule Payer record associated with the Invoice Details on that Invoice should point to the same Payer Entity, that Payer Entity should match the PayerID on the Invoice Header, and should match the PayerID on all Invoice Details for that Invoice. This field is nullable but should always have a value if it cascades down from the Schedule or Schedule Expense records. Some examples of records where this field will be NULL are PPS items (RAP, Final), Taxes, and Estimated Charges.* *Payment Postings > Payment and Postings > invd_Schedule-PayerID (Hidden)* *CMS1500 > invd_Schedule-PayerID (Hidden)* *Invoice Postings > invd_-SchedulePayerID (Hidden)* *UB04 > invd_SchedulePayer-ID (Hidden)*	bigint		8	True		

	UB04Invoice > invd_Schedule-PayerID (Hidden)					
	UB92Invoice > invd_Schedule-PayerID (Hidden)					
FK	**invd_ServiceCodeID** *Service code ID field of the invoice details. This points back to the T_ServiceCode and cascades down from either the Schedule record or the Schedule Expense record. This field is nullable but should always have a value if it cascades down from the Schedule or Expense records. Some examples of records where this field will be NULL are PPS items (RAP, Final), Taxes, and Estimated Charges.*	int		4	True	
FK	**invd_ScheduleExpenseID** *Expense ID field of the invoice details. This points back to the Schedule Expenses. This field is nullable and will only have a value if this data cascades down from a Schedule Expense. In queries, if you're looking to identify which Invoice Details records are expenses you can look at this field and if it's not NULL that record is an expense. Alternatively you can join to the service code table and verify that the IsExpense value is 1.*	bigint		8	True	
FK FK	**invd_ScheduleID** *Schedule ID field of the invoice details. This points back to the Schedule. This field is nullable but should always have a value if the record cascades down from the Schedule or Schedule Expense record. In queries, if you're looking to identify which records are Schedules or Expenses you can look at this field and if it's not NULL that record is a Schedule (Service) or Expense.*	bigint		8	True	
	invd_BranchID *Branch ID field of the invoice details. This BranchID should match the BranchID on both the Invoice Header and the Invoice Batch.*	int		4	False	

⚏ FK	**invd_PayerID** *Payer ID field of the invoice details. This PayerID should match the PayerID on the InvoiceHeader. If the SchedulePayerID has a value then this PayerID should match the PayerID on that SchedulePayer record.*	bigint		8	False		
⚏ (2) FK	**invd_ClientID** *Client ID field of the invoice details. ClientID can also be on the InvoiceHeader, but the ClientID on the InvoiceHeader is not guaranteed, it's only used by some Bill Types. The ClientID on the Invoice Detail is required and should be relied on for any queries that involve the ClientID.* *Payment Postings > Payment and Postings > invd_ClientID (Hidden)* *CMS1500 > invd_Client-ID (Hidden)* *Invoice Postings > invd_Client-ID (Hidden)* *UB04Invoice > invd_Client-ID (Hidden)* *UB92Invoice > invd_Client-ID (Not hidden)*	bigint		8	False		
	invd_RateSource *Rate source field of the invoice details. The values in this field correspond to the values in the BillRatesType.RatesOverride-Type in the Application. This field should be a fairly accurate indication of what created this record and where the rate from the record came from. It's not entirely dependable though. In particular it fails for PPS records where it is NULL in at least some situations, but I suspect it fails some other places also. I believe when the rate comes off the Schedule or Expense then this field is also NULL. Other situations where this will be NULL are Taxes and Estimated Charges. So this field is mostly useful for determining which rate schedule was used to pull this*	tinyint		1	True		

rate, but if used with a few other fields like Schedule, Expense, RevCode, Include-Taxes, and a couple fields off the Header you can make a pretty accurate breakdown of where each records rate comes from. This RateSource is specific to the Charge Rate. There are similar columns to this for the OT Rate Source and Contract Rate Source. *OfficeRates '0* *PayerOfficeRates '1* *PayerOfficeAreaRates '2* *ClientRates '3* *ClientCaregiverRates '4* *CaregiverRates '5* *Charts '6* *Schedule '7* *Expense '8* *PPS '9* *NotFound '10* *Service '11* *WeeklyOT '12* *WeeklyOTAdjustment '13* *PayrollAdjustment '14* *Tax '15*						
invd_RateID *Rate ID field of the invoice details. This points back to the Rates table. This field is nullable but will always have a value if the rate was cascaded from a Rates record. In all other situations this field will be NULL.*	bigint		8	True		
invd_ChargeRate *Charge rate field of the invoice details. Called Rate, Bill-Rate, DetailsCharge-Rate, ChargeRate. This is the Rate that is used in the calculation of the expected revenue (invd_Allocated-ChargeWOTax) of this record. The RateSource field of this table mostly describes where this Rate came from. Payment Postings > Payment and Postings > Chrg Rate (Not hidden)*	smallmoney		4	False		

CMS1500 > invd_ChargeRate (Hidden) *Invoice Postings > Chg Rate (Not hidden)* *UB04 > invd_ChargeRate (Hidden)* *UB04Invoice > invd_Charge-Rate (Hidden)* *UB92Invoice > invd_Charge-Rate (Hidden)*						
invd_InvoiceRate *Invoice rate field of the invoice details. This is the rate that is used in calculating the amount that typically shows on the Invoice. It is slightly different than the ChargeRate in that it determines what the Payer wants to see on the Invoice and not what the expected revenue of this record is. Each Bill Type is different though and they don't always rely on this field. The source of this rate will vary, but it will sometimes be determined by settings on the Payer. In cases where the Invoice should show the same value as the expected revenue this will field will usually be NULL.* *CMS1500 > invd_InvoiceRate (Hidden)* *UB04 > invd_InvoiceRate (Hidden)* *UB04Invoice > invd_Invoice-Rate (Hidden)* *UB92Invoice > invd_Invoice-Rate (Hidden)*	smallmoney		4	True		
invd_ChargeUnits *Charge units field of the invoice details. Called Details-Units, . The sum of all invd_-ChargeUnits is called BillUnits, ServiceUnits, Charge-Units or chg_units. This is the number of units of the Service, Expense, or other line item type being billed. The calculation of expected revenue is very complicated, but in most single payer situations the expected revenue of the line item will be equal to the ChargeUnits * ChargeRate. You can usually guess where this field was set,*	decimal(18,8)		9	False		

but it will vary per Bill Type. In most Schedule situations it's reverse engineered from the ChargeUnitFlag and the duration fo the Schedule. This field applies mostly to the ChargeRate, the other Rates in the record will have their own Units fields associated with them. I say mostly because there are some complex situations where the chargeunits may have an effect on how fields other than the expected revenue (invd_-AllocatedChargeWOTax) are calculated. *Payment Postings > Payment and Postings > Chrg Units (Not hidden)* *CMS1500 > invd_ChargeUnits (Hidden)* *Invoice Postings > Chg Units (Not hidden)* *UB04 > invd_ChargeUnits (Hidden)* *UB04Invoice > invd_Charge-Units (Hidden)* *UB92Invoice > invd_Charge-Units (Hidden)*						
invd_ChargeUnitFlag *Charge unit flag field of the invoice details. Shows how it was charged. The MAX invd_-ChargeUnitFlag is called unit-Flag. This field describes the type of Units we're dealing with. It refers back to the Unit-Flags table. For any value greater than 0 we're dealing with a time based unit. In these cases the value is the number of minutes of the Unit. For example 1 would mean that each unit was equivalent to 1 minute, while 30 would mean each unit was equivalent to a half hour. the Value 0 is a little more flexible and usually refers to Visits for Schedules and the ambiguous Units for everything else. This field is sometimes used when rates/units etc need to be amortized or allocated in a complex manor. This field applies mostly to the Charge-Units and ChargeRate, but the*	smallint		2	True		

calculations for amounts are complex and there are situations where this value will be used in the determination of Amounts other than the expected revenue. *CMS1500 > invd_ChargeUnit-Flag (Hidden)* *UB04 > invd_ChargeUnitFlag (Hidden)* *UB04Invoice > invd_Charge-UnitFlag (Hidden)* *UB92Invoice > invd_Charge-UnitFlag (Hidden)*					
invd_InvoiceUnits *Invoice units field of the invoice details. This is the number of units used in the calculation of the InvoiceAmount, which is typically the Amount shown on the Invoice which is not necessarily the amount of expected revenue. It is also typically the number of units shown on the Invoice, but again, each BillType is different and it is not guaranteed to use the Invoice-Units.* *CMS1500 > invd_InvoiceUnits (Hiden)* *UB04 > invd_InvoiceUnits (Hidden)* *UB04Invoice > invd_Invoice-Units (Hidden)* *UB92Invoice > invd_Invoice-Units*	decimal(18,8)		9	True	
invd_InvoiceUnitFlag *Invoice unit flag field of the invoice details. It refers back to the UnitFlags table. For any value greater than 0 we're dealing with a time based unit. In these cases the value is the number of minutes of the Unit. For example 1 would mean that each unit was equivalent to 1 minute, while 30 would mean each unit was equivalent to a half hour. the Value 0 is a little more flexible and usually refers to Visits for Schedules and the ambiguous Units for everything else. This field is sometimes used when rates/units etc need to be amortized or allocated in a*	smallint		2	True	

	complex manor. This field applies to the InvoiceUnits and InvoiceRate. *CMS1500 > invd_InvoiceUnit-Flag (Hidden)* *UB04 > invd_InvoiceUnitFlag (Hidden)* *UB04Invoice > invd_Invoice-UnitFlag (Hidden)* *UB92Invoice > invd_Invoice-UnitFlag (Hidden)*						
▦	**invd_ChargeFlag** *Charge flag field of the invoice details. This field is used in determining how to calculate the Invoice Header Charge-Total. It's mostly used to effect the value shown on PPS Invoices where the Invoice needs to display a Total that doesn't match the sum of expected revenue or the Display Amount.* *CMS1500 > invd_ChargeFlag (Hidden)* *UB04 > invd_ChargeFlag (Hidden)* *UB04Invoice > invd_Charge-Flag (Hidden)* *UB92Invoice > invd_Charge-Flag* *0: Charge - Invoice Total from Charge Fields (Default)* *1: Charge - Invoice Total from Invoice Fielda (RAP)* *2: No Charge - Invoice Total from Charge Fields (Final Claim)* *3: No Charge - Invoice Total from Invoice Fields* *4: Charge - Invoice Total from TotalCharge Field (invd_Total-Charges), before allocation due to payer's split types.*	tinyint		1	False		((0))
	invd_SplitType *Split type field of the invoice details. This one character field explains the logic used in allocating charges across multiple payers. It's uses are more complex though, and I would use it very carefully if at all. It usually cascades down from the Schedule Payers record associated with this Invoice Detail. But it defaults*	char(1)		1	False		('S')

to S which can be confusing for situations where it was not specifically set. And I believe there are situations where the SchedulePayers and ScheduleShiftPayers have values other than what shows in this field. I believe during the transfer process the value T is used on the Invoice Detail, no Schedule Payer record is created, and a different value is used in the ScheduleShift-Payer. Anyway, just be careful if you need to use this field search out the local experts who will probably need to do a significant amount of research. This field mostly associates with the values in the application list created by ListItemsUtility.GetBillSplit-TypeListItems. But there are some situations, like the value T where they are not selectable so they are not in the Application. *Values* *---* *B - Balance* *S - Split* *V - Visit* *H - Hourly Benefit* *I - Schedule Hourly Benefit* *D - Daily Benefit* *W - Weekly Benefit* *M - Monthly Benefit* *C - COB Managed* *T - Transfer* *Payment Postings > Payment and Postings > Split Type (Not hidden)* *CMS1500 > invd_SplitType (Hidden)* *Invoice Postings > Split Type (Not hidden)* *UB04Invoice > invd_SplitType (Hidden)* *UB92Invoice > invd_SplitType (Not hidden)*					
invd_BenefitDate *Benefit Date field of the invoice details. Non-UTC date. This*	datetime		8	True	

	field used to be invd_Daily-BenefitDay. It was changed to invd_BenefitDate in order to support Monthly, Weekly, and Hourly Benefit Allocation in addition to Daily Benefit Allocation. We need to take a closer look at the logic used in this field and the associated ScheduleShiftPayer fields and describe the use for each allocation type. This field will be set for certain Benefit Split-Types (D - Daily, W - Weekly, M - Monthly). You'll notice that it's not set for either of the Hourly Benefit Types (H - Hourly, I - Schedule Hourly). This is because those Invoice Details are summed together on the Invoice, so their particular date (which is a particular hour of the day) is meaningless after they are merged into a single record. *CMS1500 > invd_BenefitDate (Hidden)* *UB04Invoice > invd_Benefit-Date (Hidden)* *UB92Invoice > invd_Benefit-Date (Not hidden)*						
	invd_PmtAllowance *Payment allowance field of the invoice details. Max allowed for the benefit period.* *CMS1500 > invd_Pmt-Allowance (Hidden)* *UB04Invoice > invd_Pmt-Allowance (Hidden)* *UB92Invoice > invd_Pmt-Allowance (Not hidden)*	money		8	True		
	invd_SplitPercent *Split percent field of the invoice details. How much it is being split. This is used to determine the percent of the expected revenue to allocated to this Invoice Detail when the Split Type is S - Split* *Payment Postings > Payment and Postings > Split % (Hidden)* *CMS1500 > invd_SplitPercent (Hidden)* *Invoice Postings > Split % (Not hidden)*	decimal(5,4)		5	False		((1))

UB04 > invd_SplitPercent (Hidden) *UB04Invoice > invd_Split-Percent (Hidden)* *UB92Invoice > invd_Split-Percent (Not hidden)*						
invd_Description *Description field of the invoice details. Called* *Returned as ItemDescription if ServiceGrouping is NULL.Returned as Details-ServiceName or Service-Grouping if T_Service-Code.svcc_Name is NULL.* *Returned as svcc_-Name, ServiceName or Code if OverrideService-Code.svcc_Name, System-ServiceCode.svcc_Name, T_-InvoiceDetails.invd_-Description, T_Service-Code.svcc_Name in different combinations are NULL.Payment Postings > Payment and Postings > Service Code (Not hidden)* *CMS1500 > invd_Description (Hidden)* *Invoice Postings > Description (Not hidden)* *UB04 > 43 DESCRIPTION (Not Hidden)* *UB04Invoice > 43 DESCRIPTION (Not Hidden)* *UB92Invoice > 43 DESCRIPTION (Not Hidden)*	nvarchar(100)		200	True		
FK invd_BillCodeID *Bill code ID field of the invoice details. refers back to the Bill-Code table. The Bill Code records are mostly used to determine the value in the RevCode field, which is mostly or entirely used by the UB04 Bill Types. I believe this field relates directly to T_BillCodes but will cascade down from the T_ServiceCodes.svcc_Bill-CodeID. Each Payer has their own values for Rev Code stored in the T_PayerBillCodes table. VERY IMPORTANT - This field is in NO WAY related to the invd_BillCode field, they're TOTALLY different. That they are directly*	int		4	True		

next to each other in the table is a HUGE mind destroying accident.						
invd_BillCode *Bill code field of the invoice details. This field is one of the most confusingly named fields. invd_BillCode is not related to T_BillCodes which is related to invd_RevCode. But invd_BillCode is related to T_Schedules.sch_RevenueCode, which is not related to invd_RevCode. So... yeah. It's also frequently called ChargeFlag in the drafting process which is confusing because it's very related to the field invd_ChargeFlag. I think there were several attempts to rename things that ended in this mess. But basically this is the field that determines whether a service/expense is billable. It will usually cascade down from the schedule, but it's a field that's used differently all over the place. Here are the simplest values.* *0: Default1: Billable2: Billable No Charge3: Not Billable* *4: A special value used by the 1500 to effect invd_Charge-Flag* *CMS1500 > invd_BillCode (Hidden)* *UB04 > invd_BillCode (Hidden)* *UB04Invoice > invd_BillCode (Hidden)*	tinyint		1	True		
invd_SchShfID *Schedule shift ID field of the invoice details. refers back to the ScheduleShifts table. During the draft each schedule will be broken up by Shift and occasionally some other reasons (like crossing midnight). These records are stored in the ScheduleShifts table and are used to calculate the total amount for a given Schedule Shift. This is then allocated across all the payers for that Schedule and Shift which then cascades down to an individual Invoice Detail. There have been some*	bigint		8	True		

	issues with this field not getting updated appropriately in the past. You can usually count on this being correct, but there may be some undiscovered data errors.					
	invd_ShiftNo *Shift No field of the invoice details. Called invd_ShiftNo, Shift_Number or Shift_Name. Valid values are NULL and from 0 through 6.* *CMS1500 > invd_ShiftNo (Hidden)* *UB04 > invd_ShiftNo (Hidden)* *UB04Invoice > invd_ShiftNo (Hidden)* *UB92Invoice > invd_Shift-No (Not hidden)*	tinyint		1	True		((1))
FK🔑	**invd_HolidayID** *Holiday ID field of the invoice details. Also called invd_-HolidayID. If this record is affected by holiday rates you this ID will refer back to the Branch Holidays table*	bigint		8	True		
	invd_HolidayAdd *Holiday add field of the invoice details.* *CMS1500 > invd_HolidayAddn (Hidden)* *UB04 > invd_HolidayAdd (Hidden)* *UB04Invoice > invd_Holiday-Add (Hidden)* *UB92Invoice > invd_Holiday-Add (Not hidden)*	smallmoney		4	True		
	invd_HolidayMult *Holiday mult. field of the invoice details.* *CMS1500 > invd_HolidayMult (Hidden)* *UB04 > invd_HolidayMult (Hidden)* *UB04Invoice > invd_Holiday-Mult (Hidden)* *UB92Invoice > invd_Holiday-Mult (Not hidden)*	decimal(6,2)		5	True		
	invd_ServiceDateFrom *Starting date of the service. Service date from field of the invoice details. Non-UTC date. Also called invd_-*	datetime		8	False		

MedicareExpenseDate-From, invd_ServiceDate-To, RAPFBVDate, Visit Date, ScheduleStart, StartTime, Inv-VisitStartDate, DetailsService-Date, ServiceMonth, invh_-Date, invd_ServiceDate-From, ServiceDate, Service-DatePeriod, TransactionDate, CMS1500 > invd_ServiceDate-From (Hidden) *UB04Invoice > 45 SERV. DATE (Not hidden)* *UB92Invoice > 45 SERV. DATE (Not hidden)*						
invd_ServiceDateTo *Ending date of the service. Service date to field of the invoice details. Non-UTC date. Also called EndTime, InvVisit-EndDate, ServiceDateTo.* *CMS1500 > invd_ServiceDate-To (Hidden)* *UB04 > invd_ServiceDate-To (Hidden)* *UB04Invoice > invd_Service-DateTo (Hidden)* *UB92Invoice > invd_Service-DateTo (Hidden)*	datetime		8	True		
invd_RevCode *The revenue code field of the invoice details.* *CMS1500 > invd_RevCode (Hidden)* *UB04 > 42 REV CODE (Not hidden)* *UB04Invoice > 42 REV CODE (Not hidden)* *UB92Invoice > 42 REV CODE (Not hidden)*	nvarchar(14)		28	True		
invd_HCPCS *The Healthcare Common Procedure Coding System field of the invoice details. Also called RAPHIPPS.* *CMS1500 > invd_HCPCS (Not hidden)* *UB04 > 44 HCPCS / RATES (Hidden)* *UB04Invoice > 44 HCPCS / RATES (Hidden)* *UB92Invoice > 44 HCPCS / RATES (Not hidden)*	nvarchar(25)		50	True		

invd_1500POS *The 1500 place of service code field of the invoice details.* *CMS1500* *> invd_1500POS (Not hidden)* *UB04 > invd_1500POS (Not hidden)* *UB04Invoice* *> invd_1500POS (Hidden)* *UB92Invoice* *> invd_1500POS (Hidden)*	int		4	True		((12))
invd_1500TOS *The 1500 type of service code field of the invoice details.* *CMS1500 > invd_1500TOS (Hidden)* *UB04* *> invd_1500TOS (Hidden)* *UB04Invoice* *> invd_1500TOS (Hidden)* *UB92Invoice* *> invd_1500TOS (Hidden)*	int		4	True		((0))
invd_1500Diag *The 1500Diag field of the invoice details.* *CMS1500 > invd_1500Diag (Hidden)* *UB04* *> invd_1500Diag (Hidden)* *UB04Invoice* *> invd_1500Diag (Hidden)* *UB92Invoice* *> invd_1500Diag (Hidden)*	int		4	True		((1))
invd_1500EPSDT *Early and Periodic Screening, Diagnostic, and Treatment field of the invoice details.* *CMS1500* *> invd_1500EPSDT (Not hidden)* *UB04* *> invd_1500EPSDT (Hidden)* *UB04Invoice* *> invd_1500EPSDT (Hidden)* *UB92Invoice* *> invd_1500EPSDT (Hidden)*	nvarchar(50)		100	True		
invd_1500EMG *1500EMG field of the invoice details.* *CMS1500 > invd_1500EMG (Not hidden)*	nvarchar(50)		100	True		

UB04 *> invd_1500EMG (Hidden)* *UB04Invoice > invd_1500EMG* *UB92Invoice* *> invd_1500EMG (Hidden)*						
invd_1500COB *Coordination of benefits field of* *the invoice details.* *CMS1500* *> invd_1500COB (Hidden)* *UB04* *> invd_1500COB (Hidden)* *UB04Invoice* *> invd_1500COB (Hidden)* *UB92Invoice* *> invd_1500COB (Hidden)*	nvarchar(50)		100	True		
invd_1500LocalUse *The 1500Local Use field of the* *invoice details.* *CMS1500 > invd_1500Local-* *Use (Hidden)* *UB04 > invd_1500Local-* *Use (Hidden)* *UB04Invoice* *> invd_1500LocalUse (Hidden)* *UB92Invoice* *> invd_1500LocalUse (Hidden)*	nvarchar(50)		100	True		
invd_UB_FL49 *UB_FL49 field of the invoice* *details.* *CMS1500 > invd_UB_FL49* *(Hidden)* *UB04 > 49 (Not hidden)* *UB04Invoice > 49 (Hidden)* *UB92Invoice > invd_UB_-* *FL49 (Not hidden)*	nvarchar(20)		40	True		
invd_NonCovered *Non covered field of the* *invoice details.* *CMS1500 > invd_Non-* *Covered (Hidden)* *UB04 > 48 NON COV* *CHRGS (Not hidden)* *UB04Invoice > 48 NON COV* *CHRGS (Not hidden)* *UB92Invoice > 48 NON COV* *CHRGS (Not hidden)*	money		8	True		
invd_TotalCharges *Total charges field of the* *invoice details. Also* *called TotalChargeAmount.*	money		8	True		

Payment Postings > Payment and Postings > invd_Total-Charges (Hidden) *CMS1500 > invd_Total-Charges (Hidden)* *Invoice Postings > invd_Total-Charges (Hidden)* *UB04 > invd_TotalCharges (Hidden)* *UB04Invoice > invd_Total-Charges (Hidden)* *UB92Invoice > invd_Total-Charges (Hidden)* *In any invoice processing that is build on Private Invoice process, this field will be set to ==> ((invd_chargeUnits - invd_OTUnit)* invd_charge-Rate +(invd_OTUnit * invd_chargeRate)* invd_-OTMulti). This value will be used for either Standard Invoice reports, or when we want to used the Total Charge and not the allocated Charge/Amount.*						
invd_DiscountAmount *Discount amount field of the invoice details.* *Payment Postings > Payment and Postings > invd_Discount-Amount (Hidden)* *CMS1500 > invd_Discount-Amount (Hidden)* *Invoice Postings > invd_-DiscountAmount (Hidden)* *UB04 > invd_DiscountAmount (Hidden)* *UB04Invoice > invd_Discount-Amount (Hidden)* *UB92Invoice > invd_Discount-Amount (Not hidden)*	money		8	False		((0))
invd_DiscountPercent *Payment Postings > Payment and Postings > invd_Discount-Percent (Hidden)* *CMS1500 > invd_Discount-Percent (Hidden)* *Invoice Postings > invd_-DiscountPercent (Hidden)* *UB04 > invd_DiscountPercent (Hidden)*	decimal(5,4)		5	False		((0))

UB04Invoice > invd_Discount-Percent (Hidden) *UB92Invoice > invd_Discount-Percent (Not hidden)*						
invd_CreatedDate *The date the invoice detail was created. Also called Created-Date. UTC date.*	datetime		8	False		(getutcdate())
invd_CreatedUser *The user who created the invoice detail; the user logged into the system when the invoice detail is created. Also called CreatedUser.*	nvarchar(50)		100	False		
invd_ModifiedDate *The most recent date the invoice detailed was modified. Also called ModifiedDate. UTC date.*	datetime		8	False		(getutcdate())
invd_ModifiedUser *The user who made the most recent modification to the invoice detail; the user logged into the system when the modification to the invoice detail is made. Also called ModifiedUser.*	nvarchar(50)		100	False		
invd_TS *Invoice detail time stamp. Also called TS.*	timestamp		8	False		
invd_DisplayUnits *Invoice detail units to display. Also called Unitsday_1 through Unitsday_31 and the sum of all Unitsday is called UnitsUsed.*	decimal(18,8)	True	9	True		
invd_DisplayRate *Invoice detail rate. Also called Price.*	smallmoney	True	4	False		
invd_DisplayUnitFlag *Shows how it was billed to the client.*	smallint	True	2	True		
invd_BatchTaxGrpID *Depends on the value of Invd_IncludeTaxes:* *invd_IncludeTaxes = 2 the value from the The T_Branch-Taxes is stored (brtx_ID).* *Invd_IncludeTaxes < 2 the value from T_InvoiceBatchTax-Groups is stored (invbtg_ID)*	bigint		8	True		

invd_TotalTaxPercent *The tax percent of the invoice detail.* *CMS1500 > invd_TotalTax-Percent (Hidden)* *UB04Invoice > invd_TotalTax-Percent (Hidden)* *UB92Invoice > invd_TotalTax-Percent (Not hidden)*	decimal(10,6)		9	True		
invd_TotalTaxFixedAmt *Fixed tax amount of the invoice detail.* *CMS1500 > invd_TotalTax-FixedAmt (Hidden)* *UB04Invoice > invd_TotalTax-FixedAmt (Hidden)* *UB92Invoice > invd_TotalTax-FixedAmt (Not hidden)*	money		8	True		
invd_AcctExtDate *invd_AcctExtDate of the invoice detail. Non-UTC date.* *CMS1500 > invd_AcctExtDate (Hidden)* *UB04 > invd_AcctExtDate (Hidden)* *UB04Invoice > invd_AcctExt-Date (Hidden)* *UB92Invoice > invd_AcctExt-Date (Not hidden)*	datetime		8	True		
invd_Round *Rouding method.0: No Rounding, 1: Round Up, 2: Truncate, 3: Round*	tinyint		1	False		((3))
invd_RoundDecimal *The Invoice Line Number of decimals to round*	tinyint		1	False		((2))
invd_OTMulti *Overtime multiplier factor of the invoice detail.* *CMS1500 > invd_-OTMulti (Hidden)* *UB04 > invd_OTMulti (Hidden)* *UB04Invoice > invd_OTMulti (Hidden)* *UB92Invoice > invd_OTMulti (Not hidden)*	decimal(8,4)		5	False		((1.5))
invd_OTUnit *Quantity of units considered overtime.* *CMS1500 > invd_-OTUnit (Hidden)*	decimal(8,4)		5	False		((0))

	UB04 > invd_OTUnit (Hidden) *UB04Invoice > invd_OTUnit (Hidden)* *UB92Invoice > invd_OTUnit (Not hidden)*						
	invd_IncludeEFT *Electonic fund transfer field of the invoice detail. Also called InclEFT*	bit		1	True		
🔀	invd_ServiceUTCDateFrom *Starting date/time fo service activity. UTC date updated by the UI based on widnows user's time zone.*	datetime		8	False		
	invd_ServiceUTCDateTo *End date/time fo service activity. UTC date updated by the UI based on widnows user's time zone.*	datetime		8	True		
	invd_AllocatedAmt *Allocated Amount per Invoice Details.*	money		8	True		
🔑	invd_1500BillingModifierID1 *Billing modifier 1 of the invoice detail. Modifiers are used to increse the level of service specificity.* *Billing payers on a UB04 and/or electronically with the 837I file often includes the use of Modifiers. This is often necessary with Medicaid payers. The UB04 billing process includes the modifiers. This affects payers that have the bill types of UB04, UB04 (Charge + Tax), and PPS Claim; and those that process the 5010 837I billing file.* *- Bill Type on Payers>Billing tab set to UB04- EDI Type on Payers>EDI Settings tab is set to 5010 837I- Set the Modifiers on the Payers>Payer Services tab. Each Service Code can have up to four Modifiers.* *- The Schedule Details>1500 tab is used for both 1500 and UB04 modifiers and displays the modifiers from the Payer IF the user creating and/or completing the schedule has permission to this tab [permission to Schedule.H1500 and Schedule.H1500C].*	int		4	True		

	- Modifier columns may be added to the Schedule List View layout for easier reviewing for Payers that require modifiers. *- The UB04 invoice batch displays the HCPC and Modifiers in the HCPCS column in the grid (UB04 does not have a separate locator for the modifiers).* *- The UB04 Preview form also displays the HCPC and Modifiers in the HCPCS locator.* *- The UB04 invoice report also displays the HCPC and Modifiers in the HCPCS locator.* *CMS1500 > invd_1500Billing-ModifierID1 (Not hidden)* *UB04Invoice* *> invd_1500BillingModifierID1 (Hidden)* *UB92Invoice* *> invd_1500BillingModifier-ID1 (Not hidden)*						
FK	invd_1500BillingModifierID2 *Billing modifier 2 of the invoice detail. Modifiers are used to increse the level of service specificity.* *Billing payers on a UB04 and/or electronically with the 837I file often includes the use of Modifiers. This is often necessary with Medicaid payers. The UB04 billing process includes the modifiers. This affects payers that have the bill types of UB04, UB04 (Charge + Tax), and PPS Claim; and those that process the 5010 837I billing file.* *- Bill Type on Payers>Billing tab set to UB04- EDI Type on Payers>EDI Settings tab is set to 5010 837I- Set the Modifiers on the Payers>Payer Services tab. Each Service Code can have up to four Modifiers.* *- The Schedule Details>1500 tab is used for both 1500 and UB04 modifiers and displays the modifiers from the Payer IF the user creating and/or completing the schedule has*	int		4	True		

	permission to this tab [permission to Schedule.H1500 and Schedule.H1500C]. *- Modifier columns may be added to the Schedule List View layout for easier reviewing for Payers that require modifiers.* *- The UB04 invoice batch displays the HCPC and Modifiers in the HCPCS column in the grid (UB04 does not have a separate locator for the modifiers).* *- The UB04 Preview form also displays the HCPC and Modifiers in the HCPCS locator.* *- The UB04 invoice report also displays the HCPC and Modifiers in the HCPCS locator. CMS1500 > invd_1500BillingModifier- ID2 (Not hidden)* *UB04Invoice > invd_1500BillingModifierID2 (Hidden)* *UB92Invoice > invd_1500BillingModifier- ID2 (Not hidden)*					
FK	invd_1500BillingModifierID3 *Billing modifier 3 of the invoice detail. Modifiers are used to increse the level of service specificity.* *Billing payers on a UB04 and/or electronically with the 837I file often includes the use of Modifiers. This is often necessary with Medicaid payers. The UB04 billing process includes the modifiers. This affects payers that have the bill types of UB04, UB04 (Charge + Tax), and PPS Claim; and those that process the 5010 837I billing file.* *- Bill Type on Payers>Billing tab set to UB04- EDI Type on Payers>EDI Settings tab is set to 5010 837I- Set the Modifiers on the Payers>Payer Services tab. Each Service Code can have up to four Modifiers.* *- The Schedule Details>1500 tab is used for both 1500 and*	int		4	True	

	UB04 modifiers and displays the modifiers from the Payer IF the user creating and/or completing the schedule has permission to this tab [permission to Schedule.H1500 and Schedule.H1500C]. *- Modifier columns may be added to the Schedule List View layout for easier reviewing for Payers that require modifiers.* *- The UB04 invoice batch displays the HCPC and Modifiers in the HCPCS column in the grid (UB04 does not have a separate locator for the modifiers).* *- The UB04 Preview form also displays the HCPC and Modifiers in the HCPCS locator.* *- The UB04 invoice report also displays the HCPC and Modifiers in the HCPCS locator. CMS1500* *> invd_1500BillingModifier-ID3 (Not hidden)* *UB04Invoice* *> invd_1500BillingModifierID3 (Hidden)* *UB92Invoice* *> invd_1500BillingModifier-ID3 (Not hidden)*						
🔑 FK	invd_1500BillingModifierID4 *Billing modifier 4 of the invoice detail. Modifiers are used to increse the level of service specificity.* *Billing payers on a UB04 and/or electronically with the 837I file often includes the use of Modifiers. This is often necessary with Medicaid payers. The UB04 billing process includes the modifiers. This affects payers that have the bill types of UB04, UB04 (Charge + Tax), and PPS Claim; and those that process the 5010 837I billing file.* *- Bill Type on Payers>Billing tab set to UB04- EDI Type on Payers>EDI Settings tab is set to 5010 837I- Set the Modifiers on the Payers>Payer Services*	int		4	True		

tab. Each Service Code can have up to four Modifiers. *- The Schedule Details>1500 tab is used for both 1500 and UB04 modifiers and displays the modifiers from the Payer IF the user creating and/or completing the schedule has permission to this tab [permission to Schedule.H1500 and Schedule.H1500C].* *- Modifier columns may be added to the Schedule List View layout for easier reviewing for Payers that require modifiers.* *- The UB04 invoice batch displays the HCPC and Modifiers in the HCPCS column in the grid (UB04 does not have a separate locator for the modifiers).* *- The UB04 Preview form also displays the HCPC and Modifiers in the HCPCS locator.* *- The UB04 invoice report also displays the HCPC and Modifiers in the HCPCS locator. CMS1500 > invd_1500BillingModifier-ID4 (Not hidden)* *UB04Invoice > invd_1500BillingModifierID4 (Hidden)* *UB92Invoice > invd_1500BillingModifier-ID4 (Not hidden)*						
invd_ProviderNPI *Caregiver NPI number (National Provider Number) that performed the service of the invoice detail.* *CMS1500 > invd_Provider-NPI (Not hidden)* *UB04Invoice > invd_Provider-NPI (Hidden)* *UB92Invoice > invd_Provider-NPI (Not hidden)*	nvarchar(10)		20	True		
invd_OtherIDType *Other ID type of referring provider of the invoice detail.* *CMS1500 > invd_Other-IDType (Not hidden)*	nvarchar(2)		4	True		

	UB04Invoice > invd_Other-IDType (Hidden) *UB92Invoice > invd_Other-IDType (Not hidden)*						
	invd_OtherID *Other ID number of referring provider of the invoice detail.* *CMS1500 > invd_OtherID (Not hidden)* *UB04Invoice > invd_OtherID (Hidden)* *UB92Invoice > invd_Other-ID (Not hidden)*	nvarchar(50)		100	True		
⛁	invd_AuthorizationID *Authorization ID of the authorized service of the invoice detail. Also called Auth-ID.*	bigint		8	True		
	invd_AuthDetailID *Authorization detail ID of the authorized service of the invoice detail.*	bigint		8	True		
	invd_AuthCode *Payment authorization code of the invoice detail. Also called AuthCode.*	nvarchar(50)		100	True		
	invd_DefDaysRem *Payment deferral status code of the invoice detail.0: No deferral* *1: Deferral in progress* *2: Deferral completed*	tinyint		1	False		((0))
⛁	invd_IncludeTaxes *Include taxes status code of the invoice detail.* *0: Off (Not to include taxes in the Charge total)* *1: On (Include taxes in the Charge total)* *2: Taxes Only for charge total* *3: Taxes record from Transfer Process* *Payment Postings > Payment and Postings > (Hidden)* *CMS1500 > invd_Include-Taxes (Hidden)* *Invoice Postings > invd_-IncludeTaxes (Not hidden)* *UB04Invoice > invd_Include-Taxes (Hidden)*	tinyint		1	False		((0))

	UB92Invoice > invd_Include-Taxes (Not hidden)						
FK	invd_RegionID *The region ID of the branch of the invoice detail.*	int		4	True		
	invd_AdmissionID *The admission ID of the client of the invoice detail.*	bigint		8	True		
⛁	invd_DetailsType *Details type code of the invoice detail.0 : Service* *1 : Expense* *2 : Tax*	tinyint		1	False		
	invd_AdjustedChargeTotal *Charge Total plus all Invoice Adjustments*	money		8	True		
	invd_Balance *Total charges plus any postings against the invoice details record. It can be negative.*	money		8	True		
	invd_TotalRevAdjustments *Total Revenue Adjustment Postings against the Invoice Details (posttyp_PostingType = 1)* *UB92Invoice > invd_TotalRev-Adjustments (Not hidden)*	money		8	False		((0))
	invd_TotalNonRevAdjustments *Total Non Revenue Adjustment Postings against the Invoice Details (posttyp_-PostingType = 3)* *UB92Invoice > invd_TotalNon-RevAdjustments (Not hidden)*	money		8	False		((0))
	invd_TotalPayments *Total payment postings against the Invoice Details (posttyp_-PostingType = 0)* *UB92Invoice > invd_Total-Payments (Not hidden)*	money		8	False		((0))
⛁	invd_InvoiceGroupID *Grouping based on invh_-GroupingProcessID.* *0 - No grouping used on this Invoice, invd_InvoiceGroupID = invd_ID* *1 - HCFA 1500 grouping used on this invoice. Invoice Details will be grouped by HCPCS code, Auth Code, Modifiers,*	bigint		8	True		

	and Unit Flag. The invd_-InvoiceGroupID for grouped details will be the MIN(invd_ID) for that grouping.						
⊞	invd_InvoiceGroupCount *Used to help in applying 835 payments when Invoices are grouped on the 837*	int		4	True		((1))
	invd_ScheduleNote *Taken from the associated T_-Schedules.sch_Description column for NON Schedule Expense Invoice Details (this includes schedules with multiple services stored in T_-ScheduleExpenses).* *This applies to any Invoice Process that uses usp_-InvoiceBatch_DraftPrivate.* *This also applies to any Invoice created through a transfer.* *This field will always be NULL for expenses and PPS Invoice Processes.* *This will be displayed below the Invoice Details on the Standard and Payer Invoices depending on the values in T_-Branches.br_InvParm_Display-SchNotes and T_Payers.pay_-InvParm_DisplaySchNotes.* *CMS1500 > invd_Schedule-Note (Hidden)* *UB04Invoice > invd_Schedule-Note (Hidden)* *UB92Invoice > invd_Schedule-Note (Not hidden)*	nvarchar(4000)		8000	True		
	invd_NoCalcUnits *Used with the 1500 in cases where we want to show Units on the Invoice that ultimately aren't used in calculations for any of the Amount fields (expected revenue or display amount, etc)*	decimal(18,8)		9	True		
	invd_NoCalcUnitFlag *Used with the 1500 in cases where we want to show Units on the Invoice that ultimately aren't used in calculations for any of the Amount fields (expected revenue or display amount, etc)*	smallint		2	True		

invd_NoCalcDateFrom *Non-UTC date.*	datetime		8	True		
invd_DisplayDateFrom *Date to display invoice details from. Non-UTC date.* *CMS1500 > invd_DisplayDate-From (Not hidden)* *UB04Invoice > invd_Display-DateFrom (Not hidden)* *UB92Invoice > invd_Display-DateFrom (Not hidden)*	datetime	True	8	False		
invd_NoCalcDateTo *Non-UTC date.*	datetime		8	True		
invd_DisplayDateTo *Date to display invoice details to. Non-UTC date.* *CMS1500 > invd_DisplayDate-To (Not hidden)* *UB04Invoice > invd_Display-DateTo (Not hideen)* *UB92Invoice > invd_Display-DateTo (Not hideen)*	datetime	True	8	True		
invd_TaxPortion *This is the exact portion of this service that's applied to taxes*	money		8	True		
invd_TotalTaxes *Total amount of taxes of the invoice detail. Also called Taxes* *UB04Invoice > invd_Total-Taxes (Hidden)* *UB92Invoice > invd_Total-Taxes (Not hidden)*	money	True	8	True		
invd_ContractRate *Contract rate of the invoice detail.*	smallmoney		4	True		
invd_ContractRateSource *Source of contract rate of the invoice detail.*	tinyint		1	True		
invd_ContractRateID *Contract rate ID of the invoice detail.*	int		4	True		
invd_1500DiagLabel *The actual diagnosis pointers displayed in the 1500 detail section (FL24E). The original goal was to not store this on the table, but it caused too many issues because it was required to know the version of the 1500 used in order to create this string from the bitfield stored in*	nvarchar(4)		8	True		

	invd_1500Diag. I have left that field intact, but added this field to be used in the 1500 preview. It should only be updated in the 1500 draft processes. *UB04Invoice > invd_1500Diag-Label (Not hidden)*						
	invd_ScheduleShiftPayersID *This field refers back to the T_-ScheduleShiftPayers table. The relationship between T_InvoiceDetails, T_-ScheduleShifts, and T_-ScheduleShiftPayers is complex. I wouldn't say that T_ScheduleShiftPayers is a many to many relationship to T_InvoiceDetails. But I will at least say it's a one to many AND a many to one relationship. This confusion is mostly due to the Benefit split types. Where multiple Invoice Details can point back to a single Schedule Shift Payer for Daily, Weekly, and Monthly split types and multiple Schedule Shift Payers can point back to a single Invoice Detail record for Hourly and Schedule Hourly split types. So using these 2 tables together in a query can be complex, Definitely seek the help of the local expert when using.*	bigint		8	True		
FK	**invd_TransferFromInvoice-DetailID** *Used in the COB process. This will point back to the Invoice Detail record that the current Invoice Detail record was transferred from.*	bigint		8	True		
FK	**invd_TransferToInvoiceDetail-ID** *Used in the COB process. This will point back to the Invoice Detail record that the current Invoice Detail record was transferred to.*	bigint		8	True		
	invd_DraftID *This is usde during the finalization process. When we finalize we copy records from 2 to 10 draft tables into finalized tables. There is a complex relationship between all of*	bigint		8	True		

these tables and it can be difficult to maintain that relationship during the copy. The draft ID helps us link back to the draft record to relink a finalized child record to it's parent and to it's own children.						
invd_OTRate *Rate used with OTUnits in calculating the OT Charge.* *UB92Invoice > invd_-OTRate (Not hidden)*	decimal(18,8)		9	False		((0))
invd_OTCalcType *Describes the logic used in calculating the OT Charge for this Invoice Detail* *Values* *----------------------------------* *0 - Default, This is equivalent to no OT being calculated.* *1 - Legacy, This uses the OTUnits and OTMultiplier manually added to the Schedule* *2 - Manual, This uses the OTUnits and looks up the appropriate OTRate* *3 - Automatic Client/Caregiver/Batch Order-Allocated* *UB92Invoice > invd_OTCalc-Type (Not hidden)*	tinyint		1	False		((0))
invd_PayrollBatchID *Used by the Registry Invoice to link to the Payroll Batch containing Payroll Items for this schedule*	bigint		8	True		
invd_OTRateSource *Values:* *OfficeRates = 0* *PayerOfficeRates = 1* *PayerOfficeAreaRates = 2* *ClientRates = 3* *ClientCaregiverRates = 4* *CaregiverRates = 5* *Charts = 6* *Schedule = 7* *Expense = 8* *PPS = 9* *NotFound = 10*	tinyint		1	False		((255))

	Service = 11 *WeeklyOT = 12* *WeeklyOTAdjustment =* *13* *PayrollAdjustment = 14* *Tax = 15* *DailyOT = 16* *DailyDoubleOT = 17* *SeventhDayOT = 18* *SeventhDay-* *OTAdjustment = 19* *DailyOTAdjustment = 20* *DailyDouble-* *OTAdjustment = 21* *SeventhDay = 22* *SeventhDayAdjustment =* *23* *PPSQCode = 24* *PPSRap = 25* *PPSFinal = 26* *PPSLUPA = 27* *Estimate = 28* *TaxTransfer = 29* *TotalCharges = 30* *Transfer = 31* *NoOT = 253* *NoRate = 254* *Unknown = 255*						
	invd_OTUnitsSubtract *This field determines whether OTUnits are subtracted from the Total Units when calculating the normal billing amount. As of 7/2016 the OT process is an add on rate for visits and those units should not be subtracted from the Billing Units.*	bit		1	False		((0))
	invd_DisplayOTUnits *New column of the over time units used for calculations on reports.*	decimal(8,4)	True	5	False		
	invd_ChargeTotalWOTax *This is the Total Charge per Invoice* *detail, including OTcalculation with corresponding Rounding. However, without taxes. Mostly replaced by invd_Allocated-ChargeWOTax.* *CMS1500 > invd_ChargeTotalWOTax (Hidden)*	money	True	8	True		

UB04Invoice > invd_Charge-TotalWOTax (Hidden)						
UB92Invoice > invd_Charge-TotalWOTax (Not hidden)						
invd_AllocatedChargeWOTax *This is calculated from Allocated Amount per Invoice detail, including OTcalculation with corresponding Rounding. However, without taxes.*	money	True	8	True		
invd_ChargeTotal *Total charge of the invoice detail. Also called Chg Rate, ChargeTotal, Reimbursement, ServiceCharges, TotalChgs. The sum of all invd_Charge-Total is also called Total-Charges, invd_ChargeTotal, ChargeTotal. Payment Postings > Payment and Postings > Total (Not hidden) CMS1500 > invd_ChargeTotal (Hidden) Invoice Postings > Total Charge (Not hidden) UB04Invoice > invd_Charge-Total (Hidden) UB92Invoice > invd_Charge-Total (Not hidden)*	decimal(38,6)	True	17	True		
invd_DisplayTotal *The sum of all invd_Display-Total is also called Invoice-Total or TotalDisplayAmount. Payment Postings > Payment and Postings > invd_Display-Total (Hidden) CMS1500 > invd_Display-Total (Not hidden) Invoice Postings > Invoice Total (Hidden) UB04Invoice > 47 TOTAL CHARGES (Not hidden) UB92Invoice > invd_Display-Total (Not hidden)*	numeric(38,6)	True	17	True		
invd_ContractTotal *Total amount of the contract of the invoice detail.*	money	True	8	True		
invd_DisplayOTRate *New column of the over time rate used for calculations on reports.*	decimal(18,8)	True	9	False		
invd_LineItemTypeOverride *This field allows you to*	tinyint		1	True		

	override the value in invd_-LineItemType. *Values* *--------------------------------* *0 = Unknown* *1 = Service* *2 = Expense* *3 = Tax* *4 = Estimate* *5 = Totals* *6 = PPS RAP* *7 = PPS Final* *8 = PPS LUPA* *9 = PPS QCode* *10 = PPS Medicare Advantage*						
	invd_LineItemType *This describes the type of Invoice Detail we're working with.* *default of 0 (unknown)* *Values* *--------------------------------* *0 = Unknown* *1 = Service* *2 = Expense* *3 = Tax* *4 = Estimate* *5 = Totals* *6 = PPS RAP* *7 = PPS Final* *8 = PPS LUPA* *9 = PPS QCode* *10 = PPS Medicare Advantage*	tinyint	True	1	True		
	invd_Sequence *This field represents the sequence of this shift for all Schedule Shift records for this Schedule ordered by schsh_-StartTime. This field is updated when an Invoice is extracted, so there is a high probability for this field to be null.*	int		4	True		
	invd_ShiftCount *The Total number of T_-ScheduleShift records for this Schedule*	int		4	True		

Indexes

Key	Name	Key Columns	Unique
PK C	PK_T_InvoiceDetails	invd_ID	True
	IX_T_InvoiceDetails_AuthorizationID_ServiceUTCDate-From	invd_AuthorizationID, invd_ServiceUTCDate-From	
	IX_T_InvoiceDetails_BranchID_PayerID_ClientID	invd_BranchID, invd_PayerID, invd_ClientID	
	IX_T_InvoiceDetails_ClientID	invd_ClientID	
	IX_T_InvoiceDetails_HolidayID	invd_HolidayID	True
	IX_T_InvoiceDetails_IncludeTaxes	invd_ID, invd_IncludeTaxes	
	IX_T_InvoiceDetails_InvoiceGroupID	invd_InvoiceGroupID, invd_InvoiceGroupCount	
	IX_T_InvoiceDetails_RateID	invd_RateID	
	IX_T_InvoiceDetails_ScheduleID_ExpenseID	invd_ScheduleID, invd_ScheduleExpenseID	
	IX_T_InvoiceDetails_SchedulePayerID	invd_SchedulePayerID	
	IX_T_InvoiceDetails_ServiceCodeID	invd_ServiceCodeID	
	IX_T_InvoiceDetails_TransferFromInvoiceDetailID	invd_TransferFromInvoiceDetailID	
	IX_T_InvoiceDetails_TransferToInvoiceDetailID	invd_TransferToInvoiceDetailID	
	IX_T_InvoiceDetails_invhID	invd_InvhID, invd_DetailsType	

Foreign Keys

Name	Columns
FK_T_InvoiceDetails_T_BillCodes	invd_BillCodeID->[dbo].[T_BillCodes].[bcd_ID]
FK_T_InvoiceDetails_T_BillingModifiersID1	invd_1500BillingModifierID1->[dbo].[T_BillingModifiers].[bilmod_ID]
FK_T_InvoiceDetails_T_BillingModifiersID2	invd_1500BillingModifierID2->[dbo].[T_BillingModifiers].[bilmod_ID]
FK_T_InvoiceDetails_T_BillingModifiersID3	invd_1500BillingModifierID3->[dbo].[T_BillingModifiers].[bilmod_ID]
FK_T_InvoiceDetails_T_BillingModifiersID4	invd_1500BillingModifierID4->[dbo].[T_BillingModifiers].[bilmod_ID]
FK_T_InvoiceDetails_T_BranchHolidays	invd_HolidayID->[dbo].[T_BranchHolidays].[brhol_ID]
FK_T_InvoiceDetails_T_Client	invd_ClientID->[dbo].[T_Client].[cli_ID]
FK_T_InvoiceDetails_T_InvoiceHeader	invd_InvhID->[dbo].[T_InvoiceHeader].[invh_ID]
FK_T_InvoiceDetails_T_Payers	invd_PayerID->[dbo].[T_Payers].[pay_ID]
FK_T_InvoiceDetails_T_Rates	invd_RateID->[dbo].[T_Rates].[rate_ID]
FK_T_InvoiceDetails_T_Region	invd_RegionID->[dbo].[T_Region].[reg_ID]
FK_T_InvoiceDetails_T_ScheduleExpenses	invd_ScheduleExpenseID->[dbo].[T_ScheduleExpenses].[schexp_ID] invd_ScheduleID->[dbo].[T_ScheduleExpenses].[schexp_schID]
FK_T_InvoiceDetails_T_SchedulePayers	invd_SchedulePayerID->[dbo].[T_SchedulePayers].[schcp_ID]
FK_T_InvoiceDetails_T_Schedules	invd_ScheduleID->[dbo].[T_Schedules].[sch_ID]
FK_T_InvoiceDetails_T_ServiceCode	invd_ServiceCodeID->[dbo].[T_ServiceCode].[svcc_ID]
FK_T_InvoiceDetails_TransferFrom	invd_TransferFromInvoiceDetailID->[dbo].[T_InvoiceDetails].[invd_ID]

| FK_T_InvoiceDetails_TransferTo | invd_TransferToInvoiceDetailID->[dbo].[T_InvoiceDetails].[invd_ID] |

Invoice Grouping Type

[dbo].[T_InvoiceGroupingType]

Note: Detailed documentation is pending.

Invoice Header

[dbo].[T_InvoiceHeader]

Description

Provides the main invoice information.

Columns

Key	Name	Data Type	Computed	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C (2)	invh_ID *Unique invoice ID used to reference an invoice across the system, UB04/UB92.* *Payment Postings > Payment and Postings > Invoice ID.* *Invoice Postings > Invoice ID.* *Schdeule Expenses > invh_ID.*	bigint		8	False	1 - 1	
	invh_InvoiceNumber *Invoice number field of the invoice header.* *Payment Postings > Payment and Postings > Invoice #.* *Invoice Postings > Invoice Num.*	nvarchar(50)		100	False		
(4)	invh_InvoiceDate *Invoice date field of the invoice header. Non-UTC date.* *Payment Postings > Payment and Postings > Invoice Date.* *Invoice Postings > Invoice Date.*	datetime		8	False		
FK	invh_PeriodClosedID *Invoice period closign ID. Created when invoice header record is closed.*	bigint		8	True		
(5) FK	invh_BranchID *Branch ID field of the invoice header, UB04/UB92.* *Payment Postings > Payment and Postings > Office.* *Invoice Postings > Office.* *Schedule Expenses > invh_BranchID*	int		4	False		
FK	invh_BillTypeID *Bill type ID field of the invoice*	int		4	False		

	header/UB04. Bill types ID and descriptions on T_BillType. *Payment Postings > Payment and Postings > Bill Type.* *Invoice Postings > Bill Type.*						
	invh_Status *Invoice status field of the invoice header/UB04.* *Payment Postings > Payment and Postings > Status.* *Invoice Postings > Status.*	int	True	4	False		
🖧 (4) FK🔑	invh_PayerID *Payer ID field of the invoice header, 1500/UB04.* *Payment Postings > Payment and Postings > invh_PayerID.* *Invoice Postings > invh_PayerID.*	bigint		8	False		
🖧 (3) FK🔑	invh_ClientID *Client ID field of the invoice header, 1500/UB04.* *Payment Postings > Payment and Postings > invh_ClientID.* *Invoice Postings > invh_ClientID.*	bigint		8	True		
🖧 FK🔑	invh_BatchID *Invoice batch ID field of the invoice header, 1500/UB04.* *Payment Postings > Payment and Postings > Batch ID.* *Invoice Postings > Batch ID.* *Schedule Expenses > invh_BatchID.*	bigint		8	False		
	invh_DraftID *Invoice draft ID field of the invoice header.*	bigint		8	True		
🖧 FK🔑	invh_POCID *Invoice Plan of Care (POC) ID field of the invoice header, 1500/UB04. The new POC ID is auto assigned and the new 60 Day Cert Period Dates are auto calculated.* *Payment Postings > Payment and Postings > POC ID.* *Invoice Postings > POC ID.*	bigint		8	True		
🖼	invh_InvoiceTotalRound *Invoice total round mode field of the invoice header, 1500/UB04. 0: No Rounding, 1: Round Up, 2: Truncate, 3: Round*	tinyint		1	False		((1))
🖼	invh_InvoiceTotalRoundDecimal *Invoice total number of decimals to round, 1500/UB04.*	tinyint		1	False		((2))

📇	**invh_InvoiceLineRound** *Invoice line rounding mode, 1500/UB04. 0: No Rounding, 1: Round Up, 2: Truncate, 3: Round*	tinyint		1	False		((0))
📇	**invh_InvoiceLineRoundDecimal** *Invoice line number of decimals to round, 1500/UB04.*	tinyint		1	False		((2))
⚥ (3)	**invh_CancelDate** *Invoice cancel date field of the Invoice header, 1500/UB04. SQL Server's current UTC date.*	datetime		8	True		
	invh_CancelUser *User who canceled the invoice. Set from current user.*	nvarchar(50)		100	True		
	invh_CreatedUser *User who created the invoice.*	nvarchar(50)		100	True		
	invh_CreatedDate *Date invoice was created. SQL Server's current UTC date.*	datetime		8	False		(getutcdate())
	invh_ModifiedUser *User who made invoice's most recent modification.*	nvarchar(50)		100	True		
	invh_ModifiedDate *Date of invoice's most recent modification. SQL Server's current UTC date*	datetime		8	False		(getutcdate())
	invh_TS *Invoice's header timestamp field.*	timestamp		8	True		
	invh_ClientControlNo *Invoice client's control number. Flows from invh_InvoiceNumber.* *Form UB04 field '3a PAT. CTRL#' and form UB92 field 3 'PATIENT CONTROL NO'.*	nvarchar(50)		100	True		
	invh_TypeOfBill *Invoice's type of bill code. Flows from T_UB04.ub_TypeOfBill.* *Form UB04 field 4 and form UB92 field 4.*	nvarchar(10)		20	True		
	invh_FedTaxID *Form UB04 field 5 and form UB92 field 5.* *Branch's federal tax ID that produced the invoice.*	nvarchar(25)		50	True		
	invh_StatementFrom *The start date of the accounting extract period from which the produced the invoice. Non-UTC date.* *Form UB04 field 6, form UB92 field 6 and form 1500.*	datetime		8	True		

invh_StatementThrough *The end date of the accounting extract period from which the produced the invoice. Non-UTC date. Form UB04 field 6, form UB92 field 6 and form 1500.*	datetime		8	True	
invh_ClientLastName *Client's last name field of the invoice header, 1500/UB04.Flows from T_-Client.cli_LastName.*	nvarchar(50)		100	True	
invh_ClientFirstName *Client's first name field of the invoice header, 1500/UB04.Flows from T_-Client.cli_FirstName.*	nvarchar(50)		100	True	
invh_ClientMiddleName *Client's middle name field of the invoice header, 1500. Flows from T_-Client.cli_MiddleName.*	nvarchar(50)		100	True	
invh_ClientSuffixName *Client's suffix field of the invoice header, UB04. Flows from T_-Client.cli_Suffix.*	nvarchar(50)		100	True	
invh_Address1 *Client's address1 field of the invoice header, 1500/UB04. Flows from T_-Client.cli_Address1.*	nvarchar(255)		510	True	
invh_Address2 *Client's address2 field of the invoice header, 1500/UB04. Flows from T_-Client.cli_Address2.*	nvarchar(60)		120	True	
invh_City *Client's city field of the invoice header, 1500/UB04. Flows from T_-Client.cli_City.*	nvarchar(50)		100	True	
invh_StateOrProvince *Client's state or province field of the invoice header, 1500/UB04. Flows from T_Client.cli_StateOrProvince.*	nvarchar(20)		40	True	
invh_PostalCode *Client's postal code field of the invoice header, 1500/UB04. Flows from T_Client.cli_PostalCode.*	nvarchar(20)		40	True	
invh_County *Client's county of the invoice header and UB04. Flows from T_Client.cli_-County.*	nvarchar(50)		100	True	
invh_Country *Client's country code of the invoice header and UB04. Flows from T_-Client.cli_Country.*	int		4	False	((240))
invh_DOB *Client's date of birth of the invoice*	datetime		8	True	

header. Flows from T_Client.cli_-BirthDate. *UB04 form field 10 and UB92 field 14.*						
invh_Sex *Client's sex of the invoice header. Flows from T_Client.cli_Sex. UB04 form field 11 and UB90 field 15.*	char(1)		1	True		
invh_ClientNumber *Client number of the invoice header. Flows from T_-H1500.h1500_PatientAccount-Number or T_Client.cli_ID. UB04 form field 8a.*	nvarchar(19)		38	True		
invh_PrvdrName *Provider's (Branch) name of the invoice header. Flows from T_-Branches.br_FormalName. UB04 form field 1.*	nvarchar(128)		256	True		
invh_PrvdrAddress1 *Provider's (Branch) address1 of the invoice header. Flows from T_-Branches.br_Address1 or T_-Branches.br_RemitAddress1 on form 1500. UB04 form field 1.*	nvarchar(255)		510	True		
invh_PrvdrAddress2 *Provider's (Branch) address2 of the invoice header. Flows from T_-Branches.br_Address2 or T_-Branches.br_RemitAddress2 on form 1500. UB04 form field 1.*	nvarchar(60)		120	True		
invh_PrvdrCity *Provider's (Branch) city of the invoice header. Flows from T_Branches.br_-RemitCity for H1500 T_-Branches.br_City for UB04 H1500 and UB04 form field 1.*	nvarchar(50)		100	True		
invh_PrvdrStateOrProvince *Provider's (Branch) state or province of the invoice header. Flows from T_-Branches.br_StateOrProvince for H1500 and T_Branches.br_StateOr-Province for UB04. H1500 and UB04 form field 1.*	nvarchar(20)		40	True		
invh_PrvdrPostalCode *Provider's (Branch) postal code of the invoice header. Flows from T_-Branches.br_RemitPostalCode for H1500 and T_Branches.br_Postal-Code for UB04.*	nvarchar(20)		40	True		

H1500 and UB04 form field 1.						
invh_PrvdrCounty *Provider's (Branch) county of the invoice header and UB04.* *Flows from T_Branches.br_County.*	nvarchar(50)		100	True		
invh_PrvdrCountry *Provider's (Branch) country of the invoice header and UB04.* *Flows from T_Branches.br_Country.*	int		4	False		((240))
invh_PrvdrTelephone *Provider's (Branch) telephone number of the invoice header. Flows from V_BranchPrimaryPhone.bsph_-Phone for H1500 and T_-Branches.br_RemitPhone for UB40.* *H1500 and UB04 form field 1.*	nvarchar(30)		60	True		
invh_PrvdrFax *Provider's (Branch) fax number of the invoice header. Flows from T_-Branches.br_RemitFax.* *UB04 form field 1*	nvarchar(30)		60	True		
invh_PrvdrEmail *Provider's (Branch) email field of the invoice header.*	nvarchar(50)		100	True		
invh_PrvdrNPI *Provider's (Branch) NPI of the invoice header, H1500 and UB04. Flows from T_Branches.br_NPI.*	nvarchar(15)		30	True		
invh_PrvdrType1 *Provider's (Branch) type1 field of the invoice header, H1500 and UB04.*	nvarchar(2)		4	True		
invh_PrvdrID1 *Provider's (Branch) ID1 field of the invoice header, H1500 and UB04.*	nvarchar(50)		100	True		
invh_PrvdrType2 *Provider's (Branch) type2 field of the invoice header, H1500 and UB04.*	nvarchar(2)		4	True		
invh_PrvdrID2 *Provider's (Branch) ID2 field of the invoice header, H1500 and UB04.*	nvarchar(50)		100	True		
invh_PrvdrType3 *Provider's (Branch) type3 field of the invoice header, H1500 and UB04.*	nvarchar(2)		4	True		
invh_PrvdrID3 *Provider's (Branch) ID3 field of the invoice header, H1500 and UB04.*	nvarchar(50)		100	True		
invh_PayName *Pay-to name field of the invoice header, H1500 and UB04 form field 2. Flows from T_Payers.pay_Name.*	nvarchar(50)		100	True		

invh_PayAddress1 *Pay-to address1 field of the invoice header. Flows from T_Payers.pay_-Address1.* *H1500 and UB04 form field 2*	nvarchar(255)		510	True		
invh_PayAddress2 *Pay-to address2 field of the invoice header, H1500 and UB04.* *Flows from* *T_Payers.pay_Address2.*	nvarchar(60)		120	True		
invh_PayCity *Payer city field of the invoice header. Flows from T_Payers.pay_City.* *H1500 and UB04 form field 2*	nvarchar(50)		100	True		
invh_PayStateOrProvince *Pay-to state or province field of the invoice header. Flows from T_-Payers.pay_StateOrProvince.* *H1500 and UB04 form field 2.*	nvarchar(20)		40	True		
invh_PayPostalCode *Pa-to postal code field of the invoice header, H1500 and UB04 form field 2. Flows from* *T_Payers.pay_PostalCode.*	nvarchar(20)		40	True		
invh_PayCounty *Pay-to county field of the invoice header, H1500 and UB04.* *Flows from* *T_Payers.pay_County*	nvarchar(50)		100	True		
invh_PayCountry *Pay-to country code field of the invoice header, H1500 and UB04.* *Flows from* *T_Payers.pay_Country*	int		4	False		((240))
invh_AdmissionDate *Client admission date field of the invoice header, H1500. Flows from T_H1500.h1500_OthrInsuredsDOB for H1500 and from T_-Admissions.adm_ActualSOCDate for UB04. Non-UTC date.* *UB04 form field 12 and UB92 form field 17.*	datetime		8	True		
invh_AdmissionHR *Client admission hour field of the invoice header. Flows from T_-UB04.ub_AdmissionHour.* *UB04 form field 13 and UB92 form field 18.*	nvarchar(10)		20	True		
invh_AdmissionType *Client type of admission field of the*	nvarchar(10)		20	True		

invoice header. Flows from T_-UB04.ub_AdmissionType. *UB04 form field 14 and UB92 form field 19.*						
invh_AdmissionSRC *Client source of admission field of the invoice header. Flows from RIGHT(T_Admission-Sources.admsrc_Name, 2) or 1 if T_-AdmissionSources.admsrc_Name IS NULL .* *UB04 form field 15 and UB92 form field 20.*	nvarchar(10)		20	True		
invh_MedicalRecordNumber *Medical record field of the invoice header. Flows from T_-Admissions.adm_MedicalRecord-Number.* *UB04 form field 3a PAT CTRL# and UB92 form field 23.*	nvarchar(50)		100	True		
invh_RPartyName *Responsible party name field of the invoice header.* *UB04 form field 38.*	nvarchar(50)		100	True		
invh_RPartyAddress1 *Responsible party address1 field of the invoice header. Flows from T_-Client.cli_Address1, T_-H1500.h1500_InsuredsAddress1 or NULL depending on some conditions.* *UB04 form field 38a*	nvarchar(255)		510	True		
invh_RPartyAddress2 *Responsible party address2 field of the invoice header. Flows from T_-Client.cli_Address2 or NULL depending on some conditions.* *UB04 form field 38b*	nvarchar(60)		120	True		
invh_RPartyCity *Responsible party city field of the invoice header, H1500 and UB04. Flows from T_Client.cli_City, T_-H1500.h1500_InsuredsCity or NULL depending on some conditions. UB04 field 38c combined with state and postal code (RPartyCityState-PostalCode).*	nvarchar(50)		100	True		
invh_RPartyStateOrProvince *Responsible party state or province field of the invoice header, H1500 and UB04. Flows from T_Client.cli_-StateOrProvince, T_H1500.h1500_-InsuredsState or NULL depending on some conditions.*	nvarchar(20)		40	True		

	UB04 field 38c combined with city and postal code (RPartyCityState-PostalCode).						
	invh_RPartyPostalCode *Responsible party postal code field of the invoice header, H1500 and UB04. Flows from T_Client.cli_-PostalCode, T_H1500.h1500_-InsuredsZipCode or NULL depending on some conditions.* *UB04 field 38c combined with city and state or province (RPartyCity-StatePostalCode).*	nvarchar(20)		40	True		
	invh_RPartyCounty *Responsible party county field of the invoice header.* *UB04 field 38d combined with country (RPartyCountyCountry).*	nvarchar(50)		100	True		
	invh_RPartyCountry *Responsible party country field of the invoice header.* *UB04 field 38d combined with county (RPartyCountyCountry).*	int		4	True		((240))
🖽	invh_CurrentPayerLocation *Current payer location field of the invoice header.*	tinyint		1	False		((1))
	invh_Payer1 *Payer name field of the invoice header. Flows from T_Payers.pay_-Name.* *UB04 form field 50 and UB92 form field 50.*	nvarchar(50)		100	True		
	invh_ProviderNo1 *Provider number/health plan ID field of the invoice header. Flows from T_-UB04.ub_HealthPlanIDPrimary.* *UB04 form field 51 and UB92 form field 51.*	nvarchar(20)		40	True		
	invh_RelInfo1 *Release of information field of the invoice header, 1500. Flows from T_-Admissions.adm_RelInfo.* *UB04 form field 52 and UB92 form field 52.*	nvarchar(3)		6	True		
	invh_AsgBen1 *Assignment of benefits field of the invoice header, 1500. Flows from T_-Admissions.adm_AssignBenefits for UB04 or T_H1500.h1500_Accept-AssignmentFlag for 1500.* *UB04 form field 53 and UB92 form field 53.*	nvarchar(3)		6	True		

invh_PriorPayments1 *Prior payments field of the invoice header.* *UB04 form field 54 and UB92 form field 54.*	money		8	True	
invh_EstAmountDue1 *Estimated amount due field of the invoice header. Flows from V_-InvoiceTotalsDraft.InvoiceTotal.* *UB04 form field 55 and UB92 form field 55.*	money		8	True	
invh_Payer2 *Payer name (2) field of the invoice header, Flows from T_UB04.ub_-PayerNameSecondary.* *UB04 form field 50 and UB92 form field 50.*	nvarchar(50)		100	True	
invh_ProviderNo2 *Provider number/health plan ID (2) field of the invoice header. Flows from T_UB04.ub_HealthPlan-IDSecondary.* *UB04 form field 51 and UB92 form field 51.*	nvarchar(20)		40	True	
invh_RelInfo2 *Release of information (2) field of the invoice header, 1500. Flows from T_UB04.ub_RelInfoSecondary.* *UB04 form field 52 and UB92 form field 52.*	nvarchar(3)		6	True	
invh_AsgBen2 *Assignment of benefits (2) field of the invoice header, 1500. Flows from T_-Admissions.adm_AssignBenefits for UB04 or T_UB04.ub_AssignBenefits-Secondary.* *UB04 form field 53 and UB92 form field 53.*	nvarchar(3)		6	True	
invh_PriorPayments2 *Prior payments (2) field of the invoice header.* *UB04 form field 54 and UB92 form field 54.*	money		8	True	
invh_EstAmountDue2 *Estimated amount due (2) field of the invoice header.* *UB04 form field 55 and UB92 form field 55.*	money		8	True	
invh_Payer3 *Payer name (3) field of the invoice header. Flows from T_UB04.ub_-PayerNameTertiary.*	nvarchar(50)		100	True	

UB04 form field 50 and UB92 form field 50.						
invh_ProviderNo3 *Provider number/health plan ID (3) field of the invoice header. Flows from T_UB04.ub_HealthPlan-IDTertiary.* *UB04 form field 51 and UB92 form field 51.*	nvarchar(20)		40	True		
invh_RelInfo3 *Release of information (3) field of the invoice header, 1500. Flows from T_UB04.ub_RelInfoTertiary.* *UB04 form field 52 and UB92 form field 52.*	nvarchar(3)		6	True		
invh_AsgBen3 *Assignment of benefits (3) field of the invoice header, 1500. Flows from T_-Admissions.adm_AssignBenefits for UB04 or T_UB04.ub_AssignBenefits-Tertiary.* *UB04 form field 53 and UB92 form field 53.*	nvarchar(3)		6	True		
invh_PriorPayments3 *Prior payments (3) field of the invoice header.* *UB04 form field 54 and UB92 form field 54.*	money		8	True		
invh_EstAmountDue3 *Estimated amount due (3) field of the invoice header.* *UB04 form field 55 and UB92 form field 55.*	money		8	True		
invh_DueFromPatient *Estimated amoutn due - Patient field of the invoice header.* *UB92 form field 55.*	money		8	True		
invh_InsuredsName1 *Insured's name field of the invoice header, 1500.* *UB04 form field 58 and UB92 form field 58.*	nvarchar(102)		204	True		
invh_P_Rel1 *Patient's relationship field of the invoice header, 1500. Flows from T_-H1500.h1500_PatientsRelationFlag to 1500 and T_UB04.ub_Patient-RelationshipPrimary or 18 for UB04* *UB04 form field 59 and UB92 form field 59. .*	nvarchar(5)		10	True		
invh_GroupName1 *Insurance group name field of the*	nvarchar(50)		100	True		

invoice header, 1500. Flows from T_-H1500.h1500_InsuredsInsurance-PlanProgramName for 1500 and T_-UB04.ub_InsuranceGroupName-Primary for UB04. *UB04 form field 61 and UB92 form field 61.*					
invh_InsuranceGroupNo1 *Insurance group number field of the invoice header, 1500. Flows from T_-H1500.h1500_InsuredsPolicyGrp-NumFECANum for 1500 and T_-UB04.ub_InsuranceGroupNo-Primary.* *UB04 form field 62 and UB92 form field 62.*	nvarchar(50)		100	True	
invh_InsuredsName2 *Insured's name (2) field of the invoice header, 1500. Flow from T_-H1500.h1500_OthrInsuredsName for 1500 and T_UB04.ub_Insureds-NameSecondary for UB04.* *UB04 form field 58 and UB92 form field 58.*	nvarchar(102)		204	True	
invh_P_Rel2 *Patient's relationship (2) field of the invoice header, 1500. Flows from T_UB04.ub_PatientRelationship-Secondary for UB04.* *UB04 form field 59 and UB92 form field 59.*	nvarchar(5)		10	True	
invh_GroupName2 *Insurance group name (2) field of the invoice header, 1500. Flows from T_H1500.h1500_InsuredsInsurance-PlanProgramName for 1500 and T_-UB04.ub_InsuranceGroupName-Primary for UB04.* *UB04 form field 61 and UB92 form field 61.*	nvarchar(50)		100	True	
invh_InsuranceGroupNo2 *Insurance group number (2) field of the invoice header, 1500. Flows from T_UB04.ub_InsuranceGroupNo-Secondary.* *UB04 form field 62 and UB92 form field 62.*	nvarchar(50)		100	True	
invh_InsuredsName3 *Insured's name (3) field of the invoice header, 1500. Flows from T_-UB04.ub_InsuredsNameTertiary for UB04.* *UB04 form field 58 and UB92 form field 58.*	nvarchar(102)		204	True	

invh_P_Rel3 *Patient's relationship (3) field of the invoice header, 1500. Flows from T_-UB04.ub_PatientRelationshipTertiary for UB04.* *UB04 form field 59 and UB92 form field 59.*	nvarchar(5)		10	True	
invh_GroupName3 *Insurance group name (3) field of the invoice header, 1500. Flows from T_-H1500.h1500_InsurancePlan-ProgramName for 1500 and T_-UB04.ub_InsuranceGroupName-Tertiary for UB04.* *UB04 form field 61 and UB92 form field 61.*	nvarchar(50)		100	True	
invh_InsuranceGroupNo3 *Insurance group number (3) field of the invoice header, 1500. Flows from T_H1500.h1500_OthrInsuredsPolicy-GrpNum for 1500 and T_UB04.ub_-InsuranceGroupNoTertiary for UB04.* *UB04 form field 62 and UB92 form field 62.*	nvarchar(50)		100	True	
invh_TreatmentAuthCode1 *Treatment authorization code field of the invoice header. Flows from T_-UB04.ub_TreatmentAuthCode-Primary.* *UB04 form field 63 and UB92 form field 63.*	nvarchar(50)		100	True	
invh_EmployerName1 *Employer name field of the invoice header. Flows from T_UB04.ub_-EmployerNamePrimary.* *UB04 form field 65 and UB92 form field 65.*	nvarchar(50)		100	True	
invh_TreatmentAuthCode2 *Treatment authorization code (2) field of the invoice header. Flows from T_-UB04.ub_TreatmentAuthCode-Secondary.* *UB04 form field 63 and UB92 form field 63.*	nvarchar(50)		100	True	
invh_EmployerName2 *Employer name (2) field of the invoice header. Flows from T_-UB04.ub_EmployerNameSecondary.* *UB04 form field 65 and UB92 form field 65.*	nvarchar(50)		100	True	
invh_TreatmentAuthCode3 *Treatment authorization code (3) field*	nvarchar(50)		100	True	

of the invoice header. Flows from T_-UB04.ub_TreatmentAuthCode-Tertiary. *UB04 form field 63 and UB92 form field 63.*						
invh_EmployerName3 *Employer name (3) field of the invoice header. Flows from T_-UB04.ub_EmployerNameTertiary.* *UB04 form field 65 and UB92 form field 65.*	nvarchar(50)		100	True		
invh_ICDVersion *DX version qualifier. ICD Version Indicator (9=9th version, 0=10th version) Medicare processes 9 of the invoice header, 1500. Flow from T_-H1500.h1500_OthrInsuredsSexFlag for 1500 and T_UB04.ub_DXVersion-Qualifier for UB04.* *UB04 form field 66.*	nvarchar(2)		4	True		((9))
invh_PrinDiagCd *Principal diagnosis code field of the invoice header, 1500.* *UB04 form field 67 and UB92 form field 67.*	nvarchar(10)		20	True		
invh_ADMDiagCode *Admitting diagnosis code field of the invoice header. Flows from T_-UB04.ub_AdmittingDiagnosisCode.* *UB04 form field 69 and UB92 form field 76.*	nvarchar(10)		20	True		
invh_VisitReason1 *Patient's reason for visit code field of the invoice header. Flows from T_-UB04.ub_PatientRsnVisitCode-Primary.* *UB04 form field 70 and UB92.*	nvarchar(10)		20	True		
invh_VisitReason2 *Patient's reason for visit (2) code field of the invoice header. Flows from T_-UB04.ub_PatientRsnVisitCode-Secondary.* *UB04 form field 70 and UB92.*	nvarchar(10)		20	True		
invh_VisitReason3 *Patient's reason for visit (3) code field of the invoice header. Flows from T_-UB04.ub_PatientRsnVisitCode-Tertiary.* *UB04 form field 70.*	nvarchar(10)		20	True		
invh_PPSCode *PPS code field of the invoice header, UB04 form field 71. Flows from T_-UB04.ub_PPSCode.*	nvarchar(3)		6	True		

	invh_ECode1 *External caue of injury code field of the invoice header. Flows from T_-UB04.ub_ExternalCauseInjury-Primary.* *UB04 form field 72.*	nvarchar(10)		20	True		
	invh_ECode2 *External caue of injury code (2) field of the invoice header. Flows from T_-UB04.ub_ExternalCauseInjury-Secondary.* *UB04 form field 72.*	nvarchar(10)		20	True		
	invh_ECode3 *External cause of injury code (3) field of the invoice header. Flows from T_-UB04.ub_ExternalCauseInjury-Tertiary.* *UB04 form field 72.*	nvarchar(10)		20	True		
FK	invh_Attend_PhysID *Attending physician ID field of the invoice header.* *UB04 and UB92 form field 82.*	bigint		8	True		
FK	invh_Oper_PhysID *Operating physician ID field of the invoice header, UB04.*	bigint		8	True		
FK	invh_Other_PhysID1 *Other physician ID field of the invoice header, UB04.*	bigint		8	True		
FK	invh_Other_PhysID2 *Other physician ID (2) field of the invoice header, UB04.*	bigint		8	True		
	invh_Remarks *Remarks field of the invoice header. UB04 form field 80 and UB92 for field 84.*	nvarchar(256)		512	True		
	invh_UB04 *UB04 XML Collection.*	xml([dbo].[Soneto-InvoiceCollection])		max	True		
	invh_OtherDiagnosticsCodeData *Diagnostic Codes XML Collection.*	xml([dbo].[Soneto-InvoiceCollection])		max	True		
	invh_ProcedureCodeData *Procedure Code XML Collection.*	xml([dbo].[Soneto-InvoiceCollection])		max	True		
	invh_AttendingPhysicanData *Attending Physician XML Collection.*	xml([dbo].[Soneto-InvoiceCollection])		max	True		
	invh_OperatingPhysicianData *Operating Physician XML Collection.*	xml([dbo].[Soneto-InvoiceCollection])		max	True		
	invh_OtherPhysician1Data *Other Physician XML Collection.*	xml([dbo].[Soneto-InvoiceCollection])		max	True		
	invh_OtherPhysician2Data *Other Physiciann (2) XML Collection.*	xml([dbo].[Soneto-InvoiceCollection])		max	True		

	invh_CMS1500 *CMS1500 XML Collection.*	xml([dbo].[Soneto-InvoiceCollection])		max	True		
	invh_LegacyID *Not used.*	int		4	True		
	invh_LegacyBranchId *Not used.*	int		4	True		
FK	invh_AcctExtID *Account extract ID field of the invoice header.*	bigint		8	True		
	invh_Balance *Balance due field of the invoice header.*	money		8	True		((0))
	invh_TotalCharges *Total charges field of the invoice header.*	money		8	True		((0))
	invh_ClientPhone *Client's phone number field of the invoice header.*	nvarchar(30)		60	True		
FK	invh_AdmissionID *Client's admission ID field of the invoice header.*	bigint		8	True		
FK	invh_EFTID *Electronic's funds transfer ID of the invoice header.*	int		4	True		
	invh_ClientPayerID *Client payer's ID of the invoice header.*	bigint		8	True		
	invh_SignedName *Authorized payer signature filed of the invoice heater.*	nvarchar(102)		204	True		
	invh_SignedDate *Date of authorized payment filed of the invoice heater.*	datetime		8	True		
	invh_AuthCode *Payment authorization code field of the invoice header.*	nvarchar(50)		100	True		
	invh_Notes *Notes field of the invoice header.*	nvarchar(max)		max	True		
	invh_OriginalServCharges *Sum of Details Charge Total when the Details Type = 0*	money		8	True		
	invh_OriginalExpCharges *Sum of Details Charge Total when the Details Type = 1*	money		8	True		
	invh_OriginalTaxCharges *Sum of Details Charge Total when the Details Type = 2*	money		8	True		
	invh_AdjustedServCharges *Sum of Details Charge Total plus all*	money		8	True		

Invoice details Adjustments when the Details Type = 0						
invh_AdjustedExpCharges *Sum of Details Charge Total plus all Invoice details Adjustments when the Details Type = 1*	money			8	True	
invh_AdjustedTaxCharges *Sum of Details Charge Total plus all Invoice details Adjustments when the Details Type = 2*	money			8	True	
invh_DisplayTotal *Invoice total field of the invoice header.*	money			8	True	
invh_OriginalCharges *Original charges field of the invoice header.*	money	True		8	True	
invh_InvoiceVersion *Used to identify significant changes to invoices. Any records prior to 1.14 will have NULL in this field. Any records created with 1.14 or later will have a number associating it to a particular Invoice ID. Right now this is used for the Standard Invoice, but it can be used for any Bill Type. For 1.14 I'm defaulting this value to 3 to leave room to identify records created between 1.11 and 1.13 (2) or prior to 1.11 (1), when significant changes were made.* *NULL - Prior to 1.14* *3 - 1.14 and later*	int			4	True	((4))
invh_GroupingProcessID *0 - No grouping used on this Invoice* *1 - HCFA 1500 grouping used on this invoice. Invoice Details will be grouped by HCPCS code, Auth Code, Modifiers, and Unit Flag. The invd_InvoiceGroupID for grouped details will be the MIN(invd_ID) for that grouping.*	int			4	False	((-1))
invh_InvoicePrintLine *Not being used?*	nvarchar(256)			512	True	
invh_RollUpTaxesOnPrint *When = 1 Set the Invoice Header to force printing to roll taxes into service charges and when = 0 means excess payments for this Invoice should not be distributed among taxes.*	bit			1	False	((0))
invh_Cert_SSN_HIC_ID_No1 *Insured's unique ID field of the invoice header, 1500, UB04 form field 60 and UB92 for field 60. Flows from T_Client.cli_HIC for 1500 and*	varbinary(255)			255	True	

	T_UB04.ub_InsuredsUnique-IDPrimary or T_Client.cli_HIC for UB04 and UB92.					
	invh_Cert_SSN_HIC_ID_No2 *Insured's unique ID (2) field of the invoice header, UB04 form field 60 and UB92 for field 60. Flows from T_-UB04.ub_InsuredsUnique-IDSecondary.*	varbinary(255)		255	True	
	invh_Cert_SSN_HIC_ID_No3 *Insured's unique ID (3) field of the invoice header, UB04 form field 60 and UB92 for field 60. Flows from T_-UB04.ub_InsuredsUniqueIDTertiary.*	varbinary(255)		255	True	
	invh_JoinICDVersion *The ICD version. (9=9th version, 0=10th version).*	tinyint		1	True	((9))
FK	invh_TransferFromInvoiceHeaderID *invh_TransferFromInvoiceHeaderID: If this invoice was transferred from another invoice, the invh_ID of the previous invoice is stored in this field. This data is here for a couple of reasons. First, the foreign key will prevent the original invoice from being deleted unless the transfer invoice is deleted first. This will prevent any bugs that allow an invoice to be deleted if the invoice it was transferred from still exists (even in cancelled state). Invoices can only be deleted if the entire chain of invoices following them are also deleted. The field also serves as an immediate identification that the Invoice is the result of a transfer process. It also creates a very easy to follow chain of order among invoices that have been transferred multiple times. In addition to having some applications for reporting and reverse/delete processes, it is extremely useful for debugging. This is the primary source for transfer history among invoices. Once the invoice is created this field will NEVER change. It always references the previous invoice in the chain, which can NEVER be removed unless this invoice is deleted first. So this field is a permanent record of transfer chains, even if the transfers are reversed multiple times. The corresponding field invh_TransferToInvoiceHeader-ID can be used to determine the current active transfer chain, but it will be cleared out if the next invoice*	bigint		8	True	

	in the chain is reversed or deleted. So invh_TransferToInvoiceHeaderID cannot give the full transfer history that invh_TransferFromInvoice-HeaderID can.						
🔑 FK	**invh_TransferToInvoiceHeaderID** *invh_TransferToInvoiceHeaderID: This field stores the invh_ID of the invoice this invoice was transferred to. It is similar to its counterpart invh_TransferFromInvoiceHeaderID in that it gives a clear view of an invoice transfer chain. It serves its own purpose though, and has slightly different use. It will immediately identify whether this invoice has been transferred, which is useful in determining whether it is eligible to be transferred. Any time the Transfer To invoice is deleted or reversed, the preceding invoice will have it's invh_-TransferToInvoiceHeaderID set to NULL. This means this field is not useful for a full history of invoice transfer chains. But it is useful for finding the active invoice transfer chain.*	bigint		8	True		
	invh_TransferType *invh_TransferType: This field records the Invoice Transfer Type used to create this invoice. By default the value is 0, meaning it was not created as part of the transfer process.* *0: Not a Transfer Invoice Process* *1: Balance Transfer - This is the original transfer process used to transfer the current balances to a standard invoice. This transfer process does not currently use an invoice process. During this transfer process the new invoice is created immediately, there is no draft/finalize. So there should be no invoice process records with invPr_-TransferType = 1. So there are situations where the invoice process will have a TransferType of 0 but the Invoice Header will have a Transfer-Type of 1. This transfer process is kicked off from the finalized batching screen using the procedure usp_-Invoice_Transfer.* *2: Invoice Transfer to Secondary Payer - This transfer process is new, and utilizes the typical draft/finalize, so it requires an invoice*	tinyint		1	False		((0))

	process. This gives us flexibility to make specific draft/finalize/reverse/delete procedures for different bill types. In particular this will help manage differences between transfers for UB04, 1500, and standard/payer invoices. It also gives us the ability to make custom invoice processes to address specific customer/payer transfer needs. This transfer process is kicked off from the finalized batching screen using the procedure usp_InvoiceBatch_Transfer. *?: May need to add another Transfer Type in the future to handle MSP*					
	invh_COBInvoiceID *Not being used?*	bigint		8	True	
	invh_SchedulePayersChecksum *The results of each Schedule Payer Checksum of Sequence, Client-PayerID, PayerID, and Sequence*ClientPayerID*PayerID then grouped by Schedule or Schedule Expense and aggregate checksummed.*	int		4	False	((-1))
	invh_COBSequence *Not being used?*	int		4	False	((0))
FK	invh_CancelEFTID *For Royalty processes that include PPS Invoices. When a PPS RAP or PPS Final Invoice is canceled, a portion of those charges must be reversed on the Royalty Extract. At the time that amount is included on an extract the invh_CancelEFTID will be stamped with the associated EFTID.*	int		4	True	
FK	invh_AssociatedPPSInvoiceHeader-ID *For PPS Rap Invoices this ID will point to the PPS Final Invoice and vice versa. When a PPS Final Invoice is canceled, this ID will remain and will continue to point to the PPS RAP Invoice, but this field will be cleared out on the PPS Rap Invoice.*	bigint		8	True	
	invh_RoyaltyFrontPercentage *For Royalty that includes PPS, this is the Amount of a billed RAP that is added to the Royalty when the RAP is included in a Royalty Period. It will be followed by a PPS Royalty Fulfillment when the RAP is canceled or the Final Claim is finalized. The*	decimal(5,4)		5	False	((1))

		fulfillment percentage will be equal to 1 - the Front Percentage.						

Indexes

Key	Name	Key Columns	Unique
PK C	PK_T_InvoiceHeader	invh_ID	True
	IX_T_InvoiceHeader_InvoiceNumber	invh_InvoiceNumber, invh_BranchID	True
	IX_T_InvoiceHeader_AdmissionID	invh_AdmissionID	
	IX_T_InvoiceHeader_Associated-PPSInvoiceHeaderID	invh_AssociatedPPSInvoiceHeaderID	
	IX_T_InvoiceHeader_BatchID	invh_BatchID	
	IX_T_InvoiceHeader_BranchID_AcctExtID_-InvoiceDate	invh_BranchID, invh_AcctExtID, invh_InvoiceDate	
	IX_T_InvoiceHeader_BranchID_CancelDate	invh_BranchID, invh_CancelDate	
	IX_T_InvoiceHeader_BranchID_InvoiceDate	invh_BranchID, invh_InvoiceDate, invh_CancelDate, invh_-ClientID, invh_PayerID	
	IX_T_InvoiceHeader_CancelEFTID	invh_CancelEFTID	
	IX_T_InvoiceHeader_ClientID	invh_ClientID, invh_InvoiceDate, invh_Balance, invh_ID	
	IX_T_InvoiceHeader_EFTID	invh_EFTID	
	IX_T_InvoiceHeader_POCID	invh_POCID	
	IX_T_InvoiceHeader_PayerID	invh_PayerID	
	IX_T_InvoiceHeader_PeriodClosedID	invh_PeriodClosedID	
	IX_T_InvoiceHeader_TransferFromInvoice-HeaderID	invh_TransferFromInvoiceHeaderID	
	IX_T_InvoiceHeader_TransferToInvoice-HeaderID	invh_TransferToInvoiceHeaderID	
	IX_T_InvoiceHeader_datePayerID	invh_BranchID, invh_InvoiceDate, invh_CancelDate, invh_-PayerID	
	_dta_index_T_InvoiceHeader_ID_PayerID_-ClientID	invh_ID, invh_PayerID, invh_ClientID	

Foreign Keys

Name	Columns
FK_T_InvoiceHeader_T_AcctExtract	invh_AcctExtID->[dbo].[T_AcctExtract].[acctext_ID]
FK_T_InvoiceHeader_T_Admissions	invh_AdmissionID->[dbo].[T_Admissions].[adm_ID]
FK_T_InvoiceHeader_T_BillType	invh_BillTypeID->[dbo].[T_BillType].[biltyp_ID]
FK_T_InvoiceHeader_T_Branches	invh_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_InvoiceHeader_T_Client	invh_ClientID->[dbo].[T_Client].[cli_ID]
FK_T_InvoiceHeader_T_EFT	invh_EFTID->[dbo].[T_EFT].[eft_ID]
FK_T_InvoiceHeader_T_EFT_Cancel	invh_CancelEFTID->[dbo].[T_EFT].[eft_ID]
FK_T_InvoiceHeader_T_InvoiceBatch	invh_BatchID->[dbo].[T_InvoiceBatch].[invb_ID]
FK_T_InvoiceHeader_T_InvoiceHeader_PPS	invh_AssociatedPPSInvoiceHeaderID->[dbo].[T_InvoiceHeader].[invh_ID]
FK_T_InvoiceHeader_T_Payers	invh_PayerID->[dbo].[T_Payers].[pay_ID]
FK_T_InvoiceHeader_T_PeriodDates	invh_PeriodClosedID->[dbo].[T_PeriodDates].[prdcls_ID]
FK_T_InvoiceHeader_T_Physician	invh_Oper_PhysID->[dbo].[T_Physician].[phys_ID]
FK_T_InvoiceHeader_T_Physician1	invh_Other_PhysID1->[dbo].[T_Physician].[phys_ID]
FK_T_InvoiceHeader_T_Physician2	invh_Other_PhysID2->[dbo].[T_Physician].[phys_ID]
FK_T_InvoiceHeader_T_Physician3	invh_Attend_PhysID->[dbo].[T_Physician].[phys_ID]
FK_T_InvoiceHeader_T_PlanOfCare	invh_POCID->[dbo].[T_PlanOfCare].[poc_ID]
FK_T_InvoiceHeader_TransferFrom	invh_TransferFromInvoiceHeaderID->[dbo].[T_InvoiceHeader].[invh_ID]
FK_T_InvoiceHeader_TransferTo	invh_TransferToInvoiceHeaderID->[dbo].[T_InvoiceHeader].[invh_ID]

Invoice Process

[dbo].[T_InvoiceProcess]

Note: Detailed documentation is pending.

Margin Types

[dbo].[T_MarginTypes]

Description

Margin Types for liabilities that affect Gross Margin (Payroll and Billing).

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	margtyp_ID *System generated ID number for the margin types record.* *Also called ID.*	int	4	False	10001 - 1	
⊹	margtyp_Name *The name of the margin type.* *Also called Name.*	nvarchar(50)	100	True		
	margtyp_CreatedDate *UTC date updated by SQL server's current UTC date.* *The date the margin type record was created.* *Also called CreatedDate.*	datetime	8	False		(getutcdate())
	margtyp_CreatedUser *The user logged in to the system when the margin type record was created.* *Also called CreatedUser.*	nvarchar(50)	100	False		
	margtyp_ModifiedDate *UTC date updated by SQL server's current UTC date.* *The date when the margin types record was last modified.* *Also called ModifiedDate.*	datetime	8	False		(getutcdate())
	margtyp_ModifiedUser *The user logged in to the system when the margin types record was last modified.* *Also called ModifiedUser.*	nvarchar(50)	100	False		
	margtyp_TS *The timestamp field of the margin type record.* *Also called TS.*	timestamp	8	False		
🖳	margtyp_ListItemType *The list type of the margin for the DropDown-List control.*	tinyint	1	False		((0))

	margtyp_RptGroupID *Optional report group ID for reporting.*	int	4	False		((71))
	margtyp_BranchID *Optional Branch ID for offices that have special margin requirements not covered by the system margins.*	int	4	True		
	margtyp_OverrideID *Optional ID of system margin to be overridden with this margin.*	int	4	True		
	margtyp_Description *The description of the margin type.*	nvarchar(1000)	2000	True		('')
	margtyp_Active *The status active/inactive of the margin type.*	bit	1	False		((1))

Indexes

Key	Name	Key Columns	Unique	Fill Factor
	PK_T_MarginTypes	margtyp_ID	True	80
	IX_T_MarginTypes_BranchOverride-Name	margtyp_BranchID, margtyp_OverrideID, margtyp_-Name	True	80

Foreign Keys

Name	Columns
FK_T_MarginTypes_T_Branches	margtyp_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_MarginTypes_T_MarginTypes	margtyp_OverrideID->[dbo].[T_MarginTypes].[margtyp_ID]
FK_T_MarginTypes_T_ReportGroups	margtyp_RptGroupID->[dbo].[T_ReportGroups].[rptgrp_ID]

Medications

[dbo].[T_Medications]

Note: Detailed documentation is pending.

OT Exempt Types

Note: The OT Exempt Types are no longer being used.

🖽 [dbo].[T_OTExemptTypes]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	otextyp_ID	int		False	(10001,1)	
	otextyp_Name	[nvarchar](50)	50	False		
	otextyp_OTExemptHrs	[decimal](8, 2)		False		0
	otextyp_ListItemType	tinyint		False		0
FK	otextyp_BranchID	int		False		
	otextyp_RptGroupID	int		False		122
FK	otextyp_OverrideID	int		False		
	otextyp_Active	bit		False		
	otextyp_CreatedDate	datetime		False		(getutcdate())
	otextyp_CreatedUser	[nvarchar](50)	50	False		'sbsdba'
	otextyp_ModifiedDate	datetime		False		(getutcdate())
	otextyp_ModifiedUser	[nvarchar](50)	50	False		'sbsdba'
	otextyp_TS	timestamp		False		
	otextyp_Description	[nvarchar](1000)	1000	False		('')
	otextyp_Bill *Flag to indicate this NonWorking type applies to billing*	bit		False		0
	otextyp_Pay *Flag to indicate this NonWorking type applies to payroll*	bit		False		1

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_OTExemptTypes	otextyp_ID	True	80
	IX_T_OTExemptTypes_BranchOverrideName	otextyp_BranchID, otextyp_OverrideID, otextyp_Name	True	80

Foreign Keys

Name	Columns
FK_T_OTExemptTypes_T_Branches	otextyp_BranchID-> [dbo].[T_Branches] ([br_ID])
FK_T_OTExemptTypes_T_OTExemptTypes	otextyp_OverrideID-> [dbo].[T_OTExemptTypes] ([otextyp_ID])
FK_T_OTExemptTypes_T_ReportGroups	otextyp_RptGroupID-> [dbo].[T_ReportGroups] ([rptgrp_ID])

Payer Bill Codes

[dbo].[T_PayerBillCodes]

Note: Detailed documentation is pending.

Payer Branches

🖼 [dbo].[T_PayerBranches]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK FK C	paybr_ID *System generated unique ID for the Payer Branches record.*	bigint	8	False	1 - 1	
FK	paybr_PayerID *The ID of the Payer that this Payer Branches record is associated with. Flows from [T_Payer].[pay_id]*	bigint	8	False		
FK	paybr_Branch_ID *The ID of the Branch that this Payer Branches record is associated with. Flows from [T_Branches].[br_id]. Shown in the Payer/Offices form as the Office, shown in the Offices grid.*	int	4	False		
	paybr_CreatedUser *The user logged in the system when the record was created. Called Created By in the Payer>Offices form, shown in the Offices grid.*	nvarchar(50)	100	False		
	paybr_CreatedDate *The Date the Payer Branches record was created. UTC date. Updated by SQL Server's current UTC date. Called Created On in the Payer>Offices form, shown in the Offices grid.*	datetime	8	False		(getutcdate())
	paybr_ModifiedUser *The user logged in the system when the record was last modified. Called Modified By in the Payer>Offices form, shown in the Offices grid.*	nvarchar(50)	100	False		
	paybr_ModifiedDate *The date that this record was last modified. It is a UTC date and is updated by the SQL Server current UTC date. This date is converted to the user's computer's timezone in the UI. Called Modified On in the Payer>Offices form, shown in the Offices grid.*	datetime	8	False		(getutcdate())
	paybr_TS *The TS field of the Payer Branches record.*	timestamp	8	False		
	paybr_AllowFlexibleTimeScheduling *Indicates whether the payer uses flexible scheduling times. Used to control missed visit notifications. Used only for payer offices. Called Tel Ignore Time in the Payer>Offices form, shown in the Offices grid. When checked, a first downloaded arrival and departure call from the Telephony server associates to the first scheduled visit for the Client (If there are multiple visits*	bit	1	False		((0))

scheduled for the day for a Client, any further downloaded arrival and departure calls will display in the Unassigned Calls section of the Telephony Call Review screen and need to be manually matched to the scheduled visit).					

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_PayerBranches	paybr_ID	True	80

Foreign Keys

Name	Delete	Columns
FK_T_PayerBranches_T_Branches		paybr_Branch_ID->[dbo].[T_Branches].[br_ID]
FK_T_PayerBranches_T_Payers	Cascade	paybr_PayerID->[dbo].[T_Payers].[pay_ID]

Payer Documents

▦ [dbo].[T_PayerDocuments]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	paydoc_ID	bigint	8	False	1 - 1	
FK	paydoc_PayerID	bigint	8	False		
FK	paydoc_TypeID	int	4	False		
	paydoc_Data	image	max	False		
	paydoc_Format	nvarchar(50)	100	False		
	paydoc_FileName	nvarchar(256)	512	False		
	paydoc_FileSize	bigint	8	True		
	paydoc_Thumbnail	image	max	True		
	paydoc_Notes	nvarchar(4000)	8000	True		
FK	paydoc_Sharelevel	int	4	False		
	paydoc_CreatedDate	datetime	8	False		(getutcdate())
	paydoc_CreatedUser	nvarchar(50)	100	False		
	paydoc_ModifiedDate	datetime	8	False		(getutcdate())
	paydoc_ModifiedUser	nvarchar(50)	100	False		
	paydoc_TS	timestamp	8	False		
	paydoc_isCompressed	bit	1	False		((0))
FK	paydoc_SubTypeID	int	4	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_PayerDocuments	paydoc_ID	True	80
	IX_T_PayerDocuments	paydoc_PayerID		80

Foreign Keys

Name	Columns
FK_T_PayerDocuments_T_DocumentSubTypes	paydoc_SubTypeID->[dbo].[T_DocumentSubTypes].[docstyp_ID]
FK_T_PayerDocuments_T_DocumentTypes	paydoc_TypeID->[dbo].[T_DocumentTypes].[doctyp_ID]
FK_T_PayerDocuments_T_Payer	paydoc_PayerID->[dbo].[T_Payers].[pay_ID]
FK_T_PayerDocuments_T_PayerDocumentShare-Levels	paydoc_Sharelevel->[dbo].[T_PayerDocumentShare-Levels].[paydocslvl_ID]

Payer Phones

[dbo].[T_PayerPhones]

Note: Detailed documentation is pending.

Payer Services

[dbo].[T_PayerServices]

Note: Detailed documentation is pending.

Payer Status

[dbo].[T_PayerStatus]

Note: Detailed documentation is pending.

Payer Type

[dbo].[T_PayerType]

Description

Defines the Payer Types available in the application. Users can use the system (Global) Payer-Types, add their own Payer Types at the Office level, or override the system (Global) Payer-Types.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	paytyp_ID *System generated ID number for the Payer Type record. Also called ID.*	int	4	False	10001 - 1	
	paytyp_Name *The Name of the Payer Type.*	nvarchar(50)	100	True		('')
	paytyp_Active *The status of the payer type. 0 = inactive, 1 = active*	bit	1	False		((1))
	paytyp_CreatedDate *UTC date updated by SQL server's current UTC date. The date the payer type record was created. Also called Created On in the Drop Down Maintenance grid.*	datetime	8	False		(getutcdate())
	paytyp_CreatedUser *The user logged in to the system when the payer type record was created. Also called Created By in the Drop Down Maintenance grid.*	nvarchar(50)	100	False		
	paytyp_ModifiedDate *UTC date updated by SQL server's current UTC date. The date when the payer type record was last modified. Also called Modified On in the Drop Down Maintenance grid.*	datetime	8	False		(getutcdate())
	paytyp_ModifiedUser *The user logged in to the system when the payer type record was last modified. Also called Modified By in the Drop Down Maintenance grid.*	nvarchar(50)	100	False		
	paytyp_TS *The timestamp field of the payer type record. Also called TS.*	timestamp	8	False		
	paytyp_ListItemType *The list type of the payer type for the DropDown List control. 0 = Global, 1 = Office, 2 = Override*	tinyint	1	False		((0))
FK	paytyp_RptGroupID *Optional report group ID for reporting.*	int	4	False		((76))

	paytyp_BranchID *Optional Branch ID for offices that have special payer type requirements not covered by the system payer types.*	int	4	True		
	paytyp_OverrideID *Optional ID of system payer type to be overridden with this payer type.*	int	4	True		
	paytyp_Description *The description of the payer type.*	nvarchar(1000)	2000	True		('')
	paytyp_AcctID *The FK to the T_AcctsCharts table. The default acctID is set to 1 (Default Account). This is called Accounting Chart in the Drop Down Maintenance grid in the UI, if exists.*	int	4	True		
	paytyp_DefAcctID *The FK to the T_AcctsCharts table. The default acctID is set to 1 (Default Account). This is called Deferred Accounting Chart in the Drown Down Maintenance grid in the UI, if exists. This is the Account for Deferred Revenue such as Medicare Revenue.*	int	4	True		
	paytyp_AcctCode *The Account Code of the associated Accounting Chart, if it exists. Called Account Code in the UI.*	nvarchar(50)	100	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
	PK_T_PayerType	paytyp_ID	True	80
	IX_T_PayerType_BranchOverrideName	paytyp_BranchID, paytyp_OverrideID, paytyp_Name	True	80

Foreign Keys

Name	Columns
FK_T_PayerType_T_AcctCharts	paytyp_AcctID->[dbo].[T_AcctCharts].[acct_ID]
FK_T_PayerType_T_AcctCharts1	paytyp_DefAcctID->[dbo].[T_AcctCharts].[acct_ID]
FK_T_PayerType_T_Branches	paytyp_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_PayerType_T_PayerType	paytyp_OverrideID->[dbo].[T_PayerType].[paytyp_ID]
FK_T_PayerType_T_ReportGroups	paytyp_RptGroupID->[dbo].[T_ReportGroups].[rptgrp_ID]

Payers

[dbo].[T_Payers]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	pay_ID	bigint	8	False	1 - 1	
FK	pay_BranchID	int	4	False		
(2) FK	pay_ClientID	bigint	8	True		
(2)	pay_Name	nvarchar(50)	100	False		
	pay_Address1	nvarchar(255)	510	True		
	pay_Address2	nvarchar(60)	120	True		
	pay_City	nvarchar(50)	100	True		
	pay_StateOrProvince	nvarchar(20)	40	True		
	pay_PostalCode	nvarchar(20)	40	True		
	pay_County	nvarchar(50)	100	True		
	pay_Country	int	4	False		((240))
	pay_Active	bit	1	False		((1))
	pay_ContactSalut	nvarchar(5)	10	True		
	pay_ContactTitle	nvarchar(50)	100	True		
	pay_ContactFirstName	nvarchar(50)	100	True		
	pay_ContactLastName	nvarchar(50)	100	True		

	pay_Phone	nvarchar(30)	60	True		
	pay_PhoneType	int	4	True		
	pay_Notes	text	max	True		
🔀	pay_PayerTypeID	int	4	False		
🖼	pay_NPI	nvarchar(10)	20	True		
	pay_BillTypeID	int	4	False		((9))
	pay_AgencyProviderNum	nvarchar(20)	40	True		
	pay_ExcludeFromBatch	bit	1	False		((1))
	pay_PaymentTypeID	int	4	True		
	pay_RegionID	int	4	True		
	pay_AuthRequired	bit	1	False		((0))
🖼	pay_AnsiISAFI01 *Authorization Information Qualifier*	nvarchar(2)	4	True		('00')
	pay_AnsiISAFI02 *Authorization Information*	nvarchar(10)	20	True		
🖼	pay_AnsiISAFI03 *Security Information Qualifier*	nvarchar(2)	4	True		('00')
	pay_AnsiISAFI04 *Security Information*	nvarchar(10)	20	True		
🖼	pay_AnsiISAFI05_1 *Sender Interchange ID Qualifier*	nvarchar(2)	4	True		('ZZ')
	pay_AnsiISAFI06 *Interchange Sender ID*	nvarchar(15)	30	True		
🖼	pay_AnsiISAFI05_2 *Receiver Interchange ID Qualifier*	nvarchar(2)	4	True		((28))
	pay_AnsiISAFI07 *Interchange Receiver ID*	nvarchar(15)	30	True		
🖼	pay_AnsiISAFI10 *Interchange Control Standards Indentifier*	char(1)	1	True		('U')
	pay_AnsiISAFI11 *Interchange Control Version Number*	nvarchar(5)	10	True		('00401')
	pay_AnsiISAFI12 *Interchange Control Version Number*	nvarchar(9)	18	True		
🖼	pay_AnsiISAFI13 *Aknowledgment Requested*	char(1)	1	True		('1')

🖳	pay_AnsiISAFI14 *Usage Indicator*	char(1)	1	True		('P')
	pay_AnsiISAFI15 *Component Element Separator*	char(1)	1	True		('>')
	pay_AnsiGSF479	nvarchar(2)	4	True		('HC')
	pay_AnsiGSF28 *Group Control Number*	int	4	True		((1))
	pay_AnsiGSF455 *Group Control Number*	nvarchar(2)	4	True		('X')
	pay_AnsiGSF480 *Group Control Number*	nvarchar(12)	24	True		('004010X096A1')
	pay_AnsiSTF143 *Group Control Number*	nvarchar(3)	6	True		((837))
	pay_AnsiSTF329 *Group Control Number*	nvarchar(9)	18	True		('0001')
	pay_AnsiSTF1705	nvarchar(35)	70	True		
	pay_AnsiBHTF1005 *Transaction Set Purpose Code*	nvarchar(4)	8	True		('0019')
	pay_AnsiHeaderREFF128	nvarchar(3)	6	True		((87))
	pay_AnsiHeaderREFF127	nvarchar(30)	60	True		('004010X096A1')
	pay_AnsiLoop1000ANM1F98	nvarchar(3)	6	True		(N'41')
	pay_AnsiLoop1000BNM1F98	nvarchar(3)	6	True		(N'40')
	pay_AnsiLoop1000ANM1F66	nvarchar(2)	4	True		(N'46')
	pay_AnsiLoop1000BNM1F66	nvarchar(2)	4	True		(N'46')
	pay_AnsiReceiverName	nvarchar(35)	70	True		
	pay_AnsiIDType1 *1: Use NPI, 2: Use Employer's ID 3:Use Provider Number*	tinyint	1	False		((1))
	pay_AnsiIDType2	tinyint	1	False		((0))
	pay_AnsiIDType3	tinyint	1	False		((0))
	pay_AnsiPhysIDType1	tinyint	1	False		((1))
	pay_AnsiPhysIDType2	tinyint	1	False		((0))
	pay_AnsiPhysIDType3	tinyint	1	False		((0))

	pay_InvoiceTotalRound *0: No Rounding, 1: Round Up, 2: Truncate, 3: Round*	tinyint	1	False		((1))
	pay_InvoiceTotalRoundDecimal *The Invoice Total Number of Decimals to Round*	tinyint	1	False		((2))
	pay_InvoiceLineRound *0: No Rounding, 1: Round Up, 2: Truncate, 3: Round*	tinyint	1	False		((3))
	pay_InvoiceLineRoundDecimal *The Invoice Line Number of decimals to round*	tinyint	1	False		((2))
	pay_EdiTypeID	int	4	True		
	pay_CreatedDate	datetime	8	False		(getutcdate())
	pay_CreatedUser	nvarchar(50)	100	False		
	pay_ModifiedDate	datetime	8	False		(getutcdate())
	pay_ModifiedUser	nvarchar(50)	100	False		
	pay_TS	timestamp	8	False		
	pay_StatusID	int	4	False		((1))
	pay_LegacyID	int	4	True		
	pay_LegacyBranchID	int	4	True		
	pay_Email	nvarchar(50)	100	True		
	pay_ERNID	nvarchar(10)	20	True		
	pay_Itemize1500Billing	bit	1	False		((0))
	pay_AllowMassEmail	bit	1	False		((0))
	pay_AuthorizationConflictsAllow	tinyint	1	False		((0))
	pay_AuthorizationConflictsOverride	tinyint	1	False		((0))
	pay_DailyBenefit12am *If the Payers Split Type is assigned to Daily Benefit in a schedule, and pay_Daily- Benefit12am is false, then DailyBenefitDay is the day of the Schedule Start time and would not Split*	bit	1	False		((0))

	pay_ShowDFPSplit *0: Always* *1: Only on primary* *2: Never*	tinyint	1	False		((2))
	pay_ShowDFPBalance *0: Always* *1: Only on primary* *2: Never*	tinyint	1	False		((2))
	pay_ShowDFPDailyBenefit *0: Always* *1: Only on primary* *2: Never*	tinyint	1	False		((2))
	pay_ShowDFPVisit *0: Always* *1: Only on primary* *2: Never*	tinyint	1	False		((2))
	pay_UseClientForInsured	bit	1	False		((0))
🖼	pay_InvDetailProviderTypeID *0 = None, 1 = Caregiver, 2 = Office*	tinyint	1	False		((0))
	pay_UseBillContactForSign	bit	1	False		((0))
	pay_UseBillProviderForFacility	bit	1	False		((0))
	pay_BillByShift	bit	1	False		((1))
	pay_StampAuth	bit	1	False		((0))
	pay_DXVersionDefault *Current values:* *0: Timing Date* *9: ICD-9* *10: ICD-10* *255: No Diagnosis*	tinyint	1	False		((0))
	pay_ContactSalutationID	int	4	True		
	pay_InvBreakByAuth	bit	1	False		((0))
	pay_InvBreakByHCPCS	bit	1	False		((0))
	pay_InvoiceFromToType *0) Invoice Batch From and Through dates* *1) Invoice First and Last Service Dates*	tinyint	1	False		((0))
	pay_ShowInvFromDtOnly *If Only single dated of service is reported for the Invoice.*	bit	1	False		((0))

	True - The From Date only should be pulled to the invoice *false - The From Date and To Date pulled by the option in pay_InvoiceFromToType*					
	pay_InvoiceUnitFlag	smallint	2	True		
	pay_ElectPmtGatewayCustProfileID	nvarchar(20)	40	True		
	pay_ElectPmtDfltCustPmtProfileID	nvarchar(20)	40	True		
	pay_InvParm_DisplayBrLogo *0: False, 1: True, 2: Default*	tinyint	1	False		((2))
	pay_InvParm_DisplayCrBalances *0: False, 1: True, 2: Default*	tinyint	1	False		((2))
	pay_InvParm_DisplayCarFistNameOnly *0: False, 1: True, 2: Default*	tinyint	1	False		((2))
	pay_InvParm_DisplayRecentPmts *0: False, 1: True, 2: Default*	tinyint	1	False		((2))
	pay_InvParm_DisplayOutstandingInv *0: False, 1: True, 2: Default*	tinyint	1	False		((2))
	pay_InvParm_DisplayDepositBalances *0: False, 1: True, 2: Default*	tinyint	1	False		((2))
	pay_InvParm_PmtWithinDays *Payments within Days*	tinyint	1	True		
	pay_1500OthrPvdrType *0 None, 2 Employer's Identification Number, 3 Medicare Provider Number, 4 Medicaid Provider Number, 5 Blue Cross Provider Number, 6, Blue Shield Provider Number, 7 License Number, 8 Taxonomy, 255 Office Additional*	tinyint	1	False		((0))
	pay_AuthorizationFromPhysicanOrder *Build Authorizations from Physicians Orders. Default the setting to False.*	bit	1	False		((0))
	pay_InvParm_DisplaySchTime *Determines whether to display Start and End Times on Invoice Details on (all versions) of the Standard Invoice, Payer Invoice, and Basic Invoice* *0: False,* *1: True,* *2: Default*	tinyint	1	False		((2))
	pay_485Box1UsePolicyNumber	bit	1	False		((0))
	pay_AnsiISAFI65 *Repetition Separator*	char(1)	1	True		('^')
	pay_DeliveryMethod *1 is Print,2 is E-mail,3 is both Print and E-mail*	tinyint	1	False		((1))

pay_AnsiSBR1032 *HIPAA 5010 - Added so we could data drive this value rather than having it hard coded depending on the EDI Type. This allowed us to remove the Medicaid version of the 837I. This data element is SITUATIONAL, but at the moment should always be filled in. There are technically a limited number of options for this data element, but given the likliehood of this data element changing, I've decided to do NO edits against the value. The database default is a zero length string, but the Payer EDI screen will default this to "MA" for the 837I EDI Type and "MC" for the 837P EDI Type.*	nvarchar(2)	4	True		('')
pay_AnsiLoop2310A_Enable *HIPAA 5010 - Added so we could data drive the use of the 837P 2310A - Referring Provider Loop. This does not apply to the 837I where 2310A is the Attending Physician Loop and is based off the UB04. A tinyint was used instead of a bit because these fields should really have more options that are currently stored elsewhere.* *VALUES:* *0 - Disabled* *1 - Enabled* *DEFAULT: 0 - Disabled*	tinyint	1	False		((0))
pay_AnsiLoop2310B_Enable *HIPAA 5010 - Added so we could data drive the use of the 837P 2310B - Rendering Provider Loop. This does not apply to the 837I where 2310B is the Operating Physician Loop and is based off the UB04. A tinyint was used instead of a bit because these fields should really have more options that are currently stored elsewhere.* *VALUES:* *0 - Disabled* *1 - Office* *2 - Admission Case Manager* *3 - Schedule Caregiver* *DEFAULT: 1 - Office* *2012.10.15 - The values for this field have been altered. A customer needed the ability to use the Admission Case Manager as the rendering provider. Another scenario of Schedule Caregiver is a possibility, but has not been added to the UI and has not been coded for.*	tinyint	1	False		((1))
pay_AnsiLoop2310C_Enable *HIPAA 5010 - Added so we could data drive the use of the 837P 2310C - Service Facility Loop. This does not apply to the 837I where*	tinyint	1	False		((0))

2310C is the Other Operating Physician Loop and is based off the UB04. A tinyint was used instead of a bit because these fields should really have more options that are currently stored elsewhere. *VALUES:* *0 - Disabled* *1 - Office* *2 - Patient Home* *DEFAULT: 0 - Disabled*					
pay_AnsiCLM1359 *HIPAA 5010 - Added so we could data drive this value rather than having it hard coded. Previously this value was always returned as "A" - Assigned.* *VALUES:* *"A" - Assigned* *"C" - Not Assigned* *A value "B" - Clinical Lab Services Only does not apply to our customers so it is not supported.*	char(1)	1	True		('A')
pay_AnsiCLM1351 *HIPAA 5010 - Added so we could data drive this value rather than having it hard coded. Previously this value was always returned as "". This should technically be an Admission level value, but it is unlikely that any of our customers require the ability to change this at the admission level.* *VALUES:* *"" - Not Required* *"P" - Signature Generated by provider*	nvarchar(1)	2	True		('')
pay_AnsiCLM1331 *Place of Service Code - HIPAA 5010 - Added so we could data drive this value rather than having it hard coded. Previously this value was always returned as "12". This should technically be a Claim level value. We do have this at the Service Level but I don't want to force them to update this on every Service. It will almost always be "12" for our customers. I'm adding it to the Payer EDI so that they can override it in case they need to. This will Default to "12" - Home. These values are maintained by the NUBC and can be updated outside the 837 spec, so this will not be a dropdown, it will be a textbox where they can freewrite their values. The min length of the field is 1, the max length is 2.*	nvarchar(2)	4	True		('12')
pay_AnsiCLM1325 *Claim Frequency Code - HIPAA 5010 -*	nvarchar(1)	2	True		('1')

	Added so we could data drive this value rather than having it hard coded. Previously this value was always returned as "1". This should technically be a Claim level value. This is usually "1", "2", "3", or "4" for Home Care, but it's really used for UB04s and the 837I. I believe I read somewhere that it should always be "1" for Home Health Claims on the 1500/837P. There is no place to specify it on the 1500, so I'm adding it to the Payer EDI so that they can override it in case they need to. This will Default to "1". These values are maintained by the NUBC and can be updated outside the 837 spec, so this will not be a dropdown, it will be a textbox where they can freewrite their values. This field must be exactly 1 character.					
	pay_AnsiCLM1073_1 *Provider Signature Indicator - HIPAA 5010 - Added so we could data drive this value rather than having it hard coded. Previously this value was always returned as "Y". This should technically be a Claim level value. But for most provider/payer relationships it will always be the same. I'm adding it to the Payer EDI so that they can override it in case they need to. This will Default to "Y". There are only 2 possible values, "Y" - Yes and "N" No. This field must be exactly 1 character.*	nvarchar(1)	2	True		('Y')
	pay_EDIPostingTypeID *1 - Original PPS 835 posting (no longer used)* *2 - New PPS 835 posting* *3 - SVC level REF*6R based posting* *4 - SVC level Procedure Code Date Range Posting* *5 – Tellus SVC level REF*6R based posting*	tinyint	1	False		((3))
	pay_AnsiLoop2300REF_9F_Enable	tinyint	1	False		((0))
	pay_EDIAdditionalID	nvarchar(50)	100	True		
	pay_EDIAdditionalIDType	nvarchar(3)	6	True		
	pay_InvParm_PayerInvGroupBy *2: Client* *1: Caregiver*	tinyint	1	False		((2))
	pay_AnsiLoop2010BBNM1F1035_1 *Loop 2010BB NM103*	nvarchar(60)	120	True		
	pay_AnsiLoop2010BBNM1F66 *Loop 2010BB NM108*	nvarchar(2)	4	False		(N'PI')

	Values: *"PI" - Payer Identifier* *"XV" - Centers for Medicare and Medicaid Services PlanID*					
	pay_AnsiLoop2010BBNM1F67 *Loop 2010BB NM109*	nvarchar(80)	160	True		
	pay_InvParm_DisplaySchNote *Determines whether to display Schedule Notes (sch_Description) on the Standard and Payer Invoice* *VALUES* *0: False* *1: True* *2: Default (Use value in T_Branches.br_Inv-Parm_DisplaySchNotes)* *DEFAULT* *2: Default (Use value in T_Branches.br_Inv-Parm_DisplaySchNotes)*	tinyint	1	False	((2))	
	pay_InvoiceGroupingTypeID *Determines what logic to use for grouping Invoice Details. Values taken from T_-InvoiceGroups* *VALUES* *0: No Grouping* *1: Group by Service across entire Invoice* *2: Group by Service and Day (as defined by Service Start Date)* *DEFAULT* *0: No Grouping*	int	4	False	((0))	
	pay_WeeklyBenefitStart *Setting for Weekly benefits.values are from 0 to 6 representing days of week.default value takes from br_TreatmentWeekStart-Day from the UI when creating new payer*	tinyint	1	False	((0))	
	pay_MonthlyBenefitStart *Setting for Monthly Benefit Start.values are from 1 to 31 representing days of month.*	tinyint	1	False	((1))	
	pay_AnsiLoop1000ANM1F1035_1 *Loop 1000A NM103*	nvarchar(60)	120	True		
	pay_AnsiLoop1000ANM1F67 *Loop 1000A NM109*	nvarchar(80)	160	True		
	pay_AnsiLoop1000BNM1F67 *Loop 1000B NM109*	nvarchar(80)	160	True		
	pay_AnsiGSF142 *GS02*	nvarchar(15)	30	True		

	pay_AnsiGSF124 *GS03*	nvarchar(15)	30	True		
	pay_AnsiLoop2000C_Enable *HIPAA 5010 - Added so we could data drive the use of the 837P 2000C - Patient Hierarchical Loop. Because most of our customers provide services to Homebound patients, they are usually the patient is usually the insured. This is especially true for Medicare and the Medicaid providers we've used. This specific change is being made to address issues for a customer doing services for children who are usually not the Insured. Logic for creating the patient loop will also depend on information on the UB04 and HCFA1500. However, in order to avoid any complications with existing customers, this field has been added to force customers to turn this loop on in the few cases where they may provide services to dependents of the insured.* *VALUES:* *0 - Disabled* *1 - Enabled* *DEFAULT:* *0 - Disabled*	tinyint	1	False		((0))
FK	pay_ContAllowAdj *pay_ContAllowAdj: This field stores the type of adjustment to use when the Invoice Draft uses the public rate to determine the charge and creates a contractual allowance revenue adjustment to set the receivable amount to the contracted rate. This way the invoice displays the public rate but the receivable is still the contract rate. If this field is empty it equates to using the contract rate for the charge and not using public rate w/ adjustments. The UI filters the available adjustments to offer just those adjustments where posttyp_PostingType=1 (Invoice Revenue Adjustment) and posttyp_Type=0 (Amount can be positive or negative).*	int	4	True		
	pay_InvBreakByPOC *Determines whether to split an Invoice by Plan of Care*	bit	1	False		((0))
	pay_EDI837_TerminateSegmentWithLine-Feed *This field determines whether or not 837 extracts have line feeds between segments*	bit	1	False		((1))
	pay_InvParm_DisplayRatesCharges *Controls displaying rates and charges on invoices. 1 displays them, 0 hides them. Defaults to 1.*	bit	1	False		((1))
	pay_Features *Collection of settings associated to a payer.*	int	4	True		

		int	4			
	1 = Enable Order Tracking (associated with running plan of care)					
	pay_EvvAggregatorId *Determines the EVV Aggregator to be used by this payer. This is a foreign key to T_-EVVAggregators.*	int	4	True		

Indexes

Key	Name	Key Columns	Included Columns	Unique	Fill Factor
PK/C	PK_T_Payers	pay_ID		True	80
	IX_T_ContactFirstName	pay_ContactFirstName			80
	IX_T_ContactLastName	pay_ContactLastName			80
	IX_T_Payers	pay_ClientID			80
	IX_T_Payers_BranchID_ERNID	pay_BranchID, pay_-ERNID			80
	IX_T_Payers_ClientID	pay_ClientID			80
	IX_T_Payers_Name	pay_Name			80
	IX_T_Payers_PayerTypeID	pay_PayerTypeID			80
	_dta_index_T_Payers_15_1512756842__-K1_4	pay_ID	pay_Name		80

Foreign Keys

Name	Columns
FK_T_Payers_T_Branches	pay_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_Payers_T_Client	pay_ClientID->[dbo].[T_Client].[cli_ID]
FK_T_Payers_T_PaymentPostingType	pay_ContAllowAdj->[dbo].[T_PaymentPostingType].[posttyp_ID]

Payment Posting

[dbo].[T_PaymentPosting]

Note: Detailed documentation is pending.

Payment Posting Type

[dbo].[T_PaymentPosting Type]

Note: Detailed documentation is pending.

Payment Register

[dbo].[T_PaymentRegister]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	pmtreg_ID	bigint	8	False	1 - 1	
(3) FK	pmtreg_BranchID	int	4	False		
	pmtreg_Number	nvarchar(50)	100	True		
	pmtreg_Amount	money	8	False		((0))
	pmtreg_Net-Payment	money	8	False		((0))
FK	pmtreg_PayerID	bigint	8	False		
	pmtreg_Dated	datetime	8	True		
(2)	pmtreg_Deposit-Date	datetime	8	True		
	pmtreg_Memo	nvarchar(1000)	2000	True		
FK	pmtreg_Payment-RegisterStatusID	int	4	False		((0))
FK	pmtreg_ClientID	bigint	8	True		
FK	pmtreg_Period-DatesID	bigint	8	True		
FK	pmtreg_Payment-RegisterTypeID	int	4	False		
	pmtreg_-OrderID	int	4	True		
	pmtreg_-Authorization-Number	nvarchar(50)	100	True		

Key		Column	Type	Size	Nullable		Default
		pmtreg_- Transaction- Number	nvarchar(50)	100	True		
		pmtreg_- CreatedDate	datetime	8	False		(getutcdate())
		pmtreg_- CreatedUser	nvarchar(50)	100	False		
		pmtreg_- ModifiedDate	datetime	8	False		(getutcdate())
		pmtreg_- ModifiedUser	nvarchar(50)	100	False		
		pmtreg_TS	timestamp	8	False		
FK		pmtReg_- AcctExtID	bigint	8	True		
		pmtReg_- AcctExtDate	datetime	8	True		
		pmtreg_- Deposit- Balance	money	8	False		((0))
		pmtreg_- AvailableTo- Post	money	8	False		((0))
FK		pmtReg_Edi- ID	bigint	8	True		
		pmtreg_- ElectPmt- CustID	nvarchar(20)	40	True		
		pmtreg_- ElectPmt- CustPmtID	nvarchar(20)	40	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK	PK_T_PaymentRegister	pmtreg_ID	True	80
	IX_T_PaymentRegister	pmtreg_BranchID, pmtreg_AvailableToPost		80
	IX_T_PaymentRegister_1	pmtreg_BranchID, pmtreg_Number		80
	IX_T_PaymentRegister_BranchID	pmtreg_BranchID, pmtreg_PaymentRegister- StatusID		80

	IX_T_PaymentRegister_DepositDate	pmtreg_DepositDate		80
	IX_T_PaymentRegister_PayerDeposit-Client	pmtreg_PayerID, pmtreg_DepositDate, pmtreg_-ClientID		
	IX_T_PaymentRegister_PeriodClosing-DateID	pmtreg_PeriodDatesID		80
	IX_T_PaymentRegister_pmtReg_AcctExt-ID	pmtReg_AcctExtID		

Foreign Keys

Name	Columns
FK_T_PaymentRegister_T_AcctExtract	pmtReg_AcctExtID->[dbo].[T_AcctExtract].[acctext_ID]
FK_T_PaymentRegister_T_Branches	pmtreg_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_PaymentRegister_T_Client	pmtreg_ClientID->[dbo].[T_Client].[cli_ID]
FK_T_PaymentRegister_T_EDIPayments	pmtReg_EdiID->[dbo].[T_EDIPayments].[edipmt_ID]
FK_T_PaymentRegister_T_Payers	pmtreg_PayerID->[dbo].[T_Payers].[pay_ID]
FK_T_PaymentRegister_T_PaymentRegister1	pmtreg_PaymentRegisterStatusID->[dbo].[T_PaymentRegister-Status].[pmtrstat_ID]
FK_T_PaymentRegister_T_PaymentRegister-Types	pmtreg_PaymentRegisterTypeID->[dbo].[T_PaymentRegister-Types].[pmtrtyp_ID]
FK_T_PaymentRegister_T_PeriodDates	pmtreg_PeriodDatesID->[dbo].[T_PeriodDates].[prdcls_ID]

Payment Register Status

▤ **[dbo].[T_PaymentRegisterStatus]**

Note: Detailed documentation is pending.

Payment Register Types

[dbo].[T_PaymentRegisterTypes]

Note: Detailed documentation is pending.

Payment Types

📰 **[dbo].[T_PaymentTypes]**

Note: Detailed documentation is pending.

Payroll Adjustment

📇 [dbo].[T_PayrollAdjustment]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK / C / FK	prolla_ID	bigint	8	False	1 - 1	
FK	prolla_BranchID	int	4	False		
FK	prolla_ScheduleID	bigint	8	False		
⛁ FK	prolla_PayrollAdjCode	int	4	False		
⛁	prolla_PayDate	datetime	8	True		
📇	prolla_Unit	decimal(8,2)	5	False		
📇	prolla_Rate	money	8	False		
⛁ 📇	prolla_Status *0 – Not Paid, 1 – In Progress, 2 – Completed*	smallint	2	False		((0))
	prolla_RecalcOvertime	bit	1	False		((0))
	prolla_Notes	nvarchar(500)	1000	True		
	prolla_CreatedDate	datetime	8	False		(getutcdate())
	prolla_CreatedUser	nvarchar(50)	100	False		
	prolla_ModifiedDate	datetime	8	False		(getutcdate())
	prolla_ModifiedUser	nvarchar(50)	100	False		
	prolla_TS	timestamp	8	False		
	prolla_OriginalPayDate *prolla_PayDate will be transfered to this field during finalizing of payroll for cancelation process to revert back to the original value*	datetime	8	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_PayrollAdjustment	prolla_ID	True	80
	IX_T_PayrollAdjustment_AdjustmentCode	prolla_PayrollAdjCode		80
	IX_T_PayrollAdjustment_PayDate	prolla_PayDate		80
	IX_T_PayrollAdjustment_Status	prolla_Status		80

Foreign Keys

Name	Columns
FK_T_PayrollAdjustment_T_Branches	prolla_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_PayrollAdjustment_T_PayrollAdjustment	prolla_ID->[dbo].[T_PayrollAdjustment].[prolla_ID]
FK_T_PayrollAdjustment_T_PayrollAdjustmentCode	prolla_PayrollAdjCode->[dbo].[T_PayrollAdjustmentCode].[prollac_ID]
FK_T_PayrollAdjustment_T_Schedules	prolla_ScheduleID->[dbo].[T_Schedules].[sch_ID]

Payroll Adjustment Code

[dbo].[T_PayrollAdjustmentCode]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	prollac_ID	int	4	False	10001 - 1	
	prollac_Active	bit	1	False		((1))
	prollac_CreatedDate	datetime	8	False		(getutcdate())
	prollac_CreatedUser	nvarchar(50)	100	False		
	prollac_ModifiedDate	datetime	8	False		(getutcdate())
	prollac_ModifiedUser	nvarchar(50)	100	False		
	prollac_TS	timestamp	8	False		
	prollac_Name	nvarchar(50)	100	True		('')
	prollac_ListItemType	tinyint	1	False		((0))
FK	prollac_RptGroupID	int	4	False		((130))
FK	prollac_BranchID	int	4	True		
	prollac_Description	nvarchar(1000)	2000	True		
FK	prollac_OverrideID	int	4	True		
	prollac_PayrollCode	nvarchar(50)	100	False		('E0A')
	prollac_DeductEarn	nvarchar(5)	10	False		(N'E')

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_PayrollAdjustmentCode	prollac_ID	True	80
	IX_T_PayrollAdjustmentCode_BranchID_-OverrideID_Name	prollac_BranchID, prollac_OverrideID, prollac_Name	True	

Foreign Keys

Name	Columns
FK_T_PayrollAdjustmentCode_T_Branches	prollac_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_PayrollAdjustmentCode_T_PayrollAdjustmentCode	prollac_OverrideID->[dbo].[T_PayrollAdjustmentCode].[prollac_ID]
FK_T_PayrollAdjustmentCode_T_ReportGroups	prollac_RptGroupID->[dbo].[T_ReportGroups].[rptgrp_ID]

Payroll Batch

🖼 [dbo].[T_PayrollBatch]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	prollb_ID *The ID field of the PayrollBatchInfo object.* *System ID for the payroll batch record.* *Also called PayrollBatchID, BatchID.* *Column "Batch ID" on Create Payroll > Batch > "Select an Existing Batch" drop down. (Visible)* *Column "Batch ID" on Finilized Payroll > Batch > "Select an Existing Batch" drop down. (Visible)*	bigint	8	False	1 - 1	
(2) FK 🔑	prollb_BranchID *System ID for the branch in the payroll batch record. This is the branch that the payroll was drafted/finalized in. If Payroll Across Offices is turned off (glbl_PayrollUserCaregiverOffice == 0), the batch will only pull in schedules from admissions belonging to that Office.* *If Payroll Across Offices is turned on (glbl_Payroll-UserCaregiverOffice == 1), the batch will pull in schedules for Caregivers that belong to this Office.*	int	4	False		
FK 🔑	prollb_ExtractTypeID *The ExtractTypeID field of the PayrollBatchInfo object.* *System ID for the payroll extract type record.* *The PayrollExtractType contains information about how to process schedules, OT, and Payroll Adjustments.. These are found in the T_Payroll-ExtractTypes table.* *Used to pull the extract type name and show on:* *Column "Payroll Type" on Create Payroll > Batch > "Select an Existing Batch" drop down. (Visible)* *Column "Payroll Type" on Finilized Payroll > Batch > "Select an Existing Batch" drop down. (Visible)*	int	4	False		((2))
(2)	prollb_PayDate *The PayDate field of the PayrollBatchInfo and Payroll-AdjustmentDetailInfo objects.* *Non-UTC date.*	datetime	8	False		

	The day payments to caregivers are made. *This will be stamped on the schedule (sch_PayDate) of the caregiver.* *Also called PayDate, BatchDate.* *Column "Pay Date" on Create Payroll > Batch > "Select an Existing Batch" drop down. (Visible)* *Column "Pay Date" on Finilized Payroll > Batch > "Select an Existing Batch" drop down. (Visible)*					
	prollb_FinalizedDate *The FinalizedDate field of the PayrollBatchInfo object.* *The date the payroll batch is finilized and locked for changes.* *UTC date. Updated by SQL Server's current UTC date (GetUTCDate)* *. When a draft batch is finalized the records are removed from T_PayrollDetailsDraft and moved to T_PayrollDetails (along with a few supporting tables). Also called FinalizedDate.Column "Finalized Date" on Create Payroll > Batch > "Select an Existing Batch" drop down. (Visible)* *Column "Finalized Date" on Finilized Payroll > Batch > "Select an Existing Batch" drop down. (Visible)*	datetime	8	True		
FK	prollb_CaregiverGroupID *The CaregiverGroupID field of the PayrollBatchInfo object.* *System ID for the caregiver group record.* *The Caregiver Group is not a required field, and if the Caregiver Group is left blank, ALL Caregivers (regardless of Caregiver Group) will pull into the payroll batch. If a Caregiver Group is selected, only those Caregivers with a matching group will pull in.* *Used to pull the caregiver group name and show on:* *Column "Caregiver Group" on Create Payroll > Batch > "Select an Existing Batch" drop down. (Visible)* *Column "Caregiver Group" on Finilized Payroll > Batch > "Select an Existing Batch" drop down. (Visible)*	int	4	True		
FK	prollb_PayrollCompanyExtractTypeID *The PayrollCompanyExtractTypeID field of the PayrollBatchInfo object.* *System ID for the payroll company extract type in the payroll batch record.* *For* *Foreign Key to T_PayrollCompanyExtractTypes. This table contains information about how to export the payroll batch records into a data file.* *Used to pull the payroll company extract name and show on:*	int	4	True		

	Column "Pr Co Extract" on Finilized Payroll > Batch > "Select an Existing Batch" drop down. (Visible)					
	prollb_LastPRCompanyExtractDate *The LastPRCompanyExtractDate field of the Payroll-BatchInfo and DraftPayrollBatchResults objects.* *UTC date.* *Updated by SQL Server's current UTC date (Get-UTCDate)* *The most recent date when the payroll batch was extracted into a data file.* *Column "Ex Last Run" on Finilized Payroll > Batch > "Select an Existing Batch" drop down. (Visible)*	datetime	8	True		
	prollb_LastPRCompanyExtractUser *The LastPRCompanyExtractUser field of the Payroll-BatchInfo and DraftPayrollBatchResults objects.* *The user who last extracted data from the payroll extract.* *Column "Run By" on Finilized Payroll > Batch > "Select an Existing Batch" drop down. (Visible)*	nvarchar(50)	100	True		
	prollb_CreatedDate *The Date the PayrollBatch Record was Created.* *UTC date. Updated by SQL Server's current UTC date (GetUTCDate)* *Also callled CreatedDate, Created_Date.* *Column "Created On" on Create Payroll > Batch > "Select an Existing Batch" drop down. (Visible)* *Column "Created On" on Finilized Payroll > Batch > "Select an Existing Batch" drop down. (Visible)*	datetime	8	False		(getutcdate())
	prollb_CreatedUser *The CreatedUser field of the PayrollBatchInfo object.* *Also callled CreatedUser.* *Column "Created By" on Create Payroll > Batch > "Select an Existing Batch" drop down. (Visible)* *Column "Created By" on Finilized Payroll > Batch > "Select an Existing Batch" drop down. (Visible)*	nvarchar(50)	100	False		
	prollb_ModifiedDate *The Date the PayrollBatch Record was last Modified.* *UTC date. Updated by SQL Server's current UTC date (GetUTCDate)* *Also callled ModifiedDate.* *Column "Modified On" on Create Payroll > Batch > "Select an Existing Batch" drop down. (Visible)* *Column "Modified On" on Finilized Payroll > Batch > "Select an Existing Batch" drop down. (Visible)*	datetime	8	False		(getutcdate())

prollb_ModifiedUser *The ModifiedUser field of the PayrollBatchInfo object.* *Also callled ModifiedUser.* *Column "Modified By" on Create Payroll > Batch* *> "Select an Existing Batch" drop down. (Visible)* *Column "Modified By" on Finilized Payroll > Batch* *> "Select an Existing Batch" drop down. (Visible)*	nvarchar(50)	100	False			
prollb_TS *The TS (timestamp) field of the PayrollBatchInfo and* *DraftPayrollBatchResults objects.* *Also called TS.*	timestamp	8	False			
prollb_CancelUser *The CancelUser field of the PayrollBatchInfo object.* *The user who cancelled the payroll batch.* *Column "Canceled By" on Finilized Payroll > Batch* *> "Select an Existing Batch" drop down. (Visible)*	nvarchar(50)	100	True			
prollb_CancelDate *The CancelDate field of the PayrollBatchInfo object.* *The date the payroll batch was cancelled.* *UTC date. Updated by SQL Server's current UTC* *date (GetUTCDate)* *Column "Canceled On" on Finilized Payroll > Batch* *> "Select an Existing Batch" drop down. (Visible)*	datetime	8	True			
prollb_ServiceThroughDate *The ServiceThroughDate field of the PayrollBatchInfo* *object.* *Also called Date, ServiceThroughDate.* *The end date of the payroll period to include* *completed services. The payroll will include any* *completed schedules that were not previously* *included in payroll extracts with service date prior to* *the through date.* *Column "Service Through Date" on Create Payroll >* *Batch > "Select an Existing Batch" drop down.* *(Visible)* *Column "Service Through Date" on Finilized Payroll >* *Batch > "Select an Existing Batch" drop down.* *(Visible)*	datetime	8	True			
prollb_LastDraftDate *The LastDraftDate field of the PayrollBatchInfo object.* *UTC date.* *The last date that the payroll batch was drafted.* *Column "Last Drafted on" on Create Payroll > Batch* *> "Select an Existing Batch" drop down. (Visible)*	datetime	8	True			
prollb_LastDraftUser *The LastDraftUser field of the PayrollBatchInfo object.*	nvarchar(50)	100	True			

	The last user that drafted this payroll batch. *Column "Last Drafted By" on Create Payroll > Batch > "Select an Existing Batch" drop down. (Visible)*					
FK🔑	prollb_CaregiverID *Foreign Key to T_Caregiver.* *If this field is null then schedules were not filtered by caregiver ID.* *If this field has a value then only schedules with the same caregiver ID will be brought into the batch.* *Shown on:* *Column "Caregiver" on Create Payroll > Batch > "Select an Existing Batch" drop down. (Visible)* *Column "Caregiver" on Finilized Payroll > Batch > "Select an Existing Batch" drop down. (Visible)*	bigint	8	True		
	prollb_OTSettings *XML formatted overtime settings record at the time the payroll batch was created.*	xml	max	True		
	prollb_IsHolidayOTEligible *Is Holiday OT Eligible. When the value = 1 then Holiday Pay is included in Regular Rate OT Calculation. This is the value from the Office at the time that the Payroll Batch is created.*	bit	1	False		((1))

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK🔑C	PK_T_PayrollBatch	prollb_ID	True	80
	IX_T_PayrollBatch_BranchID	prollb_BranchID		80
	IX_T_PayrollBatch_BranchID_Caregiver-GroupID_PayDate	prollb_BranchID, prollb_CaregiverGroupID, prollb_PayDate		80
	IX_T_PayrollBatch_PayDate	prollb_PayDate		80

Foreign Keys

Name	Columns
FK_T_PayrollBatch_T_Branches	prollb_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_PayrollBatch_T_Caregiver	prollb_CaregiverID->[dbo].[T_Caregiver].[car_ID]
FK_T_PayrollBatch_T_CaregiverGroup	prollb_CaregiverGroupID->[dbo].[T_CaregiverGroup].[carg_ID]
FK_T_PayrollBatch_T_PayrollCompany-ExtractTypes	prollb_PayrollCompanyExtractTypeID->[dbo].[T_PayrollCompanyExtract-Types].[prollcoe_ID]
FK_T_PayrollBatch_T_PayrollExtractTypes	prollb_ExtractTypeID->[dbo].[T_PayrollExtractTypes].[prolle_ID]

Payroll Details

[dbo].[T_PayrollDetails]

Columns

Key	Name	Data Type	Computed	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	prolld_ID *The ID field of the PayrollDetailsInfo object.* *System ID for the payroll detail record. This provides a unique ID for each payroll detail record in the batch. Ex: One schedule could be split into shifts, resulting in two payroll detail records. Each payroll detail record would have the same Schedule ID but a different Payroll Detail ID. Ex: A schedule could have an expense, with both processed in the same payroll batch. The service and the expense would have the same Schedule ID but a different Payroll Detail ID. Ex: Overtime records do not have a Schedule ID – the Payroll Detail ID is the ID for overtime records. This does not display on the Finalized payroll batch form.* *Also called Pay Detail ID and PayrollDetailsID. Column "ID" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	bigint		8	False	1 - 1	
(4) FK	prolld_PayrollBatchID *The PayrollBatchID field of the PayrollDetailsInfo object.* *Displays on the Finalized payroll batch form in the batch drop down list Batch ID field.* *Column "Payroll Batch ID" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	bigint		8	False		((0))
	prolld_CheckTransID *The CheckTransID field of the PayrollDetailsInfo object.* *Column "Check Trans ID" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	int		4	True		

(4) FK	**prolld_CaregiverID** *The CaregiverID field of the Payroll-DetailsInfo object.* *System ID of the Caregiver in the payroll detail record. This does not display on the Finalized payroll batch form.* *Column "Caregiver" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	bigint		8	False		((0))
	prolld_PayrollCompanyEmployeeID *The PayrollCompanyEmployeeID field of the PayrollDetailsInfo object.* *Also called EmpNum, EmpINo, Vendor, caregid, Emp ID, caregiverFileNumber, EmpPrCoID, EmployeeID, Payroll-EmployeeID, cgPayrollFileNum.* *Column "Payroll File #" in Payroll Batch Details > Batch Create Payroll Details (Visible).*	nvarchar(50)		100	True		
FK	**prolld_ScheduleID** *The ScheduleID field of the Payroll-DetailsInfo object.* *System ID of the payroll detail record. Displays on the Finalized payroll batch form in the Sch/Exp ID column on the payroll details grid.* *Column "Schedule" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	bigint		8	True		
FK	**prolld_ScheduleExpenseID** *The ScheduleExpenseID field of the PayrollDetailsInfo object.* *Also called Expense_ID.* *System ID of the expense payroll detail record. Displays on the Finalized payroll batch form in the Sch/Exp ID column on the payroll details grid. [Note: The expense row in the extract file will contain both a Schedule_ID and a Schedule_Expense_ID.]* *Column "Schedule Expense" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	bigint		8	True		
	prolld_ShiftNo *The ShiftNo field of the PayrollDetails-Info object.* *Office Shifts are configured to account for all 168 hours of the 7 day week, starting with Sunday 12:00 am and ending with Sunday 12:00am. Each office should have at least Shift 1 configured (one shift that covers all 168 hours). The system can accommodate up to 6 Shifts. Each Office Shift is*	smallint		2	True		

	named in the Shift Descriptions portion of the form, then each shift is defined with Day and Start/End times in the Shift Assignment portion of the form. *Shift number can be from 1 through 6. Column "Shift" in Payroll Batch Details > Batch Create Payroll Details (Visible).*						
FK	**prolld_BranchHolidayID** *The BranchHolidayID field of the Payroll-DetailsInfo object. ID of the office holiday entry set up on "Holidays" tab of the office settings. Column "Holiday Name" in Payroll Bath Details > Batch Create Payroll Details (Visible).*	bigint		8	True		
	prolld_HolidayMultiplier *The HolidayMultiplier field of the Payroll-DetailsInfo object.* *The multiplier is be used against the established bill rates for the holiday rate calculations. The default value is 1.00. The multiplier for time and a half is 1.50. This is set up on "Holidays" tab of the office settings.* *Column "Holiday Multiplier" in Payroll Batch Details > Batch Create Payroll Details (Visible).*	decimal(4,2)		5	False		((0))
	prolld_HolidayAddition *The HolidayAddition field of the Payroll-DetailsInfo object.* *The additional amount to be added to the established hourly bill rates for the holiday rate calculations. It is set up on "Holidays" tab of the office settings. The default value is 0.00 which also means that no Add-On is to be used.* *Column "Holiday Add" in Payroll Batch Details > Batch Create Payroll Details (Visible).*	smallmoney		4	False		((0))
⊥	**prolld_ServiceEndTime** *The ServiceEndTime field of the Payroll-DetailsInfo object.* *Service End Time of the payroll detail record. Displays on the Finalized payroll batch form in the Service End Time column on the payroll details grid. Overtime records will show the overtime period end date (daily or weekly, depending on the overtime record).* *Date and time the service ended, as recorded in the telephony interface. The duration is auto-calculated. UTC Date updated by the UI based on the user's*	datetime		8	True		

	time zone.Also called Endtime, Service-End, sch_EndTime. Used in the calculation of Hours and TotalHours. Column "Service End Time" in Payroll Batch Details > Batch Create Payroll Details (Visible).					
⊹ (5)	**proIId_ServiceDate** *The ServiceDate field of the Payroll-DetailsInfo object.* *Service Start Date of the payroll detail record. Displays on the Finalized payroll batch form in the Service Start Time column on the payroll details grid. Overtime records will show the overtime period start date (daily or weekly, depending on the overtime record). The file content sorts by Service Start Date/Start Time.* *Date and time the service started, as recorded in the telephony interface.UTC Date updated by the UI based on the user's time zone.Also called StartTime, SvcDate, Svc Date, ChargeDate, ServiceStart, ServiceStartDate, sch_-StartTime. Used in the calculation of Hours and TotalHours.Column "Service Start Time" in Payroll Batch Details > Batch Create Payroll Details (Visible).*	datetime		8	False		
⊹ (2) FK	**proIId_ServiceCodeID** *The ServiceCodeID field of the Payroll-DetailsInfo object.* *System ID of the Service or Expense of the payroll detail record. This does not display on the Finalized payroll batch form.* *The ID of the service performed by the caregiver. Service codes are defined in Drop Down Maintenance Service Codes. This is a system generated number. Any Service Code with an ID under 10000 is a system default and cannot be changed.Column "Service" in Payroll Batch Details > Batch Create Payroll Details (Visible).*	int		4	True		
	proIId_Notes *The Notes field of the PayrollDetailsInfo object.* *Notes regarding caregiver pay adjustment.* *Column "Notes" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	nvarchar(255)		510	True		
	proIId_DeductionEarning *The DeductionEarning field of the PayrollDetailsInfo object.* *Deduct/Earn Code of the payroll detail record. Displays on the Finalized payroll*	char(2)		2	True		('E')

	batch form in the D/E column on the payroll details grid. *If overtime is to be included in the extract file, use the deduction code of 'E' for OT. Value default to 'E'. Also called DedEarn.* *Column "D/E" in Payroll Batch Details > Batch Create Payroll Details (Visible).*						
	prolld_Rate *The Rate field of the PayrollDetailsInfo object.* *Per Unit Pay Rate of the service, expense, or payroll adjustment of the payroll detail record. Displays on the Finalized payroll batch form in the Pay Rate column on the payroll details grid. In the case of an Overtime detail line, the rate will display without the OT Multiplier being applied.* *Also called Rate, PayRate, IncomeRate.* *Column "Pay Rate" in Payroll Batch Details > Batch Create Payroll Details (Visible).*	smallmoney		4	False		((0))
	prolld_RateSource *The rate source value of the payroll detail.* *System Rate Source Lookup location for the service or expense of the payroll detail record. For Payroll Adjustments the Rate Source displays 'Payroll Adjustment'. For Overtime records the Rate Source displays the overtime type (Ex: DailyOT, WeeklyOT).* *The payroll batch 'Rate Source' column will display the location the pay rate was pulled from. Also called Ratesource. Column "Rate Source" in Payroll Batch Details > Batch Create Payroll Details (Hidden).* *16 = 'Daily OT'* *17 = 'Daily Double OT'* *18 = 'Seventh Day OT'* *19 = 'Seventh Day OT Adj.'* *20 = 'Daily OT Adj.'* *21 = 'Daily Double OT Adj.'* *22 = 'Seventh Day'*	tinyint		1	True		
FK	**prolld_RateID** *The rate ID of the payroll detail.* *ID of the caregiver pay rate record.* *Column "Rate" in Payroll Bath Details > Batch Create Payroll Details (Hidden).*	bigint		8	True		

	prolld_Units *The Units field of the PayrollDetailsInfo object.* *The quantity of units associated with the payroll details.It can be number of visits, hours or 15 minutes blocks.* *Also called PayUnit, PayUnits, Units, HoursOrUnitsPaid, IncomeUnit. Sum as TotalRegUnits, TotalUnits. Used to calculate AdjDedAmt.Column "Reg Units" in Payroll Batch Details > Batch Create Payroll Details (Visible).*	decimal(18,8)		9	False		((0))
	prolld_PayUnitFlag *The PayUnitFlag field of the Payroll-DetailsInfo object.* *Unit type defines the measure of unit to be associated to the service scheduled.* *-Visit: Units measured as 1 regardless of the duration (start/end time) of the visit. The total duration of* *the visit (hours) is displayed on the Scheduling Details>Main tab. The bill and pay units will always be 1 when 'Visit' is selected as the Service Unit. Reports are available that pull the total hours of the visit as well as the number of units for the visit.* *-Hourly: Units measured based on the duration of the visit (start/end time), with each unit equaling 1 hour. The total duration of the visit (hours) displays on the Scheduling Details>Main tab. The bill and pay units match the total duration hours when 'Hourly' is selected as the Service Unit.* *-15 Minutes: Units measured based on the duration of the visit (start/end time), with each unit equaling 15 minutes. The total duration of the visit (hours) displays on the Scheduling Details>Main tab.* *-Daily: Units measured based on the duration of the visit (start/end time) using a 24 hours multiplier.* *Column "Pay Unit" in Payroll Batch Details > Batch Create Payroll Details (Visible).*	smallint		2	False		((60))
⛬	prolld_OT_DayUnits *The OT_DayUnits field of the Payroll-DetailsInfo object.* *The number of OT units on the Daily Overtime payroll detail records. Displays on the Finalized payroll batch form in the OT Units column on the payroll details grid.*	decimal(5,2)		5	False		((0))

	Column "OT Day Units" in Payroll Batch Details > Batch Create Payroll Details (Hidden).						
	prolld_OT_DayMultiplier *The OT_DayMultiplier field of the PayrollDetailsInfo object.* *The multiplier used for Daily Overtime calculations. Configured on the Office>Payroll tab>Daily Overtime> Multiplier field. Does not display on the Finalized payroll batch form.* *Column "OT Day Multiplier" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	decimal(4,2)		5	False		((0))
	prolld_OTDayRateType *The OTDayRateType in the payroll detail.*	tinyint		1	False		
⛀	**prolld_OT_WeekUnits** *The OT_WeekUnits field of the Payroll-DetailsInfo object.* *The number of OT units on the Weekly Overtime payroll detail records. Displays on the Finalized payroll batch form in the OT Units column on the payroll details grid.* *Also called TotalHours, IncomeUnit, OTWeekUnits. Used to calculate Pay-Unit, paidOTHours.Column "OT Week Units" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	decimal(5,2)		5	False		((0))
	prolld_OT_WeekMultiplier *The OT_WeekMultiplier field of the PayrollDetailsInfo object.* *The multiplier used for Weekly Overtime calculations. Configured on the Office>Payroll tab>Weekly Overtime>Multiplier field. Does not display on the Finalized payroll batch form.* *Used to calculate Rate, paid-OTAmount.Column "OT Week Multiplier" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	decimal(4,2)		5	False		((0))
	prolld_OTWeekRateType *The prolld_OTWeekRateType in the payroll detail.*	tinyint		1	False		
	prolld_EarnCode *The EarnCode field of the PayrollDetails-Info object.* *Earn Code of the payroll detail record. Displays on the Finalized payroll batch form in the Earn Code column on the payroll details grid.* *If your office enters Payroll Adjustments, assign the Earn Code to each*	nvarchar(50)		100	False		('0A')

adjustment code. Payroll Adjustments can be a positive or negative amount, and can affect the Earnings Amount for the Payroll Code as well as the OT calculation (and hours) for the Caregiver. Assign Earn Code 21 (Caregiver Pay) to the Payroll Adjustment Codes. *Also called EarnCode, PayCode, Job, PayEarnCode* *Column "Earn Code" in Payroll Batch Details > Batch Create Payroll Details (Visible)ADP Earn CodesCode 21=Caregiver PayCode35=MileageCode 36=Other ReimbursementCode 22=Caregiver Hours- This will be passed in the extract file when services with Earn Code of 21 (Caregiver Pay) are passed. Earn Codes 35 (Caregiver Mileage) and 36 (Reimbursement), as well as Payroll Adjustments, are not included in the Gross Caregiver Hours (Earn Code 22) calculation.*						
prolld_OverrideDepartment *The OverrideDepartment field of the PayrollDetailsInfo object.* *Used when caregiver work across departments.* *Also called Dept, TempDept, Ovrd-Dept.Column "Override Department" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	nvarchar(15)		30	True		
prolld_OverrideDivision *The OverrideDivision field of the Payroll-DetailsInfo object.* *Used when caregiver work across divisions.* *Also called OvrdDiv.Column "Override Division" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	nvarchar(50)		100	True		
prolld_OverrideBranch *The OverrideBranch field of the Payroll-DetailsInfo object.* *Used when caregiver work across branches.* *Also called OvrdBrnchColumn "Override Office" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	nvarchar(50)		100	True		
prolld_OverrideState *The OverrideState field of the Payroll-DetailsInfo object.* *Used when caregiver work across states.* *Also called OvrdState.Column "Override State" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	nvarchar(50)		100	True		

prolld_OverrideLocal *The OverrideLocal field of the Payroll-DetailsInfo object.* *Used when caregiver work across locations.* *Also called OvrdLocal.Column "Override Local" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	nvarchar(50)		100	True			
prolld_Job *The Job field of the PayrollDetailsInfo object.* *Also called Job.* *Column "Job" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	nvarchar(50)		100	True			
prolld_Vacation *The Vacation field of the PayrollDetails-Info object.* *Column "Vacation" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	money		8	True		((0))	
prolld_Loan *The Loan field of the PayrollDetailsInfo object.* *Column "Loan" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	money		8	True		((0))	
prolld_Fee *The Fee field of the PayrollDetailsInfo object.* *Column "Fee" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	money		8	True		((0))	
prolld_Other *The Other field of the PayrollDetailsInfo object.* *Column "Other" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	money		8	True			
prolld_Misc *The Misc field of the PayrollDetailsInfo object.* *Column "Misc" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	money		8	True		((0))	
prolld_Holiday *The Holiday field of the PayrollDetails-Info object.* *Column "Holiday" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	money		8	True		((0))	
prolld_Advance *The Advance field of the PayrollDetails-Info object.* *Column "Advance" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	money		8	True			

	prolld_Amount *The Amount field of the PayrollDetails-Info object.* *The total pay amount of the payroll detail record. Displays on the Finalized payroll batch form in the Pay Amt column on the payroll details grid.* *Column "Pay Amt" in Payroll Batch Details > Batch Create Payroll Details (Visible).*	money		8	True		((0))
	prolld_SourceTS *The SourceTS field of the PayrollDetails-Info object.* *Column "SourceTS" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	binary(8)		8	True		
	prolld_CreatedDate *The Date the PayrollDetails Record was Created.* *UTC date. Updated by SQL' server current UTC date (GetUTCDate)* *Also called CreatedDate.*	datetime		8	False		(getutcdate())
	prolld_CreatedUser *CreatedUser field of the PayrollDetails-Info object.* *The user who created the payroll detail. Also called CreatedUser.*	nvarchar(50)		100	False		
	prolld_ModifiedDate *The Date the PayrollDetails Record was last Modified.* *UTC date. Updated by SQL' server current UTC date (GetUTCDate)* *Also called ModifiedDate.*	datetime		8	False		(getutcdate())
	prolld_ModifiedUser *The ModifiedUser field of the Payroll-DetailsInfo object.* *The user who last modified the payroll detail. Also called ModifiedUser.*	nvarchar(50)		100	False		
	prolld_TS *The TS field of the PayrollDetailsInfo object.* *Also called TS.*	timestamp		8	False		
	prolld_OTWeeklyHours *The OTWeeklyHours field of the Payroll-DetailsInfo object.* *The Branch OT weekly hours (40).* *Column "OT Limit Hours" in Payroll Batch Details > Batch Create Payroll Details (Visible).*	tinyint		1	True		((0))
⛁	prolld_PayOT *The PayOT field of the PayrollDetailsInfo object.*	tinyint		1	True		

0: Exclude: Do not include unless another service in the week is set to 1 (Include), 3 (Include-Override), or 4 (Include-Standard) *1: Include: Always include in OT calculations.* *2: Always Exclude: Never include in OT calculations.* *3: Include-Override: Always include in OT calculations.* *4: Include-Standard: Always include in OT calculations.* *Any Payroll Week that has at least one service set to 3 (Include-Override) will use the Override Payroll OT Rules* *Any Payroll Week that has at least one service set to 1 (Include) and no services set to 3 (Include-Override) will use the Default Payroll OT Rules* *Any Payroll Week that has at least one service set to 4 (Include-Standard) and no services set to 3 (Include-Override) or 1 (Include) will use the Standard Payroll OT Rules* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > OT PayColumn "OT Pay" in Payroll Batch Details > Batch Create Payroll Details (Visible).*							
prolld_WeekStartTime *The WeekStartTime field of the Payroll-DetailsInfo object.* *The Payroll Week Start Time for the overtime record. Displays on the Finalized payroll batch form in the Week Start Time column on the payroll details grid.* *Column "Week Start Time" in Payroll Batch Details > Batch Create Payroll Details (Visible).*	datetime		8	True			
prolld_WeekEndTime *The WeekEndTime field of the Payroll-DetailsInfo object.* *The Payroll Week End Time for the overtime record. Displays on the Finalized payroll batch form in the Week Start Time column on the payroll details grid.* *Column "Week End Time" in Payroll Bath Details > Batch Create Payroll Details (Visible).*	datetime		8	True			
prolld_OTAdjustedUnits *The OTAdjustedUnits field of the Payroll-DetailsInfo object.*	decimal(5,2)		5	True			

	The number of hours that constitute the OT adjustment for the OT Adjustment payroll detail record. [Note: This could be 0 if the adjustment is solely due to a pay rate change.] Displays on the Finalized payroll batch form in the OT Adjusted Hours column on the payroll details grid. *Column "OT Adjusted Hours" in Payroll Batch Details > Batch Create Payroll Details (Visible).*						
	prolld_OTAdjustedRate *The OTAdjustedRate field of the Payroll-DetailsInfo object.* *Column "OT Adjusted Rate" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	smallmoney		4	True		((0))
	prolld_TotalAmount *This field is a calculated field equal to the prolld_TotalPayment which is the actual Payment to the caregiver.* *The total pay amount of the payroll detail record. Displays on the Finalized payroll batch form in the Pay Amt column on the payroll details grid.* *Previouse to the Payroll Adjustment, the prolld_Total Amount was used in many reports, QB Extract, so on. In order not to break the previous processes the field is maintained as a copy to the Actual payment (prolld_TotalPayment).Also called TotalAmount, Pay_Amount, Total-Amt, Amount, TotalAmt, TotalPaid-Schedule,*	money	True	8	True		
🔀 (2) FK🔑	**prolld_PayrollAdjID** *The PayrollAdjID field of the Payroll-DetailsInfo object.* *System ID of the Payroll Adjustment of the payroll detail record. Displays on the Finalized payroll batch form in the Pay Adj ID column on the payroll details grid. Also accessible on the Finalized payroll batch form by opening the schedule details of the payroll detail record. Displays in the ID field on the Pay Adj tab of the schedule detail record.* *Also called AdjustmentID.Column "Pay Adj ID" in Payroll Batch Details > Batch Create Payroll Details (Visible).*	bigint		8	True		
	prolld_TotalPayment *The TotalPayment field of the Payroll-DetailsInfo object.* *This field is an assigned column for the actual payment. Evaluated from the Adjustment to the the Calculated field of the prolld_TotalDetailAmount.*	money		8	True		

Also called TotalPayment. Sum called PayTotal, TotalPay. *Column "Actual Pay Amt" in Payroll Batch Details > Batch Create Payroll Details (Visible).*						
prolld_PayerID *The payer ID of the payroll detail.* *System generated number which identifies the payer in the payroll detail record.*	bigint		8	True		
prolld_AddOn *A new field that will get the Client or Client Payer Rate for the ServiceCode "AddOn". Adds a flat dollar amount to a Caregiver's base pay rate for all services of a specific unit type. The Add On amount will be* *unit type specific, and will add the specified dollar amount to the Caregiver's base pay rate for all the payable services performed with that same unit type. The Add On amount is entered on the Client>Pay Rates tab when all Caregiver's performing services to the Client should receive the additional Add On pay rate; and is* *entered on the Client>Caregiver Specific Pay Rates tab when only certain Caregiver's performing services to the Client should receive the additional Add On pay rate. The Add On amount will only pull to payroll when* *entered into the Client>Pay Rates tab or the Client>Caregiver Specific Pay Rates tab. Entering the Add On amount in any other Soneto Pay Rate area will not affect payroll.* *Column "Add On" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	smallmoney		4	False		((0))
prolld_PrimaryRate *A new field that will be a calculated field, representing the Origingal Rate before the Addon Rate.* *Column "Actual Rate" in Payroll Batch Details > Batch Create Payroll Details (Hidden).*	smallmoney	True	4	True		
prolld_AddOnRateID *A new field that will get the Client or Client Payer Rate Override for the ServiceCode "AddOn".*	int		4	True		
prolld_RegionID *The Region ID of the payroll detail.*	int		4	True		

	System generated number which identifies the region in the payroll detail record.						
	prolld_ClientID *The Client ID of the payroll detail. Also called ClientID.* *System generated number which identifies the client in the payroll detail record.*	bigint		8	True		
	prolld_TotalDetailAmount *This is a calculated field to determine the exact value from the rate, units, OTunit, OTRate, and the rounding.* *Also called Rate.*	decimal(29,12)	True	17	True		
	prolld_IsExpense *True if the service code on the payroll details is an expense. This is the value of svcc_IsExpense at the time the payroll is drafted. Records created before the column was added will have a null value.*	bit		1	True		((0))
	prolld_CarExcludeOT *True if the caregiver is OTExempt. This is the value of car_EmpOTFlag field of T_Caregiver at the time the Payroll is drafted. Records created before the column was added will have a null value.*	bit		1	True		
FK	prolld_BranchID *The ID of the branch (office) that the schedule related to the payroll detail record belongs to.* *When the T_GlobalSettings.glbl_Payroll-UseCaregiverOffice setting is 0 then the prolld_BranchID value will always match the Office ID of the related Payroll Batch record (T_PayrollBatch.prollb_BranchID)*	int		4	False		

Key	Name	Key Columns	Unique	Filtered	Fill Factor
PK C	PK_T_PayrollDetails	proIId_ID	True		80
	IX_T_PayrollDetails	proIId_PayrollAdjID			80
	IX_T_PayrollDetails_-BranchHolidayID	proIId_BranchHolidayID		True	
	IX_T_PayrollDetails_-BranchID_ServiceDate *Index added as part of changes for OT across offices*	proIId_BranchID, proIId_ServiceDate			
	IX_T_PayrollDetails_-CaregiverID	proIId_CaregiverID, proIId_ServiceDate			
	IX_T_PayrollDetails_Daily-OT	proIId_CaregiverID, proIId_PayrollBatchID, proIId_-ServiceDate, proIId_OT_DayUnits			80
	IX_T_PayrollDetails_-PayrollBatchID	proIId_PayrollBatchID			80
	IX_T_PayrollDetails_-ScheduleExpenseID	proIId_ScheduleExpenseID			80
	IX_T_PayrollDetails_-ScheduleID	proIId_ScheduleID			80
	IX_T_PayrollDetails_-ServiceCodeID	proIId_ServiceCodeID			80
	IX_T_Payroll-Details_weeklyOT	proIId_CaregiverID, proIId_PayrollBatchID, proIId_-ServiceDate, proIId_OT_WeekUnits			80
	ix_T_PayrollDetails_-OTDaily2	proIId_CaregiverID, proIId_ID, proIId_ServiceDate, proIId_ServiceEndTime, proIId_PayrollBatchID, proIId_-ServiceCodeID, proIId_PayrollAdjID, proIId_PayOT			80

Foreign Keys

Name	Columns
FK_T_PayrollDetails_T_Branches	prolld_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_PayrollDetails_T_BranchHolidays	prolld_BranchHolidayID->[dbo].[T_BranchHolidays].[brhol_ID]
FK_T_PayrollDetails_T_Caregiver	prolld_CaregiverID->[dbo].[T_Caregiver].[car_ID]
FK_T_PayrollDetails_T_PayrollAdjustment	prolld_PayrollAdjID->[dbo].[T_PayrollAdjustment].[prolla_ID]
FK_T_PayrollDetails_T_PayrollBatch	prolld_PayrollBatchID->[dbo].[T_PayrollBatch].[prollb_ID]
FK_T_PayrollDetails_T_Rates	prolld_RateID->[dbo].[T_Rates].[rate_ID]
FK_T_PayrollDetails_T_Region	prolld_RegionID->[dbo].[T_Region].[reg_ID]
FK_T_PayrollDetails_T_ScheduleExpenses	prolld_ScheduleExpenseID->[dbo].[T_ScheduleExpenses].[schexp_ID]
FK_T_PayrollDetails_T_Schedules	prolld_ScheduleID->[dbo].[T_Schedules].[sch_ID]
FK_T_PayrollDetails_T_ServiceCode	prolld_ServiceCodeID->[dbo].[T_ServiceCode].[svcc_ID]

Payroll Details OT

🪪 [dbo].[T_PayrollDetailsOT]

Columns

Key	Name	Data Type	Computed	Max Length (Bytes)	Allow Nulls	Identity
PK C	prolldOT_ID	bigint		8	False	1 - 1
(2)	prolldOT_PayrollBatchID *The ID of the Payroll Batch that created this record (Payroll Detail OT). This is the payroll batch that caused this record to be created.* *This is not always the Payroll Batch ID of the related payroll detail.* *The Payroll Batch ID of the related Payroll Detail record is stored in the prolldOT_BatchID column.* *When the related Payroll Detail record is created with the same batch as the current Payroll Details OT record both the prolldOT_PayrollBatchID and the prolldOT_-BatchID will have the same value.*	bigint		8	True	
	prolldOT_BatchID *The Payroll Batch ID of the related payroll detail record.* *This is not always the Batch ID that created this (payroll detail OT) Record.* *The Payroll Batch ID that created this record is stored in the prolldOT_PayrollBatchID column.* *See additional prolldOT_PayrollBatchID and prolldot_-RecordID column descriptions.*	bigint		8	True	
⚎	prolldOT_CaregiverID *The ID of the caregiver that this record is created for.*	bigint		8	True	
⚎	prolldOT_ScheduleID *The ID of the related schedule.*	bigint		8	True	
	prolldOT_RatioOFHoursIncludedInWeek *Duration of the shift portion that falls in the week versus total shift duration*	numeric(32,20)		17	True	
	prolldOT_WeeklyTotalhoursForOT *Total OT eligible hours that the caregiver worked for the current week.* *This value is repeated for all the records within the same Payroll Batch, caregiver and week combination.*	numeric(38,13)		17	True	
	prolldOT_BlendedRate *The Blended Rate. Regular Rate Of Pay used for the Overtime calculation.*	numeric(38,6)		17	True	

	This value is repeated for all the records within the same Payroll Batch, caregiver and week combination.				
	prolldOT_ProrateOTAmount *For daily OT records a null value is assigned.* *For weekly OT records that fall into a week that the caregiver''s hours exceed the weekly OT limit this will be set to:* *prolldOT_BlendedRate * (((prolldOT_Weekly-TotalhoursForOT - prolldOT_WeeklyHoursLimit) / prolldOT_WeeklyTotalhoursForOT) * prolldot_Weekly-HoursForOT) * (prolldOT_OTMultiplier - 1)* *For weekly OT records that fall into a week that the caregiver''s hours do not exceed the weekly OT limit this will be set to 0.* *Do not use this column as it will be eliminated in the future.*	numeric(38,6)		17	True	
	prolldOT_ProrateOTHours *For daily OT records a null value is assigned.* *For weekly OT records that fall into a week that the caregiver's hours exceed the weekly OT limit this will be set to:* *prolldot_WeeklyHoursForOT * prolldOT_ProrateFor-OTExempt* *For weekly OT records that fall into a week that the caregiver's hours do not exceed the weekly OT limit this will be set to 0.* *Do not use this column as it will be eliminated in the future.*	numeric(38,6)		17	True	
	prolldOT_PortionForBlendedRate *How much did this record contribute to the blended rate.* *The following formula is used to calculate the value:* *(prolldOT_BlendedRate / prolldOT_WeeklyTotalhours-ForOT)* prolldot_WeeklyHoursForOT *prolldOT_-ProrateForOTExempt* *Only use this value for Weekly OT Records.*	numeric(38,6)		17	True	
	prolldOT_WeeklyHoursLimit *Weekly hours threshold before the Caregiver will get paid Weekly OT.* *This value is repeated for all the records within the same Payroll Batch, caregiver and week combination.* *This value is usually populated from br_OTWeekHours.*	tinyint		1	True	
	prolldOT_ProrateForOTExempt *This is the ratio of non OT exempt hours versus the total shift hours.* *The following formula is used to calculate the ratio:* *(ShiftDuration - OTExemptHours) / ShiftDuration* *This column is no longer used since OTExempt Hours are no longer supported but the data is needed for legacy OT records.* *All new records will have a value of 1.000*	decimal(9,5)		5	True	

prolldOT_ActualHours *The Hours in the shift /record, not taking the week or day portion into consideration.* *This is the total duration of the shift before it is splitted into payroll periods (week or day).* *If the duration of a shift is 12 hours and 8 hours falls into week 1 and 4 hours fall into week2 then both payroll OT records (week 1 and week 2) will have the prolldOT_ActualHours value set to 12.*	decimal(11,4)		9	True	
prolldOT_PayAmount *This is the total pay amount for the total duration of the shift. If the shift spans two payroll weeks then the same amount will appear for both OT payroll records. The amount stored in this column will not be the prorated amount for each week.*	decimal(19,8)		9	True	
prolldOT_TotalWeekPayAmount *The total amount paid to the caregiver for the week. This amount is the sum of all OT eligible Payroll detail amounts for the week. If a payroll detail line spans two weeks only the portion of the payroll detail amount for the week is included in the sum. In this case the prolldOT_RatioOfHoursIncludedInWeek value is used to split the payroll detail amount into each week.* *Example:* *A shift starts on Sat 11:00 pm and ends on Sun. 9:0 am, Each payroll week starts and ends on Sunday 12:00 am.* *The shifts spans two weeks. 1 out of 10 hours fall into week 1 and 9 out of 10 hours fall into week 2. If the total OT eligible pay amount for the shift is $100 then $10 ($100 * 1/10) will be allocated to week 1 and $90 (100 * 9/10) will be allocated to week 2.* *This amount is used for the Blended Rate calculation.* *This value is repeated for all the records within the same Payroll Batch, caregiver and week combination.*	decimal(19,8)		9	True	
prolldOT_WeeklyHours *The portion of the detail line hours that falls into the current payroll week. When the payroll detail line falls into a single week then this will match the payroll detail line hours. When the payroll detail line spans two weeks then prolldOT_WeeklyHours will be set to the number of hours that fall into the current week.* *Important: This is not the OT eligible hours. Non OT eligible hours are included in the prolldOT_WeeklyHours.* *Also this value does not prorate the OT hours based on the legacy prolldOT_ProrateForOTExempt value.* *The prolldOT_WeeklyHoursForOT column is used to store the OT eligible hours.*	numeric(16,8)		9	True	
prolldOT_AccumWeeklyHours *if this record is not a Weekly record (IsWeekly = 1) then this column will have a null value.* *Oterwise, the value will be the total accumulated OT eligible Hours the caregiver has worked in the week up to and including this payroll OT line. This amount is*	numeric(16,8)		9	True	

	calculated by sorting all weekly payroll detail OT lines by prolldOT_StartTime and using a running sum from top to bottom.					
	prolldOT_AccumDailyHours *If this record is not a Daily record (IsWeekly = 0) then this column will have a null value.* *Oterwise, the value will be the total accumulated OT eligible Hours the caregiver has worked in the day up to and including this payroll OT line. This amount is calculated by sorting all daily payroll detail OT lines by prolldOT_StartTime and using a running sum from top to bottom.*	numeric(16,8)		9	True	
	prolldOT_NotWorkingHrs *The number of OT exempt hours allocated to the record.* *This is callculated using this formula:* *ScheduleDuration * (1 - ProrateForOTExempt)* *For new records this is no longer supported. All new records will always have a value of 0 since OT exempt hours is no longer supported.* *Note: New functionality now uses the columns T_Schedules.sch_PayNonWorkStartTime and T_Schedules.sch_PayNonWorkEndTime to indicate non-working hours. With the new functionality the non-working duration (duration between T_Schedules.sch_PayNonWorkStartTime and T_Schedules.sch_PayNonWorkEndTime) is no longer included in the payroll details records and therefore the duration is completely excluded from OT calculations.*	decimal(8,4)		5	True	
🔾	**prolldOT_StartTime** *The start date and time of the payroll details portion that falls into the current payroll OT period.* *If this payroll detail OT record is a weekly OT record (isWeekly = 1) then the value of this column will be set to the start date time of the portion of the payroll details record that falls into the week specified on this record .* *When a payroll detail record spans two weeks, then two related weekly payroll detail OT records will be created. Example:* *Payroll detail Start: 11/7/2015 5:00 PM.* *Payroll detail end: 11/8/2015 5:00 AM* *If the payroll week ends on 11/8/2015 12:00 AM then two payroll OT line items will be created for this payroll detail.* *1. The first line will have prolldOT_StartTime = 11/7/2015 5:00 PM and prolldOT_EndTime = 11/8/2015 12:00 AM.* *2. The second line will have prolldOT_StartTime = 11/8/2015 12:00 AM and prolldOT_EndTime = 11/8/2015 5:00 AM.* *If this payroll detail OT record is a daily OT record (isWeekly = 0) then the value of this column will be set to*	datetime		8	True	

the start date time of the portion of the payroll details record that falls into the day specified on this record . *When a payroll detail record spans two days, then two related weekly payroll detail OT records will be created. For example:* *Payroll detail Start: 11/7/2015 5:00 PM.* *Payroll detail end: 11/8/2015 5:00 AM* *If the payroll day ends on 11/8/2015 12:00 AM then two payroll OT line items will be created for this payroll detail.* *1. The first line will have prolldOT_StartTime = 11/7/2015 5:00 PM and prolldOT_EndTime = 11/8/2015 12:00 AM.* *2. The second line will have prolldOT_StartTime = 11/8/2015 12:00 AM and prolldOT_EndTime = 11/8/2015 5:00 AM.*					
prolldOT_EndTime *The end date and time of the payroll details portion that falls into the current payroll OT period.* *Same logic is used as the logic described on column prolldOT_StartTime.*	datetime		8	True	
prolldOT_ScheduleDuration *The duration in hours between prolldOT_StartTime and prolldOT_EndTime.* *Note: This is neither the duration of the schedule nor the duration of the payroll detail line. This is the duration of the payroll detail OT line.* *See prolldOT_StartTime comments.*	numeric(16,8)		9	True	
prolldOT_WeekNum *The week number assigned to the payroll week of this payroll OT record.* *The week number is assigned by the payroll batch draft process and is only relevant to the current batch.* *The payroll draft process generates the week numbers based on the range of payroll weeks that are included in the batch.* *The first payroll week in the batch will have week number set to 1, the second payroll week will have week number set to 2 etc.* *This column is set for both Weekly OT record and Daily OT records.* *For daily OT records, this column will be set to the week that the current daily OT record falls into.*	tinyint		1	True	
prolldOT_WeekStartTime *The start date and time of the current record's payroll week.* *For daily OT records, this column will be set to the week start date time that the current daily OT record falls into.*	datetime		8	False	
prolldOT_WeekEndTime *Payroll week end Time for the corresponding week*	datetime		8	False	

	prolldOT_DayNo *Day of the week. Ex if payroll weekday is Monday, then the DayNO will be 1 for Monday, 2 for Tue. etc...*	tinyint		1	True	
	prolldOT_DayStartTime *the corresponding Day of the Week's Start Time.*	datetime		8	True	
	prolldOT_DayEndTime *the corresponding Day of the Week's End Time.*	datetime		8	True	
	prolldOT_DailyTotalhours *Total OT eligible hours for the caregiver in the corresponding Day of the Week.*	decimal(8,2)		5	True	
	prolldOT_DailyOTUnits *The Daily OT units caused by the record for the corresponding Day of the week.*	decimal(8,2)		5	True	
	prolldOT_DailyOTLimit *Daily OT Limit. Ex: for every day of the week if it is between 8th and 12th hour accumulated then the Daily OT Limit would be 8.*	int		4	True	
	prolldOT_TotalDailyOTUnitsPerWeek *Total Daily OT units for the currersponding week of the caregiver*	decimal(8,2)		5	True	
	prolldOT_WeeklyOTUnits *The weekly OT Units for the record.*	decimal(8,2)		5	True	
	prolldOT_OTMultiplier *The multiplier used to calculate OT.* *For weekly OT records the multiplier will always be >= 1 because it includes the regular pay + the OT multiplier (example: 1.5)* *For Daily OT records the multiplier will always be <= 1 because it only includes the OT multiplier (example: 0.5)*	decimal(8,2)		5	True	
	prolldOT_Rate *The pay rate of the shift. This is is the rate of the shift before any OT calculations.*	smallmoney		4	True	
	prolldOT_Units *The number of unit of the shift.*	decimal(8,4)		5	True	
⛓	prolldOT_IsWeekly *1 if this is a weekly OT line, 0 if daily OT line*	tinyint		1	True	
	prolldOT_HasSevenDayOT *1 if Seventh Day OT rules are used to calculate OT for this caregiver/week* *and the caregiver worked seven consecutive days during the week. 0 otherwise.*	bit		1	True	
	prolldOT_TotalPay *This column is not used. It is set to null on all records. It is referenced is some report stored procedures and should be removed in the future.*	money		8	True	
	prolldot_DailyOTOrder *The sequence of the shift in relation to other shifts in the period. The shifts are sequenced by start time. If the period is week then this is the sequence of the shift in the week. If the period is day, then then is the sequence of the shift in the day.*	smallint		2	True	

prolldot_Ranked *This column is not used*	smallint		2	True	
prolldot_RecordID *The ID of the related payroll detail record.* *Note that the related payroll detail record is not always created with the same batch as the current payroll detail OT record.* *When a late schedule is included in a payroll batch, the OT calculations of the draft process will include all payroll details from prior batches that have schedules for the same caregiver and week. In these cases the batch Id of the prior Payroll detail records will be different than the batch ID of the payroll detail OT record.*	bigint		8	True	
prolldot_AdjustmentAmt *This is a legacy column that is no longer used.* *Adjustment amount is not used in OT calculations*	smallmoney		4	True	
prolldot_AdjustmentHrs *This is a legacy column that is no longer used, Payroll Adjustments hours are no longer included in OT calculations.*	decimal(8,2)		5	True	
prolldot_WeeklyHoursForOT *The total OT eligible hours for this shift and weekly period. This column is calculated as follows;* *1. When this service is not eligible for OT the prolldot_-WeeklyHoursForOT is set to 0. A service is not eligible for OT when the Pay OT flag is set to 2 (always exclude) or all the services in the week are set to 0 (exclude). Also a shift is not eligible for OT when the caregiver exclude OT flag is set to true. 2. When a service is eligible for OT and OT exempt hours are included in the OT calculation (legacy functionality) the prolldot_Weekly-HoursForOT is set to prolldot_WeeklyHours * prolldOT_-ProrateForOTExempt.3. Otherwise the value is equal to prolldot_WeeklyHours.* *Note: For daily periods this column is set to null.*	decimal(8,2)		5	True	
prolldOT_dailyhoursForOT *The hour in the record to be used for the OT calculation, for corresponding day of the week of caregiver*	decimal(8,4)		5	True	
prolldOT_Description *Service code name associated to the payroll detail*	nvarchar(100)		200	True	
prolldOT_ClientID *Unique client ID associated to the payroll detail*	bigint		8	True	
⛁ prolldOT_BatchTS *The timestamp of the batch when the batch was finalized*	bigint		8	True	
prolldot_isexpense *1: if the payroll details is from a record in T_Schedule-Expenses.* *0: Otherwise.* *Schedule expenses are no longer included in OT calculations. This will only be set to 1 for legacy records.*	bit		1	True	

	The value should match the value of the related T_ -PayrollDetails.prolId_IsExpense column,				
	prolIdOT_RecordTotalPayment *This field is used to find the total Payment including OT allocated to the record.* *For Weekly OT records the Regular Pay amount is added to the weekly OT amount allocated to the record.For Daily OT records the Regular Pay amount is not included in the RecordTotalPayment amount (only the daily OT amount allocated to the record is).* *The is done to ensure that the Regular Pay amount is not duplicated when daily OT is allocated to a detail line.*	numeric(38,6)	True	17	True	
	prolIdOT_OTPayment *This column stores the OT Payment that is allocated to this record.*	numeric(38,6)	True	17	True	
	prolIdOT_OTUnits *Number of OT hours allocated to this line.*	decimal(8,2)	True	5	True	
	prolIdOT_RecordUnits *Do not use this column. It will be discontinued.*	numeric(16,8)	True	9	True	
	prolIdOT_PayrollTypeID *Do not use this column. It will be discontinued.*	int		4	True	
	prolIdOT_PayrollAdjID *The related payroll adjustment ID*	bigint		8	True	

Indexes

Key	Name	Key Columns	Unique
PK	PK_T_PayrollDetailsOT	prolIdOT_ID	True
	IX_T_PayrollDetailsOT_caregiver-SheduleWeeknum	prolIdOT_CaregiverID, prolIdOT_ScheduleID, prolIdOT_Week-Num, prolIdOT_StartTime	
	IX_T_PayrollDetailsOT_payrollbatchID	prolIdOT_PayrollBatchID, prolIdOT_IsWeekly	
	IX_T_PayrollDetailsOT_payrollbatchIDTS	prolIdOT_PayrollBatchID, prolIdOT_BatchTS	

Payroll OT Allocations

[dbo].[T_PayrollOTAllocations]

This table defines the schedule shift portions that are allocated OT.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
FK P C	ota_ID *The unique Id of the record*	bigint	8	False	(1,1)	
FK P	ota_PeriodShiftID *The Id of the related T_PayrollOTPeriodShifts record that is allocated OT*	bigint	8	False		
	ota_AllocationStartTime *The UTC time that the shift allocation period starts*	datetime	8	True		
	ota_AllocationEndTime *The UTC time that the shift allocation period ends*	datetime	8	True		
	ota_RuleID *The Id of the rule that was used to allocate OT*	tinyint	1	True		
	ota_Multiplier The multiplier used to calculate OT (1.5)	[decimal](8,4)	5	False		
	ota_TotalAllocatedMinutes *The total number of minutes allocated to OT*	smallint	2	False		
	ota_TotalAllocatedOTAmount *The total amount allocated to O*	smallmoney	4	False		
	ota_DraftID *This column helps re-link FK relationships when a record is moved from draft to finalized*	bigint	8	True		
FK P	ota_RuleOTTypeId	tinyint	1	False		
	ota_LegacyID	bigint	8	True		
	ota_Seq *The sequence of allocations within the period.*	tinyint	1	False		
	ota_ThresholdMinutes	smallint	2	True		
FK P	ota_OTPayrollDetailsID *The ID of the Payroll Details OT line that includes the OT amount for this allocation*	bigint	8	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_PayrollOTAllocations_ota_ID	ota_ID	True	
	IX_T_PayrollOTAllocations_PeriodShiftID	ota_PeriodShiftID	False	

Foreign Keys

Name	Delete	Columns
FK_T_PayrollOTAllocations_T_PayrollDetails		ota_OTPayrollDetailsID->[dbo].[T_PayrollDetails] ([prolId_ID])
FK_T_PayrollOTAllocations_T_PayrollOTPeriodShifts	Cascade	ota_PeriodShiftID->[dbo].[T_PayrollOTPeriodShifts] ([ots_ID])
FK_T_PayrollOTAllocations_T_PayrollOTTypes		ota_RuleOTTypeId->[dbo].[T_PayrollOTTypes] ([ottype_ID])

Payroll OT Periods

🖼 [dbo].[T_PayrollOTPeriods]

This table defines the OT periods that a caregiver worked. There are two type of OT periods:

- Week Periods
- Day Periods

If a payroll OT process pays daily OT then 8 periods are created for each week that a caregiver worked. One week period and 7 day periods.

If a payroll OT process only pays weekly OT then a single week OT period record will be created for each week that a caregiver worked.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	otp_ID *Unique record Id*	bigint	8	False	(1,1)	
FK	otp_PayrollBatchID *The Id of the Payroll Batch that this record was created for*	bigint	8	True		
	otp_WeekNumber *The Week number that this period belongs to. This will be a number from 1 - 53 that represent the week of the year*	tinyint	1	False		
	otp_WeekYear *The Year that this period belongs to, This is the calendar year that the period starts on*	smallint	2	False		
	otp_DayNumber *The Day number that this period belongs to. If the period type is week then a null value is used. Otherwise a number from 0 to 6 will be stored that represents the day of the week.*	smallint	2	True		
FK	otp_CaregiverID *The Id of the caregiver that this record belongs to*	bigint	8	True		
	otp_StartDateTime *The UTC date and time that this period starts on*	datetime	8	False		
	otp_EndDateTime	datetime	8	False		

	The UTC date and time that this period ends on					
	otp_TotalOTEligibleMinutes *The total OT eligible minutes that the caregiver worked in the period.*	smallint	2	True		
	otp_TotalOTEligiblePaid *The total OT eligible amount that the caregiver was paid in the week. If this is a day period the amount will match the amount set on the related week period.*	smallmoney	4	False		
	otp_BlendedRate *The OT blended rate for the week. If this is a day period the amount will match the amount set on the related week period.*	[decimal](8, 4)	5	False		
	otp_TotalAllocatedOTMinutes *The number of OT allocated minutes in the period. For example, if the caregiver worked 41 eligible hours and the caregiver is paid OT after 40 hours then this value will be set to 60.*	smallint	2	False		
	otp_TotalAllocatedOTPaid *The total OT amount that the caregiver will be paid in the period. If this is a week period and the caregiver is paid both daily and weekly OT then only the OT amount paid due to weekly OT rules will be stored.*	smallmoney	4	False		
	otp_OTThresholdMinutes *The number of minutes that the caregiver must work before paid OT. When multiple rules exist for the period the minimum threshold will be returned.*	smallint	2	True		
	otp_OTConfig *The config settings that were used to calculate OT for this period.*	xml	max	True		
	otp_IsWeekRecord *True if this is a week record, false if day record.*	bit	1	False		
FK	**otp_PayrollTypeID** *The payroll process type that was used to calculate OT.*	int	4	True		
FK	**otp_BranchID** *The branch ID that this payroll week belongs to.*	int	4	False	{(0)}	
FK	**otp_ParentID** *This is the ID of the top level weekly period. If this is a weekly record then the value of this column will match the value of the otp_ID record.* *If this is a daily record, then this column will have the ID of the top level weekly record related to daily record.*	bigint	8	True		

	otp_HasLegacyRecords *1 if created with legacy code and data was migrated to this table from T_PayrollDetailsOT.* *0 if it does not have legacy records.*	bit	1	False		{(0)}
	otp_DraftID *This column helps re-link FK relationships when a record is moved from draft to finalized*	bigint	8	True		
	otp_WeekSeq *A unique sequence of the week across the batch. This is needed in order to create parity with legacy records in T_PayrollDetailsOT.*	tinyint	1	True		
	otp_OTMultiplier *The multiplier used to calculate OT (1.5). When multiple rules exist for the period the multiplier for the minimum OT threshold will be returned.*	[decimal](8, 4)	5	True		
	otp_HasSeventhDayOT *1 if Seventh Day OT rules are used to calculate OT for this caregiver/week and the caregiver worked seven consecutive days during the week. 0 otherwise.*	bit	1	True		{(0)}
	otp_WeekOTPay *Describes how OT is calculated:* *1: Include(Use default rules)* *2: Always Exclude (No OT is calculated)* *3: Include Override (Use override rules)* *4: Include-Standard (Use Standard OT Rules)*	tinyint	1	False		
	otp_TotalMinutes *The total minutes worked in the period*	smallint	2	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_PayrollOTPeriods_otp_ID	otp_ID	True	
	IX_T_PayrollOTPeriods_BranchAndDate	otp_BranchID,otp_WeekYear,otp_WeekNumber, otp_DayNumber	False	
	IX_T_PayrollOTPeriods_CaregiverAndDate	otp_CaregiverID,otp_WeekYear,otp_WeekNumber, otp_DayNumber	False	
	IX_T_PayrollOTPeriods_ParentID	otp_ParentID	False	
	IX_T_PayrollOTPeriods_PayrollBatchID	otp_PayrollBatchID,otp_CaregiverID, otp_WeekYear,otp_WeekNumber, otp_DayNumber	True	

Foreign Keys

Name	Columns

FK_T_PayrollOTPeriods_T_Branches	otp_BranchID-> [dbo].[T_Branches] ([br_ID])
FK_T_PayrollOTPeriods_T_Caregiver	otp_CaregiverID-> [dbo].[T_Caregiver] ([car_ID])
FK_T_PayrollOTPeriods_T_PayrollBatch	otp_PayrollBatchID-> [dbo].[T_PayrollBatch] ([prollb_ID])
FK_T_PayrollOTPeriods_T_PayrollExtractTypes	otp_PayrollTypeID-> [dbo].[T_PayrollExtractTypes] ([prolle_ID])
FK_T_PayrollOTPeriods_T_PayrollOTPeriods	otp_ParentID]-> [dbo].[T_PayrollOTPeriods] ([otp_ID])

Payroll OT Period Shifts

📄 [dbo].[T_PayrollOTPeriodShifts]

This table defines the portions of the schedule shifts that fall into each OT periods (T_¬Payroll¬OTPeriods):

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	ots_ID	bigint	8	False	(1,1)	
FK	ots_PeriodID	bigint	8	False		
FK	ots_PayrollDetailsID	bigint	8	False		
	ots_PeriodShiftStartTime	datetime	8	False		
	ots_PeriodShiftEndTime	datetime	8	False		
	ots_PeriodShiftEligiblePay	smallmoney	4	False		
	ots_Seq	tinyint	1	True		
	ots_Duration	smallint	2	False		
	ots_LegacyID	bigint	8	True		
	ots_DraftID	bigint	8	True		
	ots_AccumulatedDuration	smallint	2	True		
	ots_OTEligibleMinutes	smallint	2	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_PayrollOTPeriodShifts_ots_ID	ots_ID	True	
	IX_T_PayrollOTPeriodShifts_PayrollDetailsID	ots_PayrollDetailsID, ots_PeriodID, ots_PeriodShiftStartTime	True	
	IX_T_PayrollOTPeriodShifts_PeriodShifts	ots_PeriodID,ots_Seq	False	

Foreign Keys

Name	Delete	Columns
FK_T_PayrollOTPeriodShifts_T_PayrollDetails		ots_PayrollDetailsID-> [dbo].[T_PayrollDetails] ([prolId_ID])
FK_T_PayrollOTPeriodShifts_T_PayrollOTPeriods	Cascade	ots_PeriodID-> [dbo].[T_PayrollOTPeriods] ([otp_ID])

Payroll OT Types

[dbo].[T_PayrollOTTypes]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	ottype_ID *The unique ID of the Record*	`tinyint`	<mark>1</mark>	False		
	ottype_Name *The name of the overtime record type*	`[nvarchar](50)`	100	False		
	ottype_DetailRateSource *The RateSource that is stamped into the T_PayrollDetails.prolld_RateSource column for this OT Type.*	`tinyint`	1	True		
	`ottype_AdjDetailRateSource` *The Rate Source that will be stamped into the T_PayrollDetails.prolld_RateSource column for Payroll OT Adjustments of this OT Type.*	`tinyint`	1	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_PayrollOTTypes	`ottype_ID`	True	

Phone Type

[dbo].[T_PhoneType]

Note: Detailed documentation is pending.

Physician

[dbo].[T_Physician]

Description

This table stores all information about a Physician.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
FK C	phys_ID *System generated unique identifier for the Physician record. Shown on the banner of all Physician tabs as ID in the UI.*	bigint	8	False	1 - 1	
	phys_FirstName *Physician First Name. Shown on the banner of all Physician tabs as First in the UI.*	nvarchar(50)	100	False		
	phys_LastName *Physician Last Name. Shown on the banner of all Physician tabs as Last in the UI.*	nvarchar(50)	100	False		
	phys_Active *Physician Status: Active or Inactive are Global but more Status values can be added in Drop Down Maintenance Physician Status which are saved in the T_PhysicianStatus table. Shown on the banner of all Physician tabs as Status in the UI.*	bit	1	False		((1))
FK	phys_BranchID *Branch ID of the office that this physician services. The ID isn't shown in the UI but the br_Name is. FK to T_Branches.br_id.*	int	4	False		
	phys_CompanyName *Name of Company that the Physician is associated with, if applicable.*	nvarchar(50)	100	True		
	phys_MiddleInitial *Physician's Middle Initial.*	nvarchar(2)	4	True		
	phys_Title *Physician's Title.*	nvarchar(20)	40	True		
	phys_Sex *The Sex of the Physician.*	char(1)	1	True		
	phys_Suffix *Physician Suffix, if applicable.*	nvarchar(50)	100	True		
	phys_ContactName *The Office Contact Name, if applicable.*	nvarchar(35)	70	True		

	phys_Birthday	datetime	8	True		
	The Birthdate of the Physician. The Age will automatically calculate.					
	phys_Address1	nvarchar(255)	510	True		
	The main Address of the Physician.					
	phys_Address2	nvarchar(60)	120	True		
	Optional Address field.					
	phys_City	nvarchar(50)	100	True		
	The City the Physician resides in.					
	phys_StateOrProvince	nvarchar(20)	40	True		
	The State the Physician resides in.					
	phys_PostalCode	nvarchar(20)	40	True		
	The Zip Code of the Physician. The system accepts + 4 zip codes. The + 4 zip code displays on all correspondence (letters, envelopes, labels and invoices) and reports that utilize zip codes (including the Caregiver Name Badge report). The non-numeric value (dash) is stripped from the OASIS extract file, the CAHPS extract file, and the 837 electronic billing files.					
	phys_County	nvarchar(50)	100	True		
	The County the Physician resides in.					
FKP	phys_Country	int	4	False		((240))
	The Country that the Physician resides in. This value is a FK to the T_Countries table.					
	phys_Phone	nvarchar(30)	60	True		
	The Phone Number of the Physician.					
	phys_PhoneType	int	4	True		
	The Phone Type of the entered Phone Number for the Physician. Examples are Home, Work, Fax, etc. FK to the T_PhoneType table and the values are found in the UI under Dropdown Maintenance, the System Office, Phone Types dropdown list.					
	phys_Specialty	nvarchar(50)	100	True		
	The medical specialty of the Physician.					
	phys_LicenseNum	nvarchar(50)	100	True		
	Physician's License Number.					
⊕	phys_UPIN	nvarchar(15)	30	True		
	Physician's UPIN number.					
	phys_DEANumber	nvarchar(50)	100	True		
	Physician's Drug Enforcement Administration license number.					
	phys_DEADate	datetime	8	True		
	Physician Drug Enforcement Administration license date.					
	phys_ExpireDt	datetime	8	True		
	Physician license expiration date.					
	phys_DataCurrent	datetime	8	True		
	Last date information was updated.					
	phys_ContactDate	datetime	8	True		
	Initial contact date with Physician.					
	phys_Degree	nvarchar(50)	100	True		
	Physician's Degree.					

	phys_LicenseStatus *Status of the Physician's license.*	nvarchar(50)	100	True		
	phys_ActivityStatus *Notes regarding the activity status of the Physician.*	nvarchar(50)	100	True		
	phys_TaxID *Physician Tax ID.*	nvarchar(50)	100	True		
	phys_TaxType *Physician Tax Type.*	nvarchar(30)	60	True		
🖽	phys_NPI *Physician's 10 digit NPI number.*	nvarchar(10)	20	True		
	phys_EDIAdditionalID *To be used when a payer specifies a specific ID for Loop 2310 (Physicians Name) is required. Enter that ID here. In the Payer record, Loop 2310 in the EDI Settings Tab must be set to Physician Additional.*	nvarchar(20)	40	True		
	phys_EDIAdditionalIDType *To be used when a payer specifies a specific Type for Loop 2310. Enter that Type here. In the Payer Record, Loop 2310 in the EDI Settings Tab must be set to Physician Additional.*	nvarchar(3)	6	True		
	phys_Email *The Email Address of the Physician.*	nvarchar(128)	256	True		
	phys_InfoRequested *Enter any notes in this field to request information from the Physician.*	nvarchar(500)	1000	True		
	phys_Notes *Enter any notes in this field to provide additional information about the Physician.*	nvarchar(500)	1000	True		
FK🔑	phys_RegionID *Office Area of Physician. FK to T_Region. Office Area is entered in Dropdown Maintenance for the Office Area drop down list.*	int	4	True		
	phys_CreatedDate *Date and Time that the Physician record was created. UTC date updated by SQL Server's current UTC date. UI Location: Physician > Created On.*	datetime	8	False		(getutcdate())
	phys_CreatedUser *User who created the Physician record.*	nvarchar(50)	100	False		
	phys_ModifiedDate *Date and time that the Physician record was modified. UTC date updated by SQL Server's current UTC date. UI Location: Physician > Modified On.*	datetime	8	False		(getutcdate())
	phys_ModifiedUser *User who last modified the Physician record.*	nvarchar(50)	100	False		
	phys_TS *The timestamp of the record.*	timestamp	8	False		
FK🔑	phys_StatusID *Physician Status ID. This is a FK to the T_Physician-Status.phys_id from that table is saved in the T_-Physician table.*	int	4	False		((1))
⌗	phys_OasisInterfaceID *Not used.*	nvarchar(50)	100	True		

	phys_AllowMassEmail *If this column has a value of 1 (True) then the Physician has agreed to allow letters and other items to be sent from within the MatrixCare system. If this column has a value of 0 (False) then the Physician does not give consent to receive email from Matrix-Care.*	bit	1	False		((0))
FK	phys_Dear *The Salutation for the Physician. The Salutation is used when running a mail merge or pinrting labels or envelopes in Letters. This dropdown is populated by entries in the Salutations drop down and this column is a FK to T_Salutation.salut_ID.*	int	4	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_Physician	phys_ID	True	80
	IX_T_Physician	phys_BranchID		80
	IX_T_Physician_FirstName	phys_FirstName		80
	IX_T_Physician_LastName	phys_LastName		80
	IX_T_Physician_OasisInterfaceID	phys_OasisInterfaceID		80
	IX_T_Physician_UPIN	phys_UPIN		80

Foreign Keys

Name	Columns
FK_T_Physician_T_Branches	phys_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_Physician_T_Countries	phys_Country->[dbo].[T_Countries].[ctry_ID]
FK_T_Physician_T_PhysicianStatus	phys_StatusID->[dbo].[T_PhysicianStatus].[phys_ID]
FK_T_Physician_T_Region	phys_RegionID->[dbo].[T_Region].[reg_ID]
FK_T_Physician_T_Salutation	phys_Dear->[dbo].[T_Salutation].[salut_ID]

Physician Phones

[dbo].[T_PhysicianPhones]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	pph_ID	bigint		False	(1,1)	
FK	pph_PhysicianID	bigint		False		
	pph_Phone	nvarchar(30)		False		
FK	pph_PhoneType	int		False		
	pph_Note	nvarchar(256)		True		
	pph_Sequence	smallint		False		1

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_PhysicianPhones	pph_ID	True	80
	IX_T_PhysicianPhones_PhysicianID	pph_PhysicianID	False	80
	IX_T_PhysicianPhones_Unique	pph_PhysicianID, pph_Sequence	True	80

Foreign Keys

Name	Columns
FK_T_PhysicianPhones_T_PhoneType	pph_PhoneType-> [dbo].[T_PhoneType] ([pht_ID])
FK_T_PhysicianPhones_T_Physician	pph_PhysicianID-> [dbo].[T_Physician] ([phys_ID])

Physician Status

🖼 [dbo].[T_PhysicianStatus]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	phys_ID	int		False	(10001,1)	
FK	phys_Name	[nvarchar](50)	50	True		
	phys_ShowOrHide	bit		False		0
	phys_ListItemType	tinyint		False		0
	phys_RptGroupID	int		False		83
	phys_BranchID	int		True		
	phys_OverrideID	int		True		
	phys_Active	bit		False		1
	phys_CreatedDate	datetime		False		(getutcdate())
	phys_CreatedUser	[nvarchar](50)	50	False		
	phys_ModifiedDate	datetime		False		(getutcdate())
	phys_ModifiedUser	[nvarchar](50)	50	False		
	phys_TS	timestamp		False		
	phys_Description	[nvarchar](1000)	1000	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_PhysicianStatus	phys_ID	True	
	IX_T_PhysicianStatus_BranchOverrideName	phys_BranchID, phys_OverrideID, phys_Name	True	

Foreign Keys

Name	Columns
FK_T_PhysicianStatus_T_Branches	phys_BranchID-> [dbo].[T_Branches] ([br_ID])
FK_T_PhysicianStatus_T_PhysicianStatus	phys_OverrideID-> [dbo].[T_PhysicianStatus] ([phys_ID])
FK_T_PhysicianStatus_T_ReportGroups	phys_RptGroupID-> [dbo].[T_ReportGroups] ([rptgrp_ID])

Plan of Care

[dbo].[T_PlanofCare]

Note: Detailed documentation is pending.

Plan of Care Diagnosis

[dbo].[T_PlanofCareDiagnosis]

Note: Detailed documentation is pending.

Plan of Care Documents

[dbo].[T_PlanofCareDocuments]

Note: Detailed documentation is pending.

Plan of Care Medications

[dbo].[T_PlanofCareMedications]

Note: Detailed documentation is pending.

Plan of Care Mod Orders

⊞ **[dbo].[T_PlanofCareModOrders]**

Note: Detailed documentation is pending.

Plan of Care Orders

[dbo].[T_PlanofCareOrders]

Note: Detailed documentation is pending.

Race

⊞ [dbo].[T_Race]

Note: Detailed documentation is pending.

Rate Bill Shifts

📧 **[dbo].[T_RateBillShifts]**

Note: Detailed documentation is pending.

Rate Schedule Last Changes

[dbo].[T_RateScheduleLastChanges]

Note: Detailed documentation is pending.

Rates

[dbo].[T_Rates]

Note: Detailed documentation is pending.

Rates Override Type

[dbo].[T_RatesOverrideType]

Note: Detailed documentation is pending.

Rates Type

[dbo].[T_RatesType]

Note: Detailed documentation is pending.

Record Type

<div>
📠 **[dbo].[T_RecordType]**
</div>

Note: Detailed documentation is pending.

Region

[dbo].[T_Region]

Description

Information about branch regions.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	reg_ID *System generated unique ID for the region record.* *Also called ID, officeArea_ID, officeAreaID, BranchRegionID, oAreaID* *UI Location: Drop Down Maintenance > Office Area > ID*	int	4	False	1 - 1	
	reg_Name *The region name of the branch office.* *Also called OfficeArea, Office_Area, officeArea-Name, BranchRegionName, oAreaName, clientofficeArea_Name* *UI Location: Drop Down Maintenance > Office Area > Name*	nvarchar(50)	100	False		
	reg_Description *The description of the region.* *UI Location: Drop Down Maintenance > Office Area > Description*	nvarchar(1000)	2000	True		
	reg_BranchID *The ID of the branch in the region record.*	int	4	False		
	reg_Active *Determines if a region is active or inactive.* *UI Location: Drop Down Maintenance > Office Area > Active*	bit	1	False		((1))
	reg_CreatedDate *Date the region record was created.* *UTC date updated by SQL Server's current UTC date.* *UI Location: Drop Down Maintenance > Office Area > Created On*	datetime	8	False		(getutcdate())
	reg_CreatedUser *User who created the region record.* *UI Location: Drop Down Maintenance > Office Area > Created By*	nvarchar(50)	100	False		

	reg_ModifiedDate *Date region record's most recent modification.* *UTC date updated by SQL Server's current UTC date.* *UI Location: Drop Down Maintenance > Office Area > Modified On*	datetime	8	False		(getutcdate())
	reg_ModifiedUser *User who made region record's most recent modification.* *UI Location: Drop Down Maintenance > Office Area > Modified By*	nvarchar(50)	100	False		
	reg_TS *Timestamp of the region record. This column is hidden in MyData.*	timestamp	8	False		
	reg_AcctClass *Classes to QBooks Details Acct Extract* *UI Location: Drop Down Maintenance > Office Area > Acct Class. This column is hidden in My-Data.*	nvarchar(30)	60	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_Region	reg_ID	True	80

Referral Entities

[dbo].[T_ReferralEntities]

Description

The Referral Entities table defines all of the Referral Entities in the MatrixCare application. The main Referral Entities are Caregiver, Client, Physician, Payer, Referral Source, Referral Contact, Address Book, and Staff. These are used in the following views: V_Admission-Referrals, V_CaregiverHiringReferrals, and V_ClientInquiryReferrals.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Default
PK C	refent_ID *Primary Key of the Referral Entities table.*	tinyint	1	False	
	refent_Name *Name of the Referral Entity.*	nvarchar(25)	50	False	
	refent_EntityEnum *Enum of the Referral Entity.*	nvarchar(25)	50	False	
	refent_CreatedUser *The UserID of the user that created the Referral Entities record.*	nvarchar(50)	100	False	
	refent_CreatedDate *UTC date updated by SQL server's current UTC date. The date the referral entities record was created.*	datetime	8	False	(getutcdate())
	refent_ModifiedUser *The UserID of the last user that modified the Referral Entities record.*	nvarchar(50)	100	False	
	refent_ModifiedDate *UTC date updated by SQL server's current UTC date. The date the referral entities record was last modified.*	datetime	8	False	(getutcdate())
	refent_TS *The timestamp field of the Referral Entities record.*	timestamp	8	False	

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_ReferralEntities	refent_ID	True	80

Referral Facilities

[dbo].[T_ReferralFacilities]

Note: Detailed documentation is pending.

Referral Facilities Branches

[dbo].[T_ReferralFacilitiesBranches]

Note: Detailed documentation is pending.

Referral Facilities Status

[dbo].[T_ReferralFacilitiesStatus]

Note: Detailed documentation is pending.

Referral Facility Documents

[dbo].[T_ReferralFacilityDocuments]

Note: Detailed documentation is pending.

Referral Facility Documents Share Levels

📰 **[dbo].[T_ReferralFacilityDocumentsShareLevels]**

Note: Detailed documentation is pending.

Referral Join

[dbo].[T_ReferralJoin]

Note: Detailed documentation is pending.

Referral Non Admission Reasons

[dbo].[T_ReferralNonAdmissionReasons]

Note: Detailed documentation is pending.

Referral Rating

[dbo].[T_ReferralRating]

Note: Detailed documentation is pending.

Referral Staff Join

[dbo].[T_ReferralStaffJoin]

Note: Detailed documentation is pending.

Referral Territories

[dbo].[T_ReferralTerritories]

Note: Detailed documentation is pending.

Referral Types

[dbo].[T_ReferralTypes]

Note: Detailed documentation is pending.

Referral By

[dbo].[T_ReferralBy]

Note: Detailed documentation is pending.

Referral By Status

[dbo].[T_ReferralByStatus]

Note: Detailed documentation is pending.

Report Groups

🖼 [dbo].[T_ReportGroups]

Description

Contains data records for Report Groups.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	rptgrp_ID	int		False	10001,1	
	rptgrp_Name	Nvarchar(50)		False		
FK	rptgrp_TypeID	int		False		
	rptgrp_Active	bit		False		((0))
	rptgrp_CreatedDate	datetime		False		(getutcdate())
	rptgrp_CreatedUser	Nvarchar(50)		False		
	rptgrp_ModifiedDate	datetime		False		(getutcdate())
	rptgrp_ModifiedUser	Nvarchar(50)		False		
	rptgrp_TS	timestamp		False		
	rptgrp_Description	Nvarchar(1000)		True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_ReportGroups	rptgrp_ID	True	80

Foreign Keys

Name	Columns
FK_T_ReportGroups_T_ReportGroupTypes	rptgrp_TypeID-> [dbo].[T_ReportGroupTypes] ([rptgrptyp_ID])

Report Group Types

[dbo].[T_ReportGroupTypes]

Description

Contains data records for Report Group Types.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	rptgrptyp_ID	int		False		
	rptgrptyp_Name	nvarchar(50)		False		
	rptgrptyp_Description	nvarchar(256)		True		
	rptgrptyp_Type	tinyint		False		((2))
	rptgrptyp_EnumName	nvarchar(50)		True		
	rptgrptyp_Active	bit		False		((1))
	rptgrptyp_CreatedDate	datetime		False		(getutcdate())
	rptgrptyp_CreatedUser	nvarchar(50)		False		
	rptgrptyp_ModifiedDate	datetime		False		(getutcdate())
	rptgrptyp_ModifiedUser	nvarchar(50)		False		
	rptgrp_TS	timestamp		False		
	rptgrptyp_DDmaintenance	bit		False		((1))
	rptgrptyp_TableName	varchar(50)		True		
	rptgrptyp_TableAbbreviation	varchar(20)		True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_ReportGroupTypes	rptgrptyp_ID	True	80

Foreign Keys

Name	Columns
FK_T_ReportGroupTypes_T_ReportGroupTypes	rptgrptyp_ID-> [dbo].[T_ReportGroupTypes] ([rptgrptyp_ID])

Schedule Expenses

📺 [dbo].[T_ScheduleExpenses]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK 🔑 C ⊞	schexp_ID *System generated ID for the schedule expense record. Also pulls expenses items to invoice.* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > ID* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > ID*	bigint	8	False	1 - 1	
⊞ (4) FK 🔑	schexp_schID *Schedule ID for the schedule expense record.* *Relates to T_Schedules.sch_ID.*	bigint	8	False		
⊞ (2) FK 🔑	schexp_expID *Expense service code which has been added to the schedule. Payer ID for the schedule expense record. Used to pull payer name and display in the UI.* *Relates to T_ServiceCode.svcc_ID* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Expense Code* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Expense Code*	int	4	False		
	schexp_ClientPayerID *The client's payer ID for the expenses on the service scheduled.*	bigint	8	True		
	schexp_PayerID *The payer ID for the expenses on the service scheduled.*	bigint	8	True		
	schexp_CostUnits *The unit cost of the schedule expenses.*	decimal(8,4)	5	True		
	schexp_CostRateOverrideAmt *The cost rate of the schedule expenses.*	smallmoney	4	True		
	schexp_CostRateOverrideModifiedUser *User that last modified the cost rate.*	nvarchar(50)	100	True		

	schexp_CostRateOverrideModifiedDate *Date and time the cost rate was last modified.* *UTC date updated by SQL Server's current UTC date.*	datetime	8	True		
	schexp_BillUnits *The number of expense units to be billed. If the expense is not billable, this remains at 0.* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Bill Units* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Bill Units*	decimal(8,4)	5	False		((0))
	schexp_BillRateUnitFlag	smallint	2	False		((1))
	schexp_BillRateOverrideAmt *The bill rate for the expense code here. If expense bill rates are set in another location (such as Office or Payer), then this bill rate may be left at $0.* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Bill Rate* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Bill Rate*	smallmoney	4	False		((0))
	schexp_BillRateOverrideModifiedUser *User that last modified the bill rate.*	nvarchar(50)	100	True		
	schexp_BillRateOverrideModifiedDate *Date and time the bill rate was last modified.* *UTC date updated by SQL Server's current UTC date.*	datetime	8	True		
	schexp_BillRateID *The ID of the bill rate on the schedule expenses record.*	bigint	8	True		
	schexp_BillRate *The billable rate that the service is billed at.*	smallmoney	4	True		
	schexp_TotalCharge *Total billable charges.*	smallmoney	4	True		
	schexp_PayUnits *The number of expense units to be paid. If the expense is not payable, this remains at 0.* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Pay Units* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Pay Units*	decimal(8,4)	5	False		((0))
	schexp_PayRateUnitFlag	smallint	2	False		((1))
	schexp_PayRateOverrideAmt *Enter the pay rate for the expense code here. If expense pay rates are set in another location (such as Office or Payer), then this pay rate may be left at $0.* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Pay Rate*	smallmoney	4	False		((0))

	and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Pay Rate					
	schexp_PayRateOverrideModifiedUser *User that last modified the pay rate.*	nvarchar(50)	100	True		
	schexp_PayRateOverrideModifiedDate *Date and time the pay rate was last modified.* *UTC date updated by SQL Server's current UTC date.*	datetime	8	True		
	schexp_Notes *Any applicable notes for the schedule expense record.* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Notes* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Notes*	nvarchar(255)	510	True		
	schexp_PayDate *Completed schedules not marked in the previous column with NPD will display a Pay Date. This date indicates the date on which the individual schedule was paid (or is scheduled to be paid).* *Non-UTC date.* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Pay date* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Pay Date*	datetime	8	True		
🗒	**schexp_RevenueCode** *Displays the appropriate Bill Flag for this expense. The choices are Billable, Billable No Charge, NotBillable, or Default. The selection Default will pull from the setting for the Service Code in DDM Service Codes. If the service code is Billable in the Service Code, then this will appear here as Default (Billable); if it is Not Billable, then it will display here as Default (Not Billable).* *0: Default* *1: Billable* *2: Billable No Charge* *3: Not Billable* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Bill Flag* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Bill Flag*	tinyint	1	False		((0))
🗒	**schexp_Paycode** *Displays the appropriate Pay Flag for this expense. The choices are NotPayable, Payable, or Default. The selection Default will pull from the setting for the Service Code in DDM Service Codes. If the service code is Payable in the Service Code, then this will appear here as Default (Payable); if it is Not Payable, then it will display here as Default (Not Payable).* *0: Not Payable* *1: Payable*	tinyint	1	False		((2))

	2: Default (Check Payer Services and ServiceCode) *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Pay Flag* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Pay Flag*					
	schexp_PayReviewFlag	bit	1	False		((0))
⬚ (2)	schexp_PayrollBatchID *Displays the Payroll Batch ID for the paid schedule.* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > PR Batch ID* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > PR Batch ID*	bigint	8	True		
	schexp_NotesDate *Shows the date on which the schedule was marked as Completed.* *Non-UTC date.* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Confirmed* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Confirmed*	datetime	8	True		
⬚	schexp_BillingStatus *Displays the current billing status for each schedule. Statuses are Complete (billing is complete), In-Progress (only one payer has been billed for services, the other payer has not) or Un-Billed (no payers have been billed for services).* *0: Un-Billed* *1: Billing Started* *2: Billing Completed* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Bill Status* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Bill Status*	tinyint	1	False		((0))
	schexp_CreatedDate *Date and time the current record was created.* *UTC date updated by SQL Server's current UTC date.*	datetime	8	False		(getutcdate())
	schexp_CreatedUser *User that last modified the current record.*	nvarchar(50)	100	False		
	schexp_ModifiedDate *Date and time the current record was last modified.* *UTC date updated by SQL Server's current UTC date.*	datetime	8	False		(getutcdate())
	schexp_ModifiedUser *User that created the current record.*	nvarchar(50)	100	False		

schexp_TS *The timestamp field of the schedule expense record.*	timestamp	8	False		
schexp_BillOTUnits *The number of over time units for the schedule.* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Bill OT Units* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Bill OT Units*	decimal(8,4)	5	False		((0))
schexp_BillOTMulti *The multiplier used for over time calculation for the schedule.* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Bill OT Multiply* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Bill OT Multiply*	decimal(8,4)	5	False		((1.5))
schexp_OriginalPayDate *Schexp_PayDate will be transfered to this field during finalizing of payroll for cancelation process to revert back to the original value.*	datetime	8	True		
schexp_TotalBillable *The total billable charges for the schedule.*	money	8	True		
schexp_TotalBilled *The actual billed amount for the schedule.*	money	8	True		
schexp_TotalPaid *The total amount paid to the caregiver for the service on the schedule.*	money	8	True		
schexp_InvoiceDetailDescription *Allows you to override the description of the Expense or Service for reporting purposes and pulls to the Invoice report. Useful if need to account for a variety of expenditures made on the Client's behalf but you do not want to configure individual expense/service codes. Displays on the Expenses tab of the Schedule list views. Not required - if left blank the Expense Code or Service Code will be used. Does not copy over with a Recurrence Pattern. Create a generic code for expenses (such as Misc Exp) under DDM Service Codes.* *UI Location: Payroll > Create Payroll > Batch tab > Schedule Calendar icon > Expenses tab on pop-up window > Inv Description* *and Scheduling > Schedule Calendar > Schedule Details > Expenses tab on pop-up window > Inv Description*	nvarchar(100)	200	True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_ScheduleExpenses	schexp_ID	True	80
	IX_T_ScheduleExpenses_ID SchID	schexp_ID, schexp_schID	True	80
	IX_T_ScheduleExpenses_PayrollBatchID	schexp_PayrollBatchID		
	IX_T_ScheduleExpenses_schexp_expID	schexp_expID, schexp_schID		80
	IX_T_ScheduleExpenses_schexp_schID	schexp_schID		80
	ix_T_ScheduleExpenses_SchIDPayrollBatch-BillingStatusExpID	schexp_schID, schexp_PayrollBatchID, schexp_BillingStatus, schexp_expID		80

Foreign Keys

Name	Columns
FK_T_ScheduleExpenses_T_Schedules	schexp_schID->[dbo].[T_Schedules].[sch_ID]
FK_T_ScheduleExpenses_T_ServiceCode	schexp_expID->[dbo].[T_ServiceCode].[svcc_ID]

Schedule Payers

[dbo].[T_SchedulePayers]

Columns

Key	Name	Data Type	Persisted	Computed	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C (5)	schcp_ID	bigint			8	False	1 - 1	
(7) FK	schcp_ClientPayerID	bigint			8	False		
(7) FK	schcp_PayerID	bigint			8	False		
(7) FK FK	schcp_AdmissionID	bigint			8	False		
(11) FK FK	schcp_ScheduleID	bigint			8	True		
(12) FK	schcp_ScheduleExpenseID	bigint			8	True		
(10)	schcp_SeqNo *schcp_SeqNo: This field is used in determining the primary payer for a schedule, which will determine the total charge for that schedule. It does not determine the order in which payers are billed though. schcp_Charge-AllocationSeqNo is the field used to determine what order to bill schedule payers.*	int			4	False		((0))
	schcp_BillSplitTypeID *B: Balance*	char(1)			1	False		('B')

	S: Split *V: Visit* *T: Transfer* *C: COB* *Time/Date Based Benefits* *--------------------------* *H: Hourly* *I: Schedule Hourly* *D: Daily* *W:Weekly* *M:Monthly*						
	schcp_Amount	money			8	False	((0))
🗔	schcp_Percent	decimal(5,4)			5	False	((0))
	schcp_DiscountAmount	money			8	False	((0))
🗔	schcp_DiscountPercent	decimal(5,4)			5	False	((0))
🔑	schcp_CopayerID	bigint			8	True	
	schcp_CopayInvoiceNote	nvarchar(255)			510	True	
	schcp_Notes	nvarchar(255)			510	True	
	schcp_Source *0:Created by user, 1:Copied* *from Admission, 2:Copied* *from Schedule, 3:Ovewritten* *from ScheduleExpense*	tinyint			1	False	((0))
	schcp_ExcludeHoliday	bit			1	False	((0))
🔗	schcp_InvoiceID	bigint			8	True	
🔗 (10)	schcp_CancelDate	datetime			8	True	
	schcp_CreatedDate	datetime			8	False	(getutcdate())
	schcp_CreatedUser	nvarchar(50)			100	False	
	schcp_ModifiedDate	datetime			8	False	(getutcdate())
	schcp_ModifiedUser	nvarchar(50)			100	False	
🔗 (3)	schcp_TS	timestamp			8	False	

FK🗝	schcp_AddressBookID	bigint			8	True		
FK🗝	schcp_FeeChartID	int			4	True		
🔀	schcp_ChargeAllocation-SeqNo *schcp_ChargeAllocation-SeqNo: This field is used in determining what order to bill a schedules payers in. This field is not used in determining the primary payer for that schedule. The field schcp_SeqNo is used to determine the primary payer, which is the payer who determines the total charge of the schedule.*	int			4	False		((0))
	schcp_ManageCOB	int		True	4	False		
	schcp_COBStatus *schcp_COBStatus: Used to designate the COB state of the current schedule payer for a particular schedule or expense (meaningless for Admission Payers)* *--------------------------------* *0: Not a COB Schedule/Expense* *1: COB Hold - A COB Schedule/Expense not ready to be drafted* *2: COB Ready To Bill - A COB Schedule/Expense ready to be drafted* *3: COB Billed - A COB Schedule/Expense already billed* *4: COB Transfered - A COB Schedule/Expense Transferred to next Invoice* *255: COB Canceled*	int	True	True	4	False		
🔀FK🗝	schcp_TransferFrom-InvoiceHeaderID *Used primarily in COB Billing.* *-1 is non-COB* *0 is Primary Payer COB or unProcessed COB* *> 0 is the previous Invoice-HeaderID in this COB Chain*	bigint			8	True		

	schcp_TransferToInvoice-HeaderID *Used primarily in COB Billing.* *-1 is non-COB* *0 is Final COB Payer or un-Processed COB* *> 0 is the next Invoice-HeaderID in this COB Chain*	bigint			8	True		
	schcp_BillingStatus *Displays the stage of the billing process for this schedule payer. This determines whether this schedule is brought into a billing batch to be drafted.* *Valid values:* *0: Not billed yet. No invoices related to this schedule payer are created (canceled invoices do not count for this).*	tivnyint			1	False	((0))	

Indexes

Key	Name	Key Columns	Included Columns	Unique
PK	PK_T_SchedulePayers	schcp_ID		True
	IX_T_SchedulePayers_Unique	schcp_AdmissionID, schcp_ScheduleID, schcp_ScheduleExpenseID, schcp_SeqNo, schcp_CancelDate		True
	IX_T_SchedulePayers_Unique1	schcp_AdmissionID, schcp_ScheduleID, schcp_ScheduleExpenseID, schcp_ChargeAllocationSeqNo, schcp_CancelDate		True
	IX_T_SchedulePayers_AdmissionID	schcp_AdmissionID, schcp_SeqNo		
	IX_T_SchedulePayers_ClientPayersID	schcp_ClientPayerID, schcp_AdmissionID, schcp_ScheduleID, schcp_ScheduleExpenseID		
	IX_T_SchedulePayers_InvoiceID	schcp_InvoiceID		
	IX_T_SchedulePayers_PayerID	schcp_PayerID, schcp_AdmissionID, schcp_ScheduleID, schcp_ScheduleExpenseID		
	IX_T_SchedulePayers_ScheduleExpense-Cancel	schcp_ScheduleID, schcp_ScheduleExpenseID, schcp_CancelDate		
	IX_T_SchedulePayers_ScheduleExpense-ID	schcp_ScheduleExpenseID, schcp_SeqNo, schcp_CancelDate		
	IX_T_SchedulePayers_ScheduleID	schcp_ScheduleID, schcp_SeqNo, schcp_CancelDate		

	IX_T_SchedulePayers_TransferFrom-InvoiceHeaderID	schcp_TransferFromInvoiceHeaderID		
	IX_T_SchedulePayers_TransferToInvoice-HeaderID	schcp_TransferToInvoiceHeaderID		
	_dta_index_T_Schedule-Payers_15_1293976432__K4_K5_K6_-K20_K7_K1_2_3_25	schcp_AdmissionID, schcp_ScheduleID, schcp_ScheduleExpenseID, schcp_-CancelDate, schcp_SeqNo, schcp_ID	schcp_ClientPayer-ID, schcp_PayerID, schcp_TS	
	_dta_index_T_Schedule-Payers_15_1293976432__K5_K1_K7_-K20_K6_2_3_25	schcp_ScheduleID, schcp_ID, schcp_-SeqNo, schcp_CancelDate, schcp_-ScheduleExpenseID	schcp_ClientPayer-ID, schcp_PayerID, schcp_TS	
	_dta_index_T_Schedule-Payers_15_1293976432__K6_K5_K7_-K1_K4_2_3	schcp_ScheduleExpenseID, schcp_-ScheduleID, schcp_SeqNo, schcp_ID, schcp_AdmissionID	schcp_ClientPayer-ID, schcp_PayerID	
	_dta_index_T_Schedule-Payers_15_1293976432__K6_K5_K7_-K20_1_2_3	schcp_ScheduleExpenseID, schcp_-ScheduleID, schcp_SeqNo, schcp_-CancelDate	schcp_ClientPayer-ID, schcp_ID, schcp_PayerID	
	_dta_index_T_Schedule-Payers_15_1293976432__K7_K20_K5_-K6_2_3	schcp_SeqNo, schcp_CancelDate, schcp_ScheduleID, schcp_Schedule-ExpenseID	schcp_ClientPayer-ID, schcp_PayerID	
	_dta_index_T_Schedule-Payers_15_1293976432__K7_K20_K6_-K1_2_3_25	schcp_SeqNo, schcp_CancelDate, schcp_ScheduleExpenseID, schcp_ID	schcp_ClientPayer-ID, schcp_PayerID, schcp_TS	

Foreign Keys

Name	Columns
FK_T_SchedulePayers_T_AddressBook	schcp_AddressBookID->[dbo].[T_AddressBook].[addbk_ID]
FK_T_SchedulePayers_T_Admissions	schcp_AdmissionID->[dbo].[T_Admissions].[adm_ID]
FK_T_SchedulePayers_T_BranchChartGroups	schcp_FeeChartID->[dbo].[T_BranchChartGroups].[brcg_ID]
FK_T_SchedulePayers_T_ClientPayers	schcp_ClientPayerID->[dbo].[T_ClientPayers].[clipay_ID] schcp_PayerID->[dbo].[T_ClientPayers].[clipay_PayerID]
FK_T_SchedulePayers_T_Payers_CoPayerID	schcp_CopayerID->[dbo].[T_Payers].[pay_ID]
FK_T_SchedulePayers_T_ScheduleExpenses	schcp_ScheduleExpenseID->[dbo].[T_ScheduleExpenses].[schexp_ID] schcp_ScheduleID->[dbo].[T_ScheduleExpenses].[schexp_schID]
FK_T_SchedulePayers_T_Schedules	schcp_ScheduleID->[dbo].[T_Schedules].[sch_ID] schcp_AdmissionID->[dbo].[T_Schedules].[sch_AdmissionID]
FK_T_SchedulePayers_TransferFrom	schcp_TransferFromInvoiceHeaderID->[dbo].[T_InvoiceHeader].[invh_ID]
FK_T_SchedulePayers_TransferTo	schcp_TransferToInvoiceHeaderID->[dbo].[T_InvoiceHeader].[invh_ID]

Schedule Recurrence

[dbo].[T_ScheduleRecurrence]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	schrec_ID	bigint		False	(1,1)	
	schrec_Description	char		True		
	schrec_OccurrenceDuration	int		False		
	schrec_OccurrenceStartTime	datetime		False		
	schrec_PatternDayOfMonth	tinyint		False		
	schrec_PatternDaysOfWeek	tinyint		False		
	schrec_PatternFrequency	tinyint		False		
	schrec_PatternInterval	int		False		
	schrec_PatternMonthOfYear	tinyint		False		
	schrec_PatternOccurrenceOfDayInMonth	tinyint		False		
	schrec_PatternType	tinyint		False		
	schrec_RangeEndDate	datetime		False		
	schrec_RangeLimit	tinyint		False		
	schrec_RangeMaxOccurrences	int		False		
	schrec_RangeMaxFrequency	int		False		
	schrec_RangeStartDate	datetime		False		
FK	schrec_RootAppointment	bigint		False		
	schrec_OriginalStartDateTime	datetime		False		
	schrec_OriginatedFromID	bigint		False		
	schrec_OriginType	tinyint		False		
FK	schrec_TimeZoneID	smallint		False		70
	schrec_CreatedDate	datetime		False		(getutcdate())
	schrec_CreatedUser	nvarchar(50)		False		
	schrec_ModifiedDate	datetime		False		(getutcdate())
	schrec_ModifiedUser	nvarchar(50)		False		
	schrec_TS	timestamp		False		
	schrec_FirstDayOfWeek	tinyint		False		0
	schrec_LastGenDate	date		True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_ScheduleRecurrence	schrec_ID	True	80
	IX_RootAppointmentID	schrec_RootAppointment	False	80
	IX_T_OriginatedFromID	schrec_OriginatedFromID	False	80

Foreign Keys

Name	Columns
FK_T_ScheduleRecurrence_T_Schedules	schrec_RootAppointment-> [dbo].[T_Schedules] ([sch_ID])
FK_T_ScheduleRecurrence_T_TimeZones	schrec_TimeZoneID-> [dbo].[T_TimeZones] ([tz_ID])

Schedule Shift

[dbo].[T_ScheduleShift]

Note: Detailed documentation is pending.

Schedule Shift Payers

[dbo].[T_ScheduleShiftPayers]

Note: Detailed documentation is pending.

Schedules

📇 [dbo].[T_Schedules]

Columns

Key	Name	Data Type	Computed	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C 🔑 🔷 ⊞ (7)	sch_ID *The System schedule ID.* *Schdeule Calendar > Schedule Details > Record Info > ID and Scheduling > Telephony > Call Review > Sch ID*	bigint		8	False	1 - 1	
⊞ (6) FK 🔑🔷 FK 🔑🔷	sch_ClientID *Auto-generated unique Client ID. Flows from [T_Admissions].[adm_ClientID]*	bigint		8	False		
⊞ (4) FK 🔑🔷	sch_CaregiverID *Description: Auto-generated unique caregiver ID. Flows from [T_-Caregiver].[car_ID].*	bigint		8	True		
⊞ (11)	sch_StartTime *The start date/time scheduled in UTC.* *Scheduling > Telephony > Call Review > Sch.Start*	datetime		8	False		(getdate())
⊞ (7)	sch_EndTime *The end date/time scheduled in UTC.* *Scheduling > Telephony > Call Review > Sch.End*	datetime		8	False		
⊞ (2) FK 🔑🔷	sch_ScheduleStatusID *The current status of the visit. Built into the system are the choices "S" for Scheduled, "C" for Completed, and "T" for Telephony Completed. Other statuses may be added in DDM Schedule Status.* *Scheduling > Scheduling Calendar > Schedule Details > Main > Status*	int		4	False		((19))
⊞ (6) FK 🔑🔷	sch_ServiceCodeID *The service code scheduled.* *Scheduling > Telephony > Call Review > Service Code*	int		4	False		
⊞ (6) FK 🔑🔷	sch_AdmissionID *The Admission ID to which the schedule is attached. Click the*	bigint		8	False		

	Admission icon to jump to that specific admission record. *Scheduling > Scheduling Calendar > Schedule Details > Main > Admission ID*					
	sch_Description *Enter notes if applicable. Notes that exist on schedules at the time invoices are finalized display on Standard and Payer invoice types if the Office>Billing Rpt Parms Display Schedule Notes field is set to True or the Payer>Billing Rpt Parms field 'Display Schedule Notes' field is set to 'True' or 'Default' (and Office is set to 'True'). See Also How To: Apply Schedule Notes to a Client Invoice. Changes made to schedule notes after the invoice is finalized will not be included on invoice reports. If the Schedule crosses multiple invoice detail records (due to office shifts or holiday shifts) the Note will repeat on each invoice detail line on the reports.* *Scheduling > Scheduling Calendar > Schedule Details > Notes > Notes*	nvarchar(4000)		8000	True	
	sch_ChargeRateOverrideAmt *Description: Entering a bill rate on this tab allows all other bill rates to be overridden for this one schedule. Enter the bill rate for this schedule in order to manually overwrite the default bill rate. Note: Holiday and Shift differentials ARE NOT applied to override records. Entering a bill rate override is the rate for that schedule and ignores other differentials.* *Main Database: [T_Schedules].[sch_-ChargeRateOverrideAmt]* *Simplified Database: [T_-Schedules].[ChargeRate]* *UI: Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Bill Rate Override > Rate*	smallmoney		4	False		((0))
	sch_ChargeRateOverrideModifiedUser *The user that manually overwrote this bill rate.* *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Bill Rate Override > By*	nvarchar(50)		100	True	
	sch_ChargeRateOverrideModifiedDate *The date and time this bill rate was manually overwritten.*	datetime		8	True	

	Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Bill Rate Override > On						
	sch_PayRateOverrideAmt *Entering a pay rate on this tab allows all other pay rates to be overridden for this one schedule. Enter the pay rate for this schedule in order to manually overwrite the default pay rate.* *Note: Holiday and Shift differentials ARE NOT applied to override records. Entering a pay rate override is the rate for that schedule and ignores other differentials.* *Main Database: [T_Schedules].[sch_-PayRateOverrideAmt]* *Simplified Database: [T_-Schedules].[PayRate]* *Scheduling > Scheduling Calendar > Schedule Details > Pay Info > Pay Rate Override > Rate*	smallmoney		4	False		((0))
	sch_PayRateOverrideModifiedUser *The user that manually overwrote this pay rate.* *Scheduling > Scheduling Calendar > Schedule Details > Pay Info > Pay Rate Override > By*	nvarchar(50)		100	True		
	sch_PayRateOverrideModifiedDate *The date and time this pay rate was manually overwritten.* *Scheduling > Scheduling Calendar > Schedule Details > Pay Info > Pay Rate Override > On*	datetime		8	True		
	sch_ChargeRateID *Set from T_InvoiceDetailsDraft.invd_-RateID from store procedure that copies the InvoiceDetail records from the draft table to the finalized table.*	bigint		8	True		
	sch_ChargeRate *Set from T_InvoiceDetailsDraft.invd_-ChargeRate.*	smallmoney		4	True		
	sch_Units *The total amount of units to be billed.* *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Bill Units*	decimal(8,4)		5	True		((0))
	sch_BillRateUnitFlag *Displays the unit type for billing. Choices are Visit, 15 Minute, Hourly and Daily. See Bill and Pay Service Units for descriptions of each Unit type.* *Scheduling > Scheduling Calendar > Schedule Details > Main > Bill Unit Type*	smallint		2	False		((60))

	sch_PayRateUnitFlag *Displays the unit type for payroll. Choices are Visit, 15 Minute, Hourly and Daily. See Bill and Pay Service Units for descriptions of each Unit type.* *Scheduling > Scheduling Calendar > Schedule Details > Main > Pay Unit Type*	smallint		2	False		((60))
	sch_PayUnits *The total amount of units to be paid.* *Scheduling > Scheduling Calendar > Schedule Details > Pay Info > Pay Units*	decimal(8,4)		5	False		((0))
	sch_OTUnits *The agency can bill overtime units at the dollar amount specified in the contract with the client and/or payer. Enter a flat dollar amount corresponding to the Billing Overtime Rate for every service code bill rate in the system. Displays how many bill units are billed at the OT rate. To change the number of OT units, change this number.* *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Overtime > Units*	decimal(8,4)		5	False		((0))
	sch_TotalCharge *Description: Not used.*	smallmoney		4	True		
	sch_NotesDate *When the schedule has been confirmed, a check appears in the box and the date of confirmation appears.* *Scheduling > Scheduling Calendar > Schedule Details > Notes > Confirmed*	datetime		8	True		
	sch_PayReviewFlag *Pay reviewed: True or False.* *Scheduling > Scheduling Calendar > Schedule Details > Pay Info > Pay Review*	bit		1	False		((0))
FK	sch_PayrollBatchID *If the schedule has been paid, the pay batch number displays here.* *Scheduling > Scheduling Calendar > Schedule Details > Pay Info > Pay Batch*	bigint		8	True		
	sch_PayNotes *Enter notes if needed.* *Scheduling > Scheduling Calendar > Schedule Details > Pay Info > Notes*	nvarchar(128)		256	True		
	sch_PayDate *Date schedule was paid.*	datetime		8	True		

	sch_PayCode	tinyint		1	False		((2))
	Displays the Pay Flag for this service code. The choices are Payable, Not Payable, or Default. The selection Default will pull from the setting for the Service Code in DDM Service Codes. If the service code is Payable in the Service Code, then this will appear here as Default (Payable); if it is Not Payable, then it will display here as Default (Not Payable). *Main Database: [T_Schedules].[sch_PayCode]* *Simplified Database: [T_Schedules].[PayableStatus] is set to 'Default Billable Status Value'* *Scheduling > Scheduling Calendar > Schedule Details > Pay Info > Pay Flag*						
	sch_RevenueCode	tinyint		1	False		((0))
	Displays the Bill Flag for this service code. The choices are Billable, Billable No Charge, NotBillable, or Default. The selection Default pulls from the setting for the Service Code in DDM Service Codes. If the service code is Billable in the Service Code, then this will appear here as Default (Billable); if it is Not Billable, then it displays here as Default (Not Billable). *Main Database: [T_Schedules].[sch_RevenueCode]* *Simplified Database: [T_Schedules].[BillableStatus] is set to 'Default Billable Status Value'* *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Bill Flag*						
	sch_BillingStatus	tinyint		1	False		((0))
	Displays the stage of the billing process for this schedule. *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Billing Status. Valid values:* *0: Not billed yet. No invoices related to this schedule are created (canceled invoices do not count for this).* *1: Billing in progress: An invoice for this schedule is created but billing for the schedule is not yet completed. More invoices are expected related to the schedule.* *For not PPS billing, this will happen when at least one but not all payers in the schedule payer list have been billed. The billing status will change to*						

	Completed when an invoice for each payer in the schedule payer list is created.					
	For PPS billing this will happen only on the first billable visit when the RAP is created but the final claim is not created.					
	2: Billing is completed.					
FK	sch_AuthID *ID of the authorization of which the schedule is under*	bigint		8	True	
FK	sch_1500POS *Place of Service codes. Used on H1500 form.* *Scheduling > Scheduling Calendar > Schedule Details > H1500 > Place of Service*	int		4	True	((12))
	sch_1500TOS *Code for H1500 form.* *Scheduling > Scheduling Calendar > Schedule Details > H1500 > Type of Service codes: TOS*	int		4	True	((0))
	sch_1500Diag *Diagnosis. Used on H1500 from.* *1500 v02.12 uses letters A-L (*old version v08.05 uses numbers 1-4). Default is A for v02.12.* *Existing records with default 1 - will show default A.* *Existing records with options 2, 3, or 4 will be mapped to the corresponding item.* *Draft 1500 Invoice process looks at the Bill Type of the batch:* *If the Bill Type is v02.12 the letter diagnosis pointer values will be used (up to 4 positions).* *If the Bill Type is v08.05 the numeric diagnosis pointer values will be used (up to 4 positions) - A=1, B=2, C=3, D=4.* *Diagnosis pointer displays in 24E of the 1500 Invoice* *Preview form based on the version of the batchTax lines do not display a diagnosis pointer value* *Payer should be set to 'Group Invoice Details' = 'No Grouping' if schedules are set with different diagnosis pointer values*	int		4	True	((1))

	Field in the UI is sch_1500Diag_Editor at Scheduling > Scheduling Calendar > Schedule Details > H1500 > Diagnosis					
	sch_1500EPSDT *Early and Periodic Screening Diagnosis* *Program. Allows the user to enter in a code which* *populates in 24H on the 1500H1500 form.* *Scheduling > Scheduling Calendar > Schedule Details > H1500 > 1500 EPSDT*	nvarchar(50)		100	True		
	sch_1500EMG *Allows the user to enter in an emergency code and this* *info populates in Box 24C on the 1500.* *Scheduling > Scheduling Calendar > Schedule Details > H1500 > 1500 EMG*	nvarchar(50)		100	True		
	sch_1500COB *H1500 form.* *Scheduling > Scheduling Calendar > Schedule Details > H1500 > 1500 COB*	nvarchar(50)		100	True		
	sch_1500LocalUse *H1500 form.* *Scheduling > Scheduling Calendar > Schedule Details > H1500 > 1500 Local Use*	nvarchar(50)		100	True		
	sch_UserDefined1 *Not used.*	nvarchar(50)		100	True		
FKP	sch_RecurrenceId *System generated unique Recurrence ID. Recurrence can be used more than once under the same schedule.*	bigint		8	True		
(5)	sch_IsRecurringAppointmentRoot *True if a recurring appointment.*	bit		1	False	((0))	
	sch_CreatedDate *Date and time when the schedule was created.* *Scheduling > Scheduling Calendar > Schedule Details > Record Info > Created On*	datetime		8	False	(getutcdate())	
	sch_CreatedUser *The user who created the schedule.* *Scheduling > Scheduling Calendar > Schedule Details > Record Info > Created By*	nvarchar(50)		100	False		
	sch_ModifiedDate *Most recent date and time when the schedule was modified.*	datetime		8	False	(getutcdate())	

	Scheduling > Scheduling Calendar > Schedule Details > Record Info > Modified On						
	sch_ModifiedUser *The user who made the most recent schedule modification.* *Scheduling > Scheduling Calendar > Schedule Details > Record Info > Modified By*	nvarchar(50)		100	False		
	sch_TS *Unique timestamp of record.*	timestamp		8	False		
⬟ (2)	sch_IsRecurrenceUnique *Not used.*	bigint	True	8	False		
	sch_LegacyID *The legacy record Id. Typically used for data conversions to identify the schedule record in the application that this record was converted from.*	int		4	True		
	sch_LegacyBranchID *The legacy branch or office Id. Typically used for data conversions to identify the branch or office record that the scheduled belonged to in the source application.*	int		4	True		
	sch_tzID *Not used.*	nchar(10)		20	True		
	sch_TimeZoneID *Timezone of the schedule based on the branch location.*	smallint		2	True		
	sch_StartOffset *Schedule start offset.*	smallint		2	True		
	sch_EndOffset *Schedule end offset.*	smallint		2	True		
	sch_OTMulti *Overtime rate multiplier.* *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Overtime > Multiply*	decimal(8,4)		5	False		((1.5))
⬟	sch_SchedStartTime *Date and time the service started, as recorded in the telephony interface.* *Scheduling > Scheduling Calendar > Schedule Details > Schedule Info > Start Date*	datetime		8	True		
	sch_SchedEndTime *Date and time the service ended, as recorded in the telephony interface. The duration is auto-calculated.* *Scheduling > Scheduling Calendar > Schedule Details > Schedule Info > End Date*	datetime		8	True		

	sch_SchedUnits *Number of hours for the record.* *Scheduling > Scheduling Calendar >* *Schedule Details > Schedule Info >* *Units*	decimal(8,4)		5	False		((0))
	sch_SchedUpdatedDate *Date the record was updated, as* *recorded by the telephony import.* *Scheduling > Scheduling Calendar >* *Schedule Details > Schedule Info >* *Updated*	datetime		8	True		
	sch_SchedOverrideModifiedDate *Date the data in the record was over* *written after the telephony import.* *Scheduling > Scheduling Calendar >* *Schedule Details > Schedule Info >* *Override Date*	datetime		8	True		
	sch_SchedOverrideModifiedUser *User ID who last overrode the* *schedule.*	nvarchar(50)		100	True		
	sch_TelUpdatedDate *Date schedule updated by telephony.*	datetime		8	True		
	sch_OTExemptHours *OT exempt hours.* *Scheduling > Scheduling Calendar >* *Schedule Details > Pay Info > Non-* *Working Hours > Hours*	decimal(8,2)		5	False		((0))
FK	sch_OTExemptTypeID *Select the Non-Working type from the* *drop down which populates with* *records set-up under DDM Non* *Working Hours Types. Enables if pay* *unit type is NOT "Visit". If the Type has* *both Pay and Bill =True* *(checked), information entered here on* *the Pay Info tab gets copied to the* *Schedule Details>Bill Info tab Non-* *Working Hours fields. Pay Units* *recalculated based on duration of Non-* *Working Hours Start and End. *A Non-* *Working Type may exist without Non-* *Working Start/End times when a* *schedule is in a Status other than a "C"* *Completed status; BUT both Non-* *Working Start/End times required when* *Non-Working Type set on a "C"* *Completed schedule.* *Scheduling > Scheduling Calendar >* *Schedule Details > Pay Info > Non-* *Working Hours > Type*	int		4	True		
FK	sch_1500BillingModifierID1 *H1500 form.*	int		4	True		

	Scheduling > Scheduling Calendar > Schedule Details > H1500 > Override Modifier 1						
FK🔑	sch_1500BillingModifierID2 *H1500 form.* *Scheduling > Scheduling Calendar > Schedule Details > H1500 > Override Modifier 2*	int		4	True		
FK🔑	sch_1500BillingModifierID3 *H1500 form.* *Scheduling > Scheduling Calendar > Schedule Details > H1500 > Override Modifier 3*	int		4	True		
FK🔑	sch_1500BillingModifierID4 *H1500 form.* *Scheduling > Scheduling Calendar > Schedule Details > H1500 > Override Modifier 4*	int		4	True		
🔗 (5)	sch_BranchID *ID of branch or office that owns the scheduled.* *Scheduling > Weekly Schedules > Quick Entry > Office* *Scheduling > Telephony > Call Review > Branch (Office)*	int		4	False		
	sch_OriginalPayDate *Sch_PayDate is transfered to this field during finalizing of payroll for cancelation process to revert back to the original value.*	datetime		8	True		
	sch_TotalBillable *Sum of schsp_AllocatedAmount values. Not being used.*	money		8	True		
	sch_TotalBilled *Sum of schsp_AllocatedAmount values if schsp_InvoiceDetailsID is not null. Not being used.*	money		8	True		
	sch_TotalPaid *Sum of T_PayrollDetailsDraft.prolld_-TotalDetailAmount values.*	money		8	True		
🔗	sch_ArrivalCallID *Latest arrival call ID.*	bigint		8	True		
🔗	sch_DepartureCallID *Latest Departure call ID.*	bigint		8	True		
	sch_TelephonyStatus *Indicates reason call did not associate, if applicable. If the call associated to the visit with no intervention, this field will be blank.* *Scheduling > Telephony > Call review > Tel.Status*	int		4	True		

FK 🔑	sch_RegionID *Regional location.* *Scheduling > Scheduling Calendar > Schedule Details > Record Info > Office Area*	int		4	True		
	sch_BilledPaidRegion *This will be used to determine Schedule's Region value. If the schedule is either Billed Or Paid, will return the region's value; possibly a null value; otherwise the value of (0) will be returned, indicating that the schedule should be assigned client's region at billing or payroll process.*	int	True	4	True		
	sch_InvoiceDetailDescription *Allows you to enter an invoice description override for the service scheduled as found on the Schedule Details Main tab. Not required.* *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Inv Description*	nvarchar(100)		200	True		
	sch_QCode *Enter in the appropriate QCode on the first billable visit for the episode. If the client changes service locations during the certification period (ex: they go to an assisted living facility on day 22), enter the QCode for ALF on the first billable service provided at the ALF location. Each billable schedule that has a QCode generates an additional line item for the Medicare Claim. See How To: Enter QCodes for Patient Location on PPS Medicare Claims.* *Not available Offline. Field locks down on schedules in 'In Progress' or 'Billed' statuses. Need-Schedule.Billed permission to modify 'In Progress' first billable visit prior to finalizing the Claim. Once the Claim is finalized, the QCode field CANNOT be changed; would need to cancel the Claim in order to modify the field.* *See About QCodes for details on the CMS Background and Policy regarding QCodes.* *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > QCode*	nvarchar(25)		50	True		
	sch_PayNonWorkStartTime *Enter the start of the non-working pay time. Enables if pay unit type is NOT 'Visit'. First row that displays in drop down is the start time matching the schedule start time. Also see DDM Non*	datetime		8	True		

	Working Hours Types. BOTH Non-Working Start/End Times REQUIRED to be entered if selecting a Non-Working Type. Non-Working Start time MUST be before the Non-Working End time. Non-Working times CANNOT be same as schedule times. *Determines sch_PayNonWorkStart-Time_TimeOnly on Scheduling > Scheduling Calendar > Schedule Details > Pay Info > Non-Working Hours > Start*						
	sch_PayNonWorkEndTime *Enter the end of the non-working pay time. Enables if pay unit type is NOT 'Visit'. Duration displays to assist in knowing number of non-working hours being entered. Also see DDM Non Working Hours Types. BOTH Non-Working Start/End Times REQUIRED to be entered if selecting a Non-Working Type. Non-Working End time CANNOT be after the schedule End time. Non-Working times CANNOT be same as schedule times.* *Determines sch_PayNonWorkStart-Time_TimeOnly on Scheduling > Scheduling Calendar > Schedule Details > Pay Info > Non-Working Hours > End*	datetime		8	True		
FK🔑	**sch_BillNonWorkTypeID** *Select the Non-Working type from the drop down which populates with records set-up under DDM Non Working Hours Types. Enables if bill unit type is NOT 'Visit'. If the Type has both Pay and Bill =True (checked), information entered here on the Bill Info tab gets copied to the Schedule Details>Pay Info tab Non-Working Hours fields. Bill Units recalculated based on duration of Non-Working Hours Start and End. *A Non-Working Type may exist without Non-Working Start/End times when a schedule is in a Status other than a 'C' Completed status; BUT both Non-Working Start/End times required when Non-Working Type set on a 'C' Completed schedule.* *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Non-Working Hours > Type*	int		4	True		
	sch_BillNonWorkStartTime *Enter the start of the non-working bill time. Enables if bill unit type is NOT 'Visit'. First row that displays in drop down is the start time matching*	datetime		8	True		

	the schedule start time. Also see DDM Non Working Hours Types. *BOTH Non-Working Start/End times REQUIRED to be entered with a Non-Working Type when schedule is set to a "C" Completed status. BOTH Non-Working Start/End Times REQUIRED to be entered if selecting a Non-Working Type. Non-Working Start time MUST be before the Non-Working End time.. Non-Working times CANNOT be same as schedule times. *Determines sch_BillNonWorkStart-Time_TimeOnly on Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Non-Working Hours > Start*						
	sch_BillNonWorkEndTime *Enter the end of the non-working pay time. Enables if pay unit type is NOT 'Visit'. Duration displays to assist in knowing number of non-working hours being entered. Also see DDM Non Working Hours Types. BOTH Non-Working Start/End Times REQUIRED to be entered if selecting a Non-Working Type. Non-Working End time CANNOT be after the schedule End time. Non-Working times CANNOT be same as schedule times.* *Determines sch_BillNonWorkEnd-Time_TimeOnly on Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Non-Working Hours > End*	datetime		8	True		
	sch_BillNonWorkStartTimeOffset *The StartOffset field of the Bill Non Working time.*	smallint		2	True		
	sch_BillNonWorkEndTimeOffset *The EndOffset field of the Bill Non Working time.*	smallint		2	True		
	sch_PayNonWorkStartTimeOffset *The StartOffset field of the Pay Non Working time.*	smallint		2	True		
	sch_PayNonWorkEndTimeOffset *The EndOffset field of the Pay Non Working time.*	smallint		2	True		
	sch_NoteReceived *Displays the current date when a schedule has been changed to a 'C' Completed status and the Notes Received field auto checks. Editable with 'Edit' permission to Notes tab. If change a schedule status from 'C' to any other status, the box auto uncheck's, the Note Date field*	date		3	True		

	*then clears when answering 'Yes' to the prompt that appears asking "Remove Confirmed, Pay Date, and Note Received and change status to S?". *Does not lock down regardless of Schedule Status, Schedule Bill Status, or Schedule Pay Status. Remains editable after the schedule has been billed or paid.* *Scheduling > Scheduling Calendar > Schedule Details > Notes > Note Date*						
	sch_OTRate *Enter the overtime rate for this schedule in order to manually enter the overtime rate.* *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Overtime > Rate*	smallmoney		4	False		((0))
	sch_BillOTOverrideModifiedDate *The date and time this overtime rate was entered.* *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Overtime > On*	datetime		8	True		
	sch_BillOTOverrideModifiedUser *The user that entered this overtime rate.* *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Overtime > By*	nvarchar(50)		100	True		
🗔	sch_BillingOTCalcType *Overtime can be calculated Manually or Automatically. To manually enter overtime, select Manual and enter a flat dollar amount. To automatically enter overtime, select Automatic and overtime will be automatically paid based on the amount entered in the overtime rate. If the bill overtime type drop down is set to Automatic, the overtime units will default to zero. If the Units field is edited, the bill overtime type drop down defaults to Manual. The Bill overtime Multiplier type is read only. This selection is no longer used and is only visible if used in a previous version. (1 - Multiplier, 2 - Manual, 3 - Automatic)* *Scheduling > Scheduling Calendar > Schedule Details > Bill Info > Overtime > Type*	tinyint		1	False		((3))
🔑	sch_ServicePlanHeaderId *Link to the service plan that was the active finalized plan at the time of check-in.*	bigint		8	True		

	Mobile						

Indexes

Key	Name	Key Columns	Included Columns	Unique	Filtered	No Recompute	Fill Factor
PK C	PK_T_Schedules	sch_ID		True			80
	IX_T_Schedules_ID_-AdmissionID	sch_ID, sch_AdmissionID		True		True	
	IX_T_Schedules_-Unique	sch_CaregiverID, sch_-ClientID, sch_StartTime, sch_ServiceCodeID, sch_Is-RecurringAppointmentRoot, sch_IsRecurrenceUnique		True	True		
	IX_AdmissionID	sch_AdmissionID, sch_-StartTime, sch_EndTime, sch_ID					80
	IX_CaregiverID	sch_CaregiverID, sch_Start-Time, sch_EndTime					80
	IX_ClientID	sch_ClientID, sch_Start-Time, sch_EndTime					80
	IX_EndTime	sch_EndTime, sch_-ScheduleStatusID, sch_-ServiceCodeID, sch_-AdmissionID					80
	IX_ServiceCode	sch_ServiceCodeID					
	IX_StartTime	sch_StartTime					
	IX_StatusCode	sch_ScheduleStatusID, sch_StartTime, sch_ID, sch_BranchID				True	
	IX_T_Schedules_-ArrivalCallID	sch_ArrivalCallID			True		
	IX_T_Schedules_-BranchIDScheduleID	sch_ID, sch_BranchID					
	IX_T_Schedules_-BranchID_StartTime_-EndTime	sch_BranchID, sch_Start-Time, sch_EndTime, sch_-ClientID, sch_CaregiverID					
	IX_T_Schedules_Client	sch_AdmissionID, sch_-ClientID				True	
	IX_T_Schedules_-DepartureCallID	sch_DepartureCallID			True		
	IX_T_Schedules_Is-RecurringAppointment-Root	sch_IsRecurring-AppointmentRoot, sch_-StartTime, sch_EndTime	sch_-AdmissionID				80
	IX_T_Schedules_Pay-Date	sch_PayDate				True	
	IX_T_Schedules_-RecurrenceID	sch_RecurrenceId				True	

	IX_T_Schedules_-ServiceCodeOverride	sch_ID, sch_ServiceCode-ID, sch_BranchID					80
	IX_T_Schedules_-StarttimeBillingStatus-PayrollbBatchID	sch_StartTime, sch_Billing-Status, sch_PayrollBatchID					80
	IX_T_Schedules_-UnassignedCar	sch_ClientID, sch_Start-Time, sch_ServiceCodeID, sch_IsRecurring-AppointmentRoot, sch_Is-RecurrenceUnique			True		
	IX_T_-Schedules_branchIs-RecurringAppointment-Root	sch_ID, sch_BranchID, sch_IsRecurring-AppointmentRoot, sch_-SchedStartTime, sch_End-Time					80
	_dta_index_T_-Schedules_15_6344980 85__K4_K7_K2_K3_-K48_K8_-K1_5_6_9_10_11_12_1 3_14_15_18_19_21_22 _24_25_26_27_28_29_ 30_31_32_33_	sch_StartTime, sch_-ServiceCodeID, sch_Client-ID, sch_CaregiverID, sch_-IsRecurringAppointment-Root, sch_AdmissionID, sch_ID					80
	idx_T_Schedules_Auth-ID	sch_AuthID			True		

Foreign Keys

Name	No Check	Columns
FK_T_Schedules_T_Admissions		sch_AdmissionID->[dbo].[T_Admissions].[adm_ID]
		sch_ClientID->[dbo].[T_Admissions].[adm_ClientID]
FK_T_Schedules_T_Authorization	True	sch_AuthID->[dbo].[T_Authorization].[auth_ID]
FK_T_Schedules_T_BillingModifiers1		sch_1500BillingModifierID1->[dbo].[T_BillingModifiers].[bilmod_ID]
FK_T_Schedules_T_BillingModifiers2		sch_1500BillingModifierID2->[dbo].[T_BillingModifiers].[bilmod_ID]
FK_T_Schedules_T_BillingModifiers3		sch_1500BillingModifierID3->[dbo].[T_BillingModifiers].[bilmod_ID]
FK_T_Schedules_T_BillingModifiers4		sch_1500BillingModifierID4->[dbo].[T_BillingModifiers].[bilmod_ID]
FK_T_Schedules_T_Caregiver		sch_CaregiverID->[dbo].[T_Caregiver].[car_ID]
FK_T_Schedules_T_Client		sch_ClientID->[dbo].[T_Client].[cli_ID]
FK_T_Schedules_T_OTExemptType		sch_OTExemptTypeID->[dbo].[T_OTExemptTypes].[otextyp_ID]
FK_T_Schedules_T_OTExemptType_Bill		sch_BillNonWorkTypeID->[dbo].[T_OTExemptTypes].[otextyp_ID]
FK_T_Schedules_T_PayrollBatch		sch_PayrollBatchID->[dbo].[T_PayrollBatch].[prollb_ID]
FK_T_Schedules_T_PlaceOfService-Codes		sch_1500POS->[dbo].[T_PlaceOfServiceCodes].[pos_ID]
FK_T_Schedules_T_Region		sch_RegionID->[dbo].[T_Region].[reg_ID]
FK_T_Schedules_T_ScheduleRecurrence		sch_RecurrenceId->[dbo].[T_ScheduleRecurrence].[schrec_ID]

FK_T_Schedules_T_ScheduleStatus		sch_ScheduleStatusID->[dbo].[T_ScheduleStatus].[schst_ID]
FK_T_Schedules_T_ServiceCode		sch_ServiceCodeID->[dbo].[T_ServiceCode].[svcc_ID]
FK_T_Schedules_T_ServicePlanHeader		sch_ServicePlanHeaderId->[dbo].[T_ServicePlanHeader].[sphead_-ID]

Schedules Tasks

[dbo].[T_SchedulesTasks]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	schtsk_ID	bigint	8	False	1 - 1	
FK	schtsk_SchID	bigint	8	False		
FK	schtsk_TaskID	int	4	False		
	schtsk_Notes	nvarchar(1000)	2000	True		
	schtsk_FromTelephony	bit	1	True		((0))
	schtsk_Active	bit	1	True		((1))
	schtsk_CreatedDate	datetime	8	False		(getutcdate())
	schtsk_CreatedUser	nvarchar(50)	100	False		
	schtsk_ModifiedDate	datetime	8	False		(getutcdate())
	schtsk_ModifiedUser	nvarchar(50)	100	False		
	schtsk_TS	timestamp	8	False		
	schtsk_NumericValue *Numeric value associated with the task. For example: weight, blood pressure, height, temperature*	decimal(6,2)	5	True		
	schtsk_NotCompletedReason *A byte value that designates why a schedule task was not completed. Valid values include: 1-Patient Denied*	tinyint	1	True		
	schtsk_NotCompletedNotes *Comments indicating why a schedule task was not completed.*	nvarchar(1000)	2000	True		

Indexes

Key	Name	Key Columns	Unique
PK C	PK_T_ScheduleTasks	schtsk_ID	True
	IX_T_ScheduleTasks_SchID_TaskID	schtsk_SchID, schtsk_TaskID	True

Foreign Keys

Name	Columns
FK_T_ScheduleTasks_T_HHATasks	schtsk_TaskID->[dbo].[T_HHATasks].[hhat_ID]
FK_T_ScheduleTasks_T_Schedules	schtsk_SchID->[dbo].[T_Schedules].[sch_ID]

Service Code

[dbo].[T_ServiceCode]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	**svcc_ID** *The ID field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.* *This is a system generated number. Any Service Code with an ID under 10000 is a system default and cannot be changed.* *Also called ID, ServiceCodeID, SvcCodeID, TaskID.*	int	4	False	10001 - 1	
	svcc_Name *The Name field of the ServiceCodeListItemInfo, ServiceCodeInfo and PlanOfCareOrdersRptInfo objects.* *Name of the Service Code.* *Also called Name, Discipline, Service, ServiceName, ServiceCodeName, DetailsServiceName, Service-Code, vServiceCodeName, Service_Category, Svc-CodeName, Code, scheduleservice, TaskName.* *UI Location: Settings > Office > Bill Rates > Service, Settings > Office > Pay Rates > Service and Scheduling > Telephony > Service Code.*	nvarchar(50)	100	True		('')
FK	**svcc_BillCodeID** *The BillCodeID field of the ServiceCodeInfo object.* *System ID of the service bill code record.* *Also called svcc_BillCodeID.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Rev Code.*	int	4	True		
	svcc_IsExpense *The IsExpense field of the ServiceCodeListItemInfo, ServiceCodeInfo and EFTInfo objects.* *Check this box if the service code created is an expense rather than a service. Selecting this will change the Bill Unit Type and Pay Unit Type to Unit (rather than Hourly, 15 Minute, etc).* *Also called IsExpense, ExpenseFlag, svcc_Is-Expense.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Is Expense.*	bit	1	False		((0))
	svcc_IsMultiple *The IsMultiple field of the ServiceCodeListItemInfo, ServiceCodeInfo and InvoiceDetailsInfo objects.*	bit	1	False		((0))

	Check Is Multiple to allow the user to select multiple services under one schedule on the Services tab on the schedule. *Also called ServiceIsMultiple, isMultiple.UI Location:DB Maintenance > Drop Down Maintenance > Service Codes > Is Multiple.*					
	svcc_OtherCode *The OtherCode field of the ServiceCodeInfo object.* *Enter the HCPC code associated with the service code, if this code is the same for all payers being invoiced for this service. If this is not the case, leave this field blank and set the HCPCs for each Payer in the Payer Services tab of their payer records.* *Also called svcc_OtherCode, default.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > HCPC Code*	nvarchar(20)	40	True		
	svcc_DefaultCost *The DefaultCost field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.* *This is used in reporting, when calculating the cost of services against the expected revenue.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Default Cost*	money	8	True		
	svcc_DefaultPayUnitFlag *The DefaultPayUnitFlag field of the ServiceCodeInfo object.* *The user must choose a default pay unit for each service code, with the choices of Visit, Minute, 15 Min, Hourly, or Daily. This default can be overridden in the Schedule if needed.Also called PayUnitFlag,* *UI Location: Scheduling > Telephony > Call Log > svcc_DefaultPayUnitFlag and DB Maintenance > Drop Down Maintenance > Service Codes > Default Pay Unit Flag*	smallint	2	False		((60))
	svcc_DefaultBillUnitFlag *The DefaultBillUnitFlag field of the ServiceCodeInfo object.* *The user must choose a default bill unit for each service code, with the choices of Visit, Minute, 15 Min, Hourly, or Daily. This default can be overridden in the Schedule if needed.* *Also called BillUnitFlag.* *UI Location: Scheduling > Telephony > Call Log > svcc_DefaultBillUnitFlag and DB Maintenance > Drop Down Maintenance > Service Codes > Default Bill Unit Flag*	smallint	2	False		((60))
FK	svcc_CategoryID *The CategoryID field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.* *Once the Service Code Category has been created, the user may go back and select the newly created category from the list. Service codes assigned to Service Code Categories where Doc Type is set to Tasks will display a Task tab on the schedule details*	int	4	True		

	page on your mobile device. This option is used for services HHA's would perform, providing them the ability to complete assigned Tasks during their visits. Service codes assigned to Service Code Categories where Doc Type is set to Forms schedule will display an Admissions tab instead of a Task tab on the schedule details page on your mobile device. This option is used for services that a Nurse (skilled disciplines) would perform. *Also called ServiceCatID.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Service Code Category*					
	svcc_PayrollCode *The PayrollCode field of the ServiceCodeInfo object.* *Also referred as EarnCode.*	nvarchar(50)	100	False		('E0A')
	svcc_DefaultReimbursment *The DefaultReimbursment field of the ServiceCode-Info object.* *The default dollar amount of reimbursement of the service code record.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Default Reimbursement*	money	8	True		
	svcc_WC *The WC field of the ServiceCodeInfo object.* *Legacy field from Visitrax - not in use.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > WC*	nvarchar(50)	100	True		
	svcc_ShiftPay *The ShiftPay field of the ServiceCodeInfo object.* *UI Location:DB Maintenance > Drop Down Maintenance > Service Codes > Shift Pay (Hidden)*	bit	1	False		((0))
🖳	svcc_OTPay *The OTPay field of the ServiceCodeInfo object.* *0: Exclude: Do not include unless another service in the week is set to 1 (Include), 3 (Include-Override), or 4 (Include-Standard)* *1: Include: Always include in OT calculations.* *2: Always Exclude: Never include in OT calculations.* *3: Include-Override: Always include in OT calculations.* *4: Include-Standard: Always include in OT calculations.* *Any Payroll Week that has at least one service set to 3 (Include-Override) will use the Override Payroll OT Rules* *Any Payroll Week that has at least one service set to 1 (Include) and no services set to 3 (Include-Override) will use the Default Payroll OT Rules* *Any Payroll Week that has at least one service set to 4 (Include-Standard) and no services set to 3 (Include-*	tinyint	1	False		

	Override) or 1 (Include) will use the Standard Payroll OT Rules *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > OT Pay*					
	svcc_BillExcludeHoliday *The BillExcludeHoliday field of the ServiceCodeInfo object.* *Check this box to exclude this service code from holiday billing calculations for all invoices. The default is unchecked.* *UI Location:DB Maintenance > Drop Down Maintenance > Service Codes > Exclude Holiday Bill*	bit	1	False		((0))
	svcc_PayExcludeHoliday *The PayExcludeHoliday field of the ServiceCodeInfo object.* *Check this box to exclude this service code from holiday payroll calculations for all Caregivers. The default is unchecked.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Exclude Holiday Pay*	bit	1	False		((0))
⛓	svcc_IsCat *The IsCat field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.* *The service code category of the service code record. Check this box if the user is creating a category for a specific service code.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Is Category*	bit	1	False		((0))
	svcc_CommissionRate *The CommissionRate field of the ServiceCodeInfo object.* *Legacy field from Visitrax - not in use.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Commission Rate*	decimal(8,4)	5	False		((0))
	svcc_BonusPoints *The BonusPoints field of the ServiceCodeInfo object.* *Services provided that are to be considered in the bonus points threshold calculation must be configured with a bonus points value in the Service Code table. Enter the weighted point value for each service code as appropriate.* *Also called BonusPoints.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Bonus Points*	decimal(4,2)	5	False		((0))
	svcc_Active *The Active field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.* *Also called Active.*	bit	1	False		((1))
🔠	svcc_RevenueCode *The RevenueCode field of the ServiceCodeInfo and ServiceCodeListItemInfo objects.*	tinyint	1	False		((1))

0 'Default(Billable)', 1 'Billable', 2 'Billable No Charge', 3 'Not Billable' *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Bill Flag*						
svcc_Pay *The Pay field of the ServiceCodeInfo and Service-CodeListItemInfo objects.* *Uncheck this box if this service code should never be paid. The default is checked. If unchecked, this service code will not pull into payroll batches.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Pay*	bit	1	False		((1))	
svcc_POCFirstBillableFlag *The POCFirstBillableFlag field of the ServiceCodeInfo object.* *For the service code to be used as a SOC visit for Medicare, this must be checked in order to bill this service code to Medicare. NOTE: The Authorization Scheduling Check will not run against the first schedule with a service code set for 'Is POC First Billable Item' for the Start of Care episode for the Client. See Plan of Care Auth Builder - First Billable for more information.* *0: Can not be used as First Billable* *1: First Billable only on subsequent episodes.* *2: First Billable on all episodes* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Is POC First Billable Item*	bit	1	False		((0))	
FKP svcc_ExpenseTypeID *The ExpenseTypeID field of the ServiceCodeInfo object.* *Choose from the list how each expense should be categorized. This list may be modified in the System Office under Expense Type Drop Down List.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Expense Type ID*	int	4	True			
svcc_CreatedDate *The Date the ServiceCode Record was Created.* *UTC date updated by SQL server's current UTC date.* *Also called CreatedDate.*	datetime	8	False		(getutc date())	
svcc_CreatedUser *The CreatedUser field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.* *Also called CreatedUser.*	nvarchar(50)	100	False			
svcc_ModifiedDate *The Date the ServiceCode Record was last Modified.* *UTC date updated by SQL server's current UTC date.* *Also called ModifiedDate.*	datetime	8	False		(getutc date())	
svcc_ModifiedUser *The ModifiedUser field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.*	nvarchar(50)	100	False			

	Also called ModifiedUser.					
	svcc_TS *The TS field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.* *Timestamp field of the service code record.* *Also called TS.*	timestamp	8	False		
🔲	svcc_ListItemType *The ListItemType field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.* *Global, Office, or Override. Global List Item Types, which can be seen by all offices, can only be created and modified in the System office. Office and Override List Item Types, which can only be seen in the individual office of creation, can only be created in that Office.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > List Item Type*	tinyint	1	False		((0))
FK🔑	svcc_RptGroupID *The RptGroupID field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.* *Report Group IDs are used to filter parameters for reporting purposes in Soneto.* *Also called RptGroupID. UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Report Group ID*	int	4	False		((97))
⛩️ (2) FK🔑	svcc_BranchID *The BranchID field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.* *Also called BranchID.*	int	4	True		
⛩️ (2) FK🔑 🔲	svcc_OverrideID *The OverrideID field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.* *If creating an override of a Global level List Item Type, select the ID of that Global service code to override. This allows the user to have an identical Office level ID with different parameters, such as changing the OT Pay flag.* *Also called OverrideID, OverrideSvcID.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Override ID*	int	4	True		
	svcc_Description *The Description field of the ServiceCodeInfo and ServiceCodeInfo objects.* *Description of the Service Code.* *Also called Description, Skill Desc, Service-Description.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Description*	nvarchar(1000)	2000	True		
FK🔑	svcc_TaxGroupID *The TaxGroupID field of the ServiceCodeInfo object.* *If an agency bills taxes, then select the tax that should be applied to the service code. The tax is set up on*	int	4	True		

	the Office Tax Groups tab. There is an override on the Payer Services tab of the Payer. *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Tax Group*					
	svcc_LegacyID *Not used.*	int	4	True		
	svcc_LegacyBranchID *Not used.*	int	4	True		
FKβ	svcc_AcctID *The AcctID field of the ServiceCodeInfo object.* *Choose the correct Accounting Chart to associate with the particular service code. The accounting charts are created in DDM Accounting Charts.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Accounting Charts*	int	4	True		((1))
	svcc_UploadTelephony *The UploadTelephony field of the ServiceCodeInfo and ServiceCodeListItemInfo objects.* *Check this box to include the service code in uploads to Santrax. The default is unchecked. See Telephony for more information.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Upload Telephony*	bit	1	False		((0))
	svcc_TelephonyTaskID *The TelephonyTaskID field of the ServiceCodeInfo and ServiceCodeListItemInfo objects.* *Enter the Telephony Task ID for each service code that has a corresponding task in telephony. See Telephony for more information.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Telephony Task*	nchar(4)	8	True		
	svcc_IncludeEFT *The IncludeEFT field of the ServiceCodeInfo object.* *Check this box for each Service Code to include the charges for these services on finalized invoices in the Royalty EFT calculation. The default is checked. See Royalty for more information.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Include EFT*	bit	1	False		((0))
	svcc_ProjectedAvgPayHourly *The ProjectedAvgPayHourly field of the ServiceCode-Info object.* *Legacy - not in use.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Projected Average Pay Hourly*	money	8	True		
	svcc_ProjectedAvgBillHourly *The ProjectedAvgBillHourly field of the ServiceCode-Info object.* *Legacy - not in use.*	money	8	True		

UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Projected Average Bill Hourly						
svcc_ProjectedAvgBillVisit *The ProjectedAvgBillVisit field of the ServiceCodeInfo object.* *Legacy - not in use.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Projected Average Bill Visit*	money	8	True		
svcc_ProjectedAvgPayVisit *The ProjectedAvgPayVisit field of the ServiceCodeInfo object.* *Legacy - not in use.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Projected Average Pay Visit*	money	8	True		
svcc_IsCopy *The IsCopy field of the ServiceCodeInfo and Service-CodeListItemInfo objects.* *When a service code is checked for Is Expense, the field Is Copy will enable. Check this box if you want the expense item to copy out to all schedules when the original schedule recurrence pattern is created. The default setting for this indicator is unchecked. Note: The expense must exist in the original schedule prior to creating the recurrence pattern. After the expenses have been copied out with the original schedule recurrence pattern, editing or adding expenses to schedules within the pattern will not update the recurrence pattern. Only the schedule being modified will be affected. The units can be left at 0 if you do not want to copy out a specific number of units for the expense for all the schedules in the recurrence. You can modify the expense units when confirming the caregiver's schedules.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Is copy*	bit	1	False		((0))
svcc_IsWorking *The IsWorking field of the ServiceCodeListItemInfo and ServiceCodeInfo objects.* *When a service code is checked for Is Working, the Caregiver Search will display the sum of hours worked by a caregiver for all service codes, where the service codes are in Schedule Status of Completed, Telephony Completed, or Scheduled. For further information, see Caregiver Search.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Is Working*	bit	1	False		((1))
svcc_DeductEarn *The DeductEarn field of the ServiceCodeInfo object.* *Enter the Deduct/Earn Code for the service code if required by a customized payroll extract files.*	nvarchar(5)	10	False		(N'E')

	UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Deduct/Earn					
	svcc_LiveInRptHrs *The DeductEarn field of the ServiceCodeInfo object.* *This number allows the agency determine (for reporting purposes) how many hours constitute Live In, or how many hours the Caregiver actually worked.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > LiveIn Report Hours*	decimal(4,2)	5	True		
	svcc_AcctCode *The AcctCode field of the ServiceCodeInfo object.* *The same Account Code is used for all offices for the same category. Enter the 3-digit Account Code for the service code category. This is used for the last 3-digits of the GL Subaccount code in the extract file.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Account Code*	nvarchar(50)	100	True		
	svcc_DisplayOnClientPortal *The DisplayOnClientPortal field of the ServiceCode-Info and ServiceCodeListItemInfo objects.* *Check this box to the service code display on the Client Portal. Filter for schedules on the client's portal based on schedule service. True = show* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Display on Client Portal*	bit	1	True		
	svcc_DisplayOnCaregiverPortal *The DisplayOnCaregiverPortal field of the Service-CodeInfo object.* *Filter for schedules on the caregiver's portal based on schedule service. True = show* *Check this UI box to have the service code display on the Caregiver Portal.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Display on Caregiver Portal*	bit	1	True		
FK P	svcc_TherapyCountingType *If this service is a therapy service, this specifies how the service is treated in relation to medicare therapy counting. Select Not Applicable, Discharge Visit, Reassessment Visit, or Therapy Visit. Determines if Service Codes should be included in therapy counting. Must configure for Medicare service codes. Uses the Bill Flag of 'Billable' or 'Default (Billable)' to be included in therapy counts. See 30th Therapy Visit Warnings for more information.* *Not Applicable - Default setting; service not included in therapy counting.* *Therapy Visit - service eligible for counting in the 30th therapy visit process. REASSESSMENT visits SHOULD NOT be set to this.* *Reassessment Visit - service is a Reassessment visits and included in the therapy count.*	tinyint	1	False		((0))

	Discharge Visit - service is a Discharge visit and included in the therapy count. Signifies 'Medicare Discipline' assigned to the service code now discharged from the case. [Useful in multi-therapy discipline cases, where discharging one discipline from the case can shrink the reassessment interval]. *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Therapy Counting Type*					
FK	svcc_MedicareDiscipline *Specifies if this service is a medicare discipline. This relates to the M0080 question on OASIS, or 0 if it's not applicable.* *Prefills based on the Service Code's assigned Service Code Category. Designates the Medicare discipline for the service code. Default is Not Applicable. Service Codes with Medicare Discipline = PT, OT, or ST (and Therapy Counting Type is not 'Not Applicable') will be included in the therapy counts.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Medicare Discipline*	tinyint	1	False		((0))
	svcc_DocType *Specifies if a service category is associated with tasks or forms.* *Used with MatrixCare Home Care Mobile to determine screen options displayed for schedules on mobile devices. The field is populated on Service Code Category entries. Possible values are Tasks or Forms. The default setting is Tasks. Service code and expense entries will display blank in this field.* *UI Location: DB Maintenance > Drop Down Maintenance > Service Codes > Doc Type*	tinyint	1	False		((0))
	svcc_IsMultipleService *Indicates that a schedule with this service code can contain more than one service.*	bit	1	False		((0))

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK/C	PK_T_ServiceCode_Code	svcc_ID	True	80
	IX_T_ServiceCode_BranchID_OverrideID_Is-Cat_Name	svcc_BranchID, svcc_OverrideID, svcc_IsCat, svcc_Name	True	90
	IX_T_ServiceCode_CategoryID	svcc_CategoryID		80
	IX_T_ServiceCode_OverrideBrID	svcc_OverrideID, svcc_BranchID		80

Foreign Keys

Name	Columns
FK_T_ServiceCode_T_AcctCharts	svcc_AcctID->[dbo].[T_AcctCharts].[acct_ID]
FK_T_ServiceCode_T_BillCode	svcc_BillCodeID->[dbo].[T_BillCodes].[bcd_ID]
FK_T_ServiceCode_T_Branches	svcc_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_ServiceCode_T_BranchTaxGroups	svcc_TaxGroupID->[dbo].[T_BranchTaxGroups].[brtg_ID]
FK_T_ServiceCode_T_ExpenseTypes	svcc_ExpenseTypeID->[dbo].[T_ExpenseTypes].[exptyp_ID]
FK_T_ServiceCode_T_MedicareDisciplines	svcc_MedicareDiscipline->[dbo].[T_MedicareDisciplines].[mcare_ID]
FK_T_ServiceCode_T_ReportGroups	svcc_RptGroupID->[dbo].[T_ReportGroups].[rptgrp_ID]
FK_T_ServiceCode_T_ServiceCode	svcc_CategoryID->[dbo].[T_ServiceCode].[svcc_ID]
FK_T_ServiceCode_T_ServiceCode_OverrideID	svcc_OverrideID->[dbo].[T_ServiceCode].[svcc_ID]
FK_T_ServiceCode_T_TherapyCountingType	svcc_TherapyCountingType->[dbo].[T_TherapyCountingType].[thercount_ID]

Service Plans

[dbo].[T_ServicePlans]

Note: Detailed documentation is pending.

Skill Categories

🗾 [dbo].[T_SkillCategories]

Description

Contains data records for Skill Categories.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	skillc_ID	int		False	10001,1	
	skillc_Name	nvarchar(50)		False		('')
	skillc_Active	bit		False		((1))
	skillc_ModifiedDate	datetime		False		(getutcdate())
	skillc_ModifiedUser	nvarchar(50)		False		
	skillc_CreatedDate	datetime		False		(getutcdate())
	skillc_CreatedUser	nvarchar(50)		False		
	skillc_TS	timestamp		False		
	skillc_ListItemType	tinyint		False		((0))
FK	skillc_RptGroupID	int		False		((98))
FK	skillc_BranchID	int		True		
FK	skillc_OverrideID	int		True		
	skillc_Description	nvarchar(1000)		True		
	skillc_UserRegPermissionGroupId	int		True		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_SkillCategories	skillc_ID	True	80
	IX_T_SkillCategories_BranchOverrideName	skillc_BranchID, skillc_OverrideID, skillc_Name	True	80

Foreign Keys

Name	Columns
FK_T_SkillCategories_T_Branches	skillc_BranchID-> [dbo].[T_Branches] ([br_ID])
FK_T_SkillCategories_T_ReportGroups	skillc_RptGroupID-> [dbo].[T_ReportGroups] ([rptgrp_ID])
FK_T_SkillCategories_T_SkillCategories	skillc_OverrideID-> [dbo].[T_SkillCategories] ([skillc_ID])

Tax Types

[dbo].[T_TaxTypes]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	taxtyp_ID	int	4	False	10001 - 1	
	taxtyp_Name	nvarchar(50)	100	True		
	taxtyp_Active	bit	1	False		((1))
	taxtyp_CreatedDate	datetime	8	False		(getutcdate())
	taxtyp_CreatedUser	nvarchar(50)	100	False		
	taxtyp_ModifiedDate	datetime	8	False		(getutcdate())
	taxtyp_ModifiedUser	nvarchar(50)	100	False		
	taxtyp_TS	timestamp	8	False		
	taxtyp_ListItemType	tinyint	1	False		((0))
FK	taxtyp_RptGroupID	int	4	False		((100))
FK	taxtyp_BranchID	int	4	True		
FK	taxtyp_OverrideID	int	4	True		
	taxtyp_Description	nvarchar(1000)	2000	True		('')
FK	taxtyp_AcctID	int	4	True		((1))

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_TaxTypes	taxtyp_ID	True	80
	IX_T_TaxTypes_BranchOverrideName	taxtyp_BranchID, taxtyp_OverrideID, taxtyp_Name	True	80

Foreign Keys

Name	Columns
FK_T_TaxTypes_T_AcctCharts	taxtyp_AcctID->[dbo].[T_AcctCharts].[acct_ID]
FK_T_TaxTypes_T_Branches	taxtyp_BranchID->[dbo].[T_Branches].[br_ID]
FK_T_TaxTypes_T_ReportGroups	taxtyp_RptGroupID->[dbo].[T_ReportGroups].[rptgrp_ID]
FK_T_TaxTypes_T_TaxTypes	taxtyp_OverrideID->[dbo].[T_TaxTypes].[taxtyp_ID]

Telephony Calls

▦ [dbo].[T_TelephonyCalls]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	tcl_ID	bigint	8	False	1 - 1	
	tcl_TelephonyAccountID	nvarchar(50)	100	False		
⊹	tcl_Purpose	int	4	True		
	tcl_CaregiverTelephonyID	nvarchar(36)	72	True		
⊹	tcl_CaregiverID	bigint	8	True		
	tcl_CaregiverMatchStatus	smallint	2	False		
⊹	tcl_ClientID	bigint	8	True		
	tcl_ClientMatchStatus	smallint	2	False		
	tcl_PhoneNumber	nvarchar(30)	60	True		
	tcl_ServerCallID	bigint	8	True		
⊹	tcl_CallTime	datetime	8	True		
	tcl_Status	tinyint	1	False		((0))
⊹	tcl_ScheduleID	bigint	8	True		
	tcl_Completed	bit	1	False		
	tcl_CreatedDate	datetime	8	False		
	tcl_BranchID	int	4	True		
	tcl_Hidden *For users display only, after they feel a call is not useful, they can hide it from the QA Review List*	bit	1	True		
	tcl_ClientTelephonyID *New in 1.23. If calling CG is at a facility or*	nvarchar(36)	72	True		

	husband/wife location with multiple phone numbers they can manually choose the client telephony ID, and it gets stored here.					
	tcl_Flags *QA flags to indicate if there is a problem or warning on this call*	int	4	True		
	tcl_Overflow *If this call would have caused a schedule to go over 24H, this call stores the number of minutes of overflow, as schedules cannot be over 24Hours.*	int	4	True		
	tcl_ClientNameList *Stores the Client Name if one, or if multiple possible matches, stores a list. this may be based on phone number match, or schedule matching.*	nvarchar(100)	200	True		
	tcl_Location *Useful for Portal time-and-attendance, not classic telephony: GPS location of caregiver when clocking in or out*	geography	max	True		
	tcl_Accuracy *Useful for Portal time-and-attendance, not classic telephony: GPS device uploads how accurate its coordinates are*	decimal(6,3)	5	True		
⬡	tcl_EventType *Describes method of acquiring data. 0 = Telephony classic, 1 = Portal Time and Attendance*	smallint	2	True		
	tcl_Overridden *TimeAndAttendance: indicates a record was replaced by a more accurate one. Multiple records can be overridden, but there must be one which is not per purpose and schedule.*	bit	1	True		
	tcl_ClientLocation *Location of the client at the time of the call being recorded. This is a copy of the location from T_AddressGeo. Can be for troubleshooting if the client location changes.*	geography	max	True		
	tcl_CertifyCorrect *User can certify that the check-in or out is correct. To be used in MatrixCare Mobile to start with, not phone-telephony or web1.*	bit	1	True		
	tcl_CertifyNotes *users can supply an explanation associated with the tcl_CertifyCorrect value. Generally, to explain why they are reporting that their check-in/out time is incorrect.*	nvarchar(500)	1000	True		
	tcl_OverrideTime *(NOTE: No relation to tcl_Overridden) Caregivers can provide an override time if they were not able to actually check out at the correct time.*	datetime	8	True		
	tcl_OverrideTimeUtcOffset	smallint	2	True		

	tcl_OverrideTimeZoneID	smallint	2	True		
	tcl_MachineIPAddress *The IP Address of the browser of the user who clicked the check in/out button. Will be NULL for phone-call telephony and portal1. Only supplied by Web2.*	nvarchar(50)	100	True		

Indexes

Key	Name	Key Columns	Unique
	PK_T_TelephonyCalls	tcl_ID	True
	IX_T_TelephonyCalls_CallTime	tcl_CallTime	
	IX_T_TelephonyCalls_ClientCaregiver	tcl_CaregiverID, tcl_ClientID	
	IX_T_TelephonyCalls_ScheduleIdEventPurpose	tcl_ScheduleID, tcl_EventType, tcl_Purpose	

Foreign Keys

Name	Columns
FK_T_TelephonyCalls_T_TimeZones	tcl_OverrideTimeZoneID->[dbo].[T_TimeZones].[tz_ID]

Telephony Call Tasks

[dbo].[T_TelephonyCallTasks]

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	tct_TelephonyCallTaskID	bigint	8	False	1 - 1	
	tct_TelephonyCallID	bigint	8	False		
	tct_TelephonyTaskID	int	4	False		
	tct_Duration	decimal(8,4)	5	True		
	tct_ServerCallID	bigint	8	True		
	tct_CreatedDate	datetime	8	False		(getdate())

Indexes

Key	Name	Key Columns	Unique
PK C	PK_T_TelephonyCallTasks	tct_TelephonyCallTaskID	True
	IX_TelephonyCallID	tct_TelephonyCallID	
	IX_TelephonyCallTaskID	tct_TelephonyCallTaskID	

Travel Time

📰 [dbo].[T_TravelTime]

T_TravelTime holds the Travel Time between 2 Schedules

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK C	tt_ToScheduleID *Holds the ID of the To Schedule*	bigint	8	False		
FK	tt_FromScheduleID *Holds the ID of the From Schedule*	bigint	8	False		
	tt_Duration *Holds the duration of the travel time*	bigint	8	False		0
	tt_Payable *Is Payable(0 - Not Payable, 1 - Payable, 2 - Default (Check Payer Services and ServiceCode))*	tinyint	1	False		
	tt_PayRateOverrideAmt	smallmoney	4	False		
	tt_CreatedDate *Record Created Date*	datetime	8	False		
	tt_CreatedUser *Record Created User*	[nvarchar](50)	100	False		
	tt_ModifiedDate *Record Modified Date*	datetime	8	False		
	tt_ModifiedUser *Record Modified User*	[nvarchar](50)	100	False		
	tt_TS *Record TS*	timestamp	8	False		
	tt_AutoCalculate *Indicates whether Travel Time should be Autocalculated*	bit	1	False		1
	tt_PayRateOverrideModifiedUser	[nvarchar](50)	100	False		
	tt_PayRateOverrideModifiedDate	datetime	8	False		

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_TravelTime	tt_ToScheduleID	True	

Foreign Keys

Name	Update	Delete	Columns
FK_T_TravelTime_T_Schedules_FromScheduleID			tt_FromScheduleID-> [dbo].[T_Schedules] ([sch_ID])
FK_T_TravelTime_T_Schedules_ToScheduleID	Cascade	Cascade	tt_ToScheduleID-> [dbo].[T_Schedules] ([sch_ID])

Users

🖽 [dbo].[T_Users]

Description

Contains data records for Users.

Columns

Key	Name	Data Type	Max Length (Bytes)	Allow Nulls	Identity	Default
PK🔑C	user_ID	int		False	10001,1	
	user_FirstName	nvarchar(30)		True		
	user_LastName	nvarchar(50)		True		
	user_UserName	nvarchar(50)		False		
	user_ReportUserName	nvarchar(128)		True		
	user_Address	nvarchar(255)		True		
	user_Address1	nvarchar(255)		True		
	user_Address2	nvarchar(60)		True		
	user_City	nvarchar(50)		True		
	user_StateOrProvince	nvarchar(20)		True		
	user_PostalCode	nvarchar(20)		True		
	user_County	nvarchar(50)		True		
FK🔑	user_Country	int		True		((240))
	user_Phone	nvarchar(30)		True		
	user_PhoneTypeID	int		True		
	user_LastLogIn	datetime		True		
	user_LAN	bit		False		((1))
	user_Attempts	smallint		False		((0))
	user_Active	bit		False		((1))
	user_RetriesExc	bit		False		((0))
FK🔑	user_BranchID	int		False		
FK🔑	user_WorkingBranchID	int		False		
	user_ImageLoading	tinyint		False		((0))
	user_SchedulingCalenderWeekStartDay	tinyint		False		((7))
	user_DefaultTravelTime	tinyint		False		((20))
	user_SchedulingConflictOverride	tinyint		False		((0))

	user_SchedulingScheduleConflicts Allow	tinyint		False		((0))
	user_SchedulingAvailabilityConflicts Allow	tinyint		False		((0))
	user_SchedulingDNUConflictsAllow	tinyint		False		((0))
	user_SchedulingAuthorizationConfli ctsAllow	tinyint		False		((0))
	user_SchedulingCaregiverExpiratio nsAllow	tinyint		False		((0))
	user_SchedulingCheckForOvertime	tinyint		False		
	user_NextPayrollDateFlag	bit		False		((0))
	user_DefaultPayDate	datetime		False		
	user_UseLocalHelp	bit		False		((0))
	user_AutoLogoffTime	tinyint		False		((5))
	user_DefaultFileLocation	nvarchar(100)		False		
	user_ShowDashboardPageOnStart up	bit		False		((0))
	user_CarBirthdayReminder	bit		False		
	user_CarBirthdayPriorReminderDay s	int		True		
	user_CarBirthdayFollowingReminde rDays	int		True		
	user_CarAnniversaryReminder	bit		False		
	user_CarAnniversaryPriorReminder Days	int		True		
	user_CarAnniversaryFollowingRemi nderDays	int		True		
	user_CarKeyDatesReminder	bit		False		
	user_CarKeyDatesPriorReminderD ays	int		True		
	user_CarKeyDatesFollowingRemin derDays	int		True		
	user_CarTrainingReminder	bit		False		
	user_CarTrainingPriorReminderDay s	int		True		
	user_CarTrainingFollowingReminde rDays	int		True		
	user_CliBirthdayReminder	bit		False		
	user_CliBirthdayPriorReminderDays	int		True		
	user_CliBirthdayFollowingReminder Days	int		True		
	user_CliAnniversaryReminder	bit		False		
	user_CliAnniversaryPriorReminder Days	int		True		
	user_CliAnniversaryFollowingRemin derDays	int		True		
	user_CliDocumentsReminder	bit		False		

	Column	Type		Nullable		Default
	user_CliDocumentsPriorReminderDays	int		True		
	user_CliDocumentsFollowingReminderDays	int		True		
	user_CliAnniversaryReminder	bit		False		
	user_CliAnniversaryPriorReminderDays	int		True		
	user_CliAnniversaryFollowingReminderDays	int		True		
	user_CliDocumentsReminder	bit		False		
	user_CliDocumentsPriorReminderDays	int		True		
	user_CliDocumentsFollowingReminderDays	int		True		
	user_MiscActivitiesReminder	bit		False		
	user_CreatedUser	nvarchar(50)		False		
	user_CreatedDate	datetime		False		(getutcdate())
	user_ModifiedUser	nvarchar(50)		False		
	user_ModifiedDate	datetime		False		(getutcdate())
	user_TS	timestamp		False		
	user_DefInquiryView	tinyint		False		((0))
	user_DefClientView	tinyint		False		((0))
	user_DefCaregiverView	tinyint		False		((0))
	user_RemindersPinOnStartup	bit		False		((0))
	user_DefRefSourceView	tinyint		False		((0))
	user_DriveListPinOnStartup	bit		False		((0))
	user_DriveListXML	xml		True		
	user_ActCalDaysBefore	tinyint		False		((30))
	user_ActCalDaysAfter	tinyint		False		((30))
	user_UITimeZoneFrom	tinyint		False		((1))
FK	user_CaregiverMapID	bigint		False		
FK	user_ClientMapID	bigint		True		
	user_Email	nvarchar(50)		True		
	user_AllowMassEmail	bit		False		((0))
	user_ShowNotificationsOnStartup	bit		False		((0))
	user_SchedulingCheckNoDaysForBalance	smallint		False		((60))
	user_SchedulingCheckForBalance	tinyint		False		((3))
	user_Favorites	xml		True		
FK	user_MapToTypeID	int		True		
	user_MapToEntityType	tinyint		True		
	user_MapToEntityID	bigint		True		
	user_AuthFlags	int		True		
	user_EulaPortalSignDate	datetime		True		

	user_EulaSonetoSignDate	datetime		True		
	user_SchedulingSkillGroupCheckAllow	tinyint		True		
	user_MustChangePassword	bit		True		
	user_PwdChangeDate	date		True		
	user_SchedulingCGStatusConflictsAllow	tinyint		False		((0))
	user_SchedulingCheckForMaxHours	tinyint		False		((0))
	user_Hidden	bit		False		((0))

Indexes

Key	Name	Key Columns	Unique	Fill Factor
PK C	PK_T_Users	`user_ID`	True	80
	IX_T_Users_BranchID	`user_BranchID`	False	80
	IX_T_Users_LicStatus	`user_LicStatus, user_BranchID, user_ID`	True	
	IX_T_Users_RelatedEntity	`user_MapToEntityID, user_MapToEntityType, user_MapToTypeID`	False	
	IX_T_Users_UserName	`user_UserName`	True	80

Foreign Keys

Name	Columns
FK_T_Users_T_Branches_user_BranchID	`user_BranchID-> [dbo].[T_Branches] ([br_ID])`
FK_T_Users_T_Branches_user_WorkingBranchID	`user_WorkingBranchID-> [dbo].[T_Branches] ([br_ID])`
FK_T_Users_T_Caregiver	`user_CaregiverMapID-> [dbo].[T_Caregiver] ([car_ID])`
FK_T_Users_T_Client	`user_ClientMapID-> [dbo].[T_Client] ([cli_ID])`
FK_T_Users_T_Countries	`user_Country-> [dbo].[T_Countries] ([ctry_ID])`
FK_T_Users_T_UserMapTypes	`user_MapToTypeID-> [dbo].[T_UserMapTypes] ([umr_ID])`