

Session Rules for All Agencies + Rhythm Exceptions

1. Teacher Rules

1. **Status:** The teacher's status must be "Active" to be recognized by the system.
2. **Role:** If the teacher role is left blank, the system cannot add a session.
3. **Approval Date:** Sessions can be scheduled for future dates from the Approval Date (can be set from Teacher's profile).
4. **Lock/Unlock Sessions:** Only the supervisor has permission to lock or unlock sessions. If a session is locked, no sessions can be added.
5. **EVV Limit:** The EVV limit applies to the teacher's profile. If the monthly EVV compliance is exceeded, an exception is recorded, and sessions cannot be added, clocked in/out, or confirmed.
6. **Service Access:** A teacher should be allowed to access the service from the teacher's profile.

2. Student Rules

7. **Status:** The student's status must be "Active."
8. **Profile Information:** The student profile reflects the HCBS service are allowed.
9. **Awaiting Approval:** Add or confirm sessions isn't allowed if Student is awaiting approval. Clocking in is allowed.

3. General Session Rules

10. **Authorization Schedule:** An authorization schedule must exist for a session to be added.
11. **Block Out Dates:**
 - If a block-out date is set in the student profile, the student cannot take a session on that date.

- If a block-out date is set in the teacher profile, he/she cannot add (in real time, cannot give/deliver) session on that date to any student.
 - If a block-out date exists, add session, clock-in, and confirmation is not possible.
12. **Clocked in:** If a teacher Clocked in exists with a student, for same student or even for different student, clock in, add session or confirm session isn't possible.
13. **Student LOC (Letter of Completion) Date:**
- If the LOC date does not exist, sessions cannot be added, confirmed, or clocked in.
 - If the LOC date exists but is expired, sessions cannot be added, confirmed, or clocked in.
14. **Holidays:**
- On holidays set by the admin, no sessions can be added, confirmed or clocked in.
 - If the admin or agency allows sessions on holidays, then sessions can be added, confirmed, and clocked in.
15. **Future Sessions:** Teachers are not allowed to add future sessions.
16. **Minimum Session Length:** Sessions must be at least 1 minute long; 0-minute sessions are not allowed.
17. **Agency Profile Confirmation Days:** Agency profiles can be configured allow confirmation of sessions within a specified number of past days (e.g., if set to 5 days, only the last 5 days' sessions can be added).
18. **Unconfirmed Sessions:** The system has a condition regarding the number of days to confirm an unconfirmed session before allowing new sessions to be added, clocked in or confirmed. For Rhythm, this number of days is set to 7.
19. **Conflict of Interest:** If this field is set yes in teacher's profile, then this file must be there to add/clock in or confirm session.

4. Compliance Rules

20. Task Document in Teacher/Student Profile:

- If the blocking field is set to "Yes" and the document date is passed, sessions cannot be added **unless the document is signed. Doc should be signed as well.** (This rule is set only for Rythm)

21. Mandated Training Certificate:

- If the certificate does not exist in the teacher's profile, session addition, confirmation, and clock-in are not allowed.
- If the certificate exists but is expired, sessions cannot be added. The file expires one year from the upload date.

5. Session Assignment and Group Rules

22. Relationship/Assignment Rule: A valid assignment must exist for the session date.

23. Group Session Limits:

- Group sessions are allowed with a maximum of 6 students. (for Rhythm)
- Sessions cannot be added for multiple students if a group session is not allowed for a student.

24. Agency Profile:

- If the agency profile has a 15-minute interval key set to "Yes," the minimum session duration must be 15 minutes.
- An authorization schedule must exist for adding a session.

6. Student Age-Based Session Limits

25. Maximum Session Time by Age:

- **< 12 years:** Sessions can be scheduled until **9:00 PM**. (for Rhythm)
- **13-14 years:** Sessions can be scheduled until **10:00 PM**.
- **15-18 years:** Sessions can be scheduled until **11:00 PM**.
- **18+ years:** Sessions can be scheduled until **12:00 AM (Midnight)**.
- If overridden from the student profile, the set time applies.

7. CFASS and HCBS Rules

26. CFASS Student Participation: CFSS service can be given to both Student and Parent.

When the participant is a student, sessions are not allowed during School-hour.

27. CFASS Service Rules - School Hour Restrictions:

- a. Check if the student's age is **>3 years** for session eligibility.
 - Monday - Thursday: School-hour (**9:00 AM – 2:00 PM**) sessions are restricted.
 - Friday: Sessions are not allowed, **only from 9:00 AM - 12:00 PM**.
 - Saturday - Sunday: Sessions are allowed.
- b. If the student is **<3 years old**, sessions are allowed.

28. HCBS HCode Rules:

- Admin -> HCBS HCode -> rules - will be checked.

8. Additional Constraints

29. Teacher's Weekly Maximum Hours: Limits are defined based on the Agency HCBS Policy and can be overridden if necessary.

30. Daily Mandate & Assignments:

- Session duration must meet a daily mandate for sessions.
- Weekly mandate must be validated before adding a session.
- Authorization processes should consider both teacher and student, daily and weekly mandate, and consider the min mandate to validate assignment.

32. Annual Mandate: The annual mandate cannot be changed.

33. Student Overlapping Rule:

- If Overlap is set to no, session cannot be scheduled for a student with more than **two teachers** simultaneously.
- A session with the same student and teacher is not possible.

34. Agency Profile for Service Goals:

- If a session goal is required for any services, without adding goal, a session can't be added for that service.
- If a Goal is required but none exists in the student profile, clock-in and clock-out are not allowed.

This document provides a structured and detailed overview of the rules applicable for all Agencies adding, clocking in/out, and confirming sessions.