

Bonus Payment Training for Employers



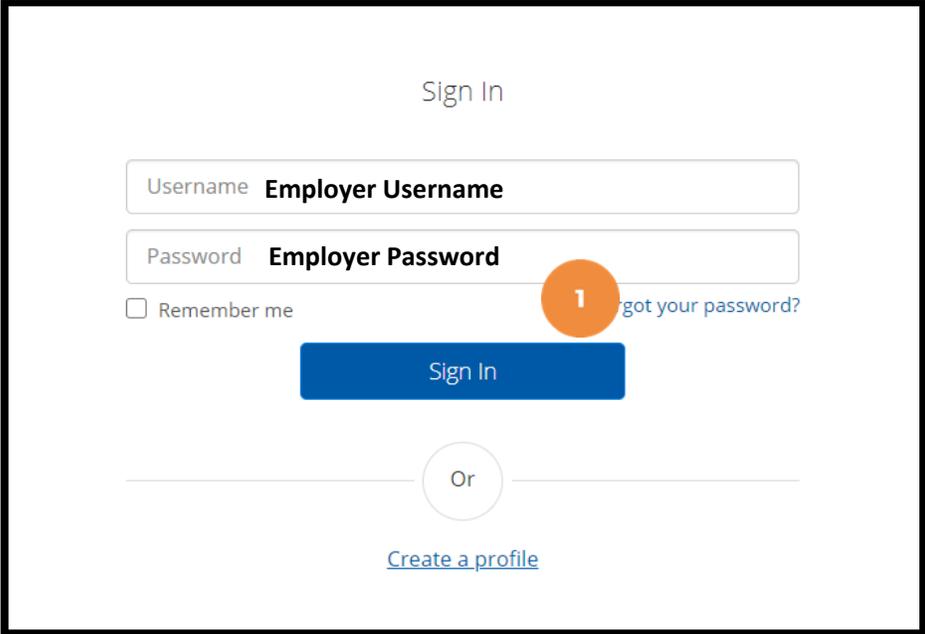
Acumen Fiscal Agent

Innovation • Opportunity • Freedom

Bonus Payment

*Please note! The Employer is responsible for creating the bonus payment entry for their employee(s)

1. Navigate to acumen.dcisoftware.com and log into the **Employer Profile**



2. Click **Employer** on the main menu
3. Click **Employees** on the submenu

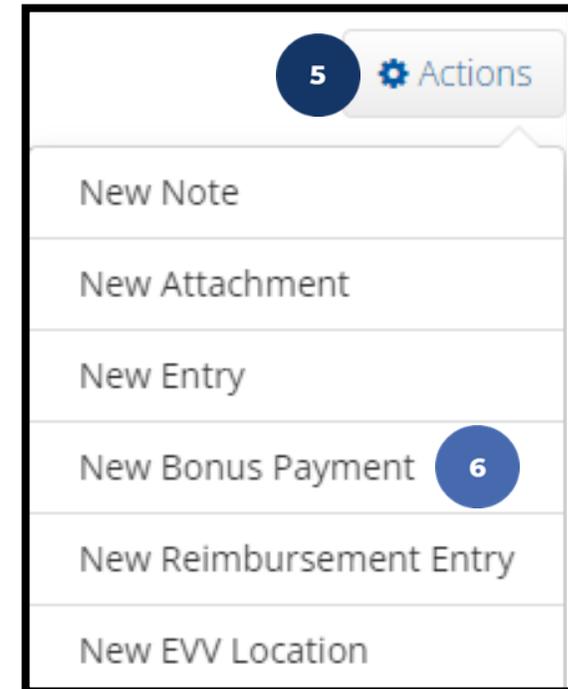


Bonus Payment

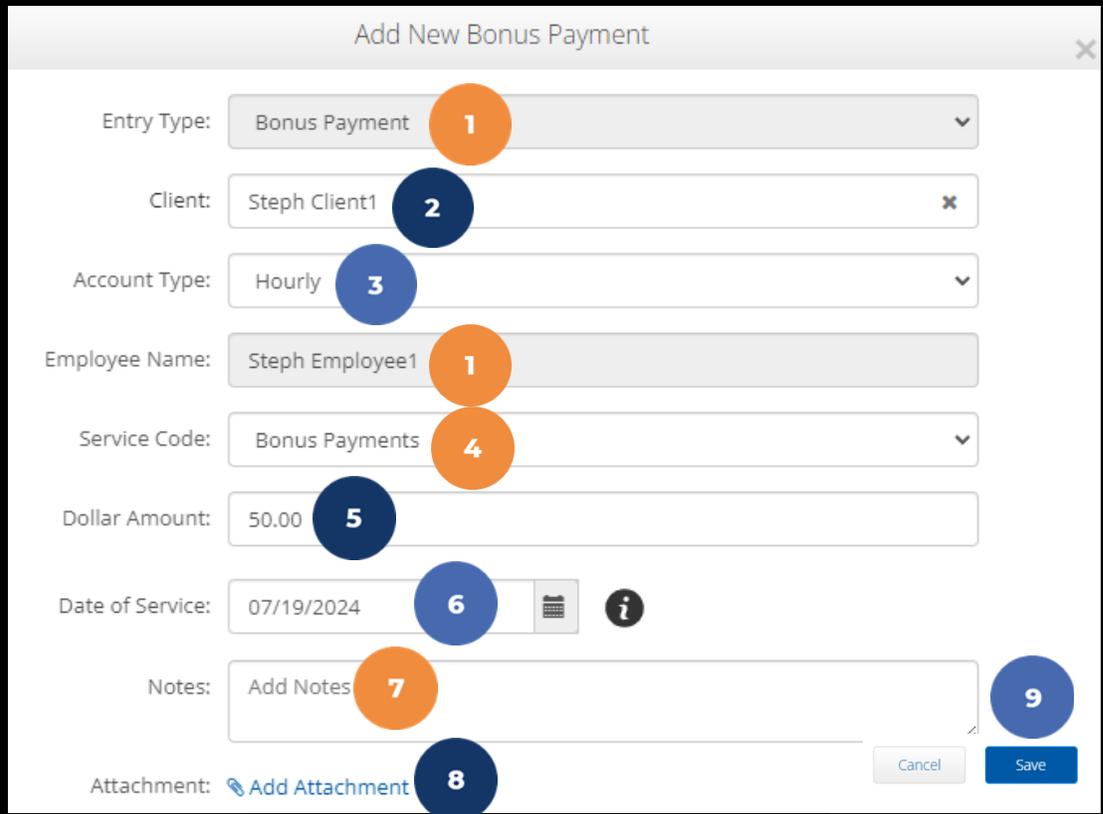
4. Click anywhere in the employee row to open the details page

Name	Employee #	Phone #
Steph Employee	125	(222) 222-2222

5. Click Actions
6. Select New Bonus payment from the drop-down menu

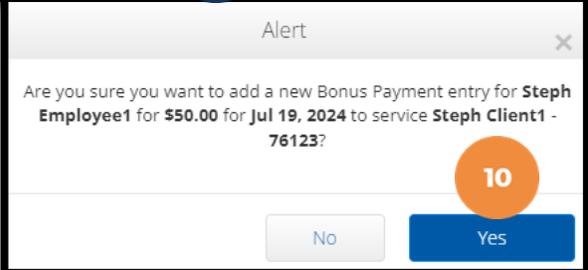


Bonus Payment



The screenshot shows a web form titled "Add New Bonus Payment" with the following fields and callouts:

- 1: Entry Type: Bonus Payment (dropdown)
- 2: Client: Steph Client1 (dropdown)
- 3: Account Type: Hourly (dropdown)
- 4: Service Code: Bonus Payments (dropdown)
- 5: Dollar Amount: 50.00 (text input)
- 6: Date of Service: 07/19/2024 (calendar icon)
- 7: Notes: Add Notes (text area)
- 8: Attachment: Add Attachment (link)
- 9: Save button



The alert dialog box contains the following text:

Alert

Are you sure you want to add a new Bonus Payment entry for **Steph Employee1** for **\$50.00** for **Jul 19, 2024** to service **Steph Client1 - 76123**?

10: Yes button

Complete the **Add New Bonus Payment** form wizard:

1. Entry Type & Employee Name: Auto-populate
2. Client: Type & select from the drop-down
3. Account Type: Hourly
4. Service Code: Select from the drop-down
5. Dollar Amount: Enter the total amount of the bonus payment
6. Date of Service: Select the date
7. Notes (optional)
8. Attachment (optional): Click the blue **Add Attachment** link to upload supporting documents
9. Click **Save**
10. Click **Yes** to confirm

View Submitted Entry

To check the status of the bonus payment entry:

1. Click **Employer** on the main menu
2. Select the **Employees** tab from the submenu
3. Click anywhere on the **employee row**



Name	Employee #	Phone #	Email	Time Zone	Type	Status
Steph Employee1	6712	(817) 453-1234	stephanies+3@dcisoftware.com	CST (UTC-6)	Hourly Non Exempt	Active

View Submitted Entry



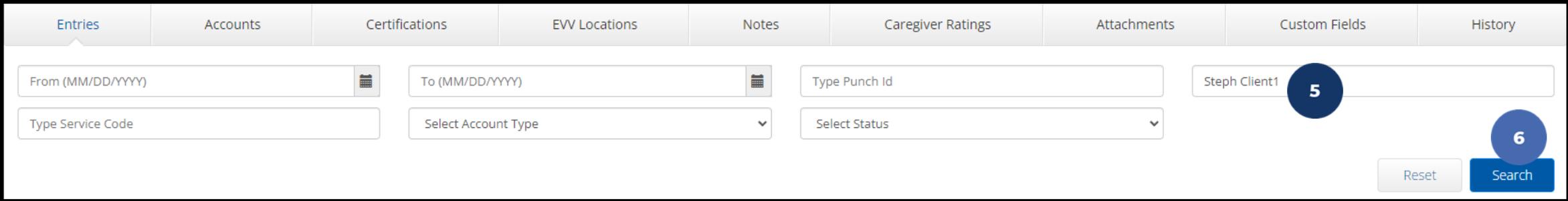
4. From the Employee Details page, scroll down to select the **Entries** tab.

The screenshot shows the Acumen Fiscal Agent web application interface. The top navigation bar includes 'HOME', 'EMPLOYER', and 'REPORTS'. The left sidebar lists 'CLIENTS', 'EMPLOYEES', 'VENDORS', and 'PENDING ENTRIES (15)'. The main content area is titled 'Employee Details - Steph Employee' and is divided into two sections: 'Basic Demographics' and 'Other Details'. The 'Basic Demographics' section includes fields for Address, GNIS, Phone, Email, Username, Time Zone, Type, SSN, Allow SSN Retrieval, Mobile Device Id, and Status. The 'Other Details' section includes fields for Average Caregiver Rating, Domestic Worker status, Domestic Worker 7 Day Exemption, Domestic Worker Preferred Day of Rest, Employee Number, Weekly Hours Available, Holiday Schedule, Cost Center, Employment Status, Authentication Status, Photo Set, Signature Set, and Email confirm. At the bottom of the page, there is a horizontal tabbed interface with tabs for 'Entries', 'Accounts', 'Certifications', 'EVV Locations', 'Notes', 'Attachments', 'Custom Fields', and 'History'. The 'Entries' tab is highlighted with an orange circle containing the number 4.

Basic Demographics	Other Details
Address: 5416 E Baseline Road Mesa, AZ 85206-4700	Average Caregiver Rating: 0
GNIS: 04-013-7890	Domestic Worker: No
Phone: (222) 222-2222	Domestic Worker 7 Day Exemption: No
Email: kristenz+22@dcisoftware.com	Domestic Worker Preferred Day of Rest: Sunday
Username: steph.employee	Employee Number: 125
Time Zone: MT (UTC-07)	Weekly Hours Available: 40.00
Type: Hourly Non Exempt	Holiday Schedule: Default Holiday Schedule - 1
SSN: ###-##-####	Cost Center: Steph Test Cost Center
Allow SSN Retrieval: No	Employment Status: Active
Mobile Device Id: 7AD12AD2-38FC-40F2-AE55-7603B5A6B2BC	Authentication Status: Active
Status: Active	Photo Set: No
	Signature Set: No
	Email confirm: Yes

View Submitted Entry

- Optionally type and select the client's name in the Type Client Name filter
- Click the blue Search button to return results



The screenshot shows a search filter interface with the following elements:

- Navigation tabs: Entries, Accounts, Certifications, EW Locations, Notes, Caregiver Ratings, Attachments, Custom Fields, History.
- Filters: From (MM/DD/YYYY), To (MM/DD/YYYY), Type Punch Id, Type Service Code, Select Account Type, Select Status.
- Client Name: Steph Client1 (Callout 5).
- Buttons: Reset, Search (Callout 6).

- Click anywhere on the entry row to view the details



Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
75289	Jul 19, 2024			Hourly		Steph Cost Center test - Steph Cost Center test	Steph Client1	Bonus Payments	50.00	Pending

View the entry status

Entry Review



- No bonus payment form is needed!
- Employee bonuses follow the payroll schedule
 - ✓ Submit within the pay cycle for the employee to receive with their paycheck
 - ✓ If approved, the entry status changes to Approved.
- Entries are then reviewed by the payroll team and if the entry is in good order, payment is made at the scheduled time.
 - ❖ The bonus payment is visible on the employee's pay stub
- If rejected by the payroll team, the entry status changes to Rejected and communication is sent to the Employer via the email listed on the DCI profile.