

**Veterans
National
Time Entry
Training for
Employers &
Employees**

Welcome to Acumen!
Thank you for joining the Acumen Family!



Helping create a positive, long-lasting
impact on people's lives.

Agenda



Acumen Fiscal Agent
Innovation • Opportunity • Freedom

	Overview + Mobile App Download & Login
	Employee – Mobile App Entry
	Employer – Mobile App – Manage Entries
	Employee – Web Portal Historical Entry & Edit Entries
	Employer – Web Portal – Manage Entries
	Troubleshooting
	Phone EVV (IVR) – Real time & Historical Entries

New Quick Resources

- Short step-by-step resource documents have been added to the [National Veteran's Time Entry Training Resources](#) page providing instructions for the punch entry and approval process.
- **Employee Specific Resources:**
 - ✓ Employee Mobile App Entries
 - ✓ Employee Web Portal Entries
- **Employer Specific Resources:**
 - ✓ Employer Manage Entries
 - ✓ Employer Manage Budgets
- **Shared Resources:**
 - ✓ Download the DCI Mobile EVV App & Log In
 - ✓ Logging into the Web Portal or the Mobile App
 - ✓ Phone EVV IVR Real Time & Historical Entries
 - ✓ Business Rule Alerts – Quick Reference

Proprietary: For Acumen and Customer Use Only



Ways to Enter Time

Only use one per shift (each clock in/out)

Mobile App



- ***Preferred Method**
- Real Time Entry
- Quick & Easy
- [Mobile App Guide](#)

Phone EVV



- Landline
- Real Time Entry
- Historical Entry
- Option when access to a mobile device or computer is limited

Web Portal



- Time Management
- [Historical Entry](#) & Corrections
- Manual Time Approval
- [Profile Settings](#)
- ***Includes Mobile Web Portal** – Mobile-friendly web portal version accessed via smartphone or tablet

DCI Requirements

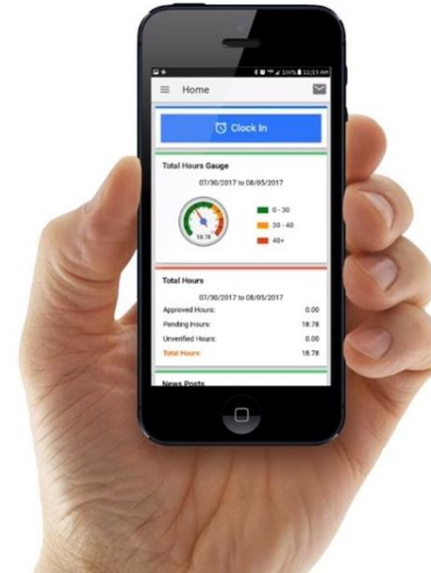
Devices & Operating Systems (OS)

Apple

- OS: iOS version 15.0 or later
 - Devices:
 - ✓ iPhone 6s or 6s Plus or later device
 - ✓ iPhone SE
 - ✓ iPod touch (7th generation)

Android

- OS: Android version 8.0 or later
 - Devices:
 - ✓ 4.6" screen or larger
 - ✓ Due to the wide range of Android devices, we are unable to provide a device list.



Web Browsers

- ✓ Google Chrome (DCI Preferred)
- ✓ Firefox
- ✓ Edge
- ✓ Safari

DCI Mobile App

***Preferred Time Entry Method**



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Mobile App Basics

- The DCI Mobile App is used for real-time entries
- Preferred, EVV-compliant method
- Can be downloaded on a mobile device or tablet
- Use for clocking in & out
- Quick & easy
- View all entries including status & details



Download DCI Mobile EVV

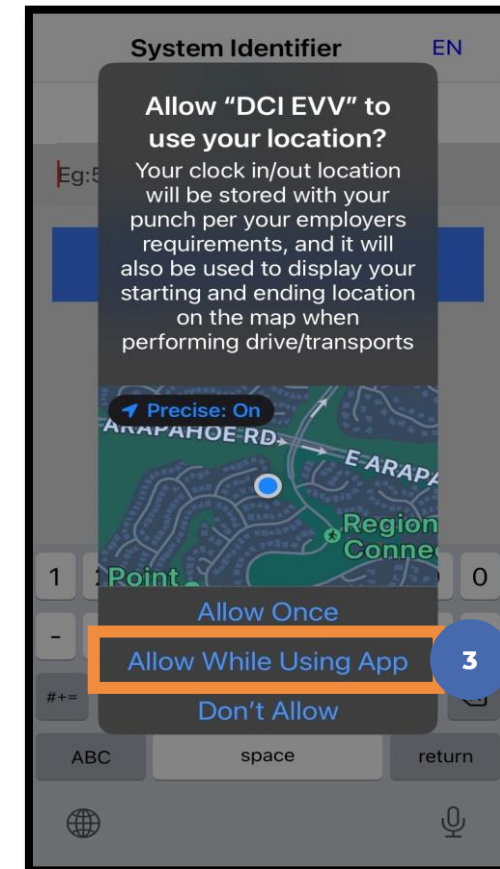
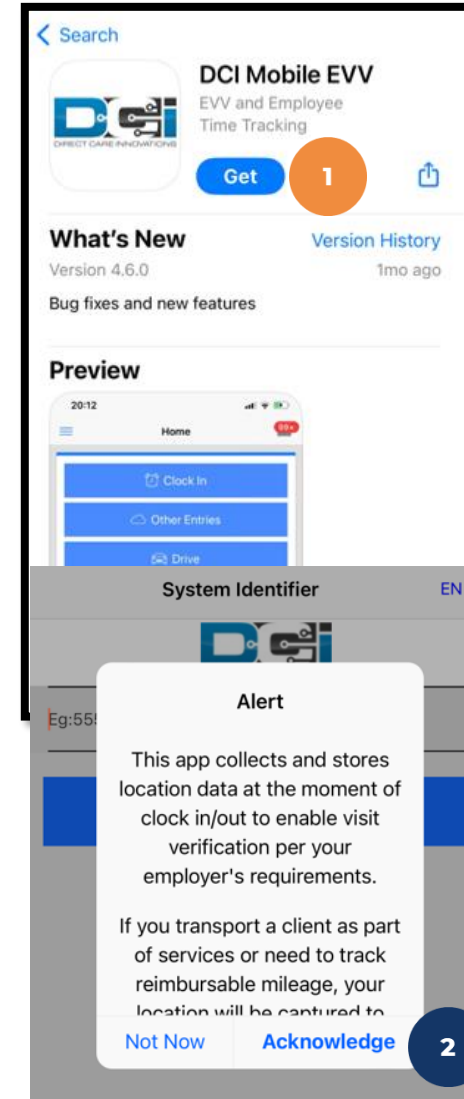
1. [Download](#) the **DCI Mobile EVV** App



2. Select Acknowledge on the Alert
 - The alert states the app collects and stores location data at clock in and clock out, if you transport a client as part of services and/or need to track reimbursable mileage
3. Select **Allow While Using App** only when accessing the app for the first time or after a new download to give the app access to the device's location
 - Location is only captured at clock in & out

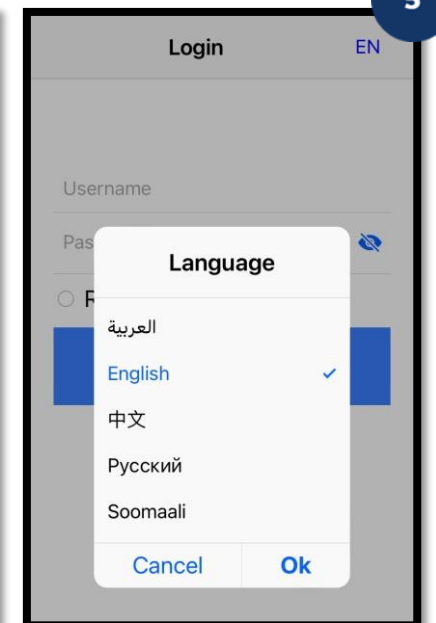
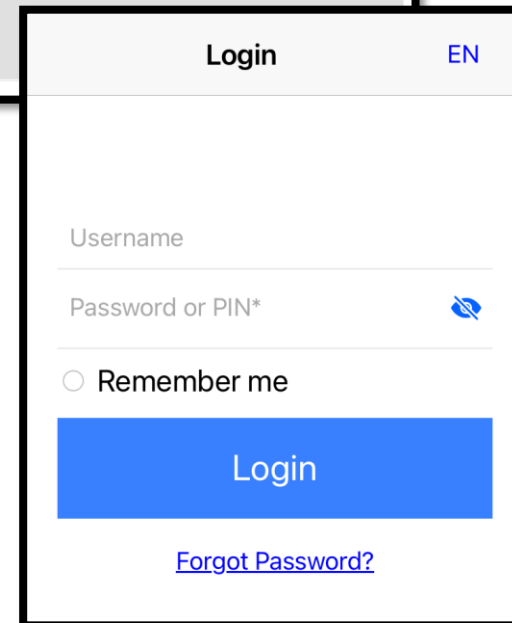
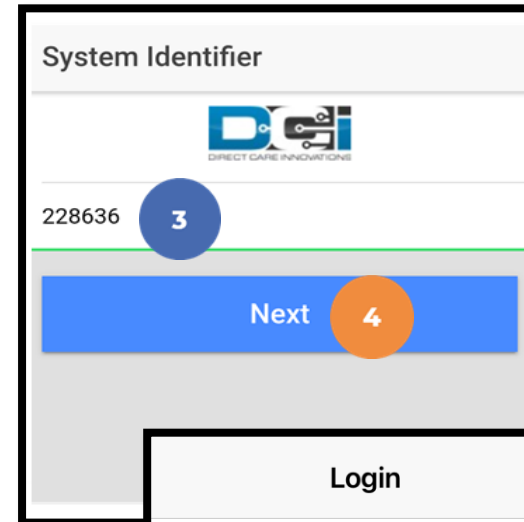
*Please note!

- There is more than one DCI app available. Please be sure to select the one labeled **DCI Mobile EVV**.
- Users may need to set app permissions. Media access is not necessary.



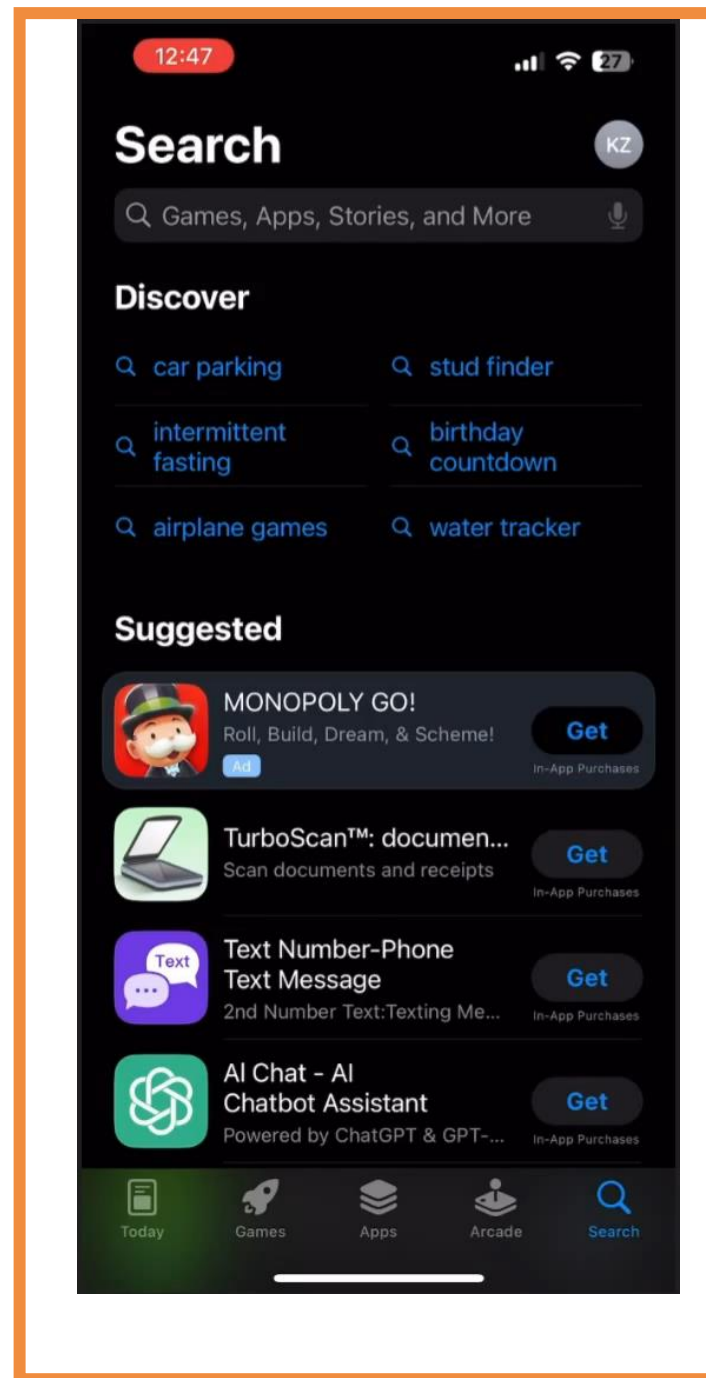
Download DCI Mobile EVV

3. Enter System Identifier **228636**
4. Click the blue **Next** button to access the login screen
5. Click the language button (**EN**) in the top right corner to change the language in the app
 - Preferred language is only available for employees
 - Choose from seven languages!



Mobile App Video

Download the DCI Mobile EVV App



Log into the DCI Mobile App



1. Enter employee credentials
 - ✓ Acumen provided a **username, password, and PIN** on the Good To Go/Welcome letter
 - ✓ Optionally, select “Remember Me” to save the username
 - *Please note:** Do not use on a shared device
2. Click the blue **Login** button to access the mobile app
 - ✓ The **Forgot Password** link is available if necessary but requires a valid email address to be on file

***Please note:** Contact Acumen with any login issues

A screenshot of the mobile app's login screen. At the top is a header with the word "Login". Below it are two input fields: "Username" and "Password or PIN*", with a callout "1" pointing to the password field. A "Remember me" checkbox is located below the password field. At the bottom is a large blue "Login" button with a callout "2" pointing to it, and a blue link for "Forgot Password?" below the button.

Username

Password or PIN*

Remember me

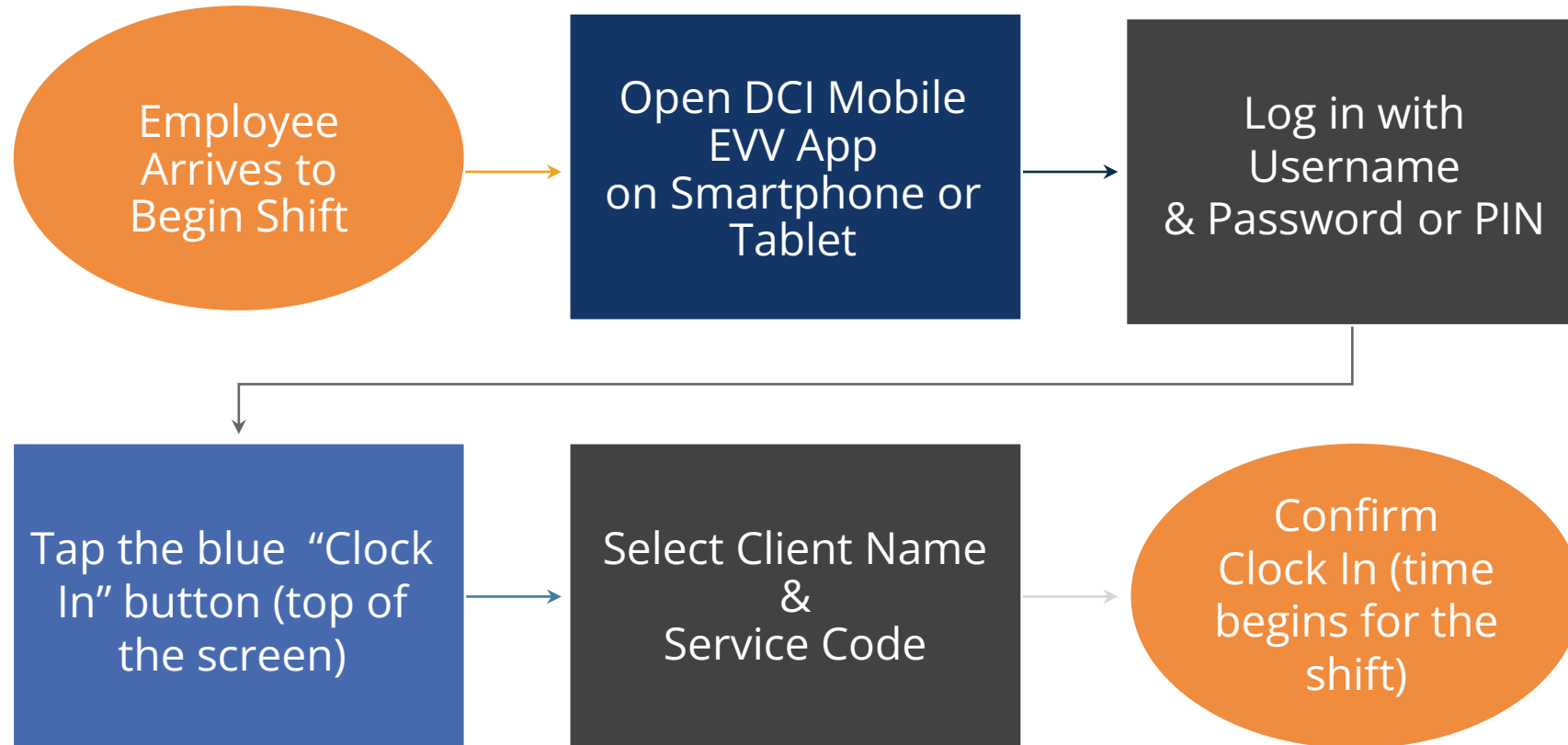
Login

[Forgot Password?](#)

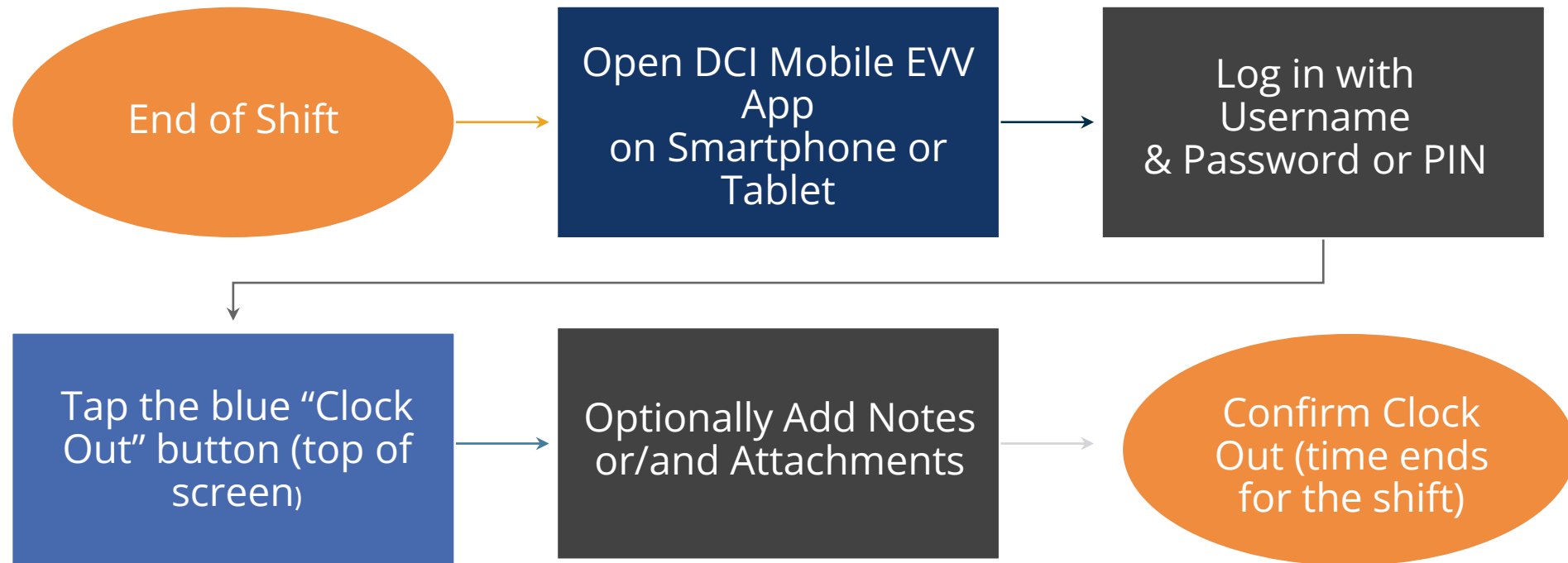
Employee Mobile App

Employee Clock In/Out Process

Overview Mobile App Clock In

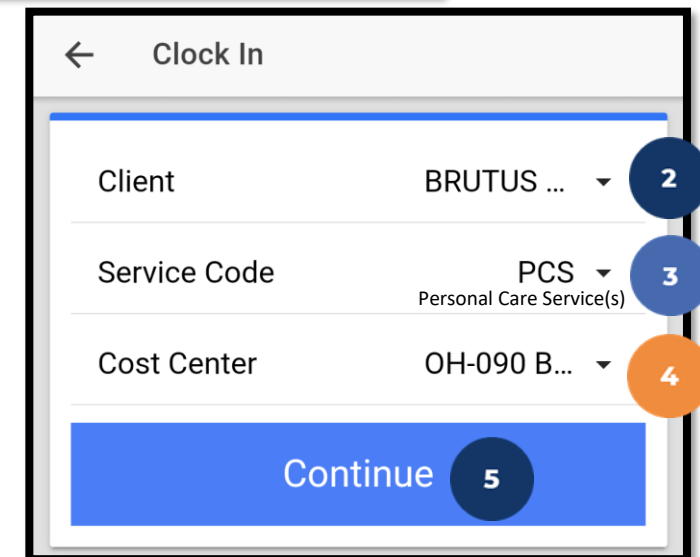
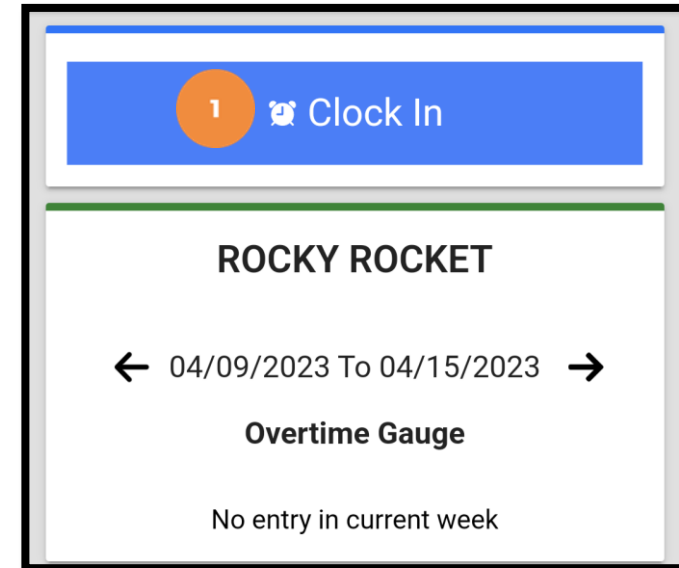


Overview Mobile App Clock Out



Clock In on Mobile App

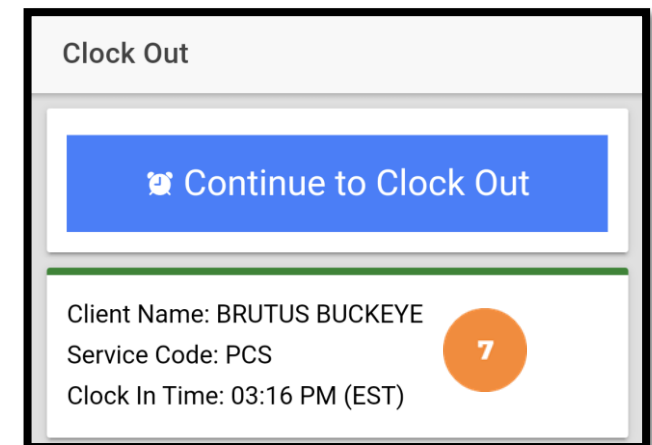
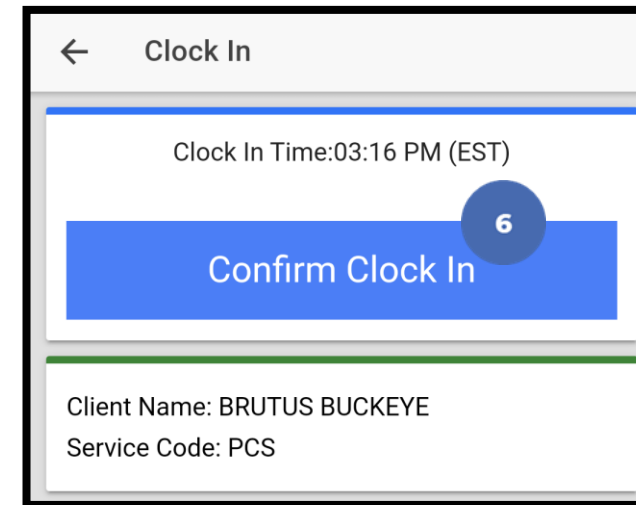
1. Click the blue **Clock In** Button
2. Select the Client's Name
 - Auto-fills for a single client
3. Select the Service Code from drop down
4. Cost Center is always auto-filled
5. Click the blue **Continue** button



Clock In on Mobile App (cont.)

6. Select Confirm Clock In
 - * *This will start the time for the shift*
7. Clock In Details Summary
 - Clock in is successful when the blue **Continue to Clock Out** button displays
 - Clock in details display in summary form

***Please note:** Users do not need to stay logged into the mobile app during their shift and cannot take any other action until clocked out.





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Clock Out on Mobile App

1. At the end of the shift, log in to the mobile app.
2. Click the blue **Continue to Clock Out** button
3. Select **Confirm** to proceed with clocking out

Username

Password or PIN*

Remember me

Login

[Forgot Password?](#)

Clock Out

Continue to Clock Out

Client Name: BRUTUS BUCKEYE
Service Code: PCS
Clock In Time: 03:16 PM (EST)

Clock Out

Continue to Clock Out

Client Name: BRUTUS BUCKEYE
Service Code: PCS
Clock In Time: 03:16 PM (EST)

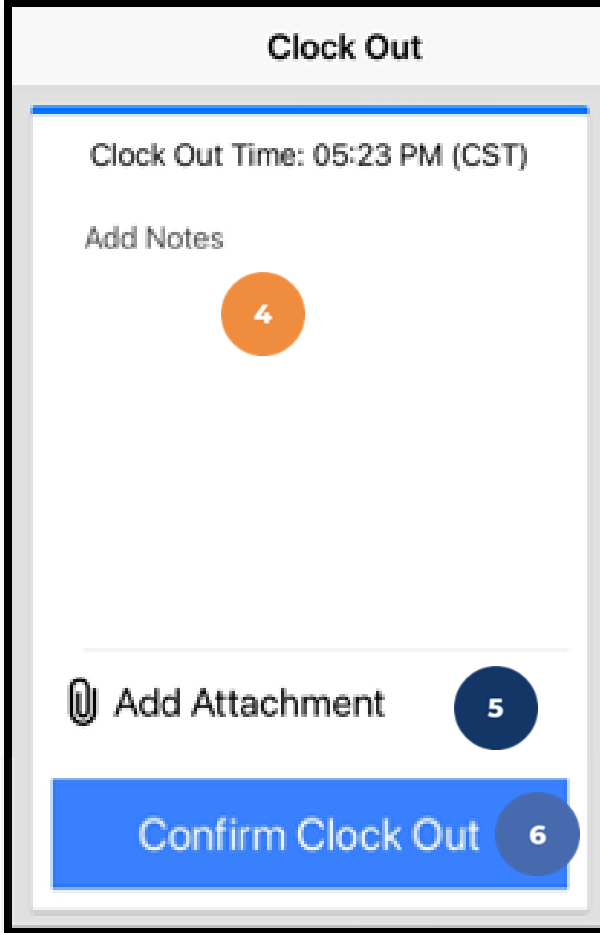
Alert

Are you sure you want to clock out current punch?

Cancel Confirm

Clock Out on Mobile App (cont.)

4. Enter any notes for the punch (optional)
5. Add an attachment for the punch (optional)
6. Click the blue **Confirm Clock Out** button when ready
 - ✓ *This will stop the time for the shift*
7. Punch Confirmation
 - ✓ Punch details are shown
 - ✓ Click the blue **Home** button when ready



Clock Out

Clock Out Time: 05:23 PM (CST)

Add Notes

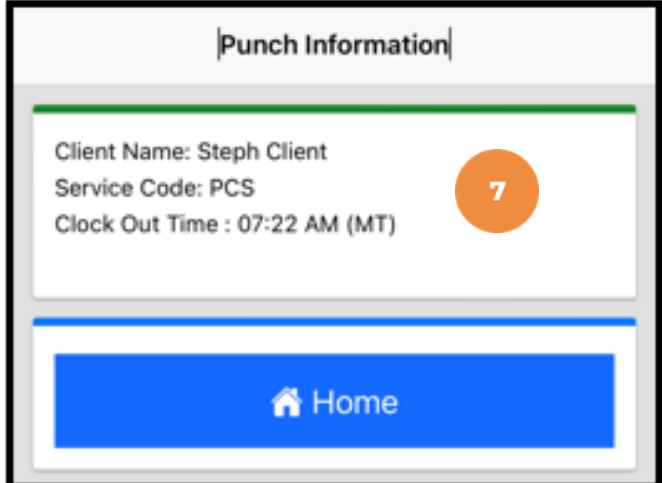
4

Add Attachment

5

Confirm Clock Out

6



Punch Information

Client Name: Steph Client

Service Code: PCS

Clock Out Time : 07:22 AM (MT)

7

Home


Congratulations!
The shift is complete.

Mobile App Video

Clocking In & Clocking Out

Login

Username*

Password or PIN* 

Remember me

Login

[Forgot Password?](#)

Proprietary: For Acumen and Customer Use Only

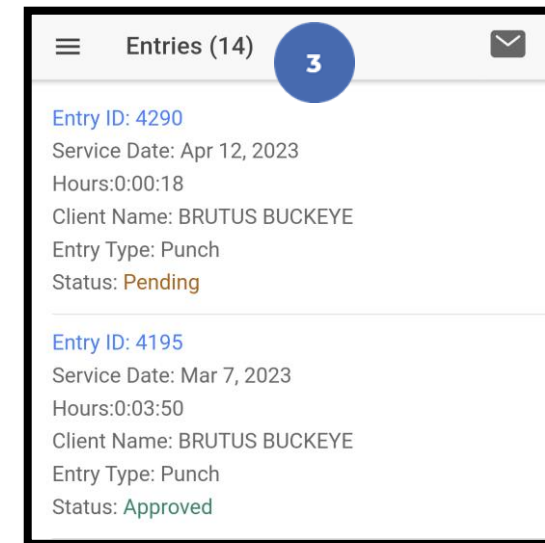
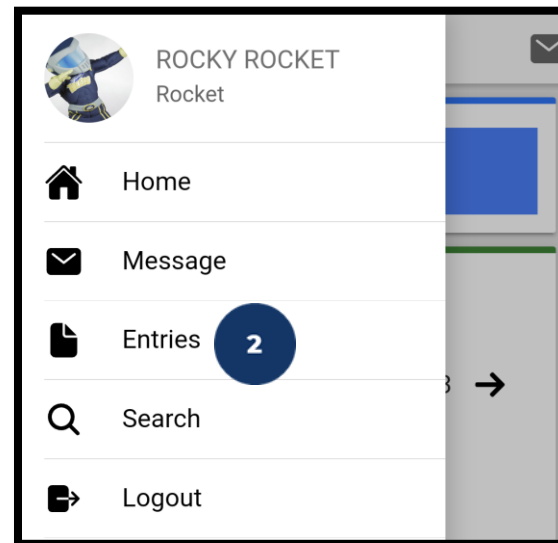
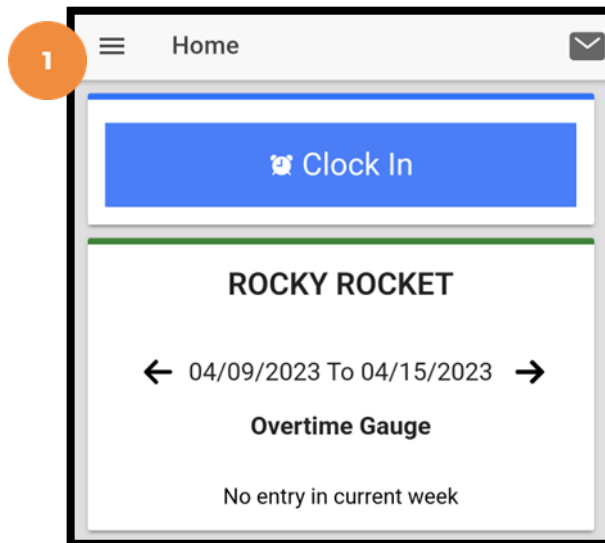
Mobile App Offline Mode



- Offline mode allows the employee to use the mobile app on a **registered device** when the device is not connected to the internet or loses connection while the app is in use
 - ✓ **Please note:** A device is registered automatically the first time the user logs into the mobile app while connected to a cellular network or internet
 - ✓ A user can only have one registered device
- Useful when there is limited or no cellular or WIFI connection at the service location
- Limits users to only clock in and clock out
- Offline mode status is indicated by a **red "Offline" bar** at the top of the dashboard
- Punches made in offline mode are saved in the mobile app as offline punches, will automatically upload when the user connects to a cellular or wireless network, and will be listed under Entries.

Review Entries

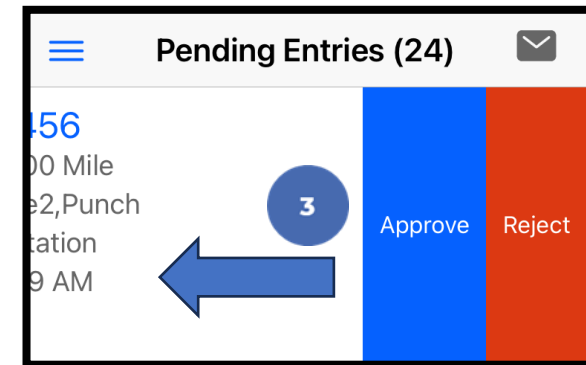
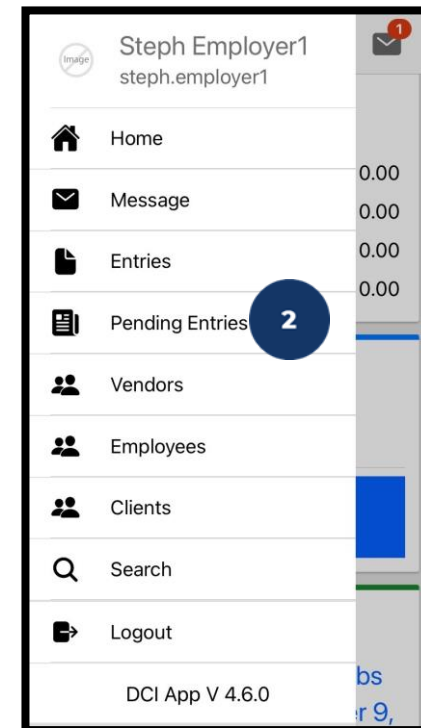
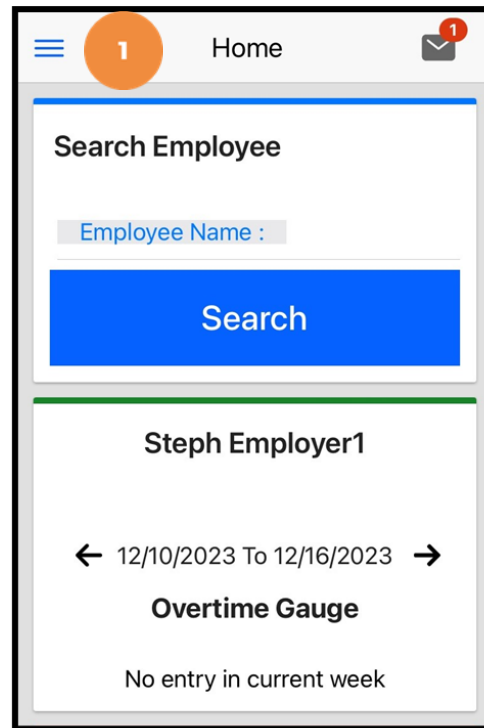
1. Click the **Menu** in the top left corner of the screen
2. Select **Entries** on the submenu
3. View the complete list of entries
 - Verify that all time is submitted
 - The employer approves the time as needed



Employer Mobile App

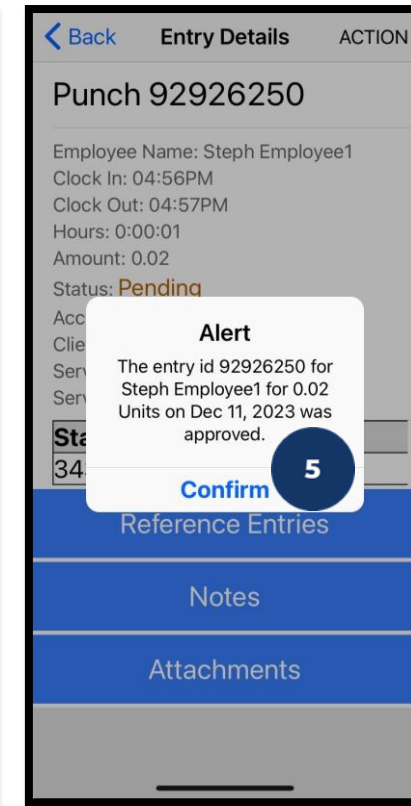
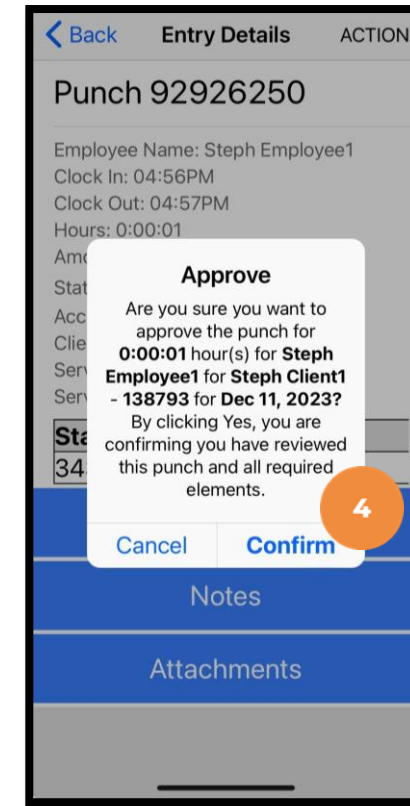
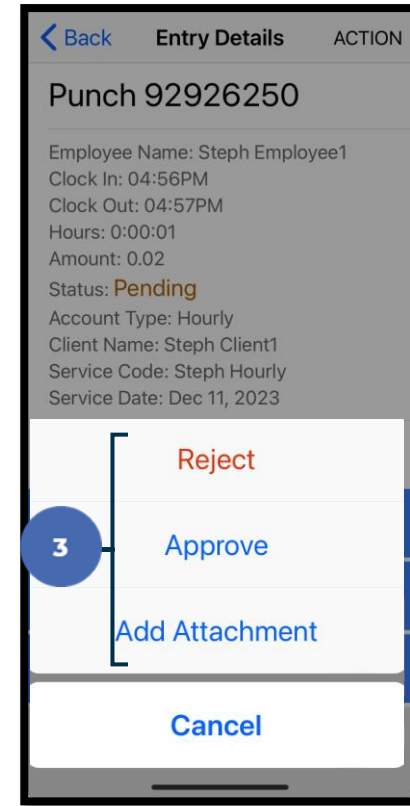
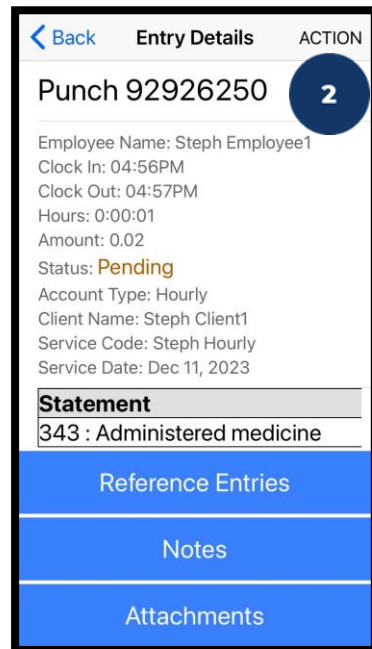
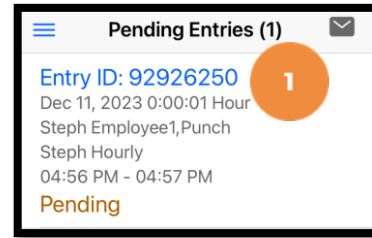
Review & Approve Entries

1. Click the **Menu** in the top left corner of the screen
2. Select **Pending Entries** on the submenu
3. **Swipe left** on the punch to select either the blue **Approve** button or the red **Reject** button



Review & Approve Entries (cont.)

1. Alternatively, click the blue entry ID hyperlink to open the entry details and take action
2. Click ACTION in the top right corner
3. Select Reject, Approve, or Add Attachment.
4. On the pop-up alert window, view the punch details and Click Confirm to initiate the confirmation process.
5. On the pop-up alert window, click Confirm again to complete the confirmation process.



***Please note:**


- If the action taken was to approve the entry, the status changes to Approved and the entry will be processed for payment.
- *Entries must be approved within 21 days of the date of service.
- *After 21 days the approval will be prohibited as it will violate the timely filing business rule

Mobile App Video

Employer Reviews & Approves Entries

|Login| EN

Username*

Password or PIN* 

Remember me

Login

[Forgot Password?](#)

DCI Web Portal

Proprietary: For Acumen and Customer Use Only



Navigation

**Full Site – Most compatible when
accessed via desktop or laptop**

Web Portal Basics

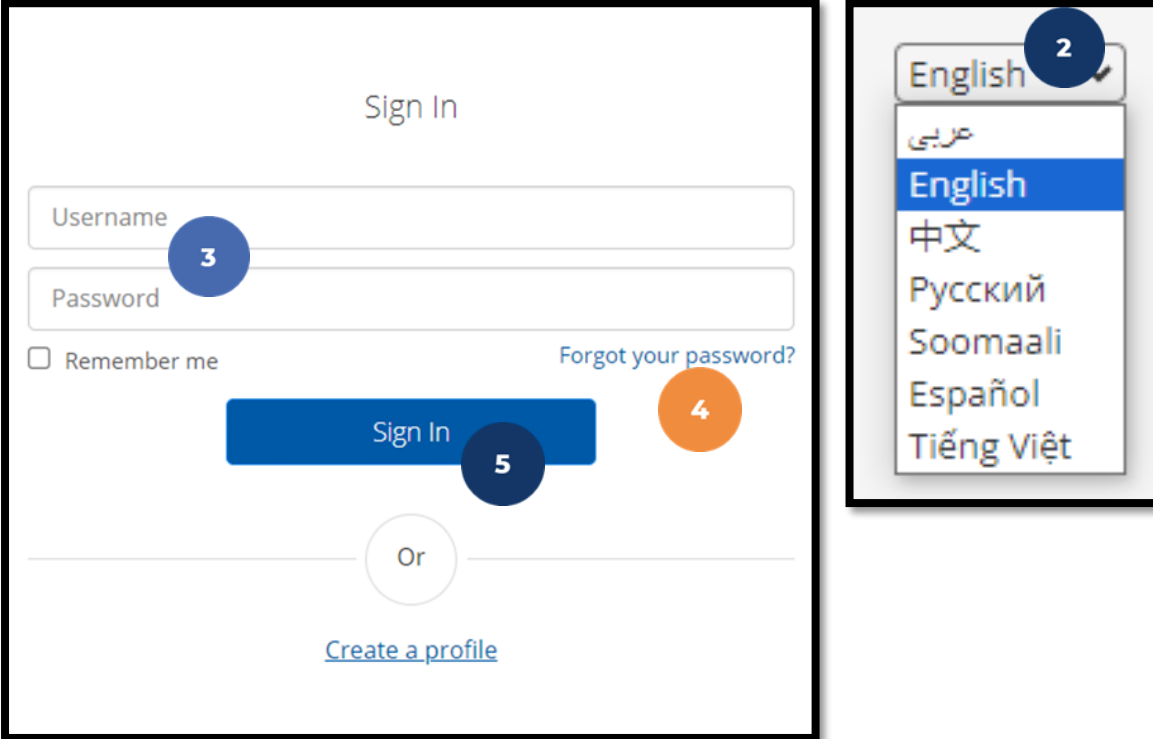
- The employer (ER)/designated representative (DR) reviews and manages time
- Employees correct punches and/or enter historical time
- Users may update profile settings



Accessing the DCI Web Portal

1. Open an internet browser on a computer or mobile device (Google Chrome is preferred) and navigate to the [DCI Web Portal](#)
2. Use the language drop-down in the top right corner to select the preferred language
 - The page will now display in the new language each time you log in
 - This feature is only available for employees
3. Enter **username** and **password**
 - Credentials provided by Acumen
4. Utilize the “**Forgot your password?**” link if needed
5. Click the blue **Sign In** button

1 acumen.dcisoftware.com



The screenshot shows the sign-in page for the DCI Web Portal. It features a 'Sign In' heading, a 'Username' field (callout 3), a 'Password' field (callout 3), a 'Remember me' checkbox, and a 'Forgot your password?' link (callout 4). A blue 'Sign In' button (callout 5) is positioned below the password field. Below the button is an 'Or' separator and a 'Create a profile' link. On the right side, a language drop-down menu (callout 2) is open, showing options: English (selected), العربية, 中文, Русский, Soomaali, Español, and Tiếng Việt.

***Please note:** Contact Acumen with login issues

Profile Settings

***Please note!** Profile settings are only available on the full site

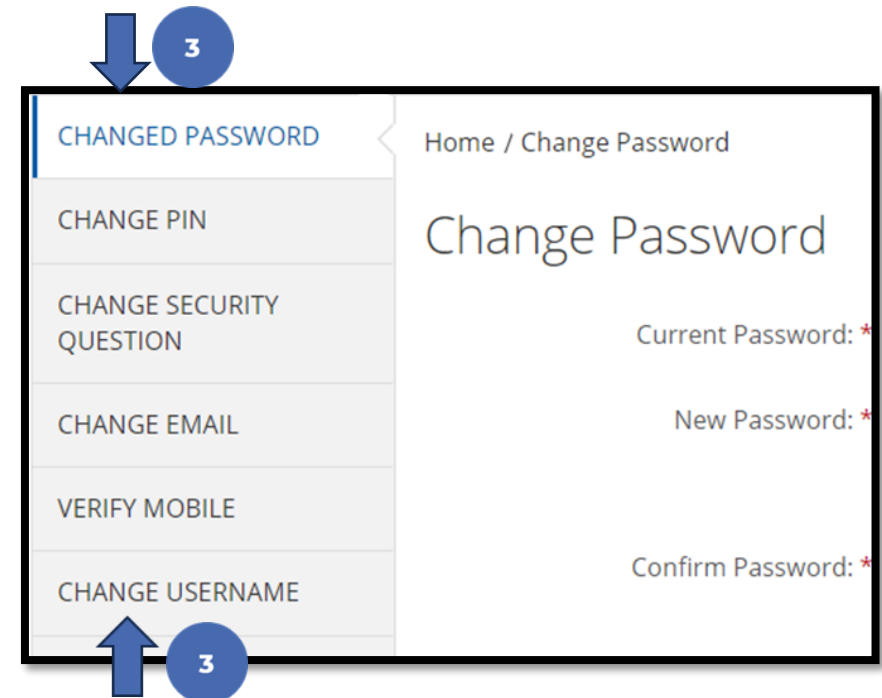
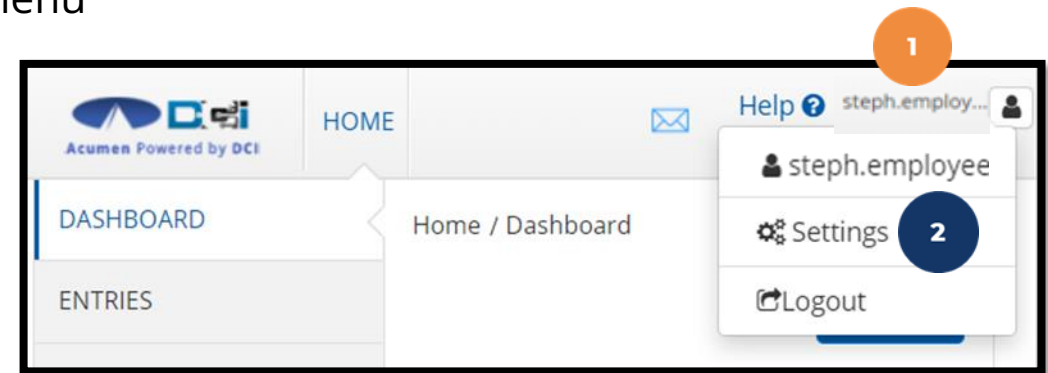


1. Click the **username** in the top right corner of the main menu

2. Click **Settings**

3. Select a submenu tab to update:


- Change Password – Used for login
- Change PIN – A number that can be used instead of a password when logging into the mobile app. *Required for employees if using Phone EVV.*
- Change Security Question
- Change Email – A valid and correct email address is required for password recovery
- Verify Mobile
- Change Username – Used for login



Add / Change PIN

***Please Note!** The PIN can only be added or changed in the web portal

1. Log in to the DCI web portal
2. Click the username in the top right corner of the main menu
3. Click **Settings** from the drop-down menu
 - ✓ Add New PIN after a reset
 - ✓ Change PIN anytime
5. Enter password
6. Click the blue **Verify** button



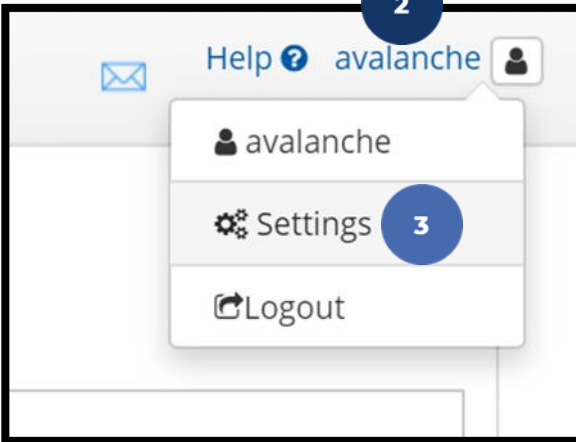
Sign In

Username **1**

Password **1**

Remember me [Forgot your password?](#)

Sign In

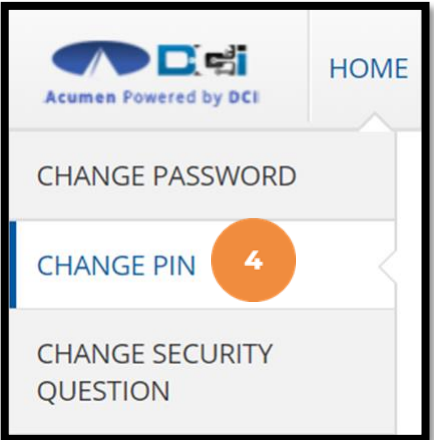


Help ? avalanche **2**

avalanche

Settings **3**

Logout



Acumen Powered by DCI HOME

CHANGE PASSWORD

CHANGE PIN **4**

CHANGE SECURITY QUESTION



Password: * Please enter password **5**

Cancel Verify **6**

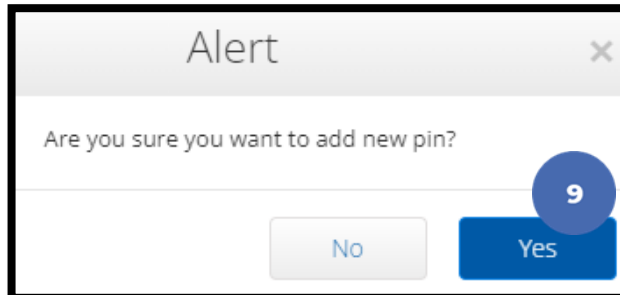
Add / Change PIN (cont.)

- Complete the New Pin field and retype the pin in the Confirm Pin field
- Click the blue **Change Pin** button
- Select **Yes** to confirm the pin change
- A green bar stating, "Pin Changed Successfully!" appears.



The screenshot shows a form with two input fields: "New Pin: *" and "Confirm Pin: *". Both fields contain the placeholder text "Please enter New Pin" and "Please Confirm Pin" respectively. A blue circle with the number "7" is positioned over the "Confirm Pin" field. To the right of the fields are two buttons: a grey "Cancel" button and a blue "Change Pin" button. A blue circle with the number "8" is positioned over the "Change Pin" button.

***Please Note!** The PIN can only be added or changed in the web portal

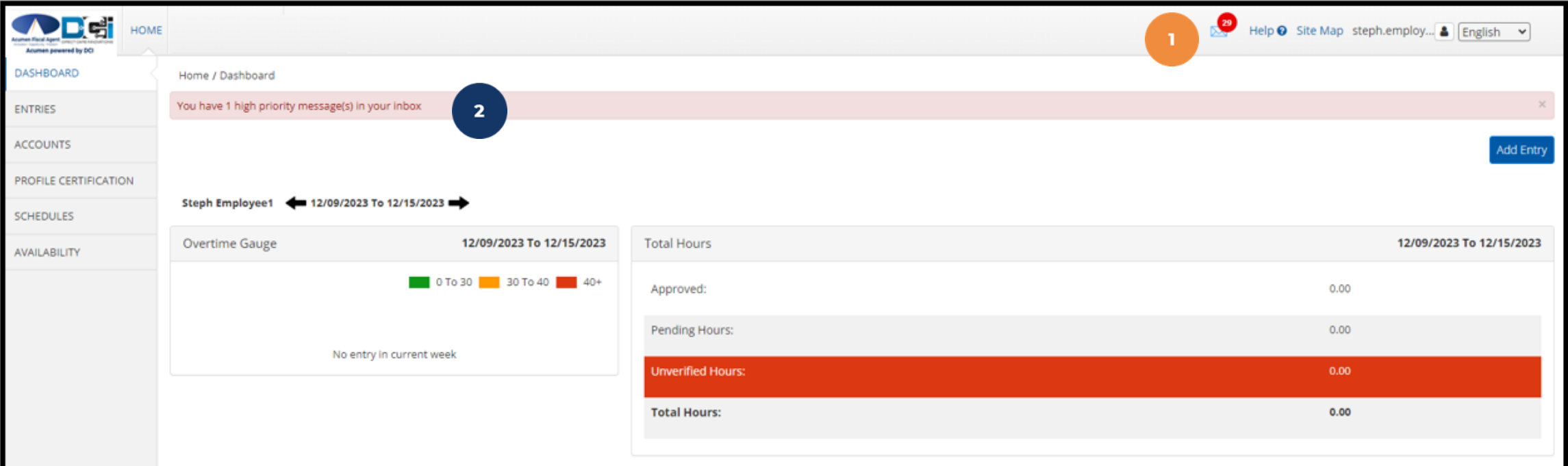


The screenshot shows an "Alert" dialog box with the text "Are you sure you want to add new pin?". Below the text are two buttons: a grey "No" button and a blue "Yes" button. A blue circle with the number "9" is positioned over the "Yes" button.



Web Portal Messaging Module

1. Click the **Mail** icon (envelope) in the top right corner of the main menu to access the inbox
2. Alternatively, if the red **high priority message banner** displays, click it to access the inbox.



The screenshot shows the Acumen Fiscal Agent web portal dashboard. The top navigation bar includes the logo, a 'HOME' link, a notification icon with a red bubble containing the number '1', and user information for 'steph.employ...'. The left sidebar contains navigation links for DASHBOARD, ENTRIES, ACCOUNTS, PROFILE CERTIFICATION, SCHEDULES, and AVAILABILITY. The main content area displays a red banner with the text 'You have 1 high priority message(s) in your inbox' and a blue circle with the number '2'. Below the banner, the user is identified as 'Steph Employee1' for the period '12/09/2023 To 12/15/2023'. An 'Overtime Gauge' shows 'No entry in current week' with a legend for 0 To 30 (green), 30 To 40 (yellow), and 40+ (red). A 'Total Hours' table is also visible.

Total Hours	12/09/2023 To 12/15/2023
Approved:	0.00
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	0.00

Web Portal Messaging Module

Select a message to view by clicking anywhere on the line

- ✓ Bold text indicates the message has not been read
- ✓ Light text indicates the message has been read
- ✓ A yellow star indicates a high priority message
- ✓ A paperclip indicates an attachment



Archive Delete Export

Showing 30 out of 72 records




<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>	★		DCI Support	Paystub for check date XX/XX/XXXX	11/02/2023 02:00 AM	
<input type="checkbox"/>	★		Kristen Ziegler	hello there	12/08/2023 05:19 PM	
<input type="checkbox"/>	★		Steph Client1	Checking on the status	11/02/2023 11:50 AM	
<input type="checkbox"/>	★		DCI Support	Punch Rejected	10/12/2023 08:33 AM	

View Paystubs/Statements via Messaging Module

1. Locate the Paystub/Statement message in the inbox and click anywhere on the line to view it
2. Click the **Attachments** tab
3. Click the **eye** icon in the download column to view the paystub/statement or the **download** icon to download it

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>	★		DCI Support	Paystub for check date XX/XX/XXXX	07:13 PM	 

Notes **Attachments** 2

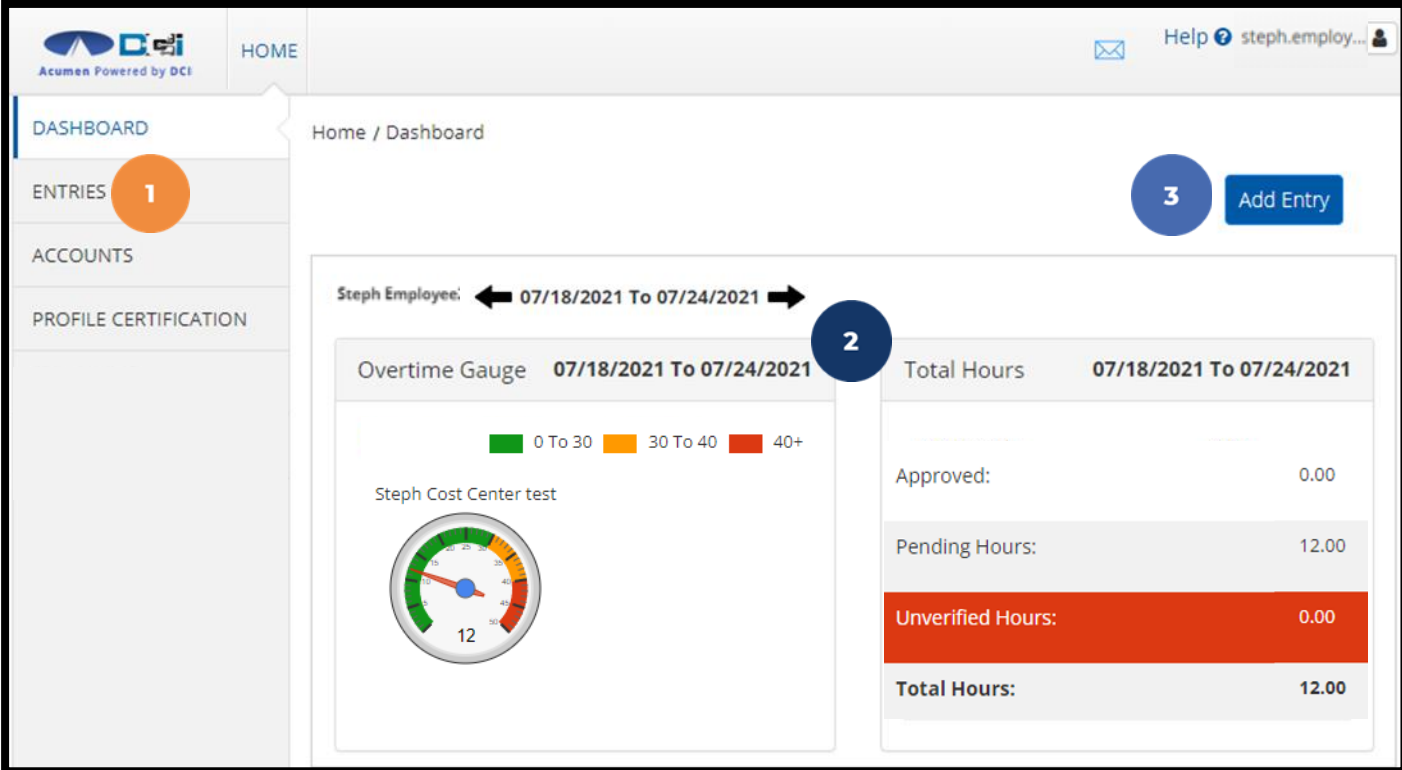
<input type="checkbox"/>	Date	File Name	File Type	File Size	Added By	Download	Status
<input type="checkbox"/>	Dec 08, 2023	Paystub.pdf		2554.02 KB	Kristen Ziegler	 	Active

Employee Web Portal

Home Tab Details - Employee

The Dashboard is the landing page

1. Select the **Entries** tab to view a complete list of submitted time entries
2. Overtime Gauge & Total Hours for the current calendar week
3. Click **Add Entry** to enter a historical time punch



The screenshot displays the dashboard interface for an employee named Steph. The left sidebar contains navigation tabs: DASHBOARD, ENTRIES (highlighted with a red circle and the number 1), ACCOUNTS, and PROFILE CERTIFICATION. The main content area shows the 'Home / Dashboard' view. At the top right, there is a 'Help' link and a user profile icon for 'steph.employ...'. A blue circle with the number 3 and an 'Add Entry' button are visible. Below this, a date range selector for 'Steph Employee:' is set to '07/18/2021 To 07/24/2021'. A red circle with the number 2 points to this date range. The 'Overtime Gauge' section shows a gauge for 'Steph Cost Center test' with a needle pointing to 12. A legend indicates three ranges: 0 To 30 (green), 30 To 40 (yellow), and 40+ (red). To the right, the 'Total Hours' table for the same date range is shown:

Total Hours	07/18/2021 To 07/24/2021
Approved:	0.00
Pending Hours:	12.00
Unverified Hours:	0.00
Total Hours:	12.00



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Add New Entry

1. Log in to the [DCI Web Portal](#)
2. Click the blue Add Entry button

***Please note!** Web Portal (historical) entries are used for a missed punch or punch correction.

Sign In

Username

Password

Remember me [Forgot your password?](#)

Sign In

Home > Dashboard

Help steph.employ...

2 Add Entry

Steph Employee: 11/01/2020 to 11/07/2020

Overtime Gauge 11/01/2020 to 11/07/2020

0 to 30 30 to 40 40+

No entry in current week

Total Hours 11/01/2020 to 11/07/2020

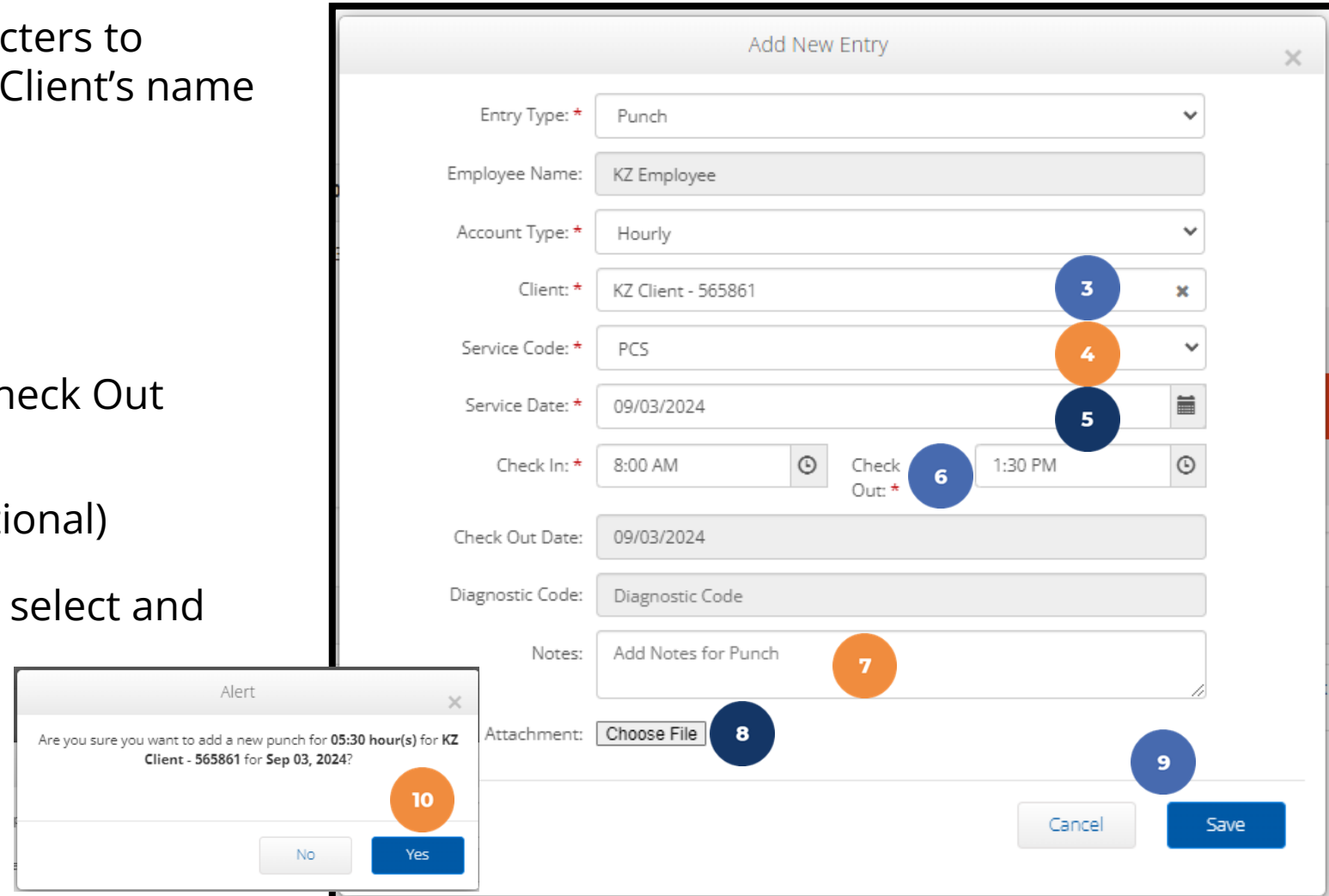
Approved By:	7.52
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	7.52

Expiring Certifications

Certification Name	Certification Expiration Date	Link to Certification Course
--------------------	-------------------------------	------------------------------

Add New Entry (cont.)

3. Type a minimum of three characters to generate results and select the Client's name from the list
4. Select the Service Code
5. Select the Service Date
6. Enter the Check In (start) and Check Out (end) times
7. Enter Notes for the punch (optional)
8. Click the **Choose File** button to select and upload Attachments (optional)
9. Click **Save**
10. Click **Yes** to submit



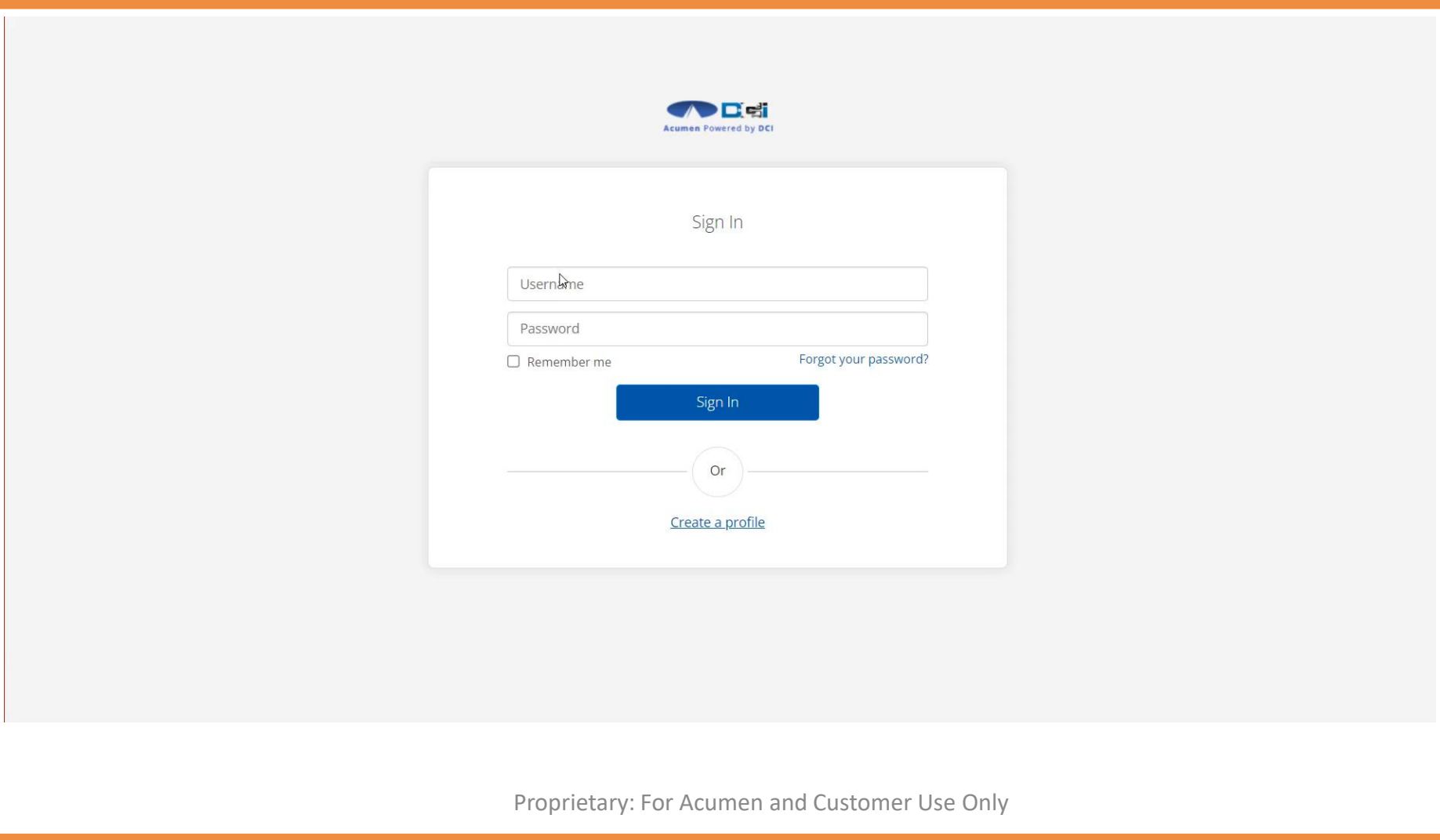
The screenshot shows the 'Add New Entry' form with the following fields and callouts:

- Entry Type: * Punch (Callout 1)
- Employee Name: KZ Employee (Callout 2)
- Account Type: * Hourly (Callout 3)
- Client: * KZ Client - 565861 (Callout 4)
- Service Code: * PCS (Callout 5)
- Service Date: * 09/03/2024 (Callout 6)
- Check In: * 8:00 AM (Callout 7)
- Check Out: * 1:30 PM (Callout 8)
- Check Out Date: 09/03/2024 (Callout 9)
- Diagnostic Code: Diagnostic Code (Callout 10)
- Notes: Add Notes for Punch (Callout 11)
- Attachment: Choose File (Callout 12)
- Buttons: Cancel, Save (Callout 13)

An 'Alert' dialog box is shown in the foreground with the following text: 'Are you sure you want to add a new punch for 05:30 hour(s) for KZ Client - 565861 for Sep 03, 2024?' with 'No' and 'Yes' buttons. Callout 10 points to the 'Yes' button.

Web Portal Video

Employee Adds (Historical) Entry



The screenshot shows a web portal sign-in page for Acumen. At the top center is the Acumen logo with the tagline "Acumen Powered by DCI". Below the logo is a "Sign In" heading. There are two input fields: "Username" and "Password". Below the "Username" field is a checkbox labeled "Remember me" and a link "Forgot your password?". A blue "Sign In" button is centered below the input fields. Below the button is a horizontal line with a circle containing the word "Or" in the center. Below the line is a link "Create a profile".

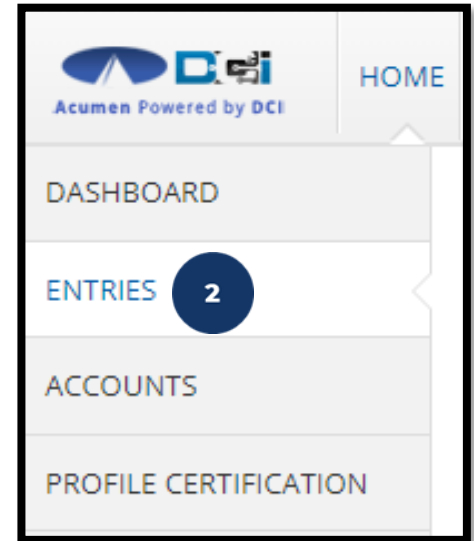




Acumen Fiscal Agent
Innovation • Opportunity • Freedom

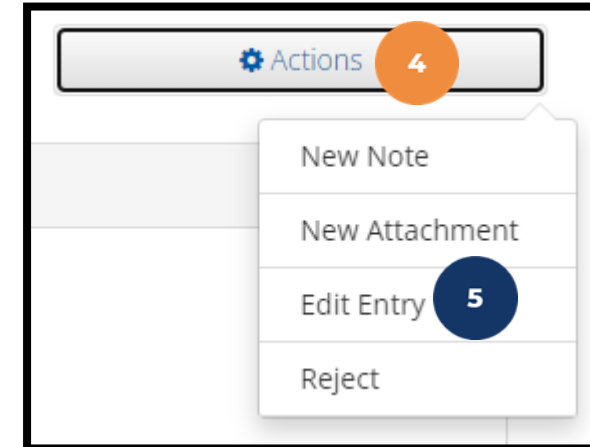
Edit Entry

***Please note!** Only entries in a Pending status can be edited by the employee. Contact Acumen for assistance if in any other status.



1. Log in to the [DCI Web Portal](#)
2. Click **Entries** on the submenu
3. Click anywhere on the line of the punch entry to be edited
4. Click the **Actions** button in the top right corner
5. Select **Edit Entry** from the drop-down menu

Id	Service Date	Start Time	End Time	Type	Account Type	Ref.	Client Name	Service Code	Amount	Unit Type	Status
92926243	Dec 02, 2023	10:30 AM	02:30 PM	Punch	Hourly		Steph_Client1	Steph Hourly	0:04:00	Hourly	Pending





Edit Entry (cont.)

***Please note!** Only entries in a Pending status can be edited by the employee

6. Complete the necessary changes in the Edit Entry form wizard
 - i.e., Service code, service date, start time (check in) or end time (check out).
7. Click **Save**
8. Click **Yes** to confirm the changes

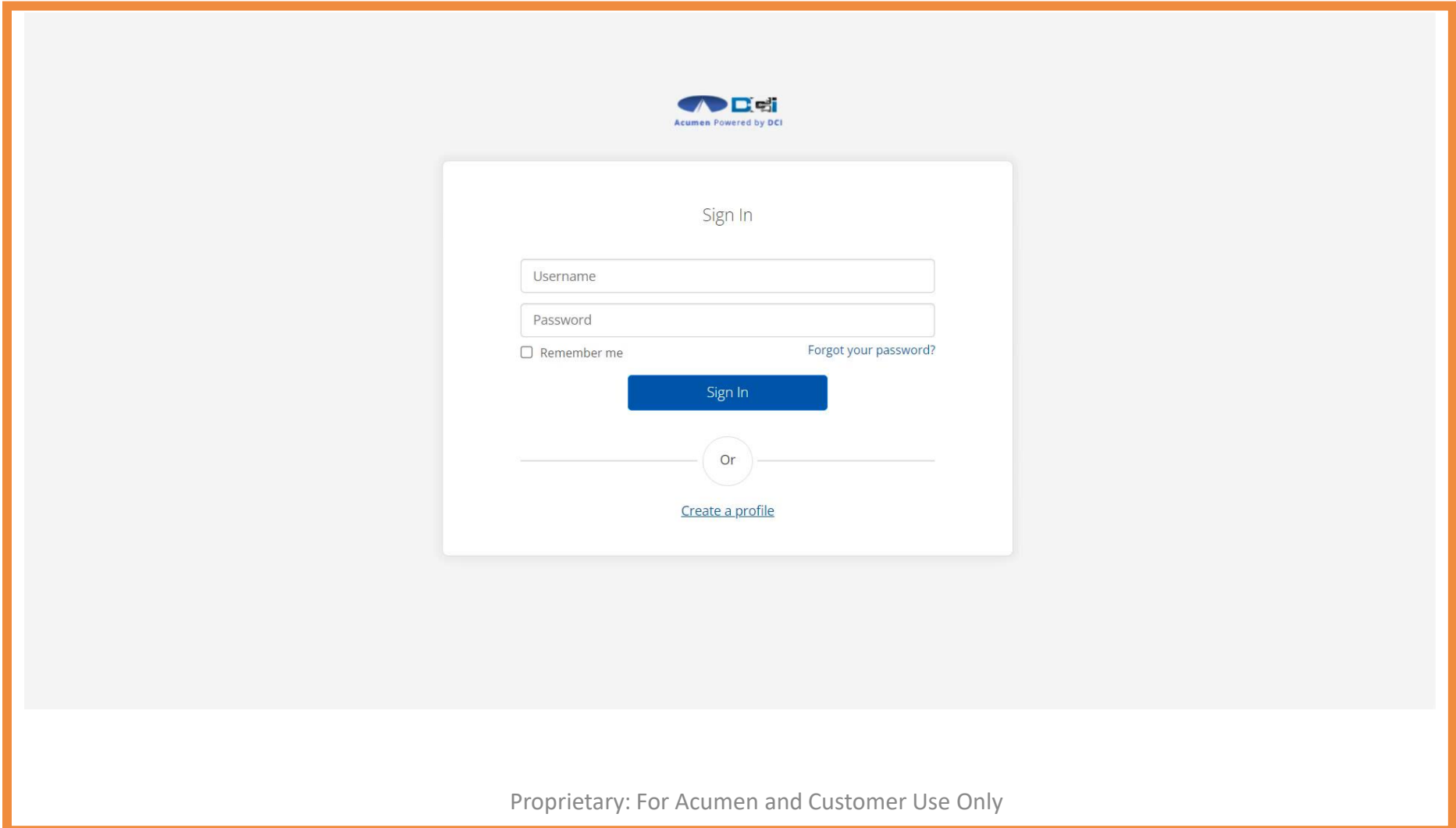
The edited entry moves into a Rejected status, and a new (corrected) entry in Pending status is created.

6

8

Web Portal Video

Employee Edits (Historical) Entry



The screenshot shows a web portal sign-in page. At the top center is the Acumen logo with the text "Acumen Powered by DCI". Below the logo is a "Sign In" heading. There are two input fields: "Username" and "Password". Below the "Password" field is a checkbox labeled "Remember me" and a link "Forgot your password?". A blue "Sign In" button is centered below the fields. Below the button is a horizontal line with a circle containing the word "Or" in the center. Below the line is a link "Create a profile".

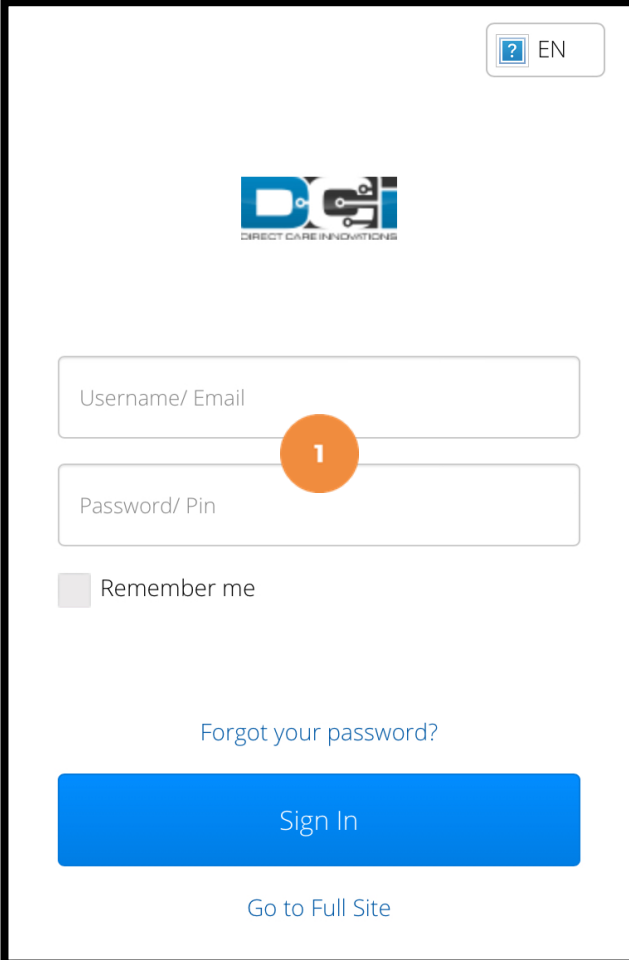
Proprietary: For Acumen and Customer Use Only



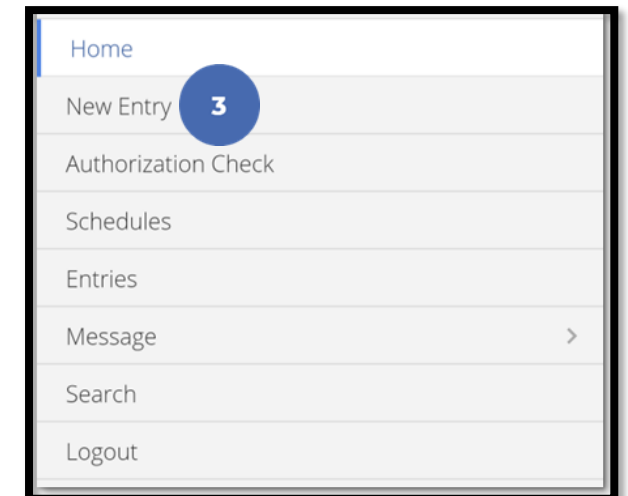
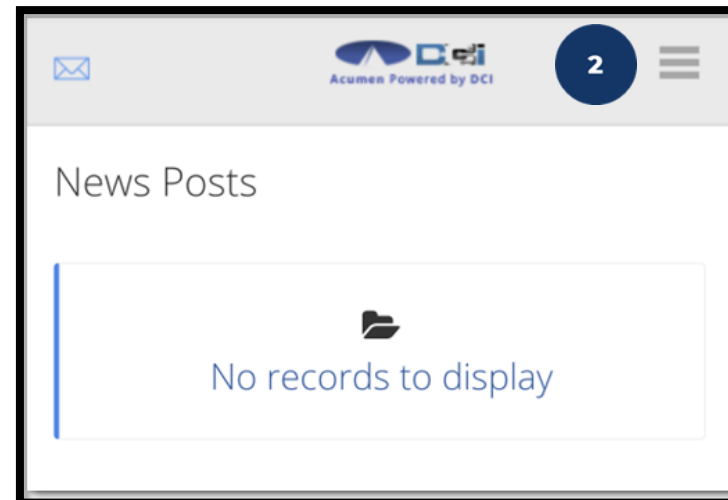
Employee Mobile Web Portal

Accessed via smartphone or tablet

Add New Entry - Mobile Device

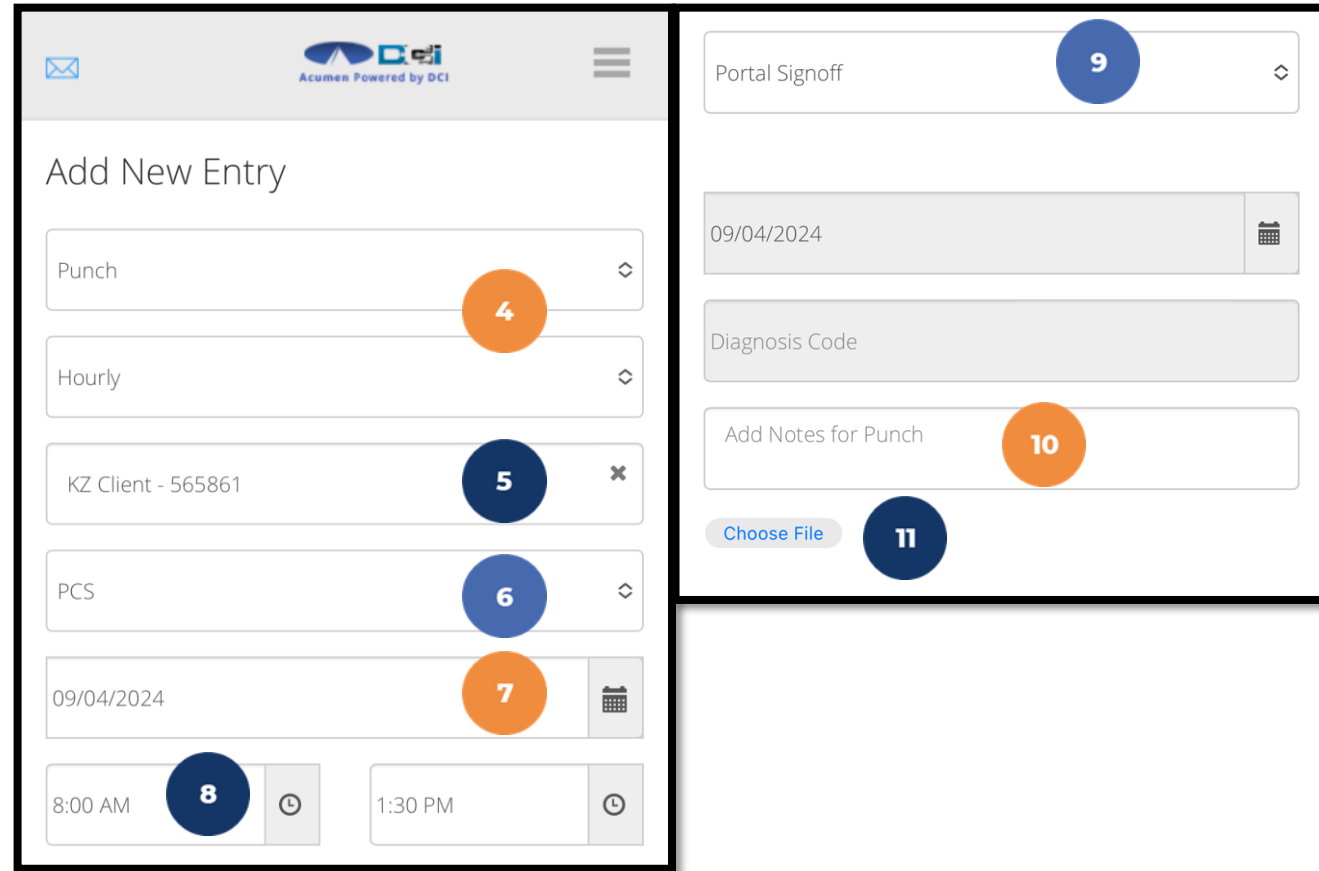


1. Log in to the DCI Web Portal on a mobile device
2. Click the **Menu** in the top right corner of the screen
3. Select the **New Entry** tab from the submenu



Add New Entry - Mobile Device (cont.)

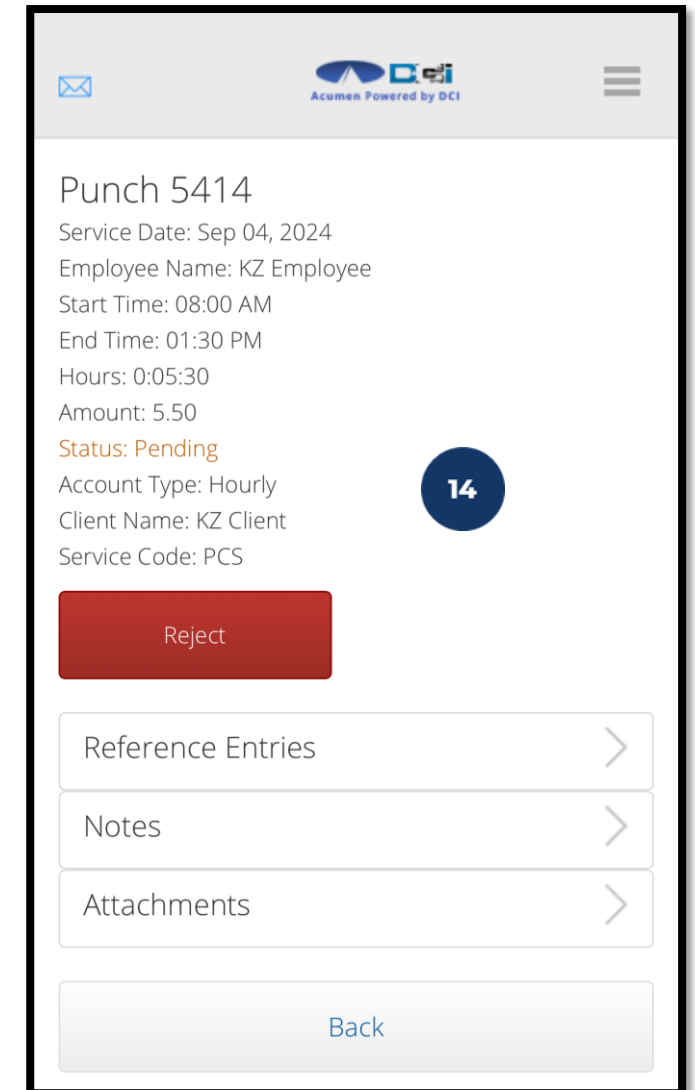
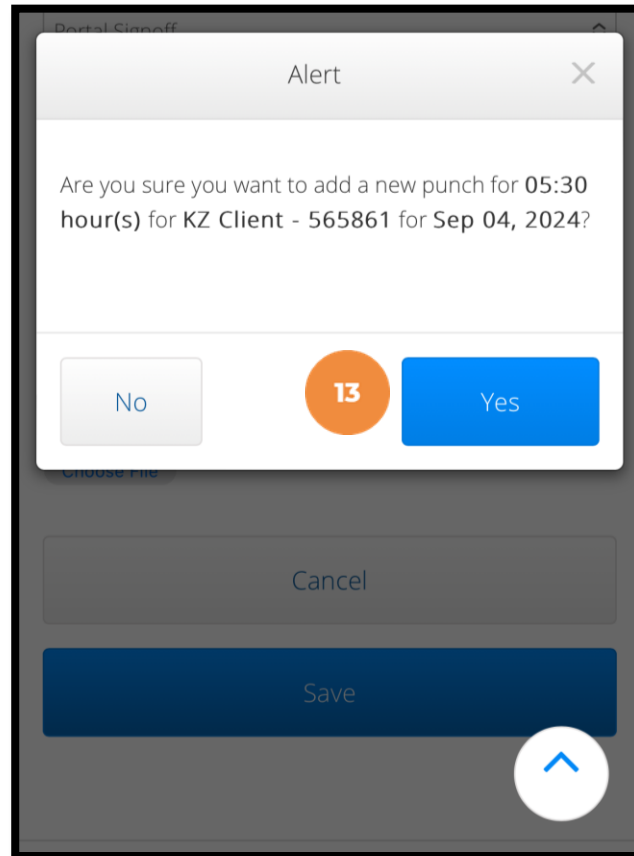
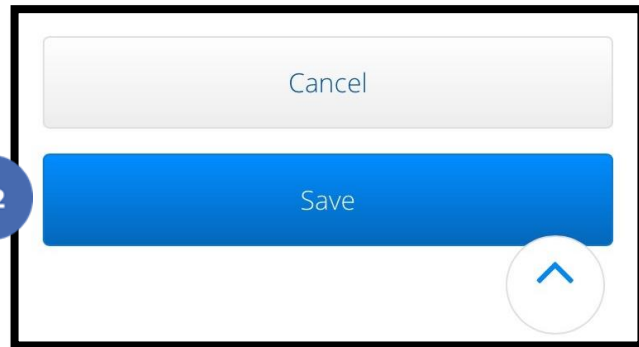
4. The first two fields are prefilled
5. Type a minimum of three characters to generate results and select the Client's name from the list
6. Select the Service Code
7. Select the Service Date
8. Enter the Check In (start) and Check Out (end) times
9. Select Portal Signoff
10. Enter Notes for the punch (optional)
11. Click the **Choose File** button to select and upload Attachments (optional)



The image shows a mobile application interface for adding a new entry. The screen is titled "Add New Entry" and features several input fields and buttons. The fields are: "Punch" (prefilled with "Punch"), "Hourly" (prefilled with "Hourly"), "KZ Client - 565861" (with a search icon), "PCS" (prefilled with "PCS"), "09/04/2024" (with a calendar icon), "8:00 AM" (with a clock icon), and "1:30 PM" (with a clock icon). The "Portal Signoff" field is prefilled with "Portal Signoff". The "Add Notes for Punch" field is empty. A "Choose File" button is located below the notes field. The interface is annotated with numbered callouts: 4 (Punch field), 5 (Client field), 6 (PCS field), 7 (Date field), 8 (Check In field), 9 (Portal Signoff field), 10 (Notes field), and 11 (Choose File button).

Add New Entry - Mobile Device (cont.)

12. Click Save
13. Click Yes to submit
14. The punch has been submitted



Employer Web Portal

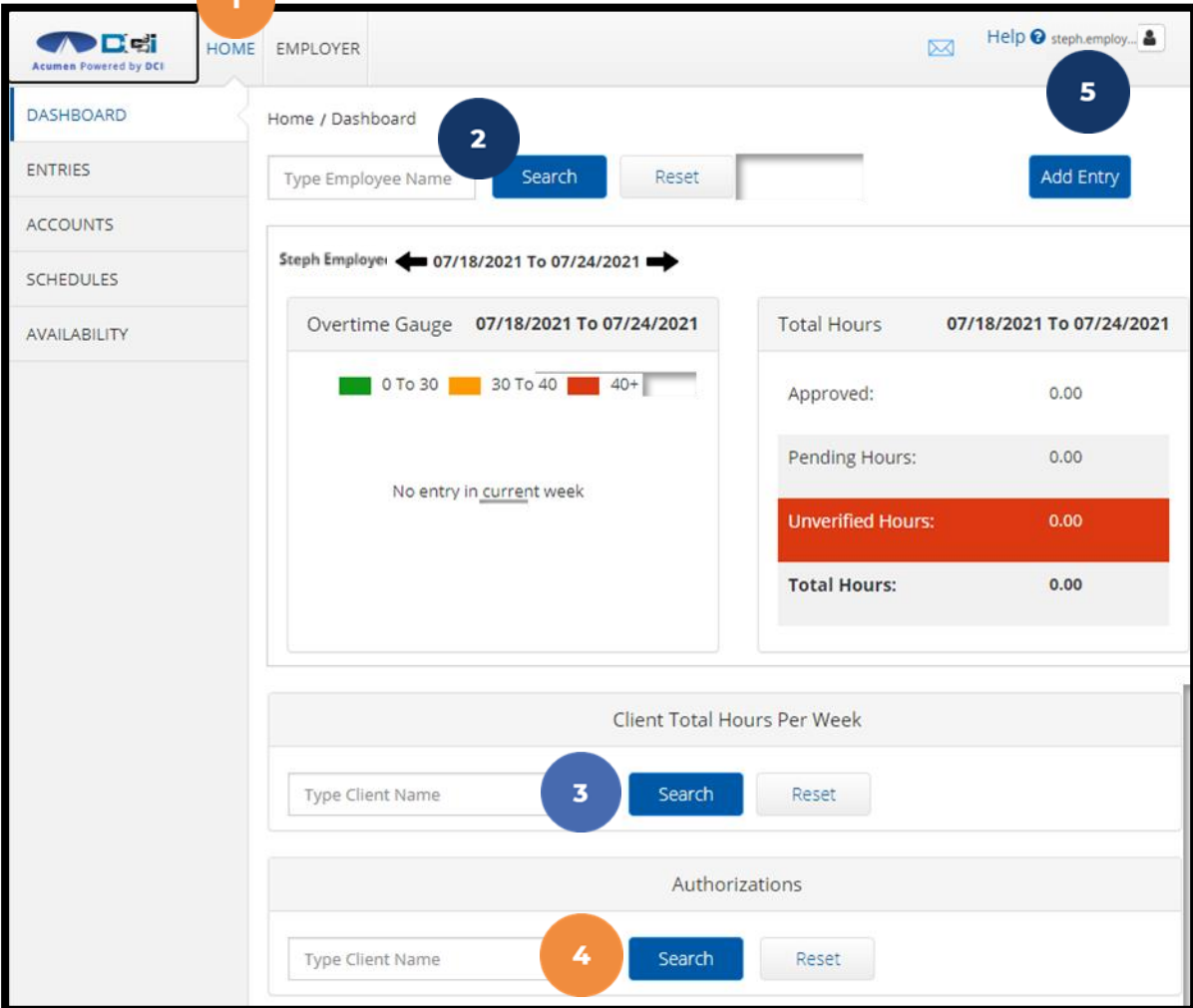
Full Site – Most compatible when accessed via computer or laptop

***Please note!** Employer mobile web portal actions are similar to the web portal but are compatible with a mobile device and do not require horizontal scrolling.

Home Tab Details

1. Select **Home** on the main menu
2. Enter an **employee name** and click the blue **Search** button to view the information below by week. Use the black arrows to toggle between weeks:
 - ✓ Overtime Gauge
 - ✓ Total Hours breakdown
3. Client Total Hours Per Week Widget
 - ✓ Enter the **client name** and click the blue **Search** button to view the total hours worked for the client by week
4. Authorizations (Budget) Widget
 - ✓ Enter the **client name** and click the blue **Search** button to view details of all active authorizations (budgets) detailed on next slide
5. Profile Settings

The Dashboard is the landing page



The screenshot shows the Acumen Fiscal Agent dashboard interface. It features a top navigation bar with 'HOME' and 'EMPLOYER' tabs, and a user profile 'steph.employ...'. A left sidebar contains menu items: DASHBOARD, ENTRIES, ACCOUNTS, SCHEDULES, and AVAILABILITY. The main content area is titled 'Home / Dashboard' and includes a search bar for 'Type Employee Name' with a blue 'Search' button and a grey 'Reset' button. Below the search bar, there's a section for 'Steph Employee' with a date range '07/18/2021 To 07/24/2021' and navigation arrows. This section contains an 'Overtime Gauge' with a legend (0 To 30, 30 To 40, 40+) and a message 'No entry in current week'. To the right is a 'Total Hours' summary table for the same date range:

Total Hours 07/18/2021 To 07/24/2021	
Approved:	0.00
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	0.00

Below this is a 'Client Total Hours Per Week' widget with a search bar for 'Type Client Name' and a blue 'Search' button. At the bottom, there's an 'Authorizations' widget with another search bar for 'Type Client Name' and a blue 'Search' button. Numbered callouts (1-5) point to the 'HOME' tab, the search bar, the search button, the client search bar, and the user profile respectively.

Authorizations (Budget) Widget



- The authorizations (budget) widget allows the user to search by client (required) or optionally use the date filter to view approved authorizations (budgets) in the past, present, or future.
- As employees clock in and clock out, their time will be deducted from the authorization and placed into a pre-authorization hold.
- Units or dollars in a pre-authorization hold remain in that status until billing and payroll have been processed. After payroll and billing completion, the units and dollars that were previously in a pre-authorization hold status will be deducted from the remaining balance and an updated remaining balance will be displayed.

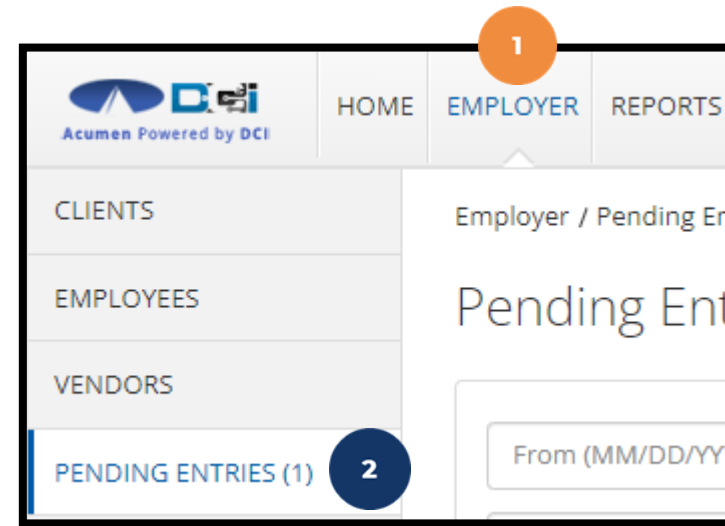
The screenshot shows the 'Authorizations' widget interface. At the top, there is a search bar with 'KZ Client2 - T45158' entered, a 'Date of Service' filter, and buttons for 'Search', 'Reset', and 'Display as Time'. Below the search bar, the text 'Authorization for Client: KZ Client2' is displayed. A table below shows the authorization details for 'PCS' with columns for Service Code, Start Date, End Date, Initial Balance, Remaining Balance, Pre Authorization Holds, Current Available Balance, Monthly Max, Weekly Max, and Daily Max. Four numbered callouts (1, 2, 3, 4) are placed above the table columns: 1 above Initial Balance, 2 above Remaining Balance, 3 above Pre Authorization Holds, and 4 above Current Available Balance.

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
PCS	01/17/2022	01/31/2024	1000.00 Dollars	785.00 Dollars	0,30 Dollars	784,70 Dollars	100.00 Dollars	100.00 Dollars	20.00 Dollars

1. Initial Balance - Total amount of authorization
2. Remaining Balance - Amount remaining after pre-authorization holds have been processed for billing and payment
3. Pre-Authorization Holds - Amount deducted from the authorization that has not yet been processed for billing and payment
4. Current Available Balance - The total of the remaining balance minus any pre-authorization holds

Navigate to Pending Entries

1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
 - ✓ The number of pending entries displays in parenthesis on the submenu



All entries requiring review/action appear in the table

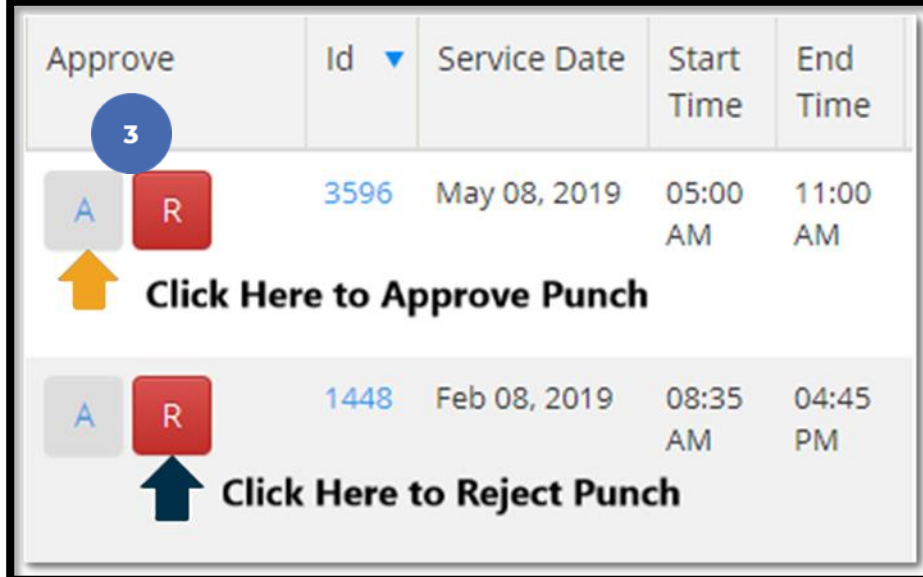
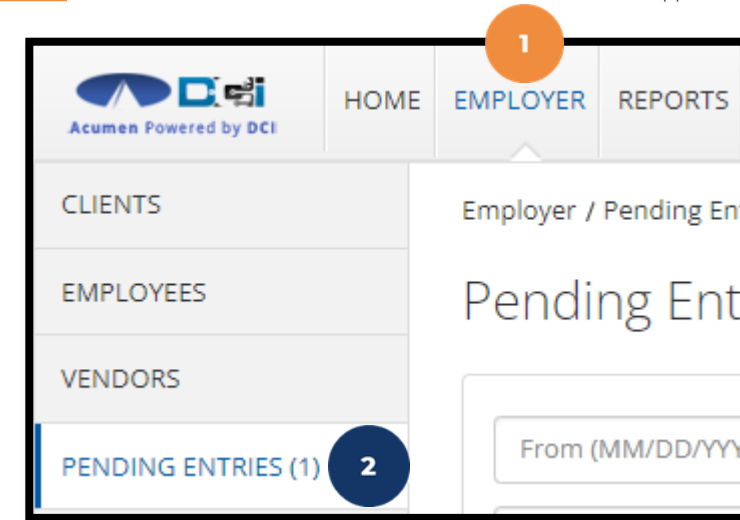
Approve	Punch ID	Service Date	Start Time	End Time	Cost Center	Client/ Program Name	Employee/ Program Name	Service Code/Type	Amount	EW	Needs Review
A R	68312	Dec 19, 2023	01:06 PM	01:10 PM	JVK Cost Center - JVKCostCenter			EVRRequired	0:00:04	No	?
A R	68310	Dec 19, 2023	12:47 PM	12:51 PM	JVK Cost Center - JVKCostCenter			EVRRequired	0:00:04	YES	👁
A R	68306	Dec 19, 2023	11:57 AM	12:46 PM	Kenneth Cost Center - KEN			Hourly	0:00:49	YES	👁
A R	68304	Dec 19, 2023	01:18 PM	01:18 PM	Default Cost Center - 00-000			DPI Hourly	0:00:00	YES	

Load More

***Please note!** To view all entries, click the Load More button at the bottom of the page.

Manage Pending Entries

1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
 - ✓ The number of pending entries displays in parenthesis on the submenu
3. Any punch that requires approval is listed here
 - ✓ Review each entry
 - Click on the entry to view all details
 - ✓ Approve or reject
 - Click the **A** on the entry line to approve
 - ❖ Entries must be approved within 21 days of the date of service
 - ❖ After 21 days the approval will be prohibited as it will violate the timely filing business rule
 - Click the red **R** on the entry line to reject
 - ❖ If an entry is rejected, ask the employee to re-enter the time correctly in the DCI web portal.

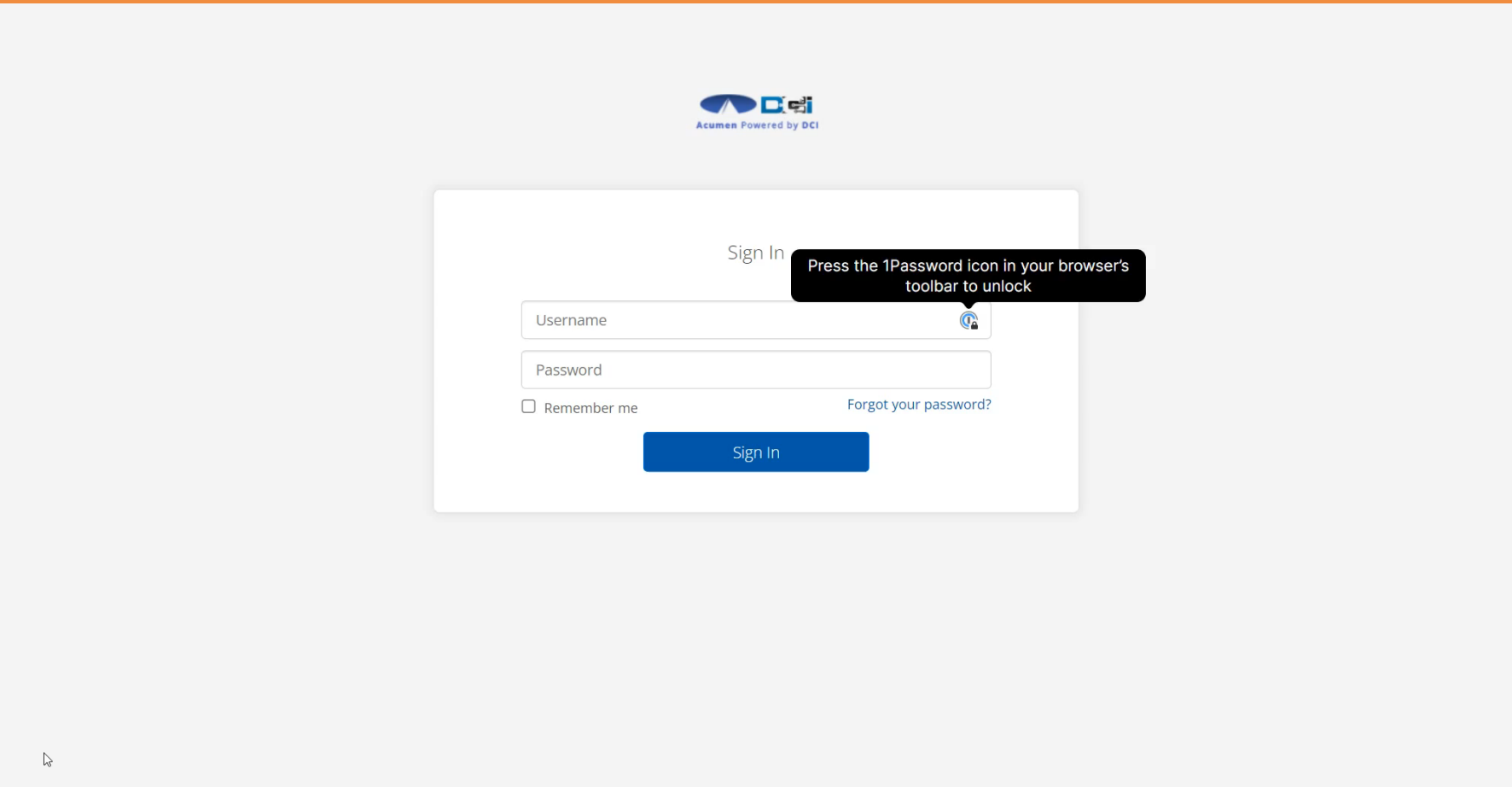


The screenshot shows a table of pending entries. The first entry has a blue circle with the number '3' pointing to the 'Approve' column. Below the 'Approve' column, there are two buttons: a blue 'A' button and a red 'R' button. An orange arrow points to the 'A' button with the text 'Click Here to Approve Punch'. The second entry also has a blue 'A' button and a red 'R' button. A blue arrow points to the 'R' button with the text 'Click Here to Reject Punch'.

Approve	Id	Service Date	Start Time	End Time
A R	3596	May 08, 2019	05:00 AM	11:00 AM
A R	1448	Feb 08, 2019	08:35 AM	04:45 PM

Employer Web Portal Video

Manage Entries



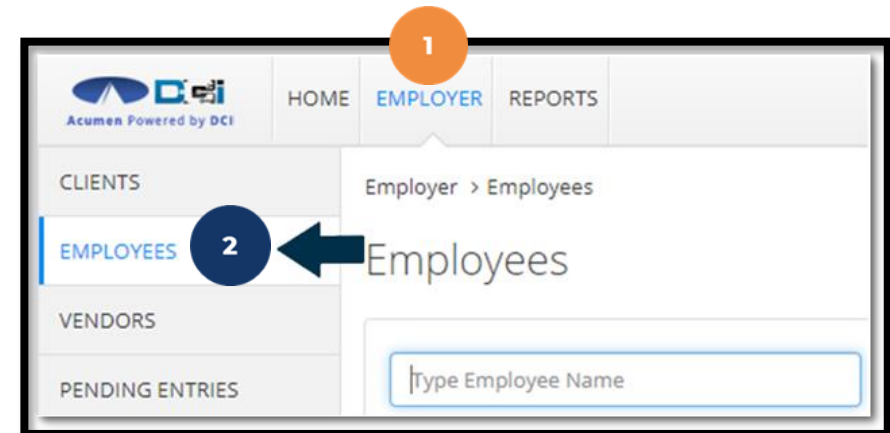
The screenshot shows the Acumen web portal sign-in page. At the top center is the Acumen logo with the text "Acumen Powered by DCI". Below the logo is a "Sign In" heading. A callout box points to a 1Password icon in the Username field, with the text "Press the 1Password icon in your browser's toolbar to unlock". The form includes a Username field, a Password field, a "Remember me" checkbox, a "Forgot your password?" link, and a blue "Sign In" button.

Proprietary: For Acumen and Customer Use Only



Using the Employees Page

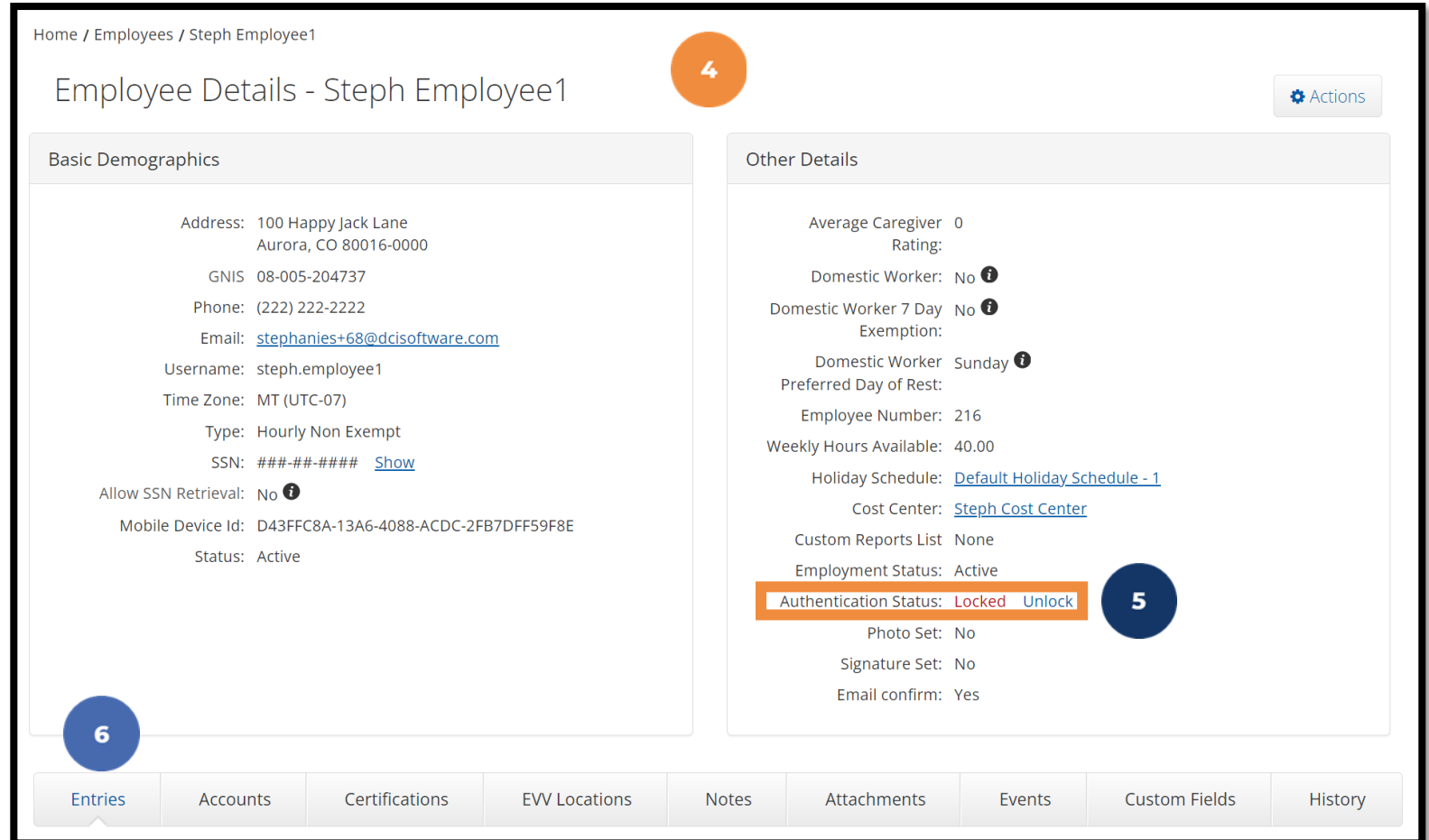
1. Click **Employer** on the main menu
2. Select the **Employees** tab from the submenu
3. Click anywhere on the selected employee's line



Name	Employee #	Phone #	Email	Time Zone	Type	Status
Steph Employee1	721	(222) 222-2222	stephanies+320@dcisoftware.com	MT (UTC-07)	Hourly Non Exempt	Active

Using the Employees Page (cont.)

4. View the employee details page
5. Unlock Employee Profile if needed
6. Scroll down to the Entries tab



Home / Employees / Steph Employee1

Employee Details - Steph Employee1

Actions

Basic Demographics

Address: 100 Happy Jack Lane
Aurora, CO 80016-0000

GNIS: 08-005-204737

Phone: (222) 222-2222

Email: stephanies+68@dcisoftware.com

Username: steph.employee1

Time Zone: MT (UTC-07)

Type: Hourly Non Exempt

SSN: ###-##-#### [Show](#)

Allow SSN Retrieval: No ⓘ

Mobile Device Id: D43FFC8A-13A6-4088-ACDC-2FB7DFF59F8E

Status: Active

Other Details

Average Caregiver Rating: 0

Domestic Worker: No ⓘ

Domestic Worker 7 Day Exemption: No ⓘ

Domestic Worker Preferred Day of Rest: Sunday ⓘ

Employee Number: 216

Weekly Hours Available: 40.00

Holiday Schedule: [Default Holiday Schedule - 1](#)

Cost Center: [Steph Cost Center](#)

Custom Reports List: None

Employment Status: Active

Authentication Status: **Locked** [Unlock](#)

Photo Set: No

Signature Set: No

Email confirm: Yes

6

5

4

Entries Accounts Certifications EVW Locations Notes Attachments Events Custom Fields History

Using the Employees Page (cont.)



7. View the punch entries for the employee
8. Ensure all time for the pay period is entered and approved before the submission due date

Navigation tabs: Entries, Accounts, Certifications, EVV Locations, Notes, Caregiver Ratings, Attachments, Custom Fields, History

Search filters:

- From (MM/DD/YYYY) [calendar icon]
- To (MM/DD/YYYY) [calendar icon]
- Type Punch Id
- Type Client Name
- Type Service Code
- Select Account Type [dropdown]
- Select Status [dropdown]

Buttons: Reset, Search

Entries **7** Export

Showing 13 out of 13 records

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
1897873	Jul 12, 2023			Client Transportation	1897872	Steph Cost Center - 75	Steph Client1	Client Transportation	0.00	Approved
1894616	Jun 07, 2023	05:00 AM	08:00 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:03:00	Approved
1894612	Jun 04, 2023	04:00 PM	05:00 PM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:01:00	Approved
1894611	Jun 03, 2023	04:00 PM	06:00 PM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:02:00	Approved
1897872	Jul 12, 2023	06:22 AM	06:25 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:00:03	Pending
1894620	Jun 23, 2023	07:18 AM	07:19 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:00:01	Pending

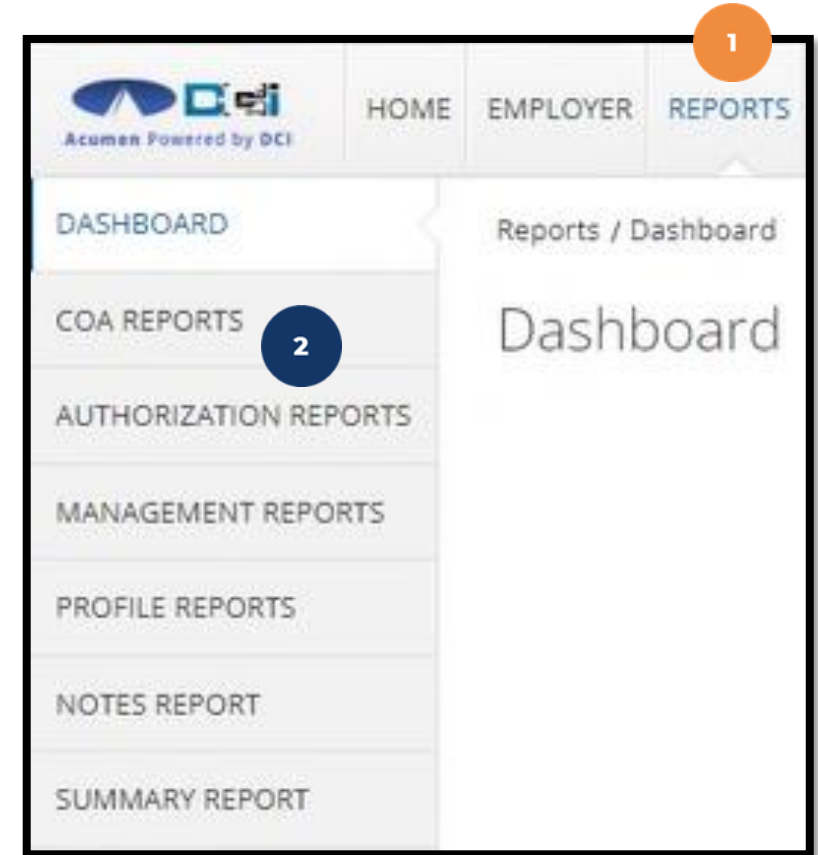
Entry Status



- **Unverified:** Entries that the Employer or Admin (someone other than the employee) enters or edits on behalf of an Employee. It is important to resolve the unverified entries, or they will not be paid.
- **Unvalidated:** Entries that are waiting for the business rule validation process to complete. This process runs multiple times an hour.
- **Pending:** Entries that are awaiting review and approval by the Employer
- **Rejected:** Entries that have been rejected by the Employer or a system process
- **Approved:** Entries that have been approved by the Employer and are ready to be processed
- **Batched:** An approved entry that has been included in a pending payroll batch
- **Processed:** Entries that have been processed and are ready for payroll

Using Reports

1. Select **Reports** on the main menu
2. Select a report category from the submenu
 - ✓ **COA Reports**
 - Punch Entries Report – Use the filters to locate specific entries
 - ✓ **Authorization (Budget) Reports**
 - Authorization Run Rate Report – View the budget usage breakdown by client, account type, or service code.
 - ✓ **Notes Reports**
 - Punch Entry Notes and Canned Statements (Tasks) Report - Pull service notes and canned statements (tasks) entered on punches
 - ✓ **Summary Report** - Breakdown of punches and percentages of budget remaining



Troubleshooting

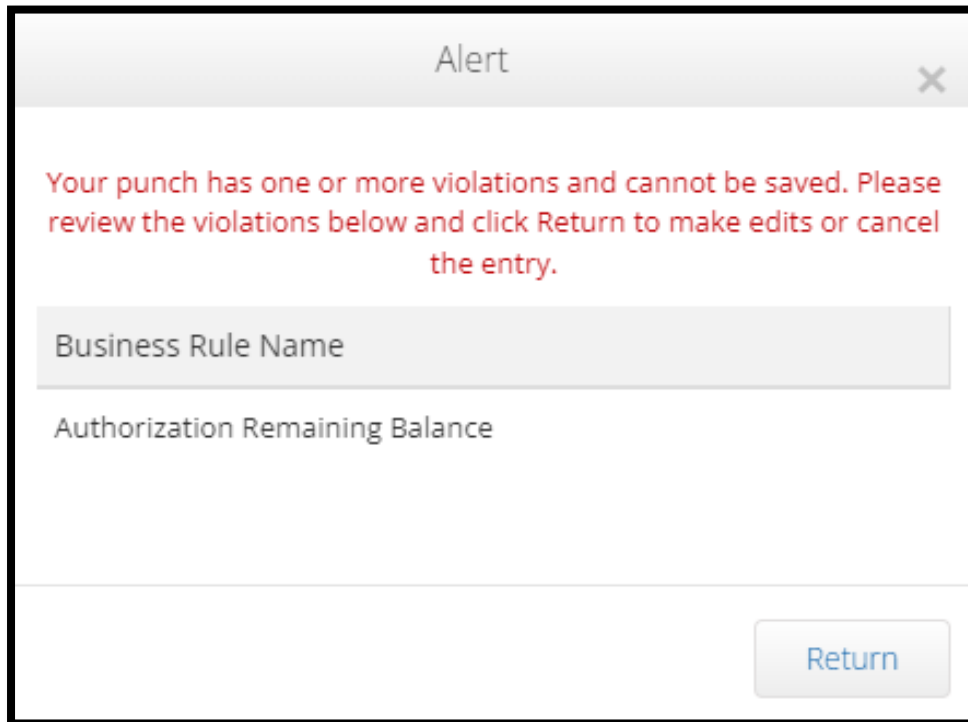
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Alerts

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

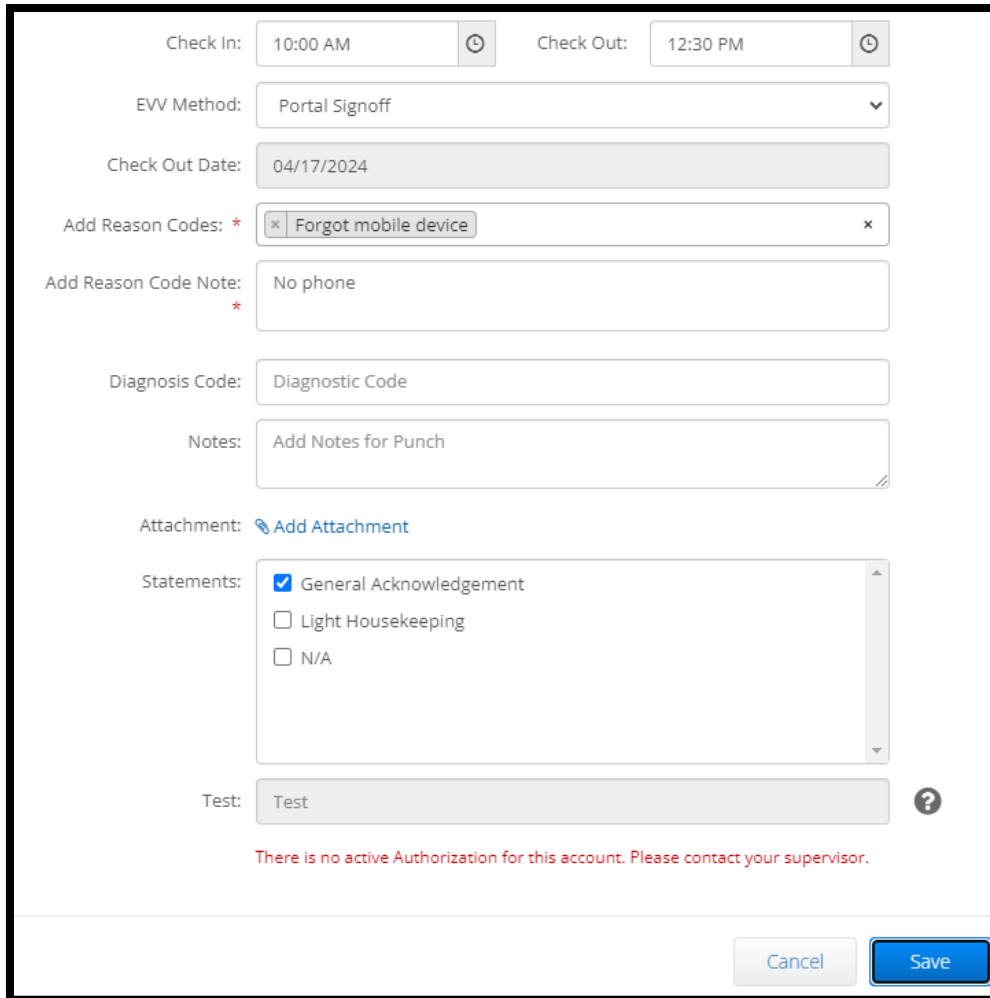
One of the most common business rules is the **Authorization Remaining Balance** rule. This rule checks to see that there are enough funds in the authorization/budget to cover the punch.






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

Alerts


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



Check In: 10:00 AM  Check Out: 12:30 PM 

EVV Method: Portal Signoff 

Check Out Date: 04/17/2024

Add Reason Codes: * 


Add Reason Code Note: *

Diagnosis Code:

Notes:

Attachment: [Add Attachment](#)

Statements: General Acknowledgement
 Light Housekeeping
 N/A

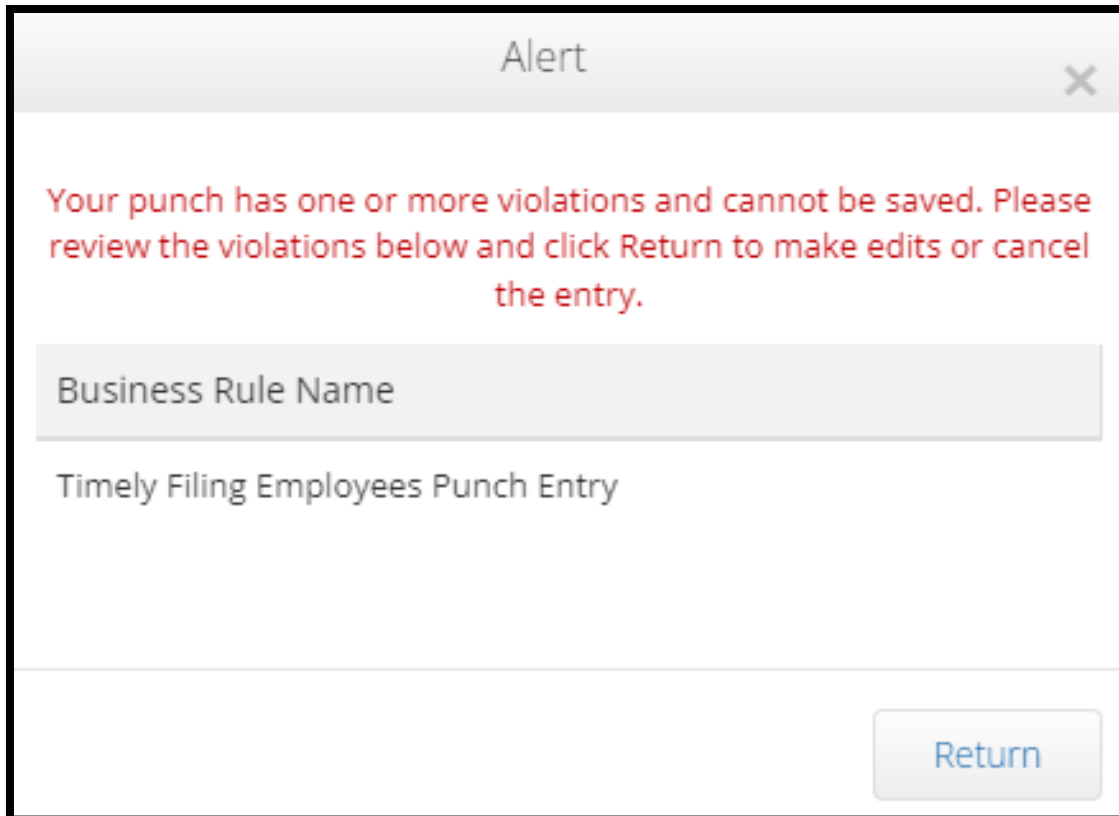
Test: 

There is no active Authorization for this account. Please contact your supervisor.

- The employee will receive this alert when attempting to punch for a date after the authorization/budget has expired
- They cannot save the punch
- The employee should contact the employer
- The employer should verify their authorization data in DCI

Alerts

Punches must be **entered AND approved** within 21 days of the date of service. After 21 days the **Timely Filing Employees Punch Entry** or the **Timely Filing Employee Punch Approval** rules will prohibit the punch from being saved.



Alert

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

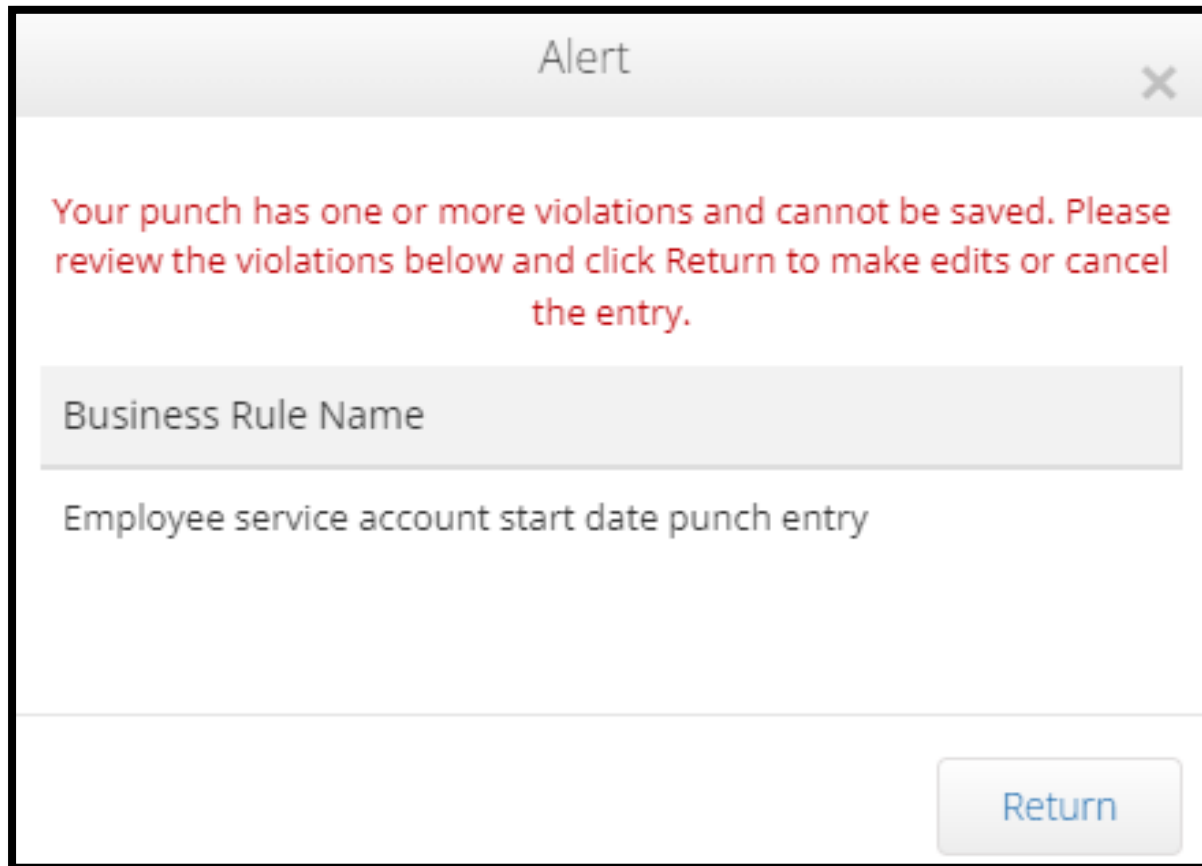
Business Rule Name
Timely Filing Employees Punch Entry

Return

- The employee will receive this alert when attempting to punch for a date that is more than 21 days after the date of service
 - The Timely Filing Employee Punch Approval alert would show if the punch was created within the timeframe, but the employer was attempting to APPROVE the punch more than 21 days after the date of service.
- The employee cannot save the punch
 - Or, in the case of the Timely Filing Employee Punch Approval alert, the employer would be unable to approve the punch.
- No action can be taken

Alerts

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



Alert

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

Business Rule Name

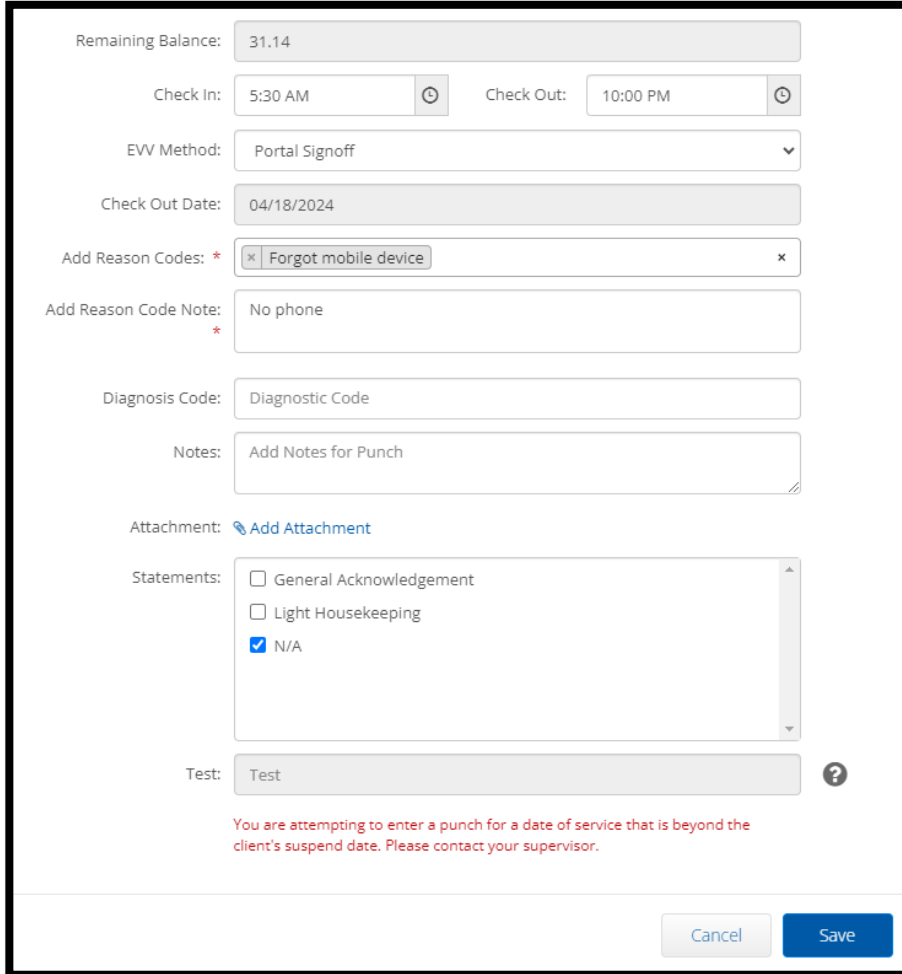
Employee service account start date punch entry

Return

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

Alerts

If enrollment is on hold, or the client cannot receive service, the client profile will be suspended. Punch entries cannot be added after the suspension date.



The screenshot shows a punch entry form with the following fields and values:

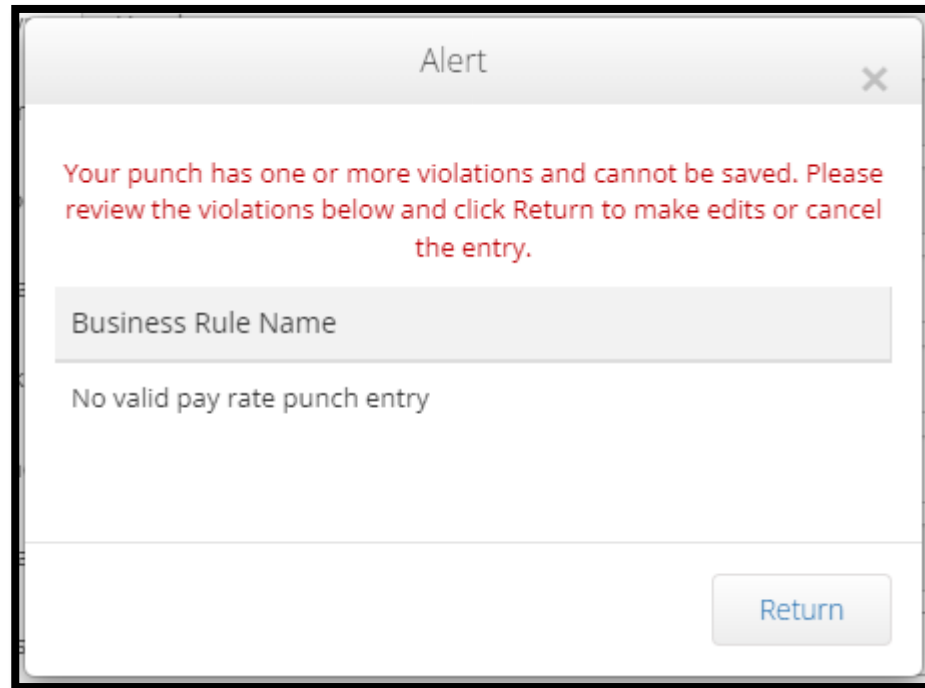
- Remaining Balance: 31.14
- Check In: 5:30 AM
- Check Out: 10:00 PM
- EW Method: Portal Signoff
- Check Out Date: 04/18/2024
- Add Reason Codes: * Forgot mobile device
- Add Reason Code Note: * No phone
- Diagnosis Code: Diagnostic Code
- Notes: Add Notes for Punch
- Attachment: Add Attachment
- Statements: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

A red error message at the bottom of the form reads: "You are attempting to enter a punch for a date of service that is beyond the client's suspend date. Please contact your supervisor." The "Save" button is disabled.

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

Alerts

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



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

Phone IVR (Interactive Voice Response)

***Option when access to a mobile device
or computer is limited**

Phone EVV Basics

- Employer - Confirm the landline or VoIP phone number on file with Acumen is for the client
 - ✓ The VoIP number must be tied to the client's home address
 - ✓ Employees must call from a recognized number only
 - ***Please note!** If calling from a number not associated with the client, you will receive an error message.
- Employee - Will be asked to validate the following information:
 - ✓ Last four digits of their social security number
 - ✓ PIN
 - ✓ MMDD of their birthday
 - ✓ Client Name & Service Code for the shift
- Client or Employer – Need client PIN for historical phone entries
 - ✓ Client PIN is on the Employer Good To Go letter



Clock In: Real Time Entry

1. Sign in:
 - ✓ Call (855) 807-9595 from the client's landline to start the shift
 - ✓ Enter the last four digits of the social security number
 - ✓ Enter PIN
 - ✓ Enter month/day of birth (MMDD)
2. Press #1 for hourly
3. Confirm the client's name with the prompt given
4. Press #1 for real time entry
5. Select the service code with the prompts given
6. Press #1 to confirm and save the punch
7. The recording will read back the punch details and then disconnect



Clock Out: Real Time Entry

1. Sign in:
 - ✓ Call (855) 807-9595 from the client's landline to end the shift
 - ✓ Enter the last four digits of the social security number
 - ✓ Enter PIN
 - ✓ Enter month/day of birth (MMDD)
2. Recording announces that there is an open punch
3. When prompted press #1 to confirm closing the punch
4. The punch is now closed, and the employee is clocked out
5. Press #2 to disconnect or Press #1 to open a new punch



Historical Entry

***Please note!** Historical entries are used for a missed punch or punch correction.

The client or employer must be present at the end of this process.

1. Sign in:
 - ✓ Call (855) 807-9595 from the client's landline to enter the shift
 - ✓ Enter the last four digits of the social security number
 - ✓ Enter PIN
 - ✓ Enter month/day of birth (MMDD)
2. Press #1 for hourly
3. Confirm the client's name with the prompt given
4. Select #2 for historical entry
5. Select the service code with the prompts given



Historical Entry (cont.)

6. Enter the date of service in MMDDYYYY format (i.e., December 28, 2023 = 12282023)
7. Enter the clock-in time in HH:MM (i.e., 0830)
8. Select #1 for AM or #2 for PM
9. Enter the clock-out time in HH:MM (i.e., 0530)
10. Select #1 for AM or #2 for PM
11. The recording will read back the punch details
12. Press #1 to confirm





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Historical Entry (cont.)

***Please Note!** The client or employer must be present for the following final steps:

13. Hand the phone to the client/employer who presses #1 when ready
14. The client/employer reviews the punch details and presses #1 to accept or #2 to reject the entry
15. The client/employer will validate the call using their PIN
16. The punch is created
17. The phone disconnects and the shift is recorded



Troubleshooting

- Is the employee having trouble signing in?
 - ✓ PIN not working? Update under profile settings
 - ✓ Employee can call Acumen to confirm their date of birth & last four digits of their social security number on their profile
- Is the employee having trouble clocking in?
 - ✓ Only call from the client's landline or VoIP
 - Contact Acumen to confirm the client's number
- Is the employee having trouble adding historical entries?
 - ✓ Enter the date & time in the correct format (MM/DD/YYYY & HH:MM)
 - ✓ Do not overlap with other employee's shifts
- Is the client having trouble validating the entry?
 - ✓ Employer calls Acumen to reset their client PIN



**Visit the Acumen Help Center
to learn more at:
acumenfiscalagent.zendesk.com**



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THANK YOU!

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