

Case Worker Training



Acumen Fiscal Agent

Innovation • Opportunity • Freedom

Agenda



Acumen Fiscal Agent
Innovation • Opportunity • Freedom



Basic Navigation



Client Details



Reports

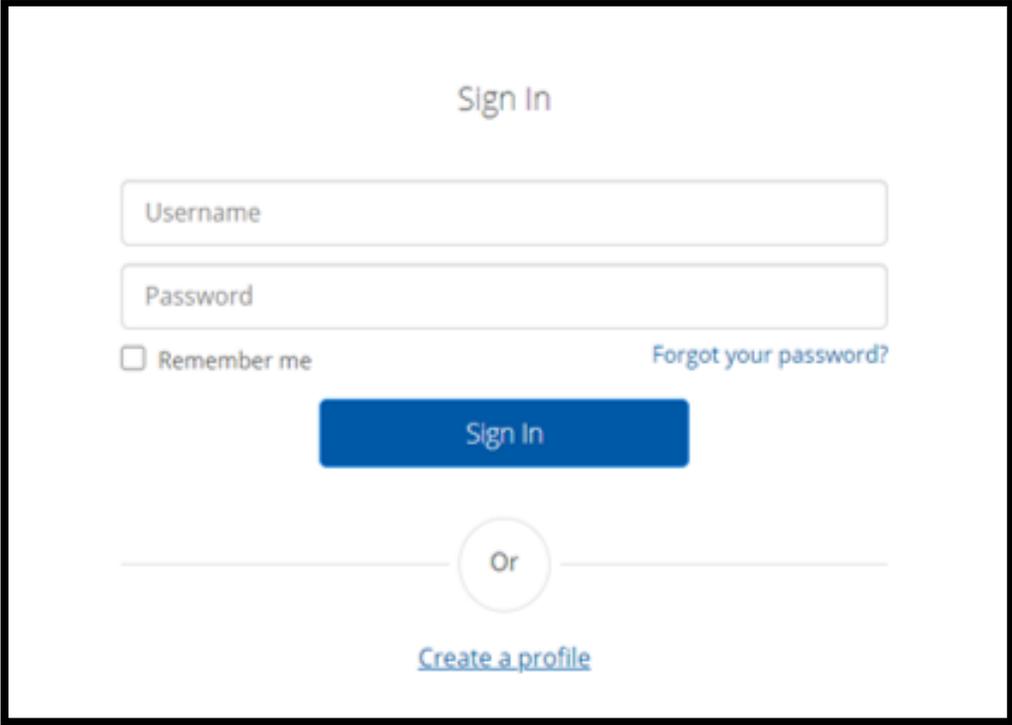
Basic Navigation

***Please note:** The Case Worker profile is view only (information is non-editable)

Case Worker Profile Basics

- The Case Worker profile allows users to review budget & entry details
- Only clients who are assigned will be visible

- Navigate to acumen.dcisoftware.com
- Log in to the Case Worker profile



Sign In

Username

Password

Remember me [Forgot your password?](#)

Sign In

Or

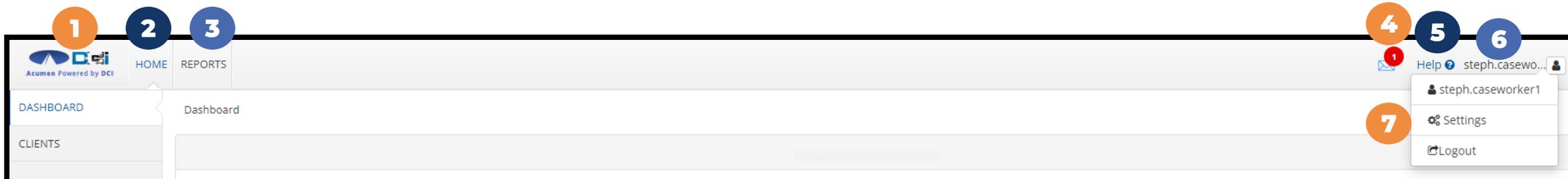
[Create a profile](#)

Main Menu



The top portion of the dashboard is called the main menu. From left to right it features:

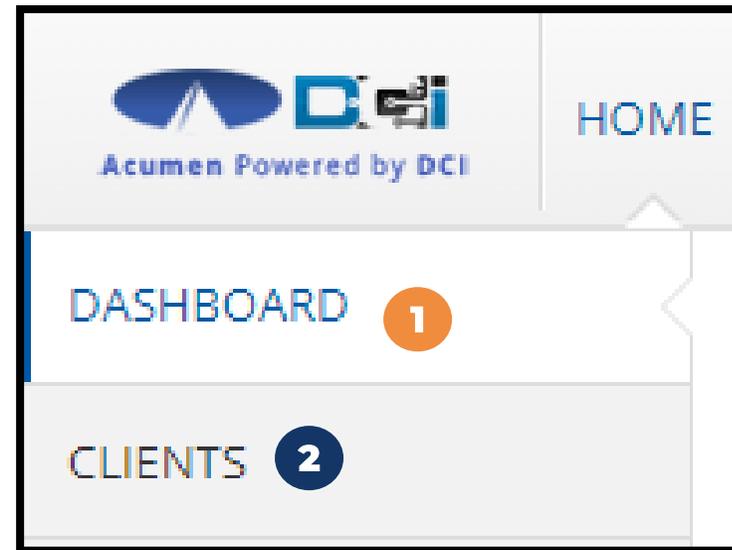
1. **Acumen Powered by DCI logo** - Click to return to the dashboard
2. **Home** - Click to return to the dashboard
3. **Reports** - Access and run reports
4. **Envelope Icon** - Access the messaging module to view system messages and communication
5. **Help** - Access the help center and search for articles by keyword or topic
6. **Username** - Displays the username of the user who is logged in to DCI
7. **Settings** – Indicated by the person icon. Click to update user settings including password, security question, email, or username (view the [Change Profile Setting](#) article for directions). Also, click to log out of DCI.



Submenu

The left portion of the dashboard is referred to as the submenu. From top to bottom it features:

1. **Dashboard** – Includes the Authorizations Widget and News Posts
2. **Clients** - Click to view client information such as basic demographics, associated entries and employees, authorizations, and diagnosis.



Authorizations Widget



The authorizations widget on the dashboard provides current information about a client's authorization(s) in a read-only view.

1. Enter the client's name in the Type Client Name field and select it when it populates
 - a. Optionally, also enter the Date of Service to narrow the search results.
2. Click **Search** to display the client's authorization information
 - Service Code – Service the client is eligible to receive. A client may have multiple service codes.
 - Start Date – The day the authorization starts
 - End Date – The day the authorization ends
 - Initial Balance – Total amount of authorized units or dollars
 - Remaining Balance – Amount deducted from the authorization after pre-authorization holds have been processed for billing and payment
 - Pre Authorization Holds – Amount deducted from the authorization that has not yet been processed for billing and payment
 - **Current Available Balance** – Total of the remaining balance minus any pre-authorization holds
 - Monthly Max – Maximum dollars available for the authorization per service per client per month
 - Weekly Max – Maximum dollars available for the authorization per service per client per week
 - Daily Max – Maximum dollars available for the authorization per service per client per day
3. Click **Display as Time** to view the authorization data in time instead of units. Once clicked, the button changes to **Display as Units**.
 - Authorizations measured in miles and dollars are excluded from time conversion. If minutes are in a decimal, the system will always round down to the whole minute.
4. Click **Reset** to exit the client's authorization. Repeat the process for additional clients.

The screenshot shows the 'Authorizations' widget interface. At the top, there are four numbered callouts: 1 (client name field), 2 (Search button), 4 (Reset button), and 3 (Display as Time button). Below the search bar, the client name 'Steph Client1' is displayed. A table of authorization data is shown below, with a yellow star highlighting the 'Current Available Balance' column.

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
RESPIRE (Hourly)	08/01/2022	07/31/2026		99985.87 Units	18.98 Units	99966.89 Units	5000.00 Units	500.00 Units	24.00 Units

News Posts



1. After logging into the mobile app, web portal, or mobile web, you may see one or more news posts, which display important information from the organization or program on a splash screen. Click **OK** to acknowledge the content on each.
2. Additionally, view news posts by scrolling down on the dashboard.
3. Click on a news post to open the details page

1 Subject - Sample News Post

Message:

- News posts are a way to notify system users of important announcements
- Examples of news posts may include:
 - Notifying users that a mobile app update is required
 - Notifying users that the office is closed due to a holiday
- It is important to read the news post in its entirety as your acknowledgment of the news post is tracked
- News posts can be displayed and viewed on the splash screen and/or on the dashboard

Created Date: Mar 13, 2024 08:56:22 AM
Created By: Kristen Ziegler

Ok

2

News Posts

Subject: Sample News Post
Message: News posts are a way to notify system users of important announcements
Created Date: Mar 13, 2024 08:56:22 AM
Created By: Kristen Ziegler

3

News Post Details - Sample News Post

News Post Details

Subject: Sample News Post
Created Date: Mar 13, 2024 08:56:22 AM
Profile Type: Case Worker
Created By: Kristen Ziegler

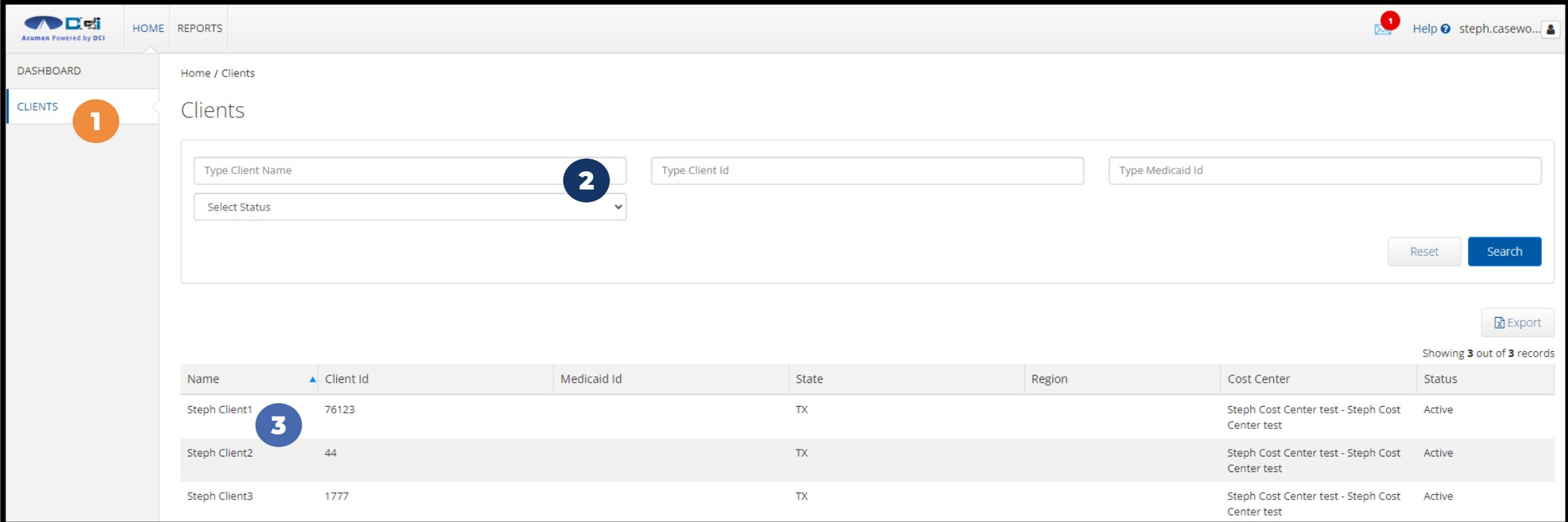
Message:

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- Examples of news posts may include:
 - Notifying users that a mobile app update is required
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- News posts can be displayed and viewed on the splash screen and/or on the dashboard

Client Details

Clients Tab

1. Click the **Clients** tab on the submenu to view the list of clients in AAA
2. If needed, use filters to narrow the results and click the blue **Search** button to return updated results.
3. Click anywhere on the client row to open the Client Details page



Home / Clients

Clients

Type Client Name Type Client Id Type Medicaid Id

Select Status

Reset Search

Export

Showing 3 out of 3 records

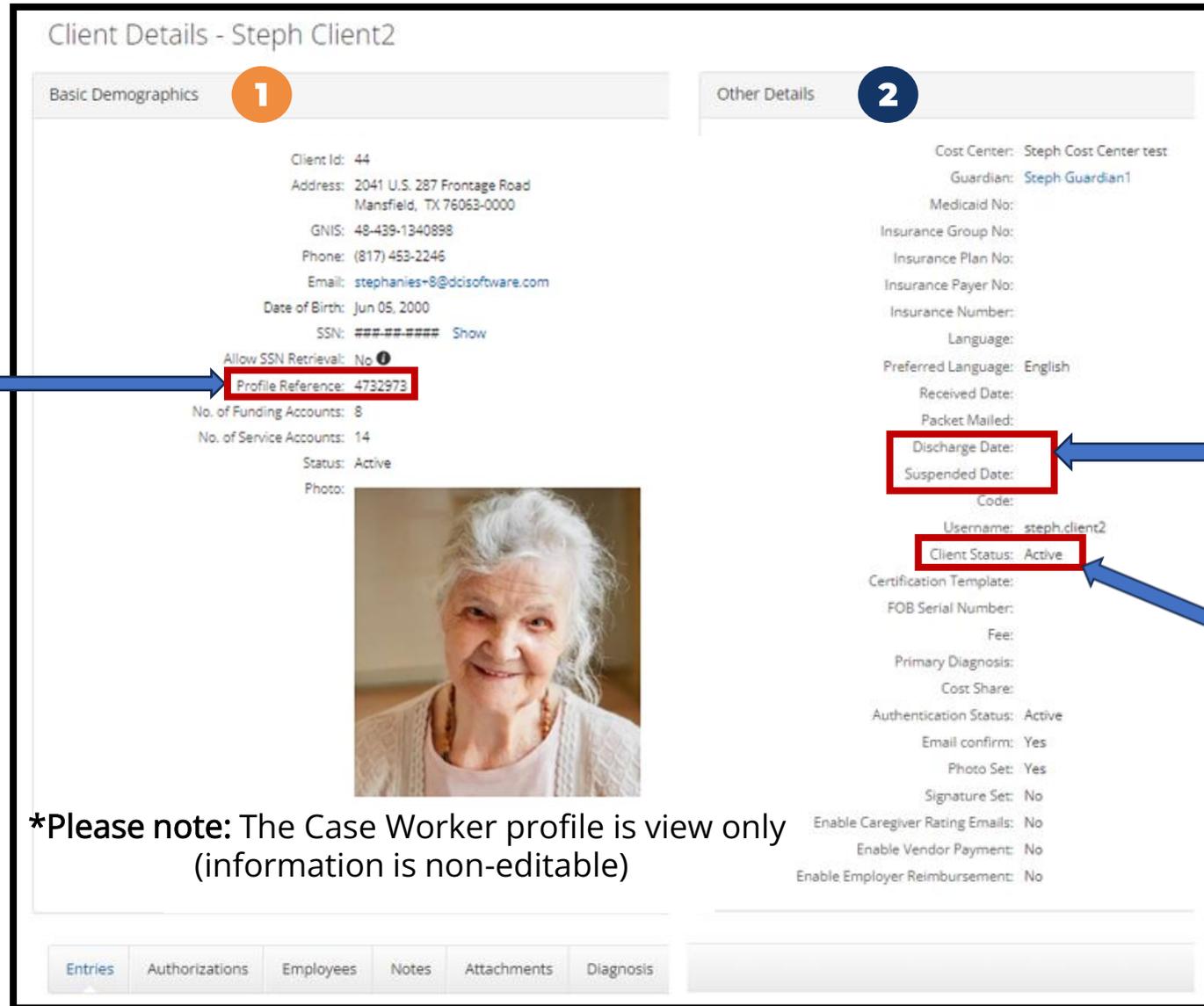
Name	Client Id	Medicaid Id	State	Region	Cost Center	Status
Steph Client1	76123		TX		Steph Cost Center test - Steph Cost Center test	Active
Steph Client2	44		TX		Steph Cost Center test - Steph Cost Center test	Active
Steph Client3	1777		TX		Steph Cost Center test - Steph Cost Center test	Active

Client Details Page

1. **Basic Demographics widget** – View client data including contact information
2. **Other Details widget** – View guardian if applicable, username, and status.

Profile Reference

- If the profile reference field is not displayed, there is no data for this field.
- May be used for program-specific data.



Client Details - Steph Client2

Basic Demographics 1

Client Id: 44
Address: 2041 U.S. 287 Frontage Road
Mansfield, TX 76063-0000
GNIS: 48-439-1340898
Phone: (817) 453-2246
Email: stephanies-8@dcisoftware.com
Date of Birth: Jun 05, 2000
SSN: ###-##-#### Show
Allow SSN Retrieval: No
Profile Reference: 4732973
No. of Funding Accounts: 8
No. of Service Accounts: 14
Status: Active
Photo:

Other Details 2

Cost Center: Steph Cost Center test
Guardian: Steph Guardian1
Medicaid No:
Insurance Group No:
Insurance Plan No:
Insurance Payer No:
Insurance Number:
Language:
Preferred Language: English
Received Date:
Packet Mailed:
Discharge Date:
Suspended Date:
Code:
Username: steph.client2
Client Status: Active
Certification Template:
FOB Serial Number:
Fee:
Primary Diagnosis:
Cost Share:
Authentication Status: Active
Email confirm: Yes
Photo Set: Yes
Signature Set: No
Enable Caregiver Rating Emails: No
Enable Vendor Payment: No
Enable Employer Reimbursement: No

Entries Authorizations Employees Notes Attachments Diagnosis

*Please note: The Case Worker profile is view only (information is non-editable)

Discharged =
Discharged

Suspended =
On-Hold

Client Status

- Active
- Deceased
- Inactive
- Discharged
- Suspended

Client Details Page

3. **Entries** – All entries associated with the client. Click the hyperlinked ID number to view entry details.
4. **Authorizations** – Alternate way to view the client’s authorizations. Additionally, view via the Authorizations Widget on the dashboard.
5. **Employees** – View employees associated with the client
6. **Notes** – View notes regarding the client entered by the employer
7. **Attachments** – View attachments pertaining to the client
8. **Diagnosis** – View client diagnosis information

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Basic Demographics

Client Id: 44
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Mansfield, TX 76063-0000
GNIS: 48-439-1340898
Phone: (817) 453-2246
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Allow SSN Retrieval: No ⓘ
Profile Reference: 4732973
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Status: Active
Photo: 

Other Details

Cost Center: Steph Cost Center test
Guardian: Steph Guardian1
Medicaid No:
Insurance Group No:
Insurance Plan No:
Insurance Payer No:
Insurance Number:
Language:
Preferred Language: English
Received Date:
Packet Mailed:
Discharge Date:
Suspended Date:
Code:
Username: steph.client2
Client Status: Active
Certification Template:
FOB Serial Number:
Fee:
Primary Diagnosis:
Cost Share:
Authentication Status: Active
Email confirm: Yes
Photo Set: Yes
Signature Set: No
Enable Caregiver Rating Emails: No
Enable Vendor Payment: No
Enable Employer Reimbursement: No

3 Entries 4 Authorizations 5 Employees 6 Notes 7 Attachments 8 Diagnosis

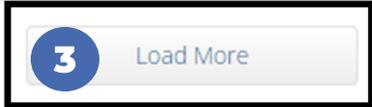
Client Details Page – Entries Tab



1. Click the **Entries** tab to view all entries associated with the client
2. If needed, use filters to narrow the results and click the blue **Search** button to return updated results.
3. Click **Load More** at the bottom of the page to view all entries
4. Select an entry ID to view the punch detail page which includes basic punch data, EVV, and notes and/or attachments for the shift.
5. Information can be exported to a CSV file by clicking the **Export** button on any tab. Click to open and access data in Excel.

The screenshot shows the 'Entries' tab selected in a navigation bar. Below the navigation bar are filter fields: 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Punch Id', 'Type Service Code', 'Type Employee/Program/Vendor Name', 'Employee Service', and 'Hourly'. There are 'Reset' and 'Search' buttons. At the bottom right, there is an 'Export' button. Below the filters is a table with one entry. The entry ID '58207' is highlighted with a callout '4'. The table has columns: Id, Service Date, Account Type, Cost Center, Employee/Program/Vendor Name, Service Code, Units, and Status. The entry shows a service date of Aug 24, 2022, for 'Employee Service' at 'Steph Cost Center test' for 'Steph Employee1' with 'RESPITE (Hourly)' units and a 'Pending' status. A 'Load More' button is highlighted with a callout '3' at the bottom of the table area. A callout '5' points to the 'Export' button.

Id	Service Date	Account Type	Cost Center	Employee/Program/Vendor Name	Service Code	Units	Status
58207	Aug 24, 2022	Employee Service	Steph Cost Center test	Steph Employee1	RESPITE (Hourly)	Hourly	Pending



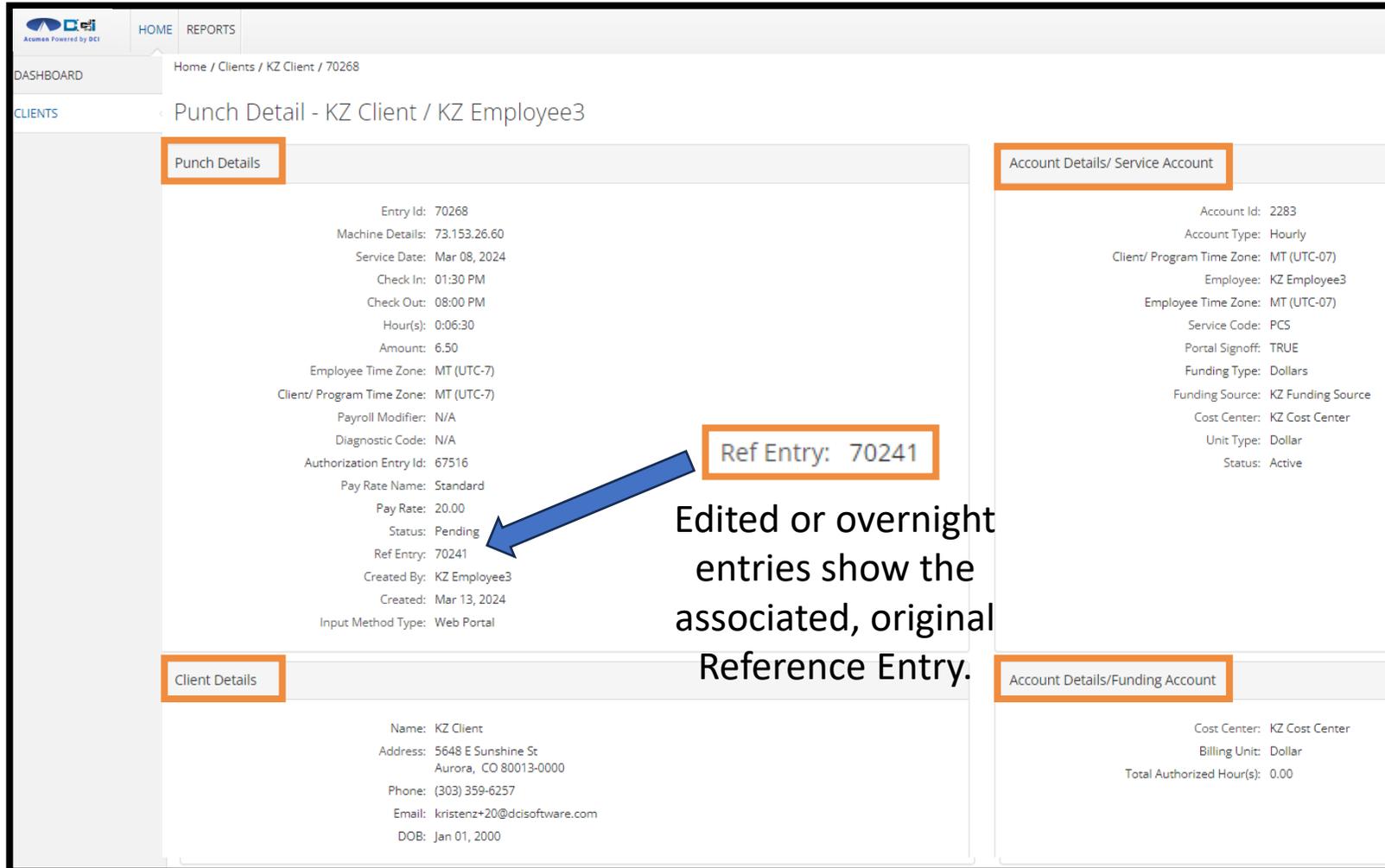
Entry Status



- **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:** Temporary status. Punch will be in pending or rejected status after system processes.
- **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
- **Processed:** Entries that have been processed and are ready for payroll
- **Batched:** An approved entry that has been included in a pending payroll batch
- **Paid:** An approved entry that has been paid out

Punch Detail - Widgets

Select an entry to view the punch detail page which includes widget boxes containing punch information and account and client details.



Punch Details

Entry Id: 70268
Machine Details: 73.153.26.60
Service Date: Mar 08, 2024
Check In: 01:30 PM
Check Out: 08:00 PM
Hour(s): 0:06:30
Amount: 6.50
Employee Time Zone: MT (UTC-7)
Client/ Program Time Zone: MT (UTC-7)
Payroll Modifier: N/A
Diagnostic Code: N/A
Authorization Entry Id: 67516
Pay Rate Name: Standard
Pay Rate: 20.00
Status: Pending
Ref Entry: 70241
Created By: KZ Employee3
Created: Mar 13, 2024
Input Method Type: Web Portal

Account Details/ Service Account

Account Id: 2283
Account Type: Hourly
Client/ Program Time Zone: MT (UTC-07)
Employee: KZ Employee3
Employee Time Zone: MT (UTC-07)
Service Code: PCS
Portal Signoff: TRUE
Funding Type: Dollars
Funding Source: KZ Funding Source
Cost Center: KZ Cost Center
Unit Type: Dollar
Status: Active

Client Details

Name: KZ Client
Address: 5648 E Sunshine St
Aurora, CO 80013-0000
Phone: (303) 359-6257
Email: kristenz+20@dcisoftware.com
DOB: Jan 01, 2000

Account Details/Funding Account

Cost Center: KZ Cost Center
Billing Unit: Dollar
Total Authorized Hour(s): 0.00

Ref Entry: 70241

Edited or overnight entries show the associated, original Reference Entry.

Punch Detail – Widgets cont'd.



Additional widget boxes include EVV data, reason codes, and statements (tasks).

EVV Details	Reason Codes
<p>EVV Method: Portal Signoff EW: No Clock In Geolocation: N/A ClockOut Geolocation: N/A Clock in EVV Address: N/A Clock out EVV Address: N/A Employee Fail InHome Validation: N/A Supervisor Approved Failed InHome Validation: N/A Schedule Comparison: Matches Schedule</p>	<p>Reason Code Name: Forgot to Clock In/Out Reason Code: KZ123 Free Text Note: Forgot to clock in Description: Forgot to Clock In/Out</p>
Statements	
1. Personal hygiene	

Punch Detail - Tabs



View the tabs on the punch detail page, located beneath the widgets.

1. **Notes** – View employee notes on the punch, reason codes, reason code notes, and statements/tasks.
2. **Attachments** – View employee attachments on the punch
3. **Events** – Log including date/time, subject, description, input type (web portal or mobile app), OS, OS version, app version, and user/system process for all punch activity including EVV method captured, updates, edits, system processes, approvals, rejections, and views.
4. **Verifications** – EVV verification data for the punch along with the status of the verification (some require approval)
5. **Map** – Visual location of the mobile app punch

The screenshot shows the 'Notes' tab selected in the punch detail interface. The navigation bar at the top has five tabs: 1 (Notes), 2 (Attachments), 3 (Events), 4 (Verifications), and 5 (Map). Below the tabs is a search filter section with the following fields:

- From (MM/DD/YYYY) with a calendar icon
- To (MM/DD/YYYY) with a calendar icon
- Select Type dropdown
- Select Sub Type dropdown
- Subject text input
- Type Added By text input
- Reset button
- Search button
- Export button

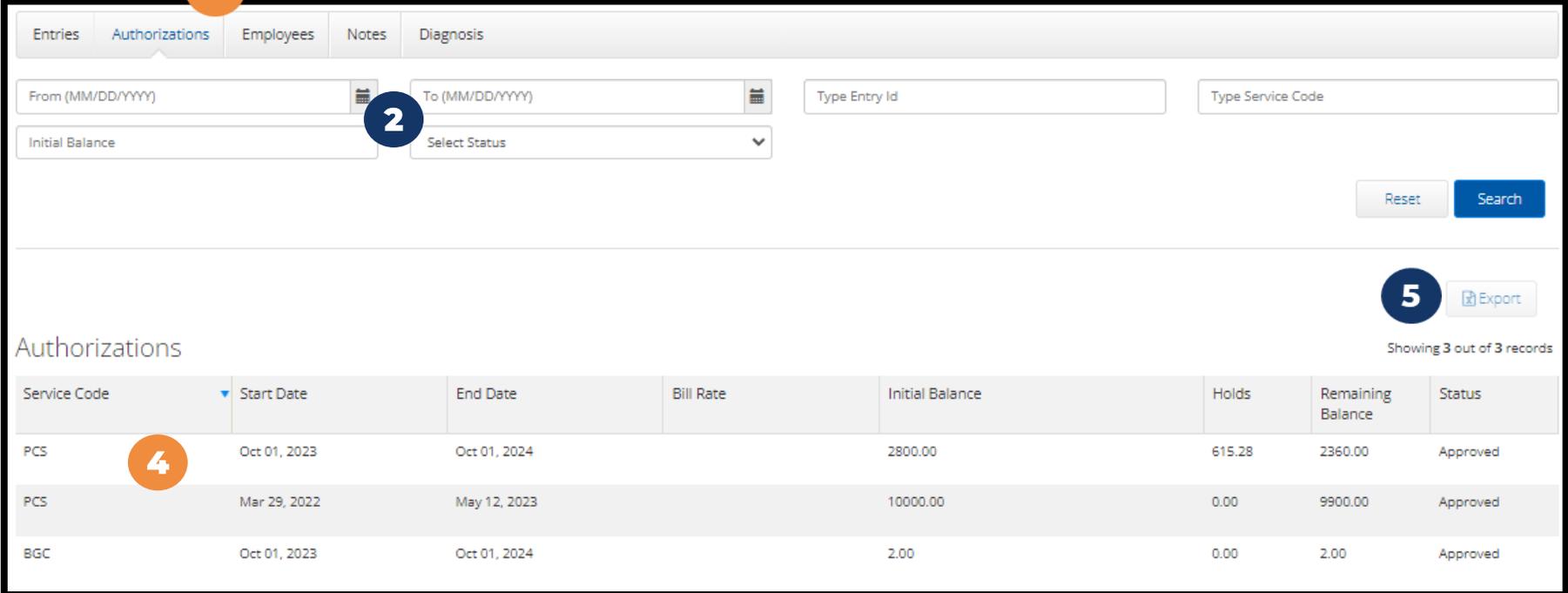
The main content area displays a table of notes with the following data:

Date	Type	Sub Type	Subject	Body	Added By
Mar 13, 2024	Note		Employee Punch Note	Employee Punch Note	KZ Employee3
Mar 13, 2024	Note		Punch Created	1. Personal hygiene	KZ Employee3
Mar 13, 2024	Note		Punch Created	Forgot to Clock In/Out	KZ Employee3

Showing 3 out of 3 records

Client Details Page – Authorizations Tab

1. Click the **Authorizations** tab to view all authorizations for the client
2. If needed, use filters to narrow the results and click the blue **Search** button to return updated results.
3. Click **Load More** at the bottom of the page to view all authorizations
4. Select an authorization to view the authorization detail page which includes basic authorization data, account details, associated entries, rate changes, notes and/or attachments for the authorization, along with an activity log.
5. Information can be exported to a CSV file by clicking the **Export** button on any tab. Click to open and access data in Excel



1

2

4

5

3

Service Code	Start Date	End Date	Bill Rate	Initial Balance	Holds	Remaining Balance	Status
PCS	Oct 01, 2023	Oct 01, 2024		2800.00	615.28	2360.00	Approved
PCS	Mar 29, 2022	May 12, 2023		10000.00	0.00	9900.00	Approved
BGC	Oct 01, 2023	Oct 01, 2024		2.00	0.00	2.00	Approved

Authorization Details Page – Widgets



Select an authorization to view the authorization detail page which includes widget boxes containing authorization and account details.

Home / Clients / Steph Client1 / 57938

Authorization Detail - 57938

Authorization Details

Start Date: Aug 01, 2022
End Date: Jul 31, 2026
Expiration Date: Aug 16, 2026
Initial Balance: 5616.00
Remaining Balance: 5361.00
Monthly Max: 468.00
Weekly Max: 9.00
Daily Max: 1.00
Billing Unit: Dollar
Non Billable: No
Status: Approved
Approved By: Stephanie Smith
Created Date: Aug 16, 2022

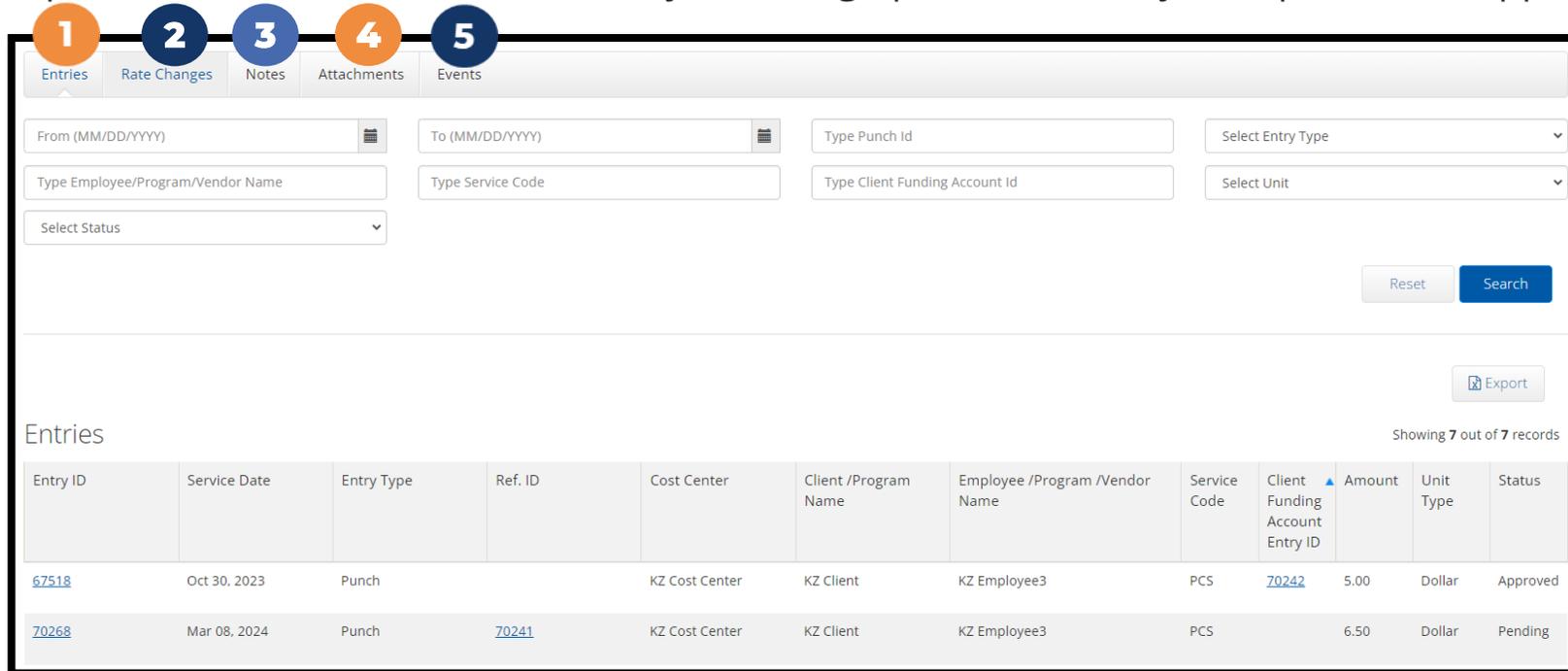
Account Details (Auth)

Account Id: 2935
Account Type: Hourly
Client: Steph Client1
Service Code: RESPITE (Dollars)
Funding Source: Steph Funding Source
Cost Center: Steph Cost Center test
Unit Type: Dollar
Status: Active

Authorizations Details Page – Tabs

View the tabs on the authorization detail page, located beneath the widgets.

1. **Entries** – View all entries associated with the authorization. Click the hyperlinked ID number to view entry details.
2. **Rate Changes** – History of all bill rate changes on the authorization
3. **Notes** – View notes created on the authorization
4. **Attachments** – View attachments pertaining to the authorization
5. **Events** - Log including date/time, subject, description, input type (web portal or mobile app), OS, OS version, app version, and user/system process for all authorization activity including updates, edits, system processes, approvals, rejections, and views.



1 Entries 2 Rate Changes 3 Notes 4 Attachments 5 Events

From (MM/DD/YYYY) To (MM/DD/YYYY) Type Punch Id Select Entry Type

Type Employee/Program/Vendor Name Type Service Code Type Client Funding Account Id Select Unit

Select Status

Reset Search

Export

Entries Showing 7 out of 7 records

Entry ID	Service Date	Entry Type	Ref. ID	Cost Center	Client /Program Name	Employee /Program /Vendor Name	Service Code	Client Funding Account Entry ID	Amount	Unit Type	Status
67518	Oct 30, 2023	Punch		KZ Cost Center	KZ Client	KZ Employee3	PCS	70242	5.00	Dollar	Approved
70268	Mar 08, 2024	Punch	70241	KZ Cost Center	KZ Client	KZ Employee3	PCS		6.50	Dollar	Pending

Client Details Page – Employees Tab



1. Click the **Employees** tab to view all employees associated with the client
2. If needed, use filters to narrow the results and click the blue **Search** button to return updated results.
3. Information can be exported to a CSV file by clicking the Export button on any tab. Click to open and access data in Excel.

Please note! Clicking on the employee line does not open the employee details. However, employers do have access to employee details.

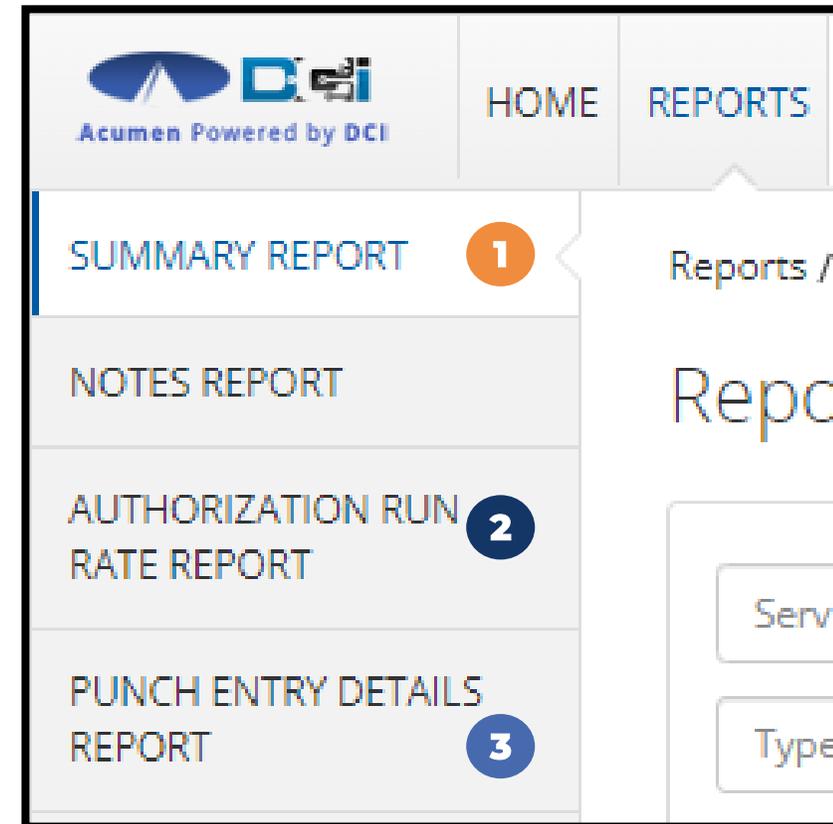
Employee Name	Service Code	Pay Rate Name	Pay Rate	Pay Rate Effective Date	Pay Rate End Date
Steph Employee1	RESPITE (Hourly)	Standard	12.00	17 Aug 2022	
Steph Employee2	RESPITE (Hourly)	Standard	12.00	24 Aug 2022	

Reports

Key Reports

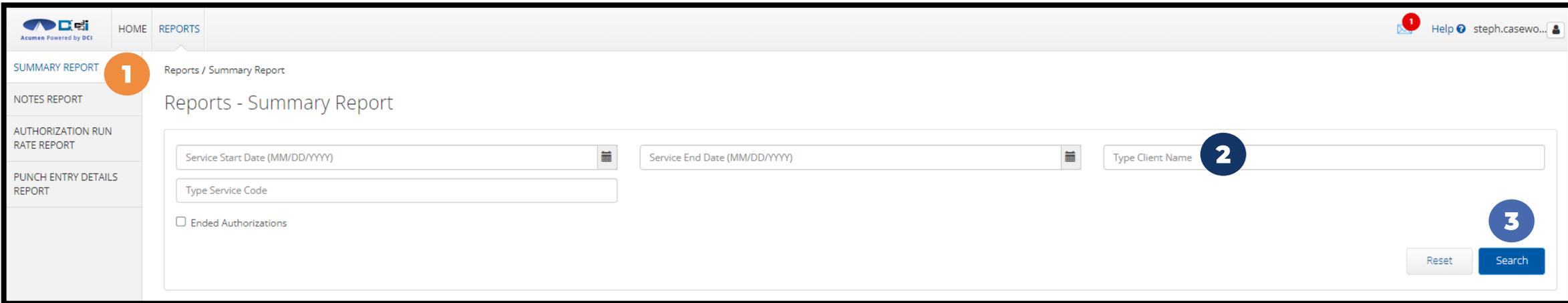
Available on the submenu:

1. **Summary Report** - The default and most popular report for case workers which provides authorization and utilization information
2. **Authorization Run Rate Report** – Shows actual versus projected budget usage
3. **Punch Entry Details Report** – View all punch entries for associated clients based on selected filters. Report column options include who created the punch, status, date of service, start and end times, and service code.



Summary Report

1. Select **Summary Report** from the submenu
2. Type and select the client's name in the filter. Optionally utilize additional filters as needed.
3. Click the blue **Search** button



The screenshot shows the Acumen Fiscal Agent web interface. The top navigation bar includes 'HOME' and 'REPORTS'. The left sidebar contains a menu with 'SUMMARY REPORT' (highlighted with a red circle and the number 1), 'NOTES REPORT', 'AUTHORIZATION RUN RATE REPORT', and 'PUNCH ENTRY DETAILS REPORT'. The main content area is titled 'Reports - Summary Report'. It features three input fields: 'Service Start Date (MM/DD/YYYY)', 'Service End Date (MM/DD/YYYY)', and 'Type Client Name' (highlighted with a red circle and the number 2). Below these is a 'Type Service Code' field and a checkbox for 'Ended Authorizations'. At the bottom right, there are 'Reset' and 'Search' buttons (the 'Search' button is highlighted with a red circle and the number 3). The top right corner shows a user profile for 'steph.casewo...' and a notification icon.

Summary Report Results

Download To PDF

6

1. Client information
2. Budget Period
3. Budget Balances
4. Budget Time Remaining
5. Scroll down the report to view punches by employee
6. Click the **Download To PDF** button to save the report

Spending Summary as of: 03/12/2024

Client Name: Steph Client1

Participant Number: 76123 Case Manager: Steph Case Worker1 1

Phone: (817) 453-8852

Steph Funding Source

Auth	Start: 08/01/2022 2	End: 07/31/2026	% Time Elapsed: 40	 4
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Dollars (Dollar Based Programs)

Authorization Name	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
RESPITE (Dollars)	\$5616.00	\$255.00	\$220.00	\$5361.00 3	95 %

Units (Unit Based Programs)

Authorization Name	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
RESPITE (Hourly)		14.16	18.95	99985.84	99 %

Client Name: Steph Client1 / Employee Name: Steph Employee1 5

Authorization Name : RESPITE (Hourly) (ID : 57934) : From 08/01/2022 To 07/31/2026

Service Code	Cost Center	Entry ID	Entry Type	Account Type	Employee / Program Name	Date of Service	Amount	Bill Rate
RESPITE (Hourly)	Steph Cost Center test	70232	Punch	Hourly	Steph Employee1	03/11/2024	-0.03	15.00
RESPITE (Hourly)	Steph Cost Center test	70044	Punch	Hourly	Steph Employee1	02/10/2024	-1.50	15.00



Authorization Run Rate Report

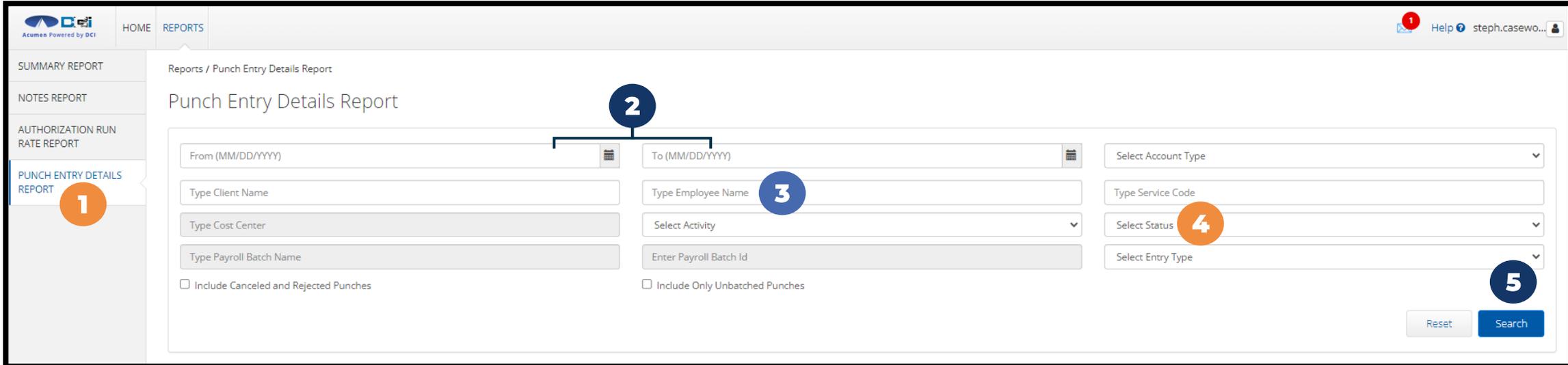
1. Select **Authorization Run Rate Report** from the submenu
2. Type and select the client's name in the filter
3. Click the blue **Search** button

The screenshot shows the 'Authorization Run Rate Report' interface. On the left sidebar, the 'AUTHORIZATION RUN RATE REPORT' menu item is highlighted with a red circle containing the number '1'. The main content area has a title 'Authorization Run Rate Report' and a breadcrumb 'Reports / Authorization Run Rate Report'. Below the title are several input fields: 'Type Client Name' (with a blue circle containing '2' over it), 'Type Funding Source Name', 'Type Service Code', and 'Type Cost Center'. To the right is a 'Select Account Type' dropdown menu. Below these fields are three checkboxes: 'Include Future Authorizations', 'Include Ended Authorizations', and 'Include Discharged Clients Authorizations'. At the bottom right, there are 'Reset' and 'Search' buttons, with the 'Search' button highlighted by a blue circle containing the number '3'. The top navigation bar includes 'HOME' and 'REPORTS' tabs, and a user profile 'steph.casewo...' with a notification icon.

Punch Entry Details Report

1. Select Punch Entry Details Report from the submenu
2. Filter by date range
3. Filter by employee
4. Filter by punch status
5. Click the blue Search button

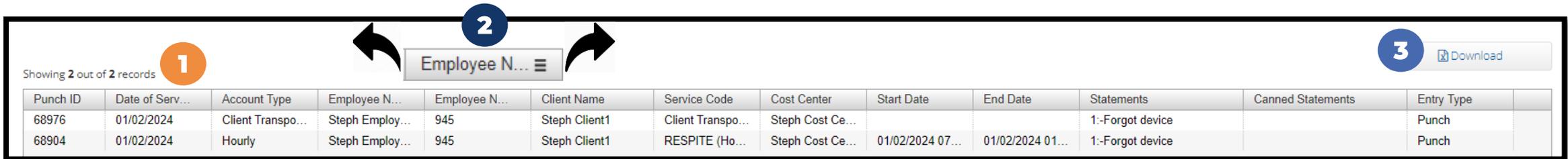
Please note! Searching without filters will pull ALL punch entries for ALL associated clients in DCI



The screenshot displays the Acumen Fiscal Agent web application interface. The top navigation bar includes the Acumen logo, "HOME", and "REPORTS". The left sidebar contains a menu with "SUMMARY REPORT", "NOTES REPORT", "AUTHORIZATION RUN RATE REPORT", and "PUNCH ENTRY DETAILS REPORT" (highlighted with a red circle and the number 1). The main content area is titled "Reports / Punch Entry Details Report" and "Punch Entry Details Report". The search area includes several filters: "From (MM/DD/YYYY)" and "To (MM/DD/YYYY)" (highlighted with a red circle and the number 2), "Type Client Name", "Type Employee Name" (highlighted with a red circle and the number 3), "Type Cost Center", "Select Activity", "Enter Payroll Batch Id", "Select Account Type", "Type Service Code", "Select Status" (highlighted with a red circle and the number 4), and "Select Entry Type". There are also checkboxes for "Include Canceled and Rejected Punches" and "Include Only Unbatched Punches". At the bottom right, there are "Reset" and "Search" buttons (the "Search" button is highlighted with a red circle and the number 5).

Download Report Results

1. Report results (for all reports except the Summary Report) populate in the results table
2. Optionally, drag and drop column headers into the desired order before downloading.
3. Click Download



Showing 2 out of 2 records

Employee N... ≡

Download

Punch ID	Date of Serv...	Account Type	Employee N...	Employee N...	Client Name	Service Code	Cost Center	Start Date	End Date	Statements	Canned Statements	Entry Type
68976	01/02/2024	Client Transpo...	Steph Employ...	945	Steph Client1	Client Transpo...	Steph Cost Ce...			1:-Forgot device		Punch
68904	01/02/2024	Hourly	Steph Employ...	945	Steph Client1	RESPITE (Ho...	Steph Cost Ce...	01/02/2024 07...	01/02/2024 01...	1:-Forgot device		Punch

Download Report Wizard



1. After clicking the download button, the Download Report Wizard opens.
2. Select all desired columns in Available Columns to download
3. Click the > **single right arrow** to add to Selected Columns
4. Alternatively, click the >> **double right arrows** to add all Available Columns to Selected Columns.
5. Click the < **single left arrow** to remove the column from the Selected Columns
6. Alternatively, click the << **double left arrows** to remove all columns from the Selected Columns.
7. Reorder selected column items by dragging and dropping into the preferred order
8. Click **Next**

The screenshot shows the 'Download Report Wizard' window. At the top right, a red circle with the number '1' is next to the window title. Below the title bar are two tabs: 'Columns' (active) and 'Options'. Each tab has a search box labeled 'Search Column' and a 'Search' button. The 'Columns' tab is divided into two panes: 'Available Columns' (with a blue circle '2' next to its title) and 'Selected Columns'. The 'Available Columns' pane lists: Punch ID, Reference Punch ID, Date of Service, Employee/Vendor Name, and Client/ Residential/ Day Program Name. The 'Selected Columns' pane lists: Client/ Residential/ Day Program Name, Service Code, Start Date (with an orange circle '7' next to it), End Date, and Statements. Between the panes are five arrow buttons: 'Undo' (blue), '>>' (orange circle '4'), '>' (blue circle '3'), '<' (blue circle '5'), '<<' (blue circle '6'), and 'Redo' (blue). At the bottom right, there are 'Cancel' and 'Next' buttons, with a blue circle '8' next to the 'Next' button.

Download Report Wizard cont'd.



1. Click the Format field drop-down to choose the download file format. Choices include Excel, PDF, CSV, and Tab Delimited.
 - PDFs have a 10-column limitation for report downloads
 - The Summary Report download is preformatted as a PDF
 - Excel is the recommended format for the Punch Entry Details Report
2. If PDF is selected, the Orientation field will become available. Select Portrait or Landscape.
3. Save as Report Download Preference box – If checked, DCI will save the format and orientation preferences for subsequent downloads.
4. Click the blue **Download** button
5. Click the blue **Yes** button to confirm
The report downloads to your computer. Check your download folder to open and view.

A screenshot of the "Download Report Wizard" interface, specifically the "Options" tab. The "Format" dropdown menu is set to "PDF" and is marked with a red circle containing the number 1. The "Orientation" dropdown menu is set to "Select Orientation" and is marked with a blue circle containing the number 2. A checkbox labeled "Save as Report Download Preference" is checked and marked with a blue circle containing the number 3. The "Download" button is highlighted with a red circle containing the number 4. There are also "Back" and "Cancel" buttons visible.A screenshot of an "Alert" dialog box. The text inside the dialog asks, "Are you sure you want to download the report - Punch Entry Details Report?". There are two buttons: "No" and "Yes". The "Yes" button is highlighted with a blue circle containing the number 5.

System Demo



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