Case Worker Training

Acumen Fiscal Agent

Innovation • Opportunity • Freedom

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Agenda

- Basic Navigation
- Client Details
- Reports

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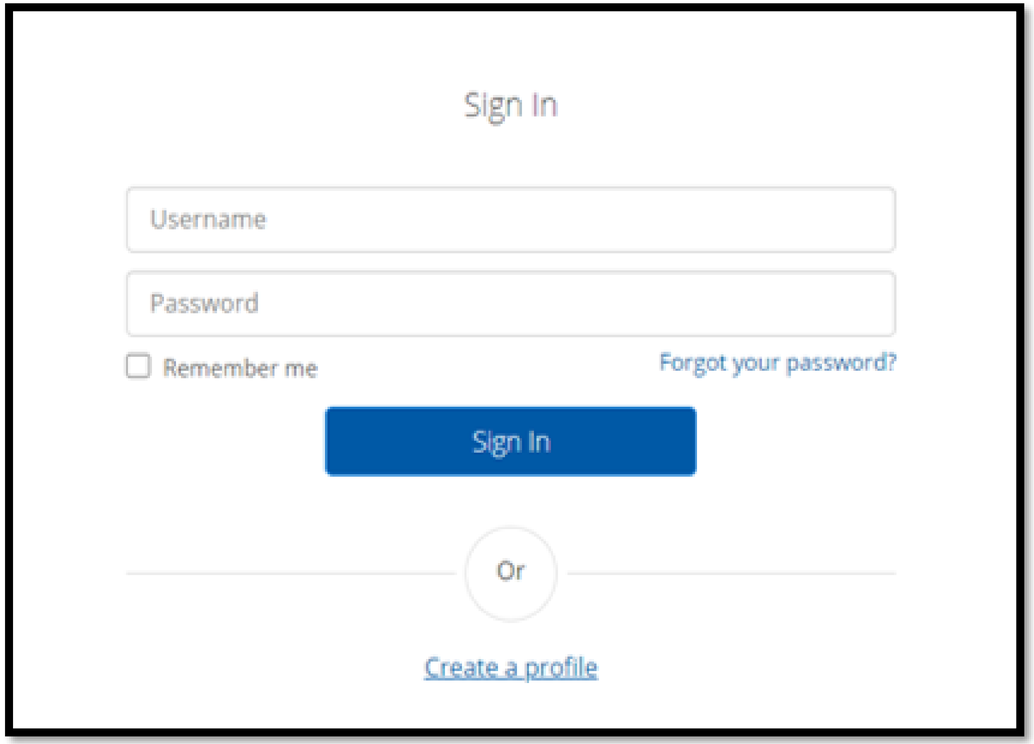
Basic Navigation

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

Case Worker Profile Basics

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



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

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Main Menu

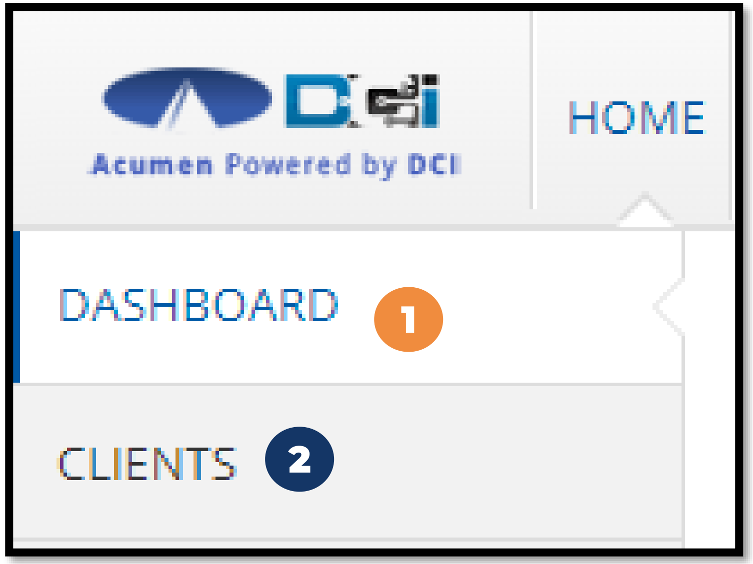
The top portion of the dashboard is called the main menu. From left to right it features:

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:

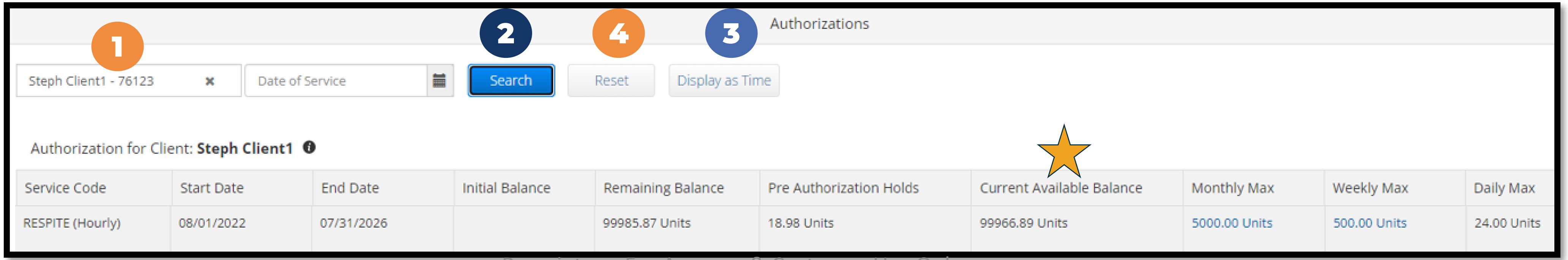
1. **Dashboard** – Includes the Authorizations Widget and News Posts
2. **Clients** - Click to view client information such as basic demographics, associated entries and employees, authorizations, and diagnosis.



Authorizations Widget

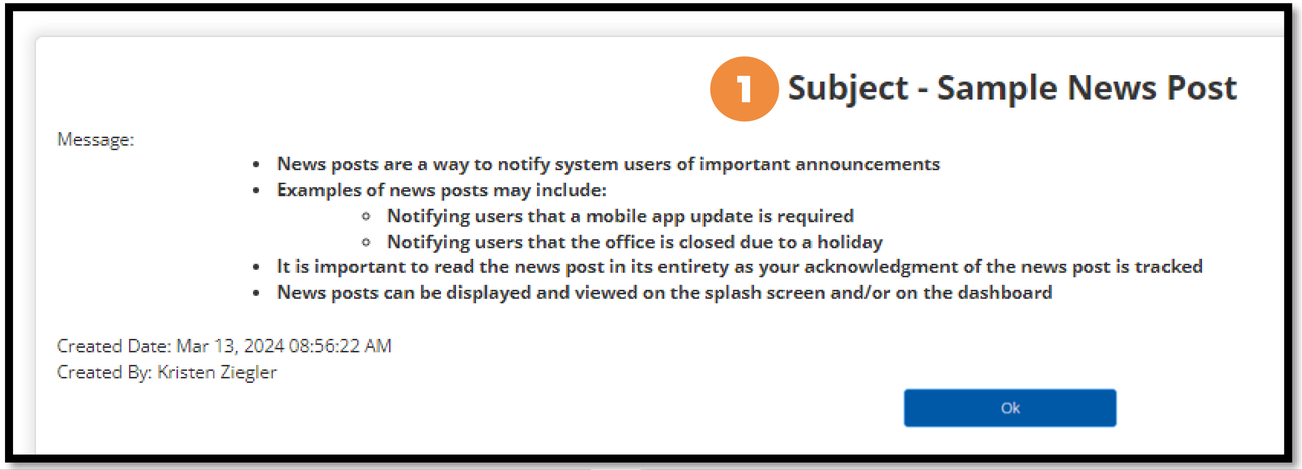
The authorizations widget on the dashboard provides current information about a client's authorization(s) in a read-only view.

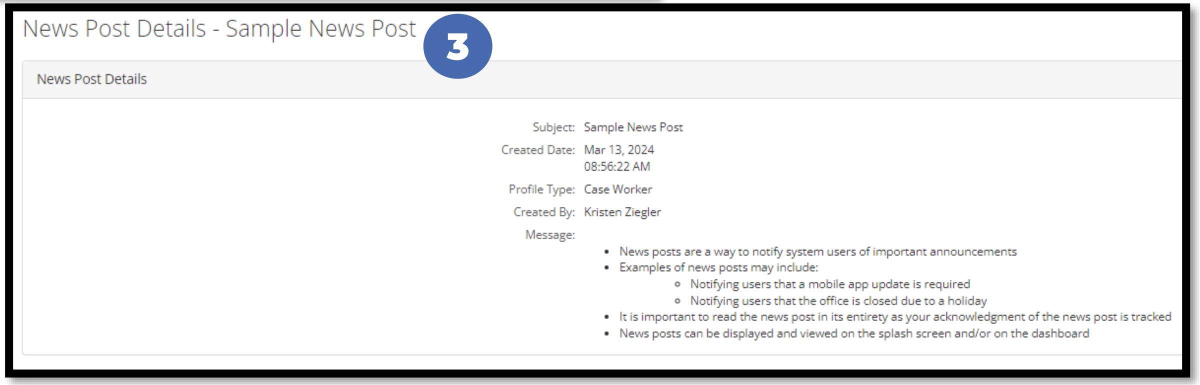
1. Enter the client's name in the Type Client Name field and select it when it populates
   a. Optionally, also enter the Date of Service to narrow the search results.
2. Click **Search** to display the client's authorization information
   - Service Code – Service the client is eligible to receive. 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.



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





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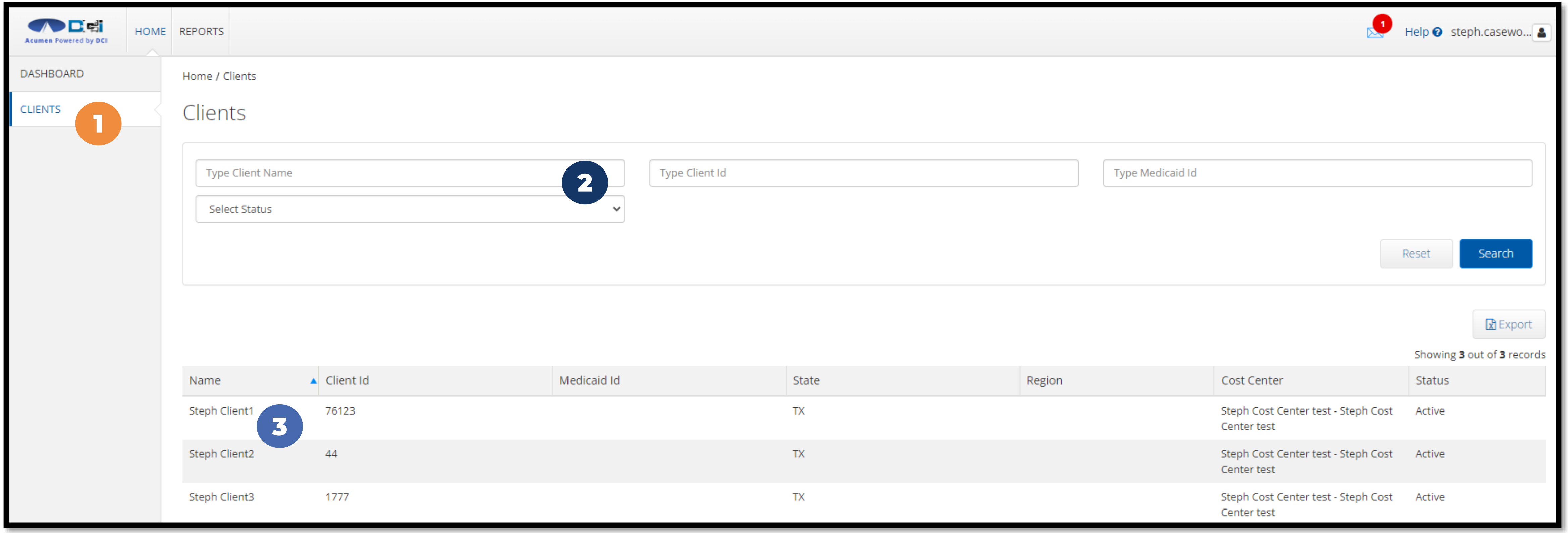
Client Details

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



Client Details Page

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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

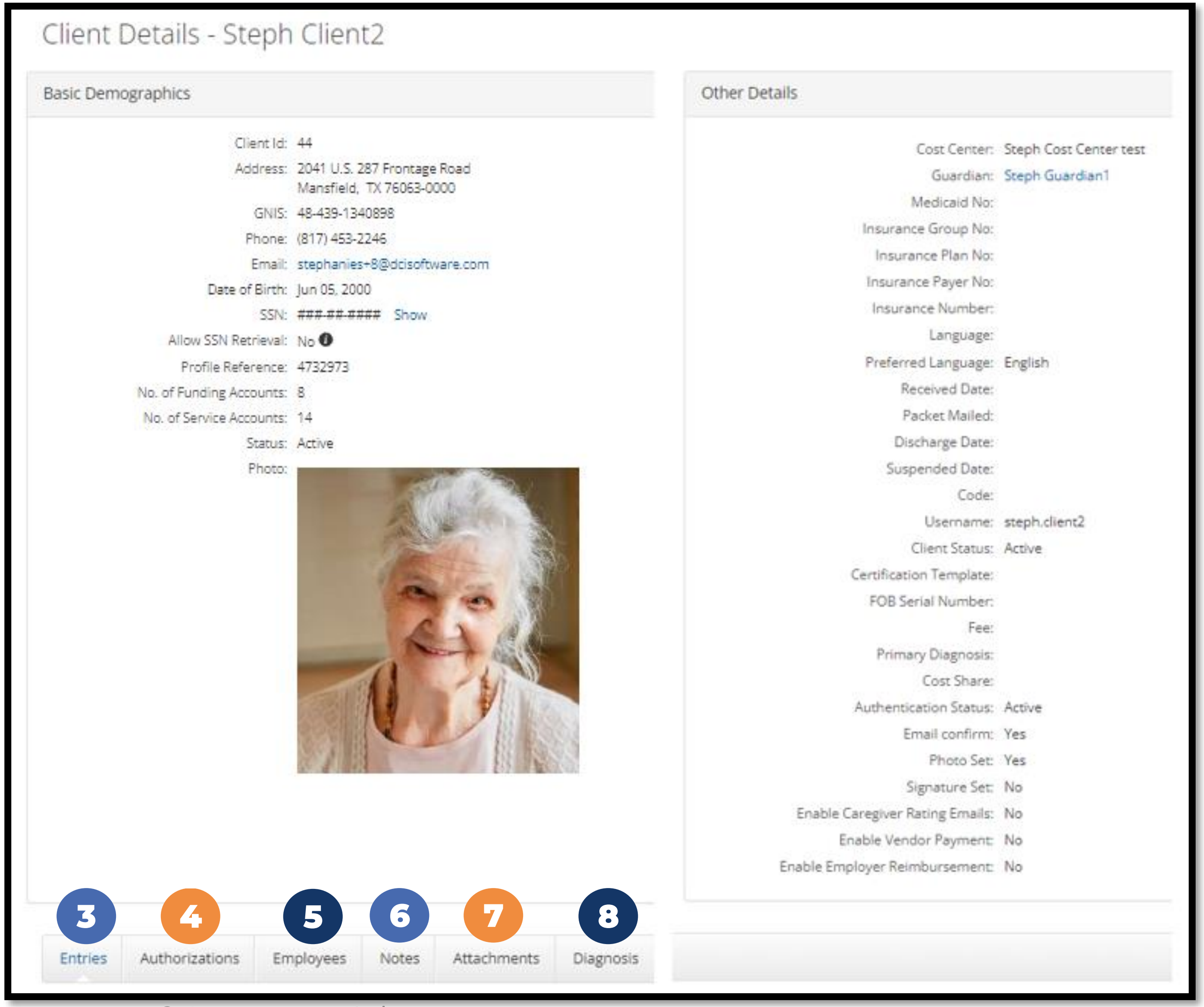
Suspended = On-Hold

Client Status

- Active
- Deceased
- Inactive
- Discharged
- Suspended

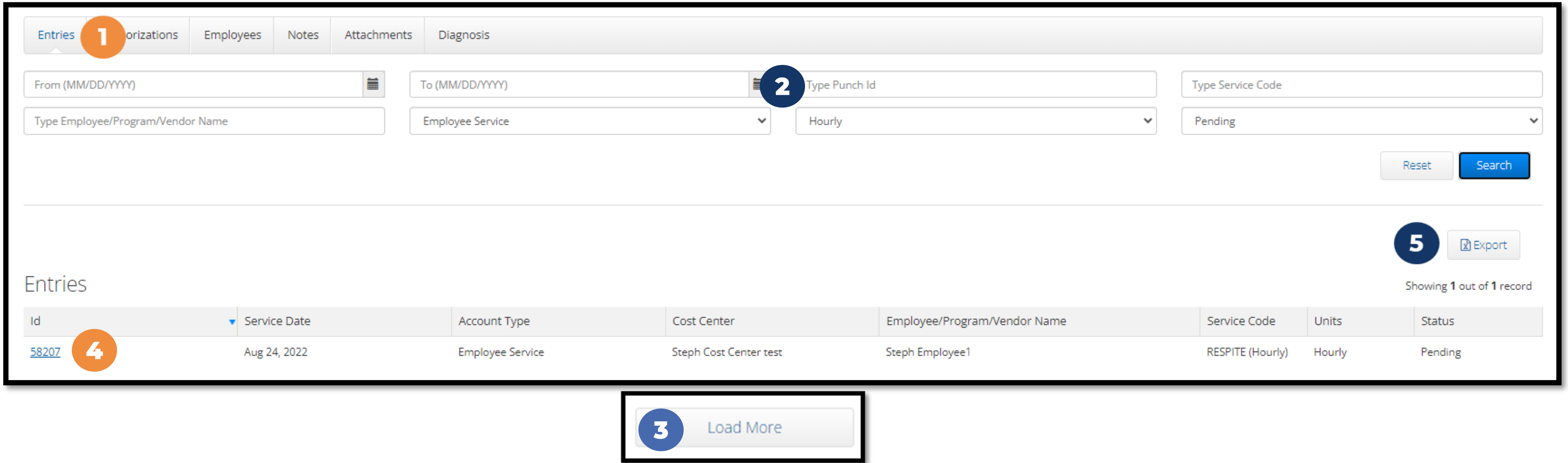
Client Details Page

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



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.



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Entry Status

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- **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

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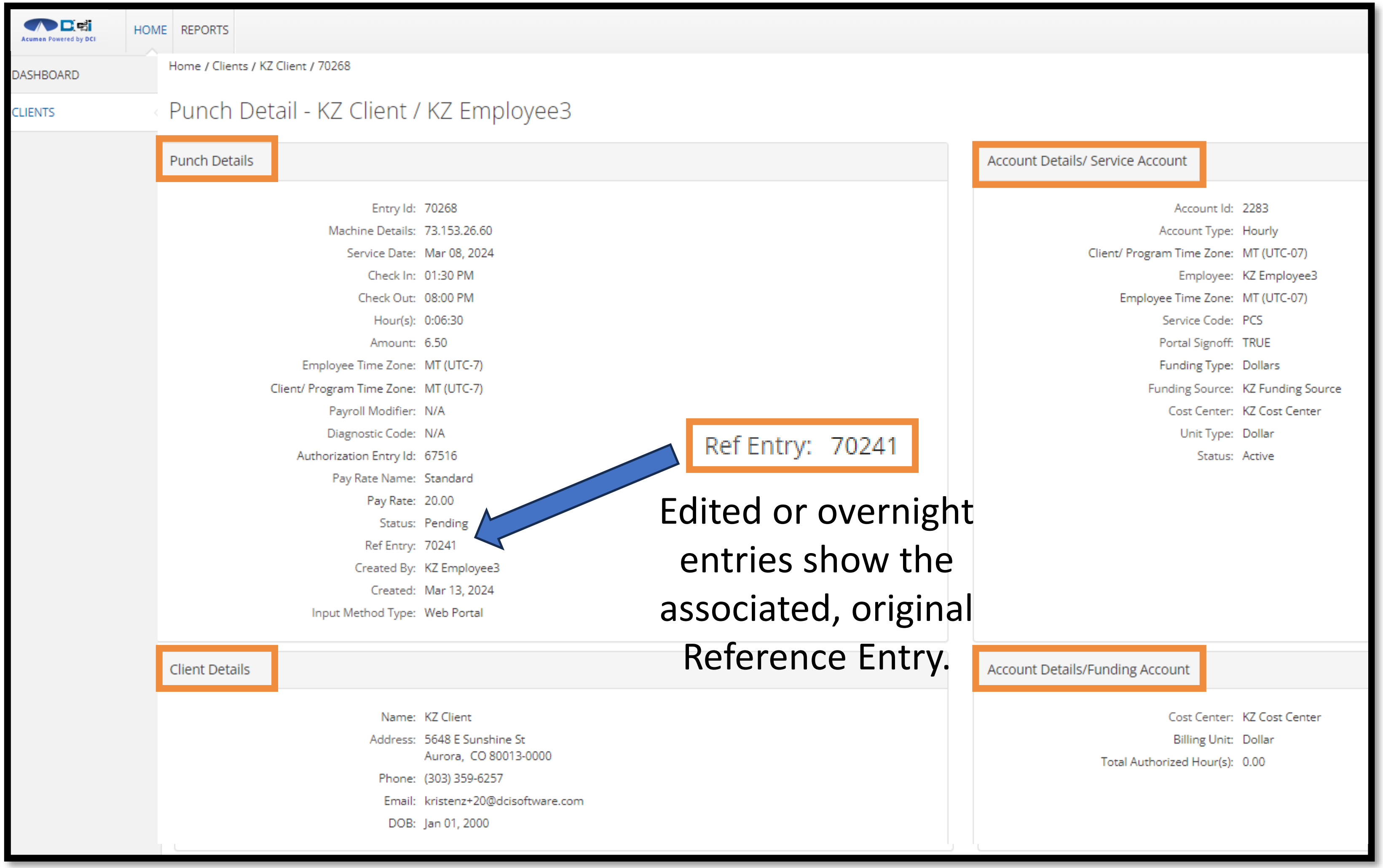
Punch Detail - Widgets

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



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Punch Detail – Widgets cont'd.

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

EVV Details

EVV Method:	Portal Signoff
EVV:	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

Reason Codes

Reason Code Name:	Forgot to Clock In/Out
Reason Code:	KZ123
Free Text Note:	Forgot to clock in
Description:	Forgot to Clock In/Out

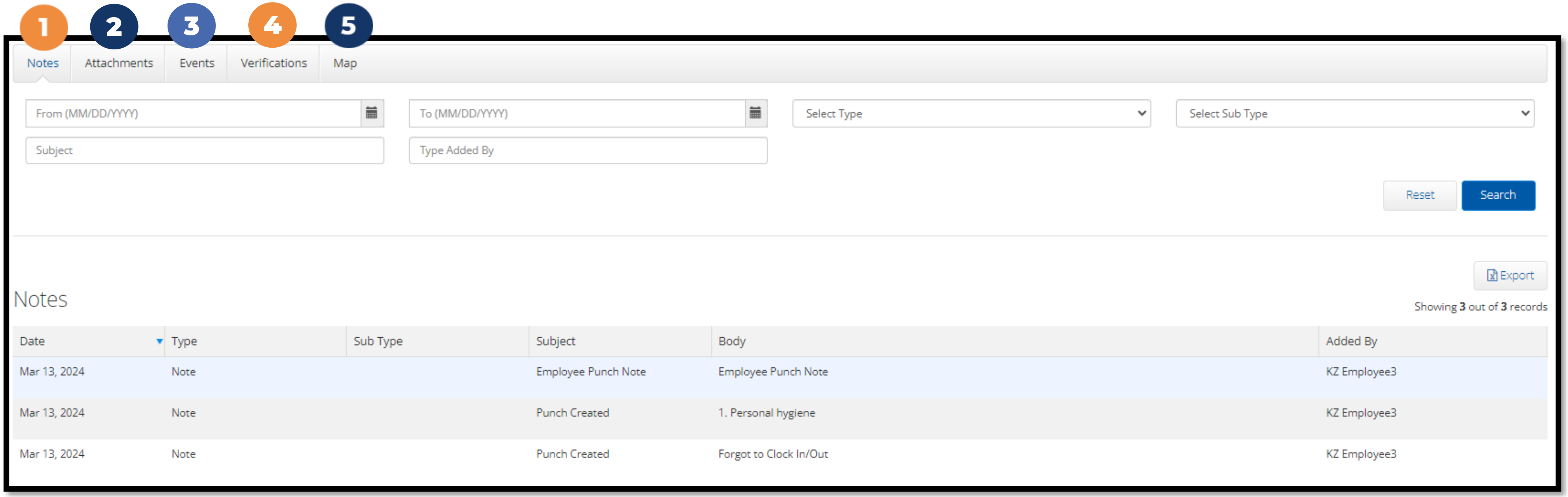
Statements

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



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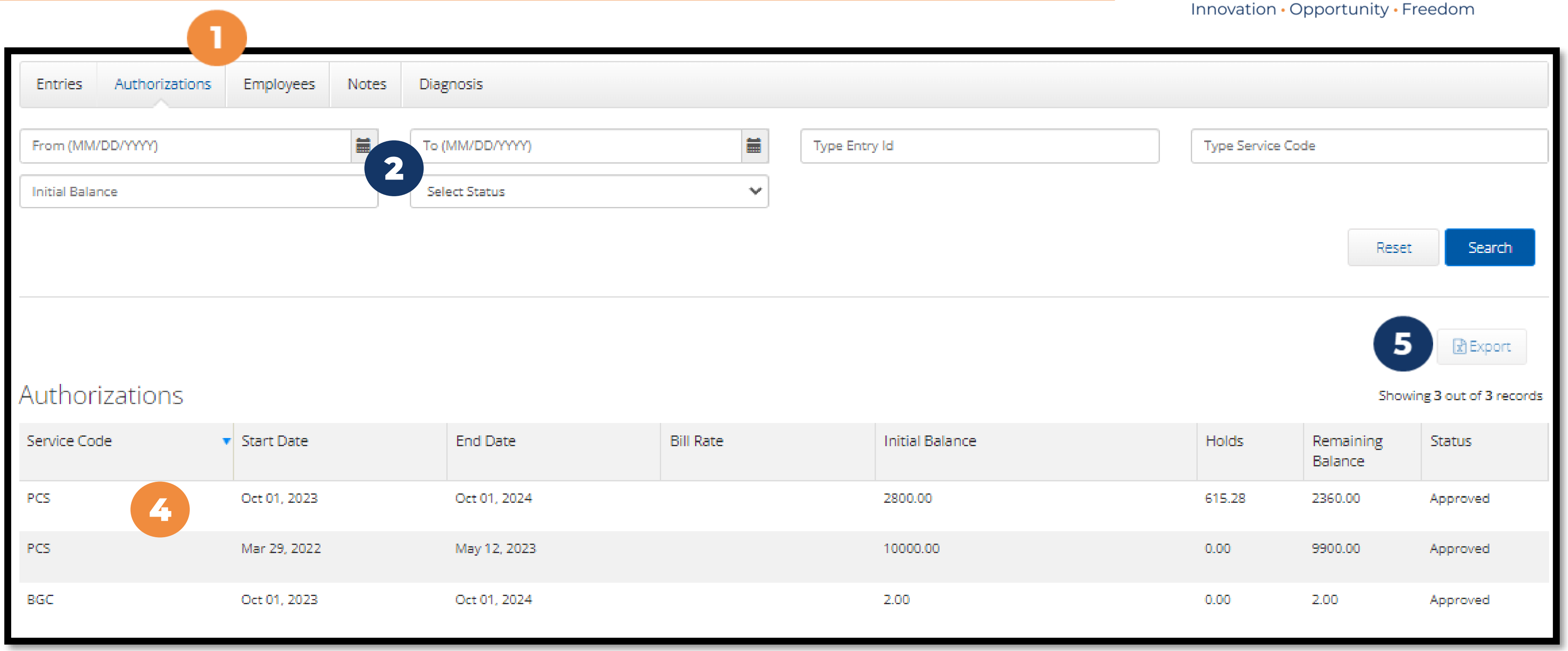
Client Details Page – Authorizations Tab

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

Authorization Details Page – Widgets

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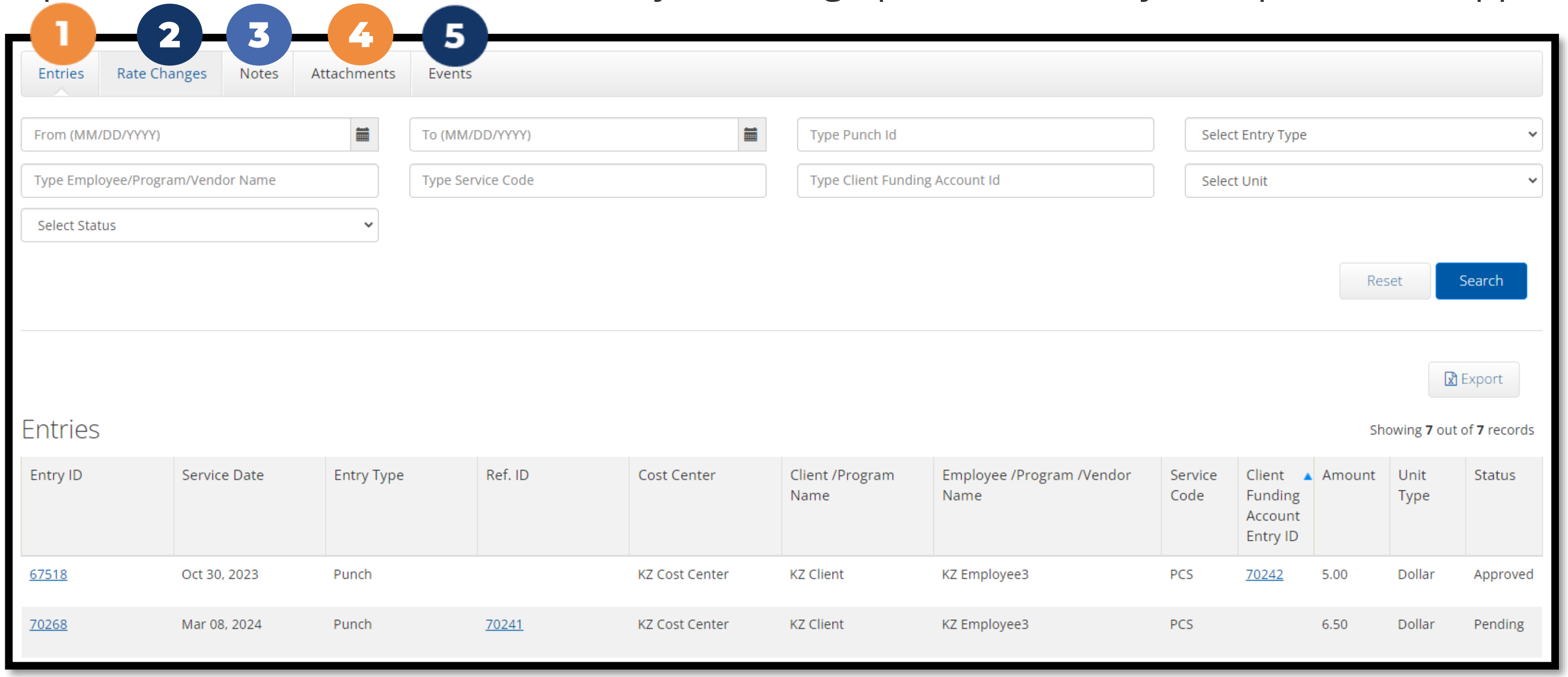
Select an authorization to view the authorization detail page which includes widget boxes containing authorization and account details.

Authorizations Details Page – Tabs

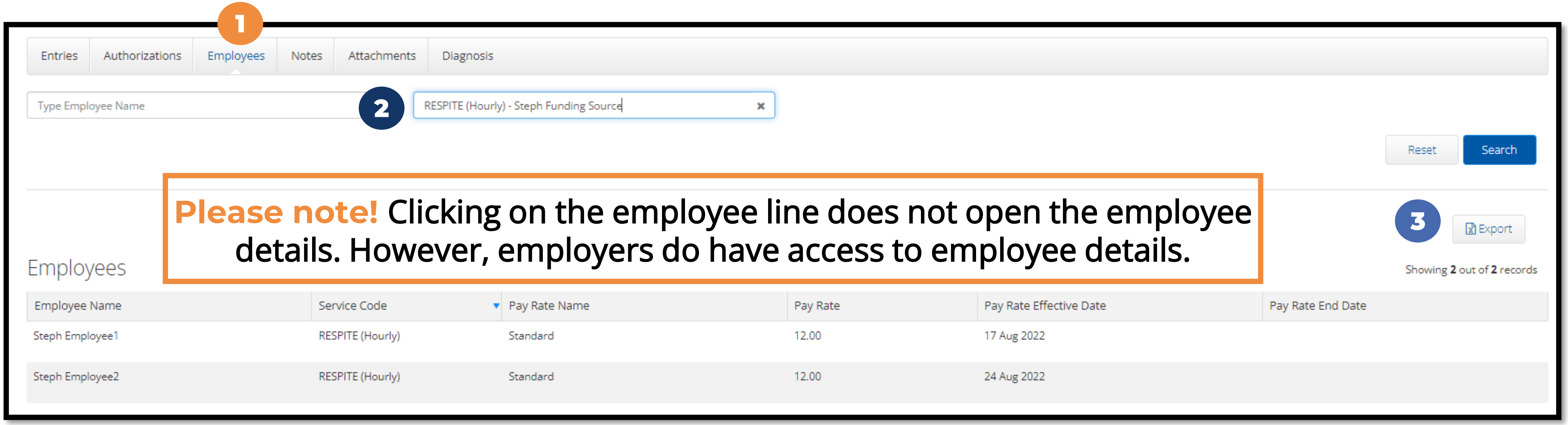
View the tabs on the authorization detail page, located beneath the widgets.

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.



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.



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Reports

Key Reports

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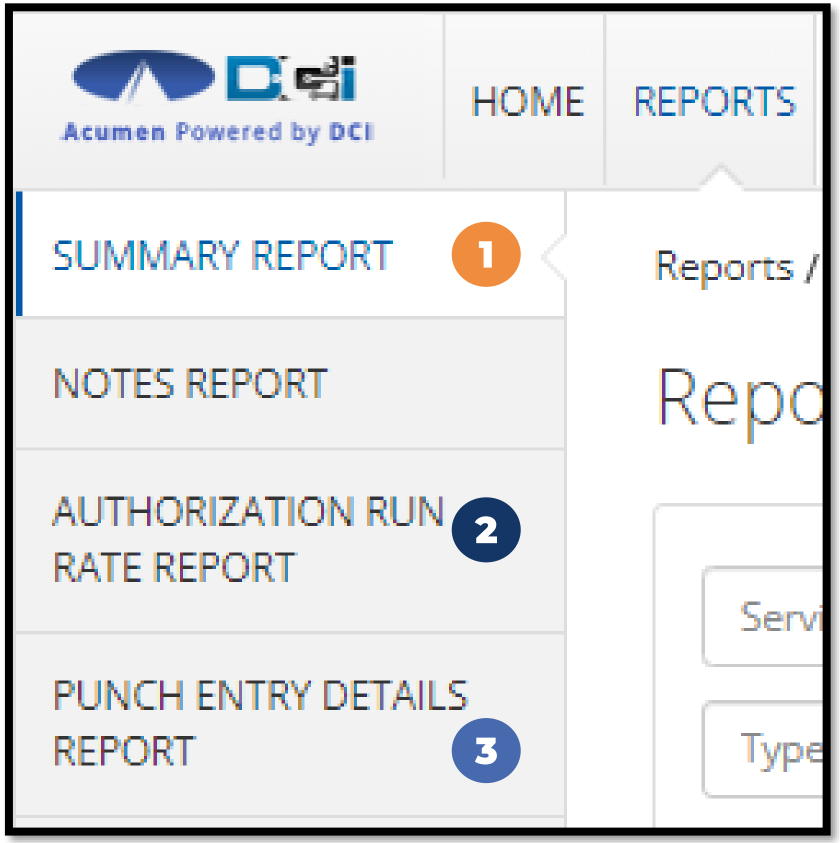
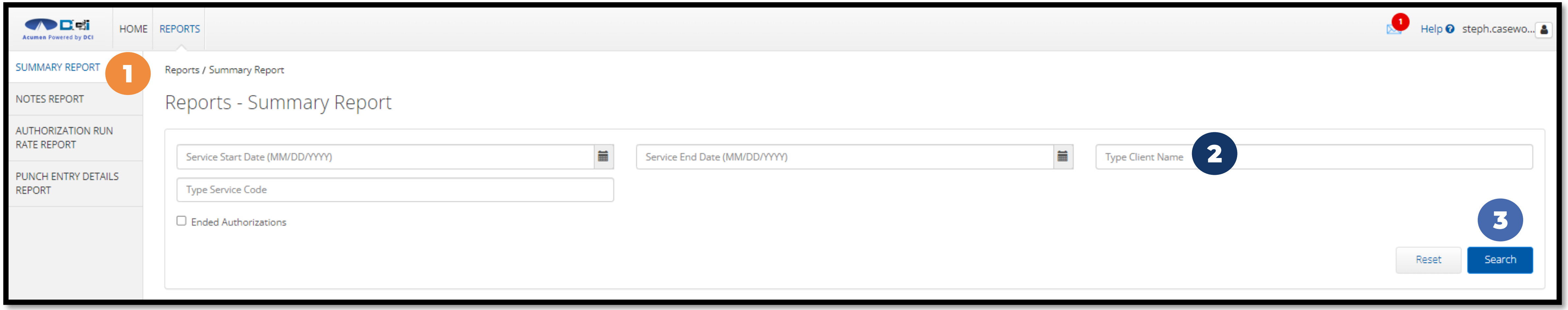
Available on the submenu:

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



Summary Report Results

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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

Download To PDF 6

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

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)

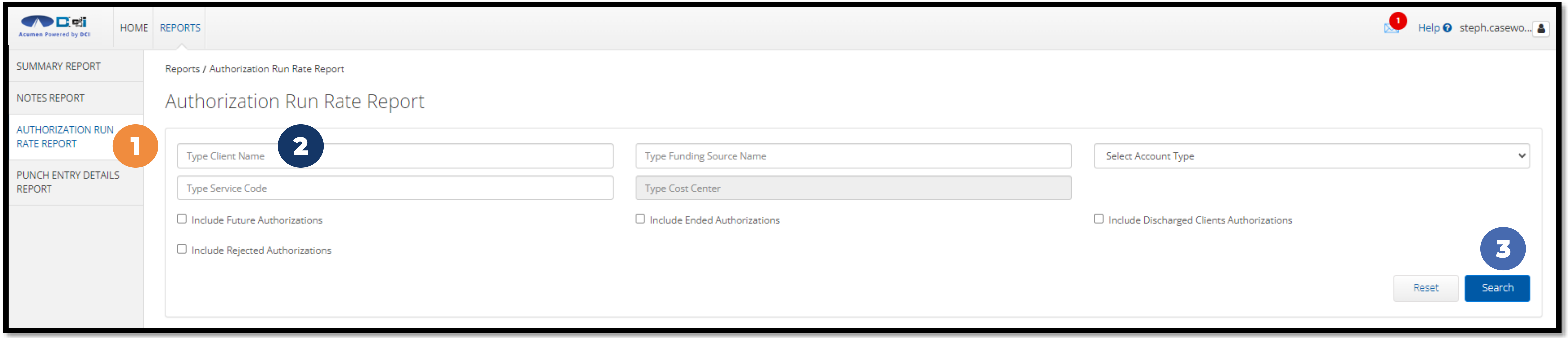
Authorization Name	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
RESPITE (Hourly)		14.16	18.95	99985.84	99 %

Client Name: Steph Client1 / Employee Name: Steph Employee1
Authorization Name : RESPITE (Hourly) (ID : 57934) : From 08/01/2022 To 07/31/2026 5

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



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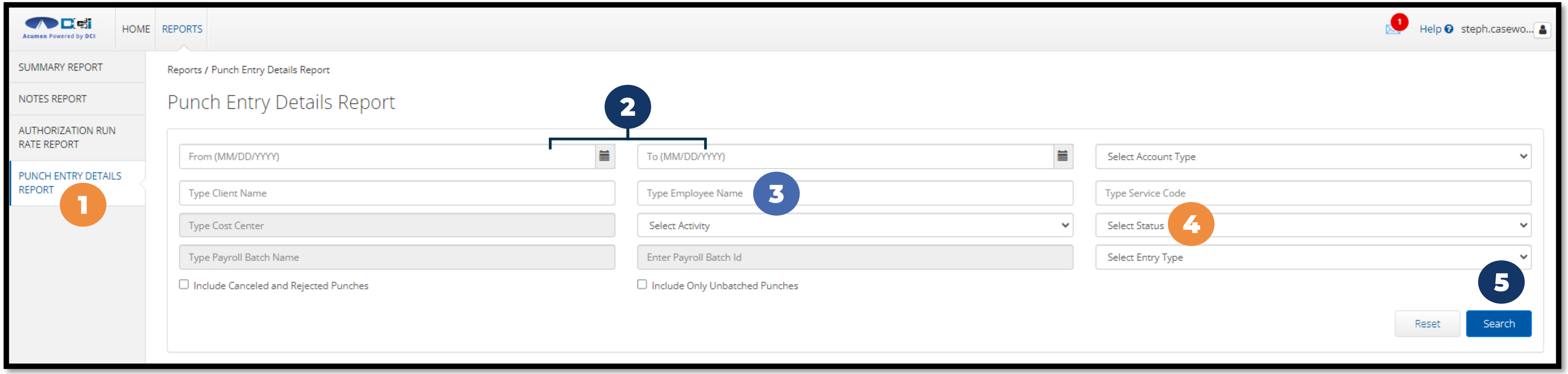
Punch Entry Details Report

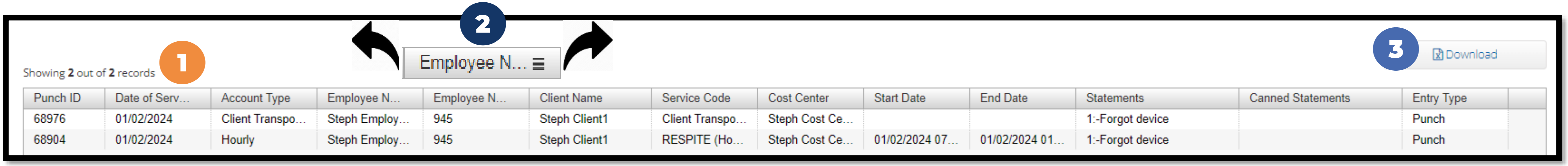
1. Select **Punch Entry Details Report** from the submenu
2. Filter by date range
3. Filter by employee
4. Filter by punch status
5. Click the blue **Search** button

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



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**



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

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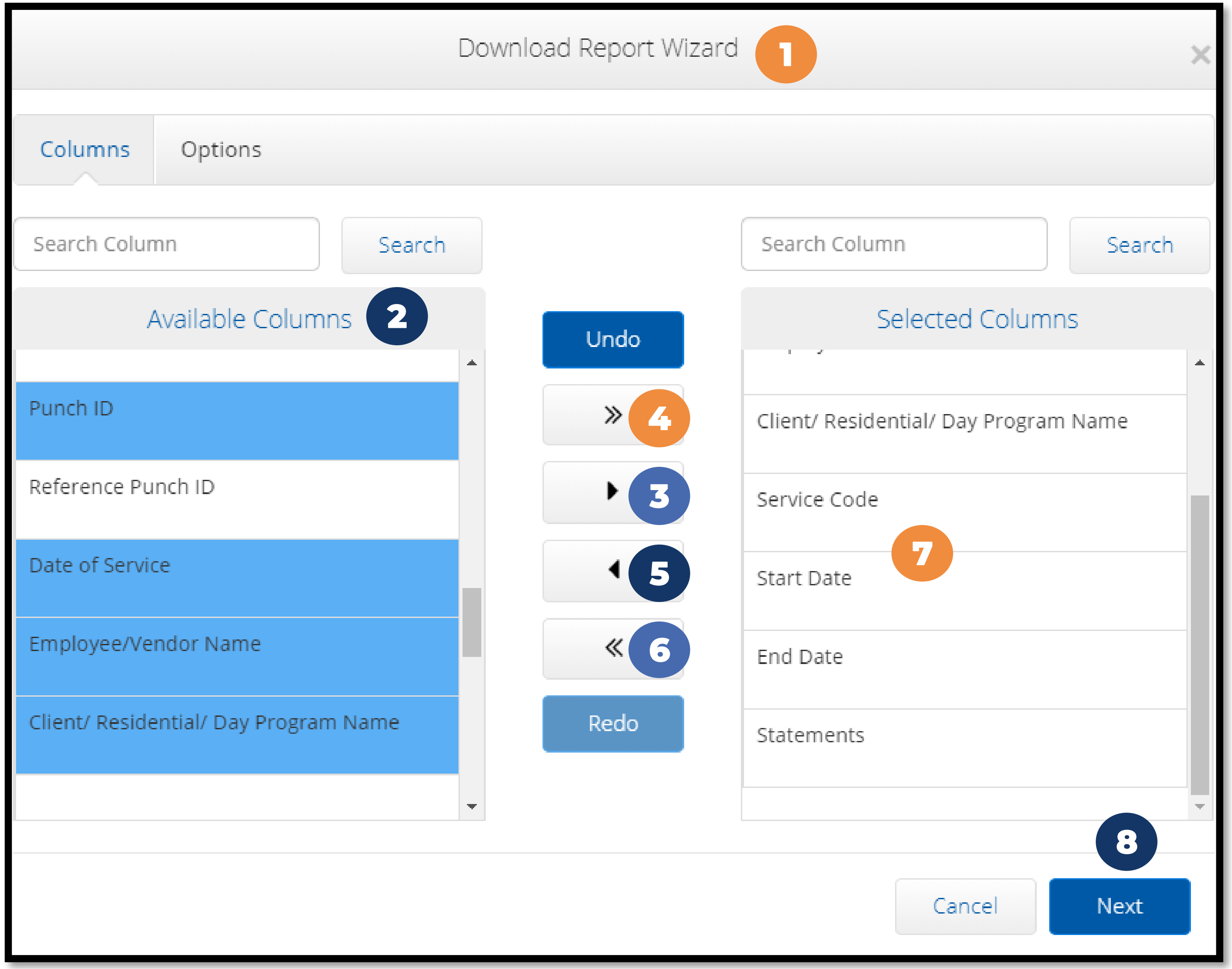
Download Report Wizard

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**



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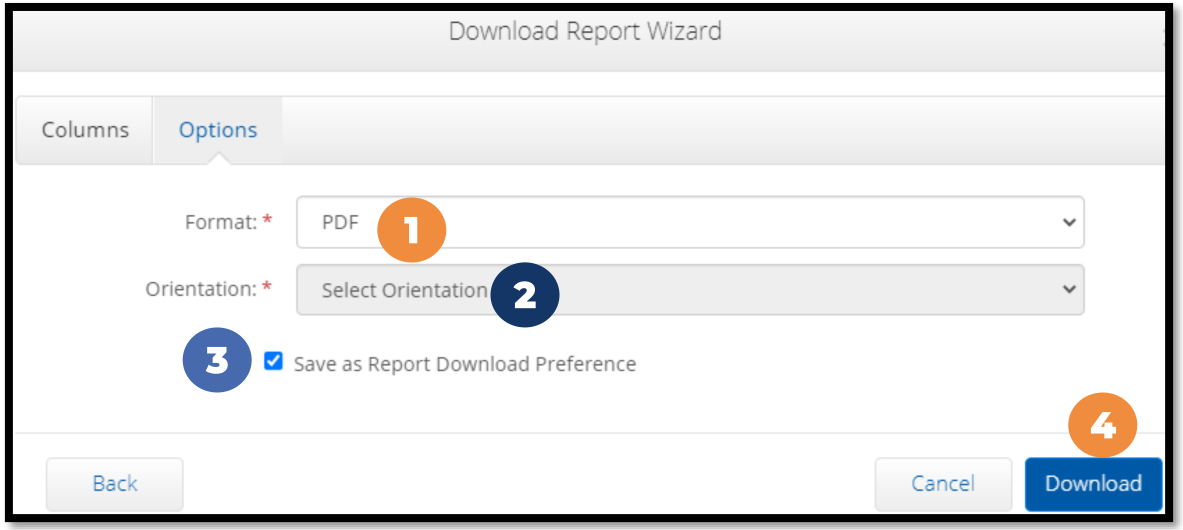
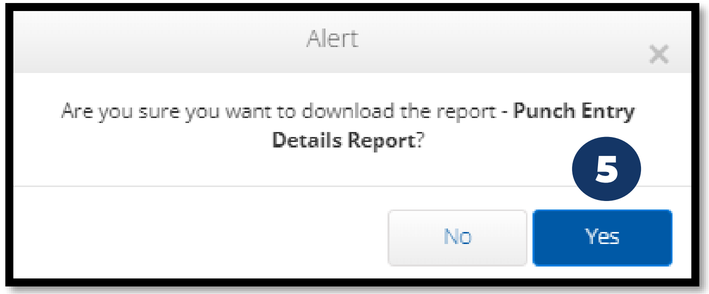
Download Report Wizard cont'd.

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.





System Demo

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THANK YOU!

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