New Jersey DDD - DCI Systems Training for Individuals and Authorized Representatives

Welcome to Acumen!

Thank you for joining the Acumen Family!

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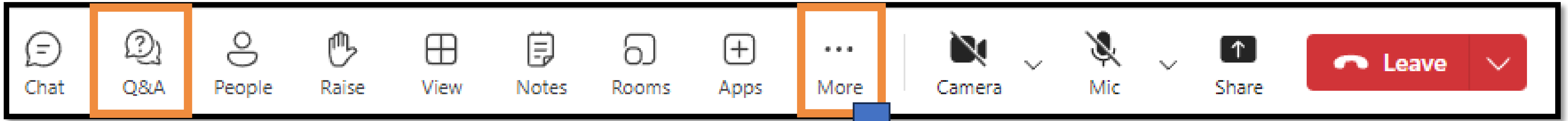
DIRECT CARE INNOVATIONS

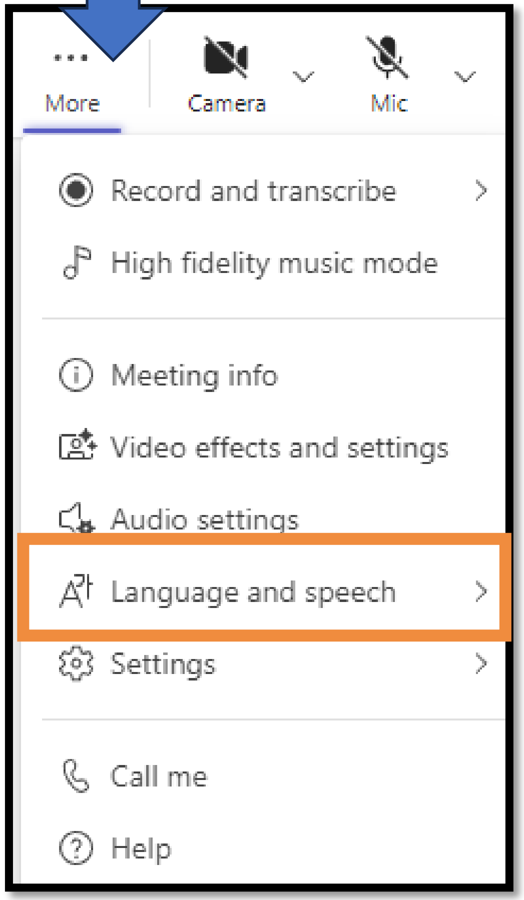
Acumen powered by DCI

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

Using Microsoft Teams



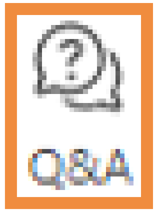
- Ensure both the Camera & the Mic are disabled (as pictured above with a line through them)
- Today we will not be using the Chat (disabled) or Raise hand features
- Click the **Q&A** button to type & send your question during the meeting

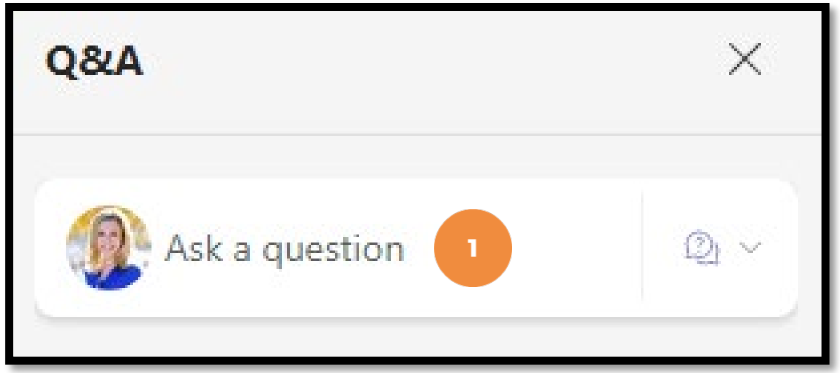


- To enable closed captioning:
  - ✓ Click the **More** button (three dots)
  - ✓ Select **Language and speech**
  - ✓ Click **Show live captions**

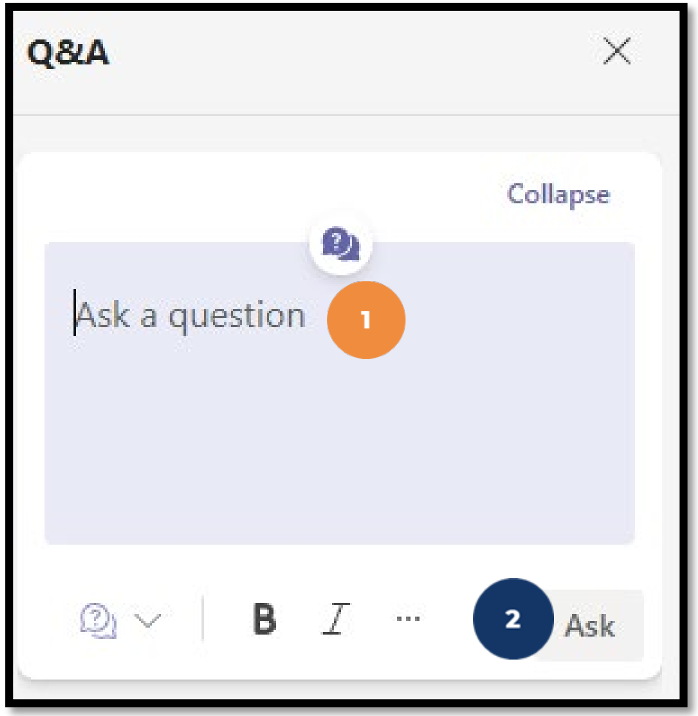
- OR press **ALT+Shift+C** on your keyboard

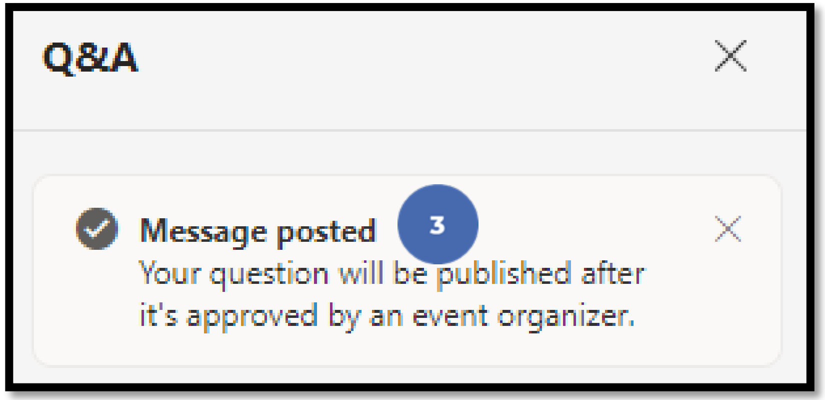
Using the Q&A button



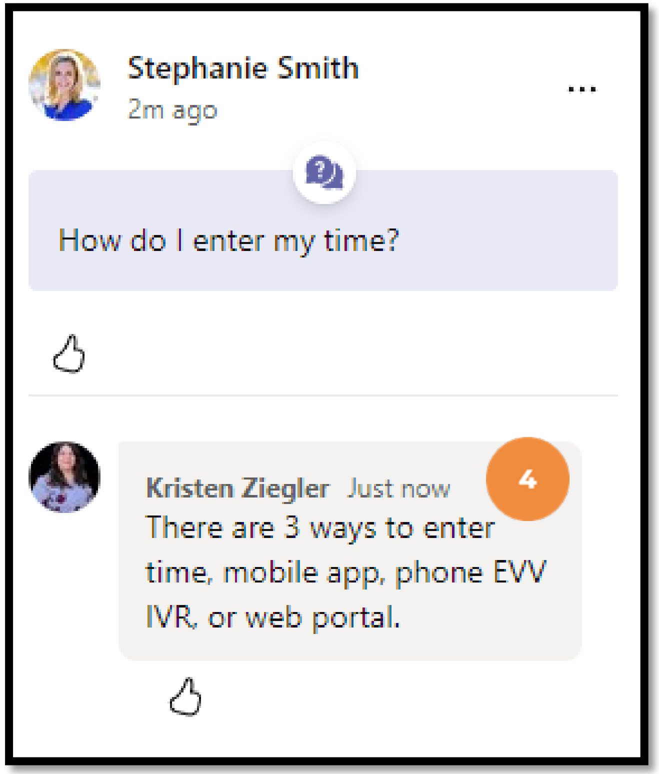


1. After clicking the Q&A button, **type your question** in the Ask a question field
   - ❖ Please do not include any confidential information or the question cannot be published & answered
2. Click the **Ask** button
3. Message posted displays





4. Moderators review, approve & answer your question.



Agenda

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- Why You Are Here/Acumen & DCI
- DCI Web Portal & Profile Settings
- Vendor Lists, Approve & Reject Payment Entries
- Clients, Employees & Reports in DCI
- FAQ's & Resources

Why Are You Here?

Why Are You Here?

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As you may know, the Division of Developmental Disabilities (**DDD**) Vendor Fiscal/Employer Agent Model will be transitioning Fiscal Intermediary (**FI**) services from Public Partnerships, LLC (**PPL**) to Acumen Fiscal Agent (**Acumen**) starting in *early June*. Acumen will help manage both Community Vendor Services and Self-Directed Employee (**SDE**) Services in this model.

Transition enrollments with Acumen will happen at staggered intervals over the next four months, with groups of participants called **cohorts** assigned to enroll within a specific window of time. Using this approach will help ensure a smooth and organized transition for everyone.

In this training, we will review the specific details to our training sessions for the New Jersey DDD program as well as several critical dates you may need to be aware of. We will also review the process flow, so you have a good comprehension of what comes next.

Training Sessions

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Enrollment

In Enrollment training, you'll learn how to create an account in Acumen's electronic enrollment system, complete all required enrollment information, and electronically sign enrollment packets. The session will include a live demonstration, and you'll have the chance to ask questions along the way. By the end of the training, you'll feel confident navigating the system and completing the enrollment process smoothly.

DCI System

In DCI System training, you'll learn how to navigate the DCI system using both the web and mobile versions to complete the essential tasks required for your role. These sessions will include a live demonstration, and you'll have the opportunity to ask questions in real time. By the end of the training, you'll be comfortable using DCI to manage your responsibilities efficiently.

Overview of NJ DDD Enrollment Process

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Attend a Training Session for Enrollment Training

Complete your Electronic Enrollment using resources available

Attend a Training Session for DCI System Training

You will receive a "Good to Go" letter when your enrollment is final

Vendors will submit all payment entries in accordance with the payment schedule*

Payments will be made bi-weekly

Note: *Approve and submit all time sheets/entries and vendor/reimbursement requests by 9pm EST of the due date, **even if it falls on a weekend or holiday.** Those received *after* 9pm EST of that date will be processed in the following payment period.

Acumen & DCI

Who is Acumen?

- One of the largest, most experienced fiscal management entities in the U.S.
- Servicing multiple states across the country
- Over 30 years of experience
- Customized approach for your needs

What is DCI?

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DCI is the electronic invoicing system that allows community vendors to securely submit supporting documentations and documentation for payment approval by the individual or their authorized representative.

<u>Web Browsers</u>

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

DCI Terms

DCI Terms

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Client: The Individual receiving services

Authorized Representative: An individual who is allowed to represent a Client, manage the Client’s care, and manage the Client’s enrollment.

- **Note**: The Authorized Representative and the Client can be the same person. For Client’s receiving vendor only services, an employer is **NOT** required. Authorized Representatives who completed the electronic enrollment in EES will be referred to as Employers in DCI.

DCI Web Portal

Accessed on a laptop or desktop computer

Accessing the DCI Web Portal

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1. Open an internet browser on a computer (Google Chrome is preferred) and navigate to the DCI Web Portal
2. Enter the **Auth Rep Username** (created during enrollment)
3. Enter the **Auth Rep Password** (created during enrollment)
4. Utilize the "**Forgot your password?**" link if needed
5. Click the blue **Sign In** button

1 acumen.dcisoftware.com

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

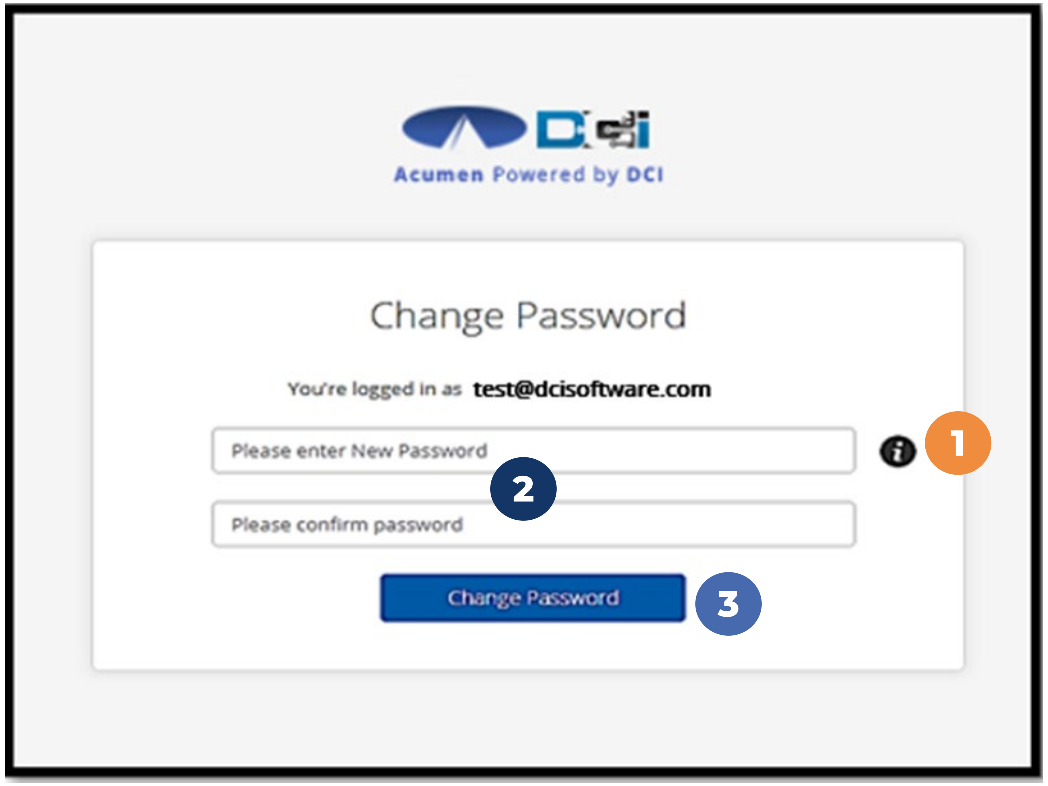
Initial Log In

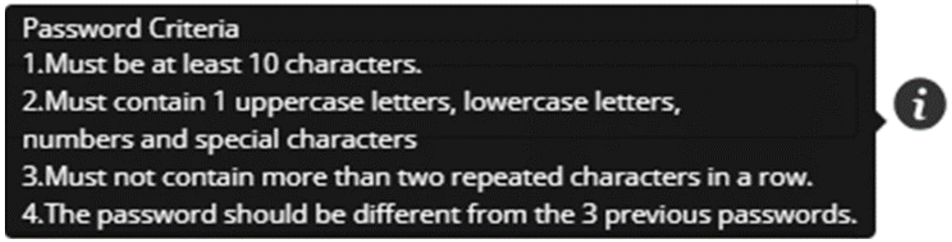
***Please note:** You must verify via the link in your email to login in for the first time

When logging in for the first time, you will be asked to change your password.

1. Hover over the circular “i” icon on the right to see the password requirements
2. Enter the same password in both password fields
3. Click the blue **Change Password** button

***Please note:** After changing the password, an email will be sent to you stating that you have changed your password.





Security Question

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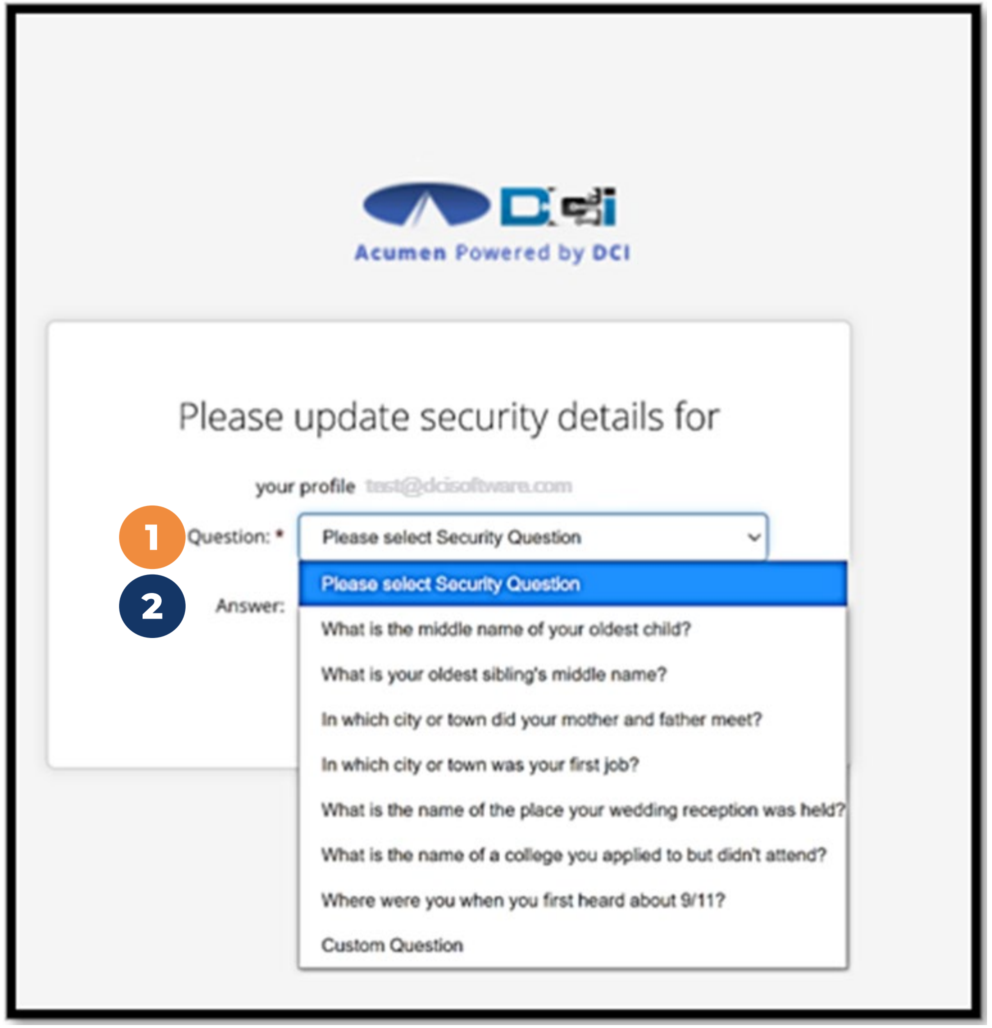
To keep your profile safe, you will need to choose a security question the first time you log in.

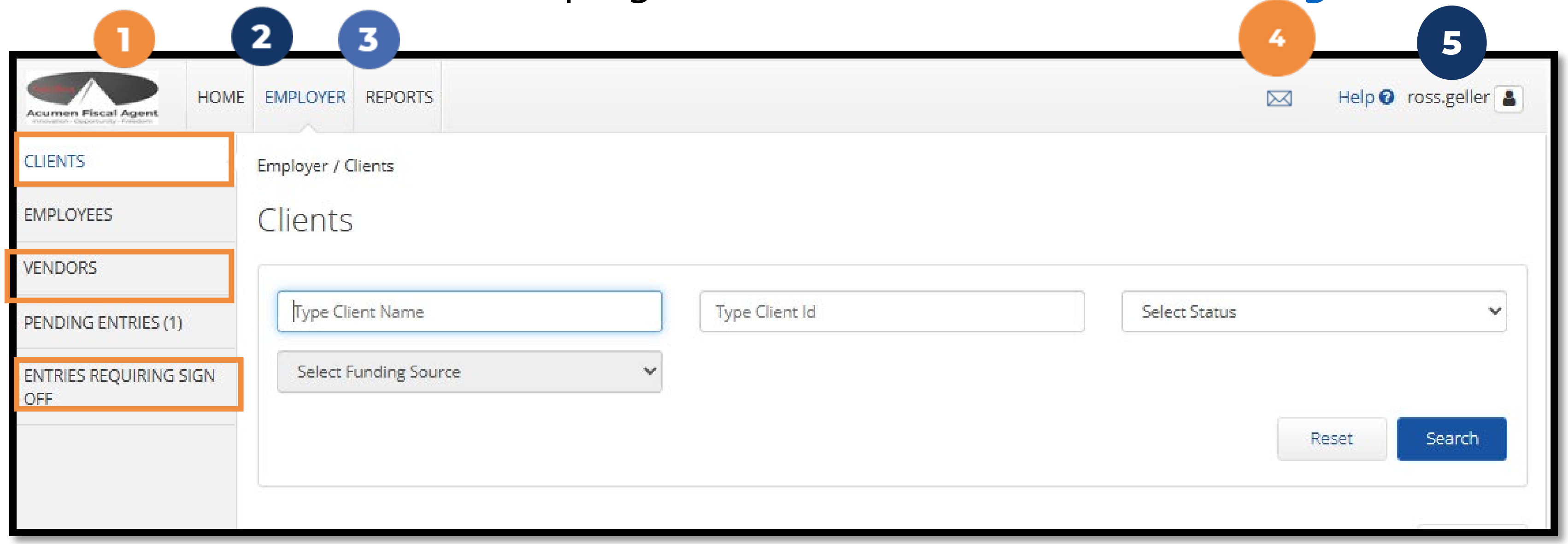
1. Select a question from the drop-down menu
2. The answer must be at least five characters which cannot be repeated in a row

*Please note: Remember the answer to the security question you chose, to reset your password in the future.



Home/Dashboard

1. Select the **Home** or Acumen Icon to view your home page/dashboard
2. Select **Employer** to see your Employer submenu
   - You can view your Clients, Vendors, and Vendor Entries Requiring Sign Off
3. Select **Reports** to show the Reports available
4. The envelope icon will open your **Messaging Module**
5. Select the **username** in the top right corner to access **Profile Settings**



Note: You will **not** need to use the Employee and the Pending Entries on the submenu

Profile Settings

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

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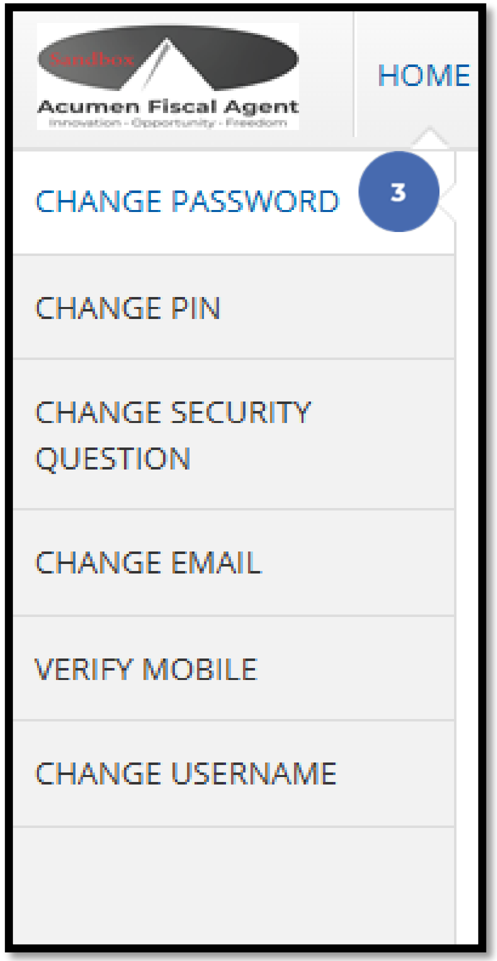
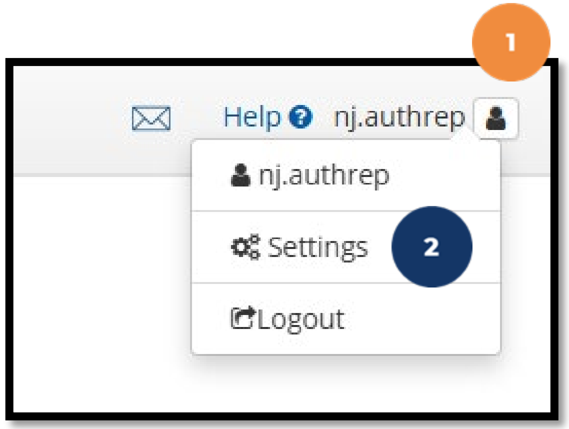
1. Click the **username** in the top right corner of the main menu
2. Click **Settings**
3. Select a submenu tab to update:
   - **Change Password** – Used for login
   - **Change Security Question**
   - **Change Email** – A valid and correct email address is required for password recovery
   - **Verify Mobile**
   - **Change Username** – Used for login

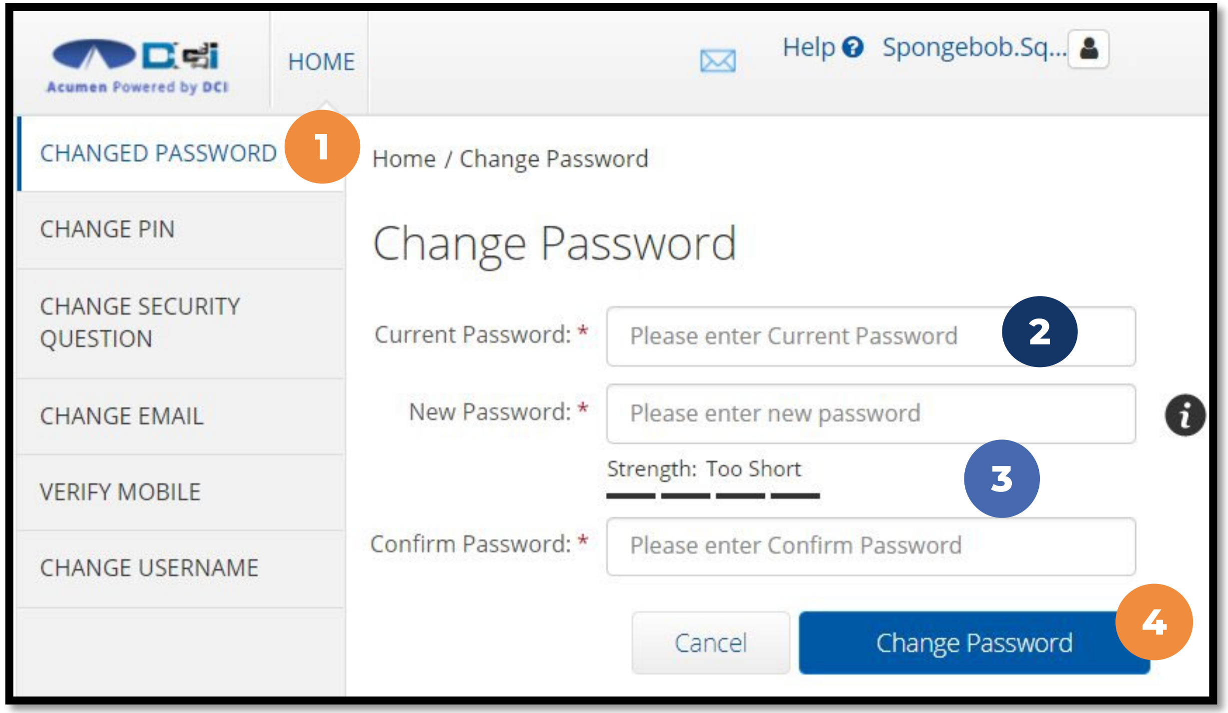




Change Password

Once Profile Settings are open

1. Select Change Password from the sub menu
2. Enter current password
3. Enter new password twice
4. Select Change Password and Confirm



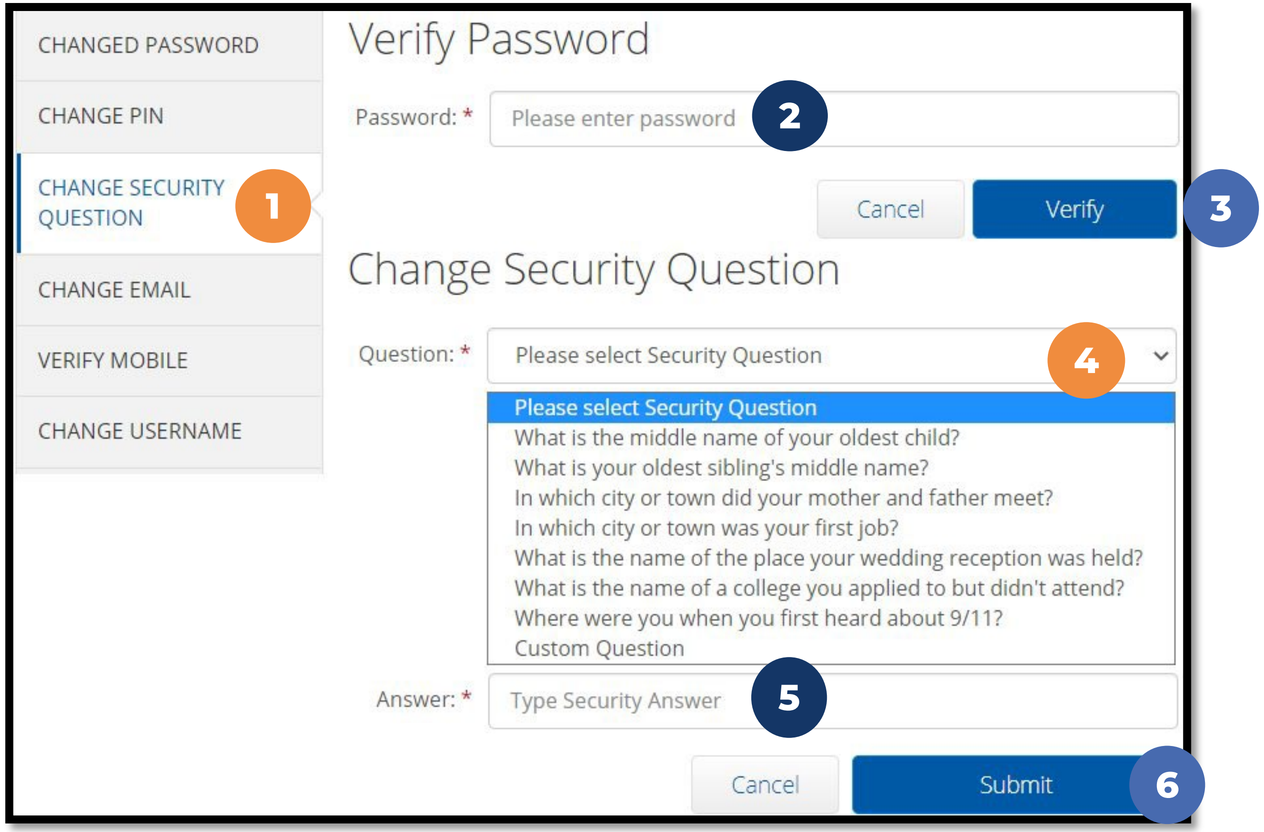
Pro Tip:
Be sure to follow Password Criteria.
Make it secure & easy to remember.

Password Criteria
1.Must be at least 10 characters.
2.Must contain 1 uppercase letters, lowercase letters, numbers and special characters
3.Must not contain more than two repeated characters in a row.
4.The password should be different from the 3 previous passwords.

Change Security Question

Once Profile Settings are open

1. Select Change Security Question
2. Enter current password
3. Select Verify
4. Select question from list
5. Type answer to question
6. Select submit and confirm



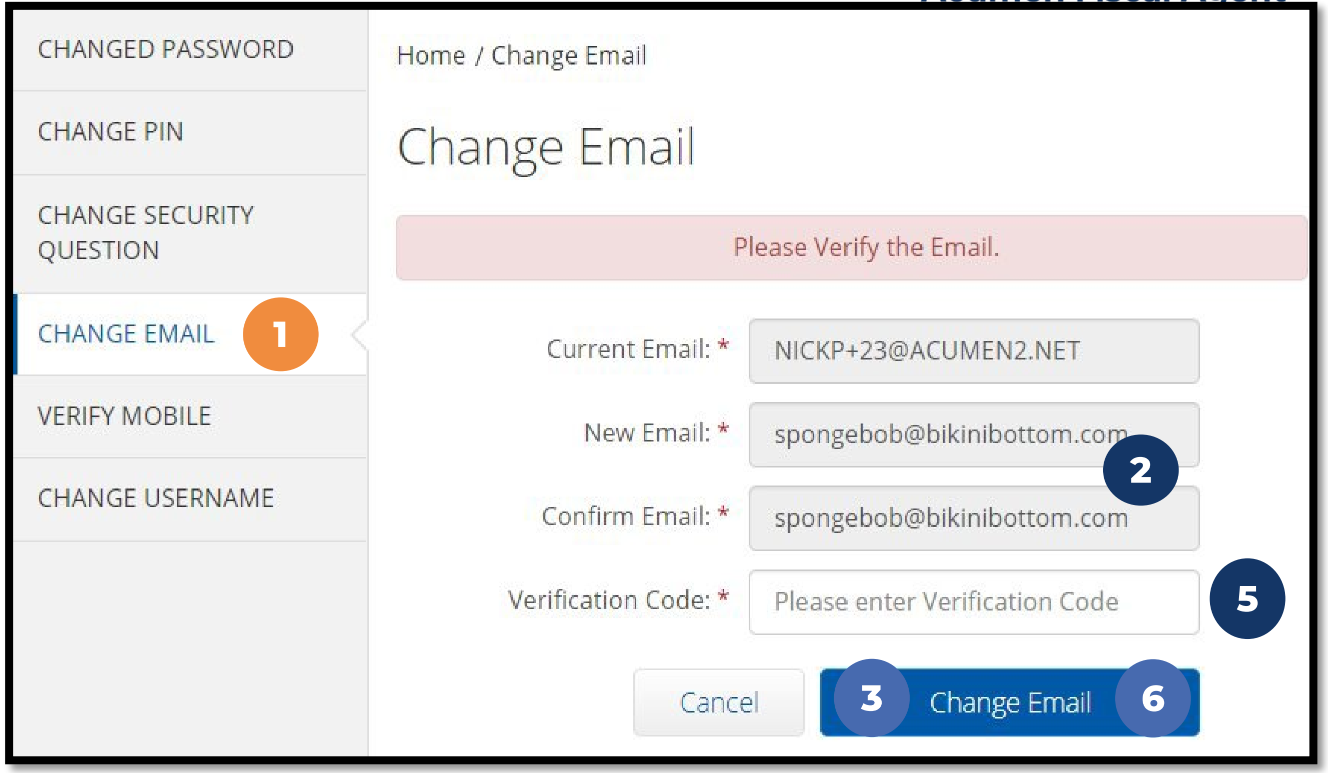
Change Email

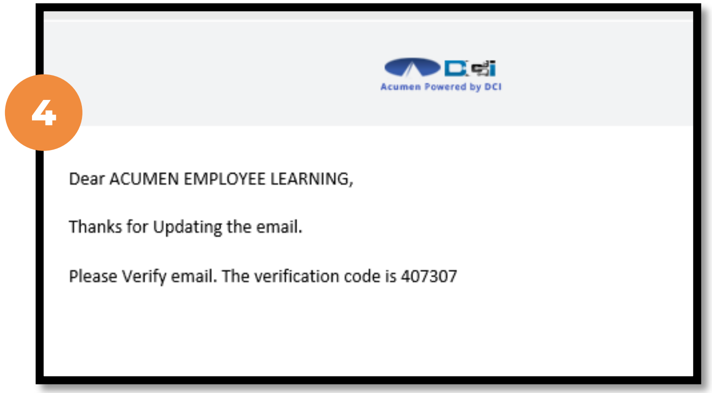
Once Profile Settings are open

1. Select Change Email from the menu
2. Enter new email twice to confirm
3. Select Change Email
4. Check email for verification code
5. Enter code from email
6. Select Change Email and confirm

Pro Tip:

Emails will help you reset passwords on your own.

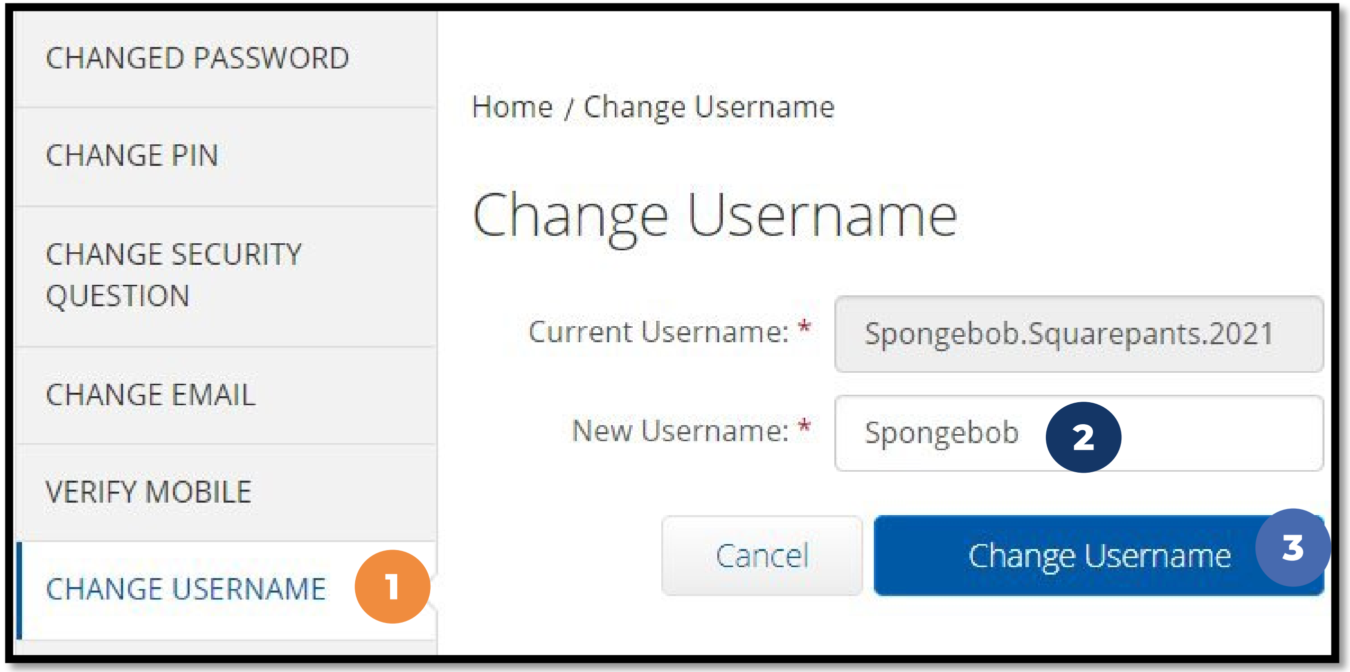




Change Username

Once Profile Settings are open

1. Select Change Username
2. Enter new Username
3. Select Change Username and confirm



Pro Tip:
Create a Username that is both secure & easy to remember

Web Portal Messaging Module

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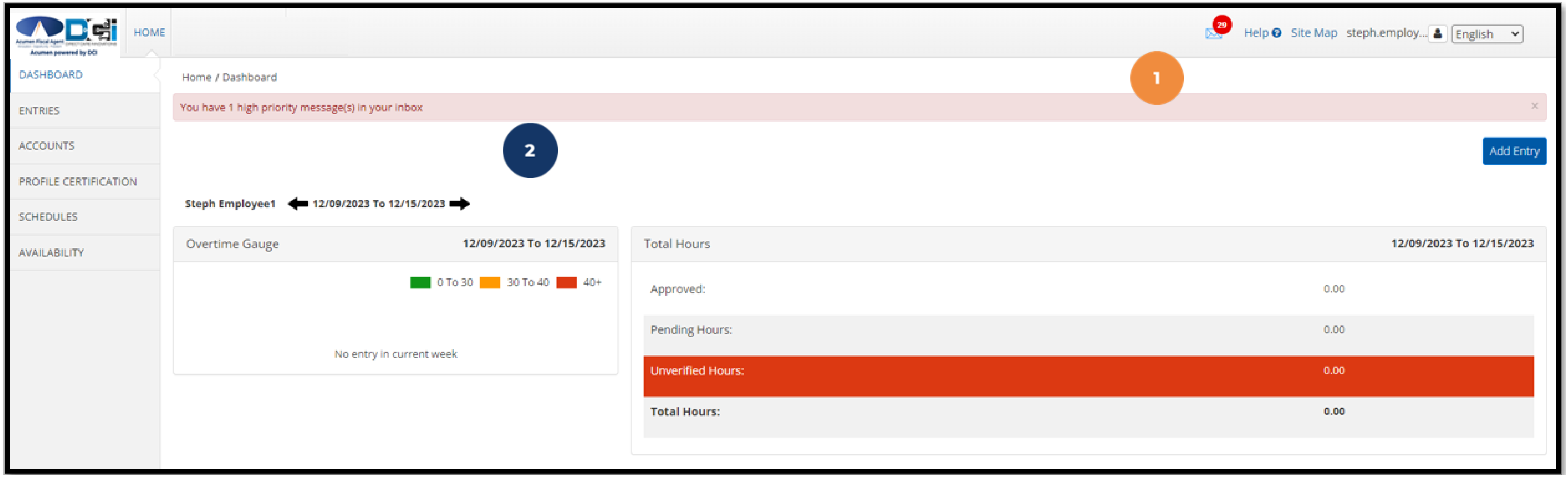
1. Click the **Mail** icon (envelope) in the top right corner of the main menu to access the inbox

2. Alternatively, if the red **high priority message banner** displays, click it to access the inbox.



Web Portal Messaging Module

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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

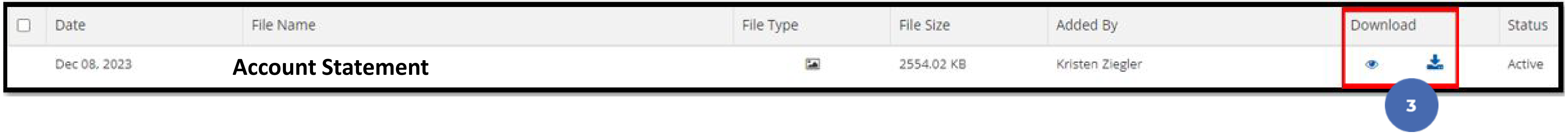
Showing **30** out of **72** records

☐	★	Attachments	From	Subject	Date/Time	Action
☐	★	📎	**DCI Support**	**Account Statement**	**11/02/2023 02:00 AM**	
☐	★	📎	Kristen Ziegler	hello there	12/08/2023 05:19 PM	
☐	★		Steph Client1	Checking on the status	11/02/2023 11:50 AM	
☐	★		DCI Support	Punch Rejected	10/12/2023 08:33 AM	

Account Statement

View Messages via Messaging Module

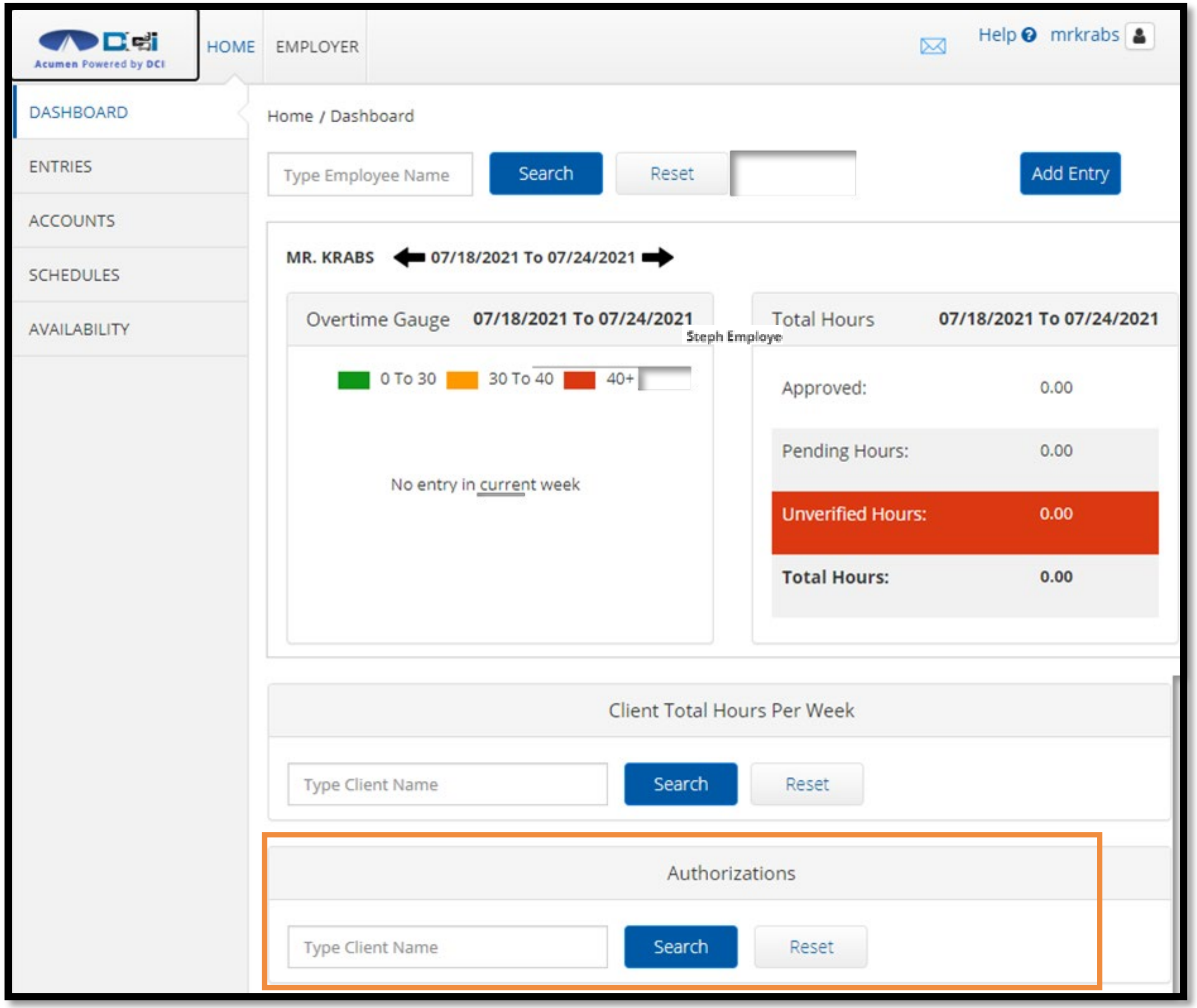
1. Locate messages to read in the inbox and click anywhere on the line to view it
2. Click the **Attachments** tab
3. Click the **eye** icon in the download column to view the account statements or the **download** icon to download it



Authorization Widget on Home Page

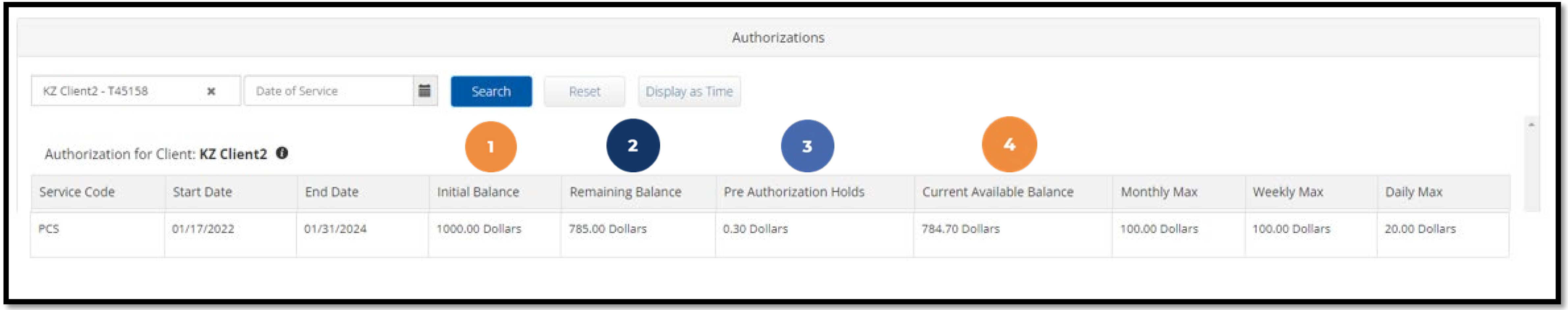
Let's take a moment to talk about an additional resources you can find, right on the home page.

It is the Authorization widget!



Authorizations (Budget) Widget

- The authorizations (budget) widget allows the user to search by client and optionally by date to view approved authorizations (budgets) in the past, present, or future.
- For units-based authorizations, optionally click the Display as Time button to view the data in time instead of units.
- As employees clock in and clock out, their time is 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, then are deducted from the remaining balance and an updated remaining balance will be displayed.



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

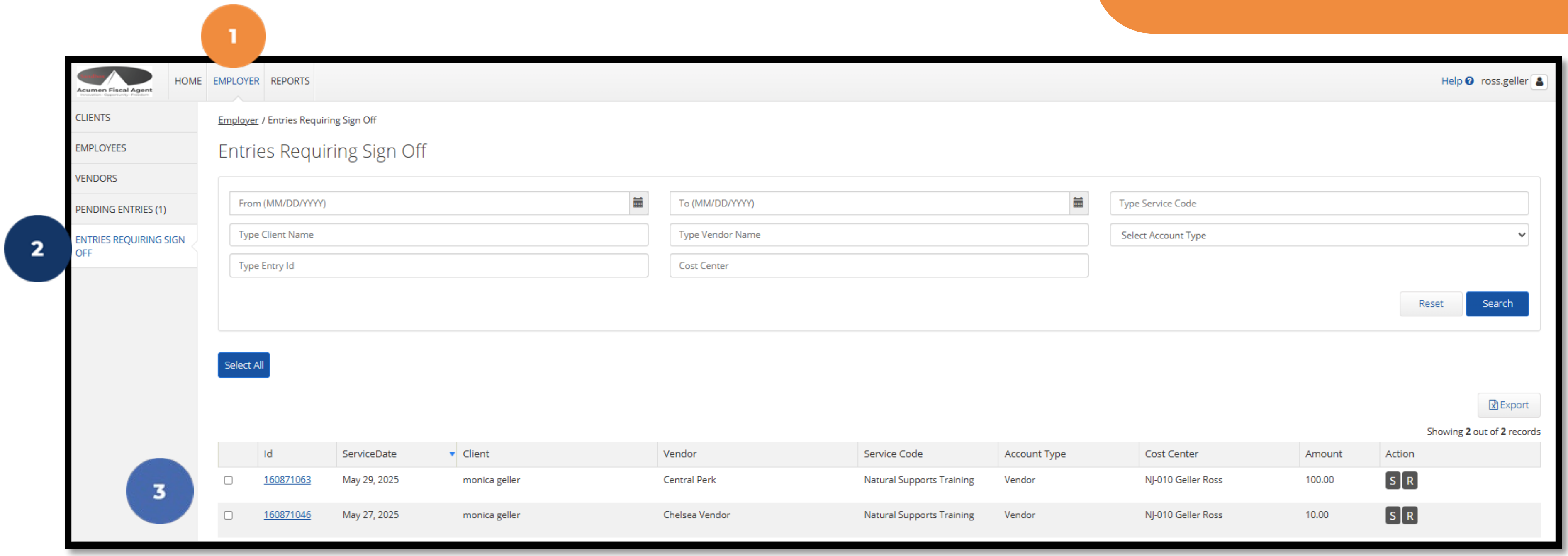
1. Initial Balance - Total amount of authorization
2. Remaining Balance - Amount remaining after pre-authorization holds have been processed for billing and payment
3. Pre-Authorization Holds - Amount deducted from the authorization that has not yet been processed for billing and payment
4. Current Available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

Sign Off or Reject Vendor Payment Entries

Sign Off or Reject Payment Entries

1. Click **Employer** on the main menu
2. Select **Entries Requiring Sign Off** on the submenu
   - ✓ All entries/invoices requiring review/action appear in the table
3. All vendor payments requiring sign off will be listed at the bottom of the page

Important: To prevent any disruption in vendor payments, all vendor payment entries must be signed off by the timesheet due date listed on the payroll schedule.



Sign Off or Reject Payment Entries

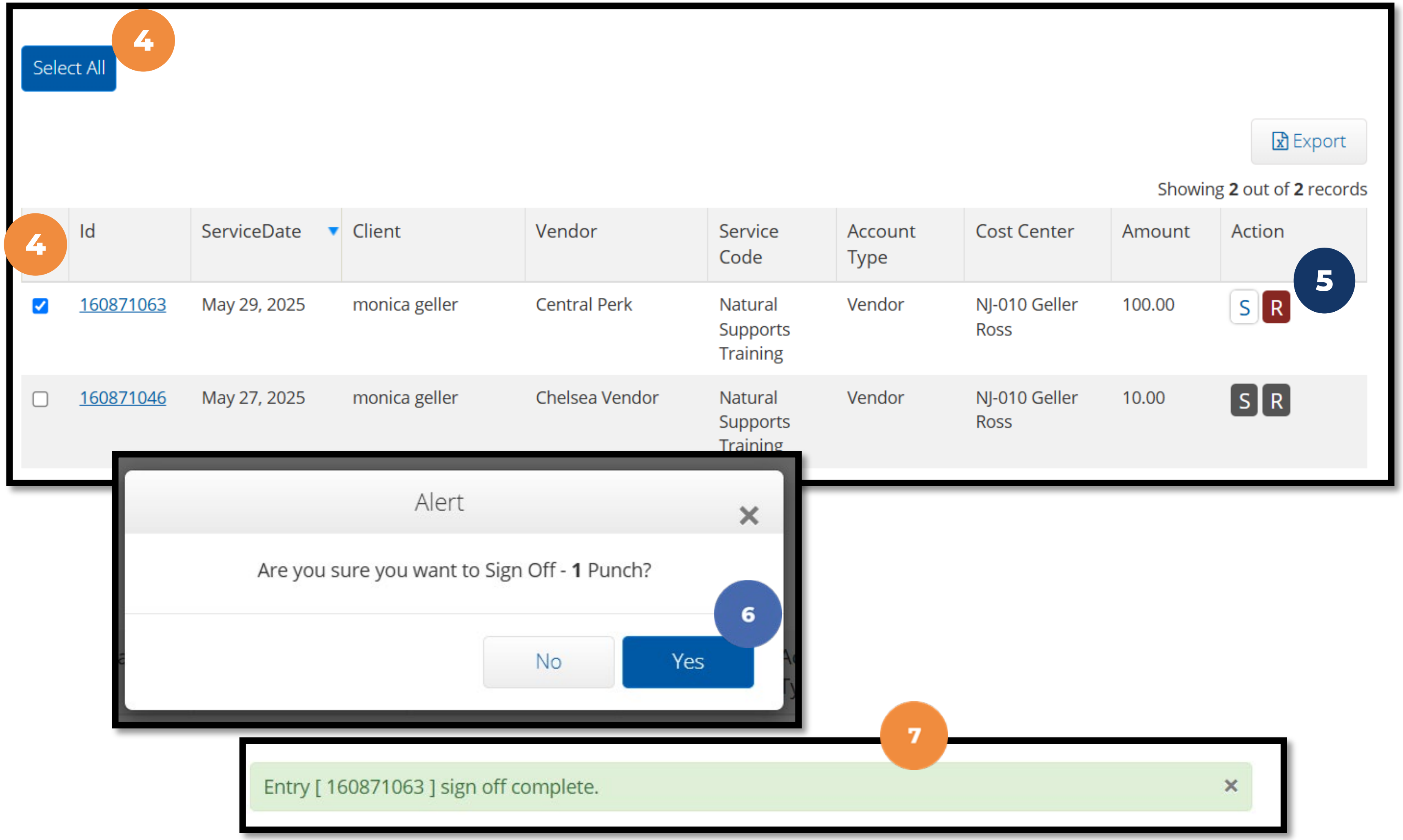
4. Check the box for the entry to sign off on (you can **select all** to sign off or reject on all entries)

5. Select "S" to Sign Off or "R" to Reject the Vendor Entry

- Select the "S" to SIGN OFF on the invoice (after you confirmed everything is correct)
- Select the "R" to reject the entry. **Note**: If you reject an entry, please reach out to the vendor so they can resubmit the payment entry correctly.

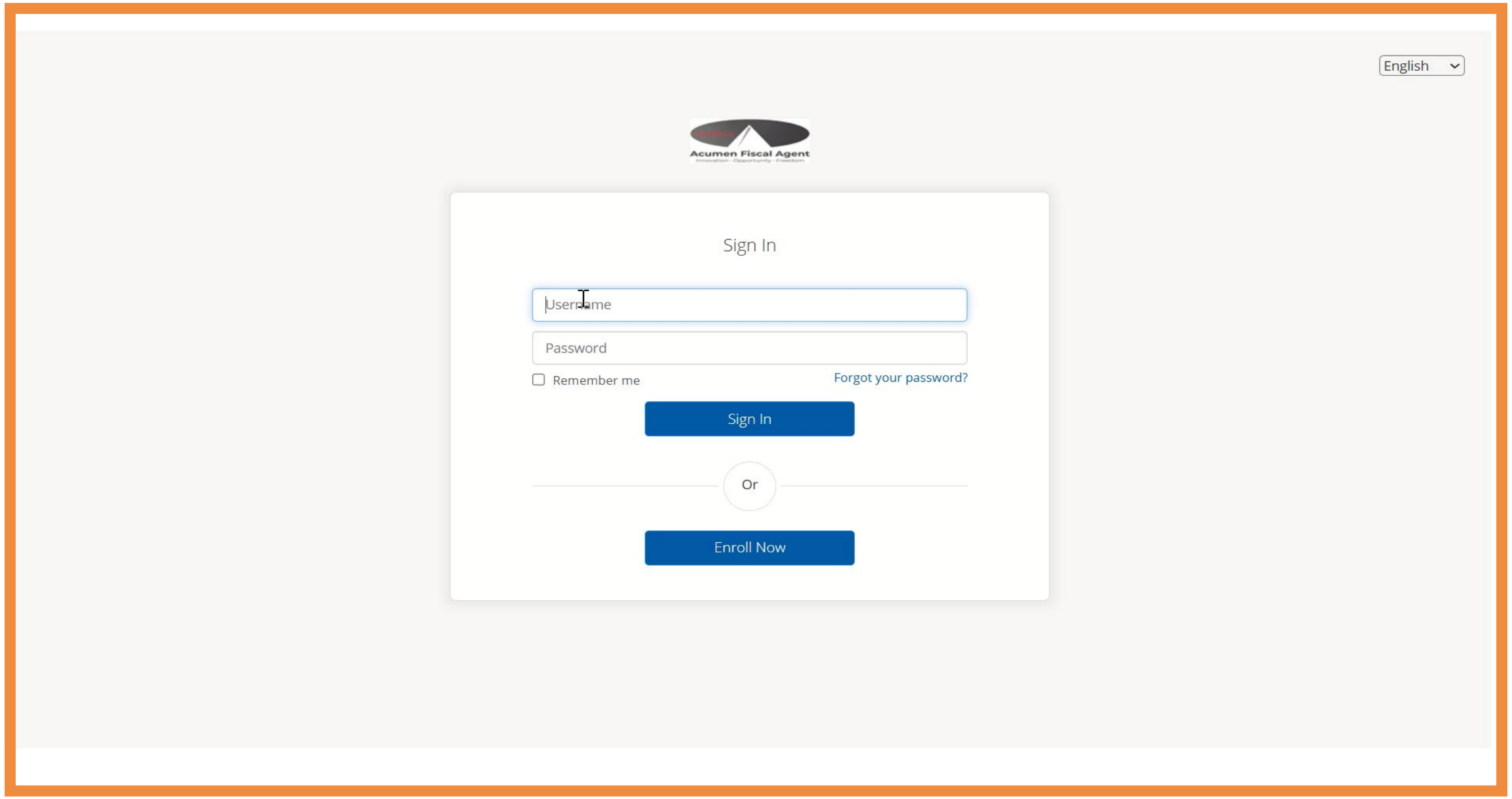
6. An alert will ask to confirm you would like to Sign off on or Reject the entry. Select Yes to Confirm.

7. A green bar will appear confirming the sign off.



Web Portal Video

Sign Off on Vendor Payment Entries



Important Reminder!

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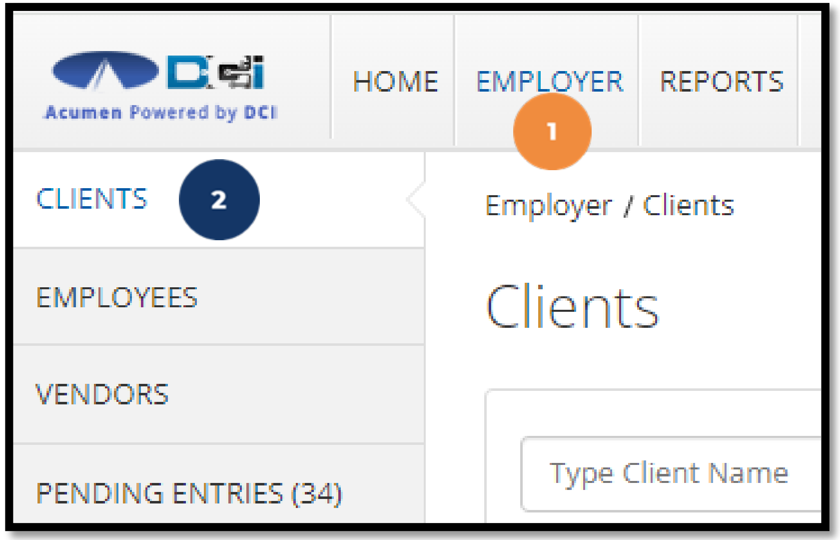
***Important!** Vendor Payment Entries must be both entered AND approved within **60** days from the date of service!

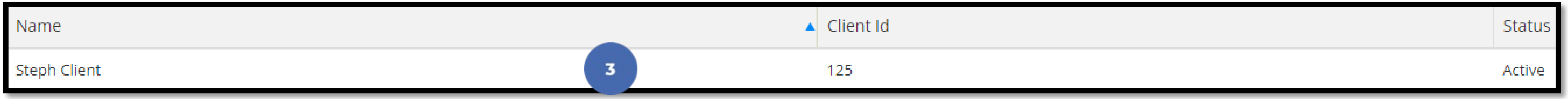
Clients

As a reminder: Client is the Individual receiving services

Client Details Page

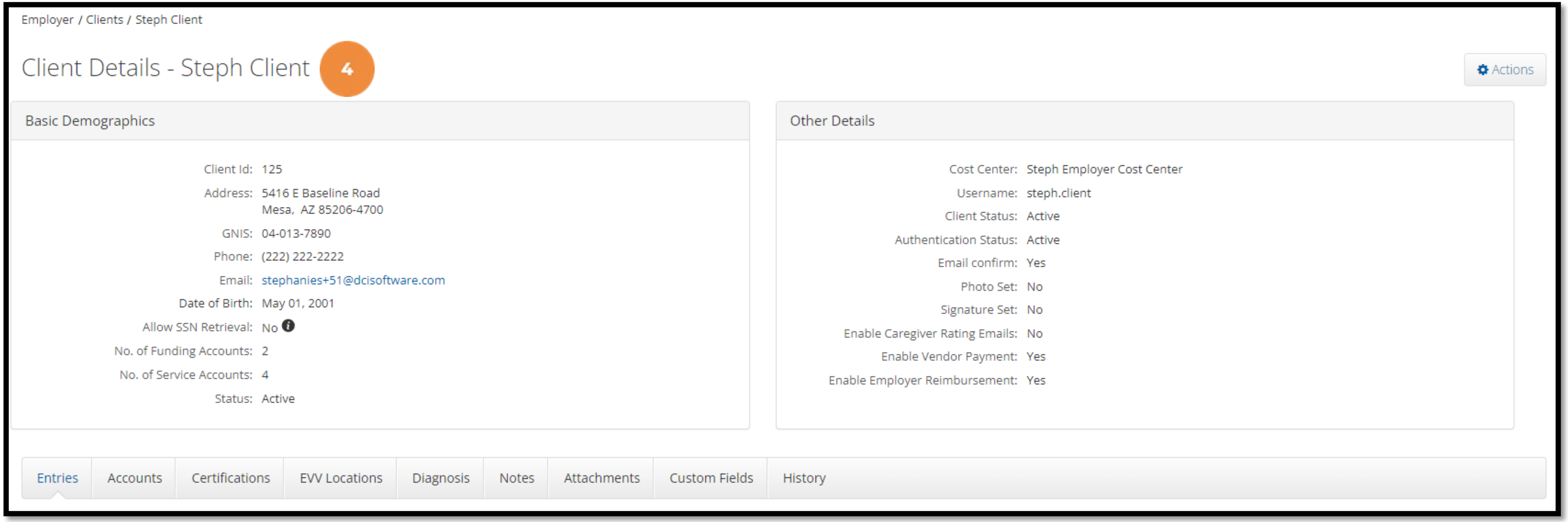
1. Click **Employer** on the main menu
2. Select the **Clients** tab from the submenu
3. Click anywhere on the selected client's row





Client Details Page

4. View the client details page including widget boxes (Basic Demographics, Other Details) containing important information



Client Details Page

5. Scroll beneath the widgets to the tabs:

- **Entries** – All entries associated with the client. Click the hyperlinked ID number to view entry details and use the Status column to ensure all time for the pay period is entered and approved before the payroll deadline.
- **Accounts -** All accounts (connections) for the client and is useful for troubleshooting
- **EVV Locations** - All locations for the client, and which is primary (if applicable).
- **Diagnosis** – View client diagnosis information
- **Notes** – View notes regarding the client entered by the employer
- **Attachments** – View attachments pertaining to the client
- **History** – View modifications made to the client profile

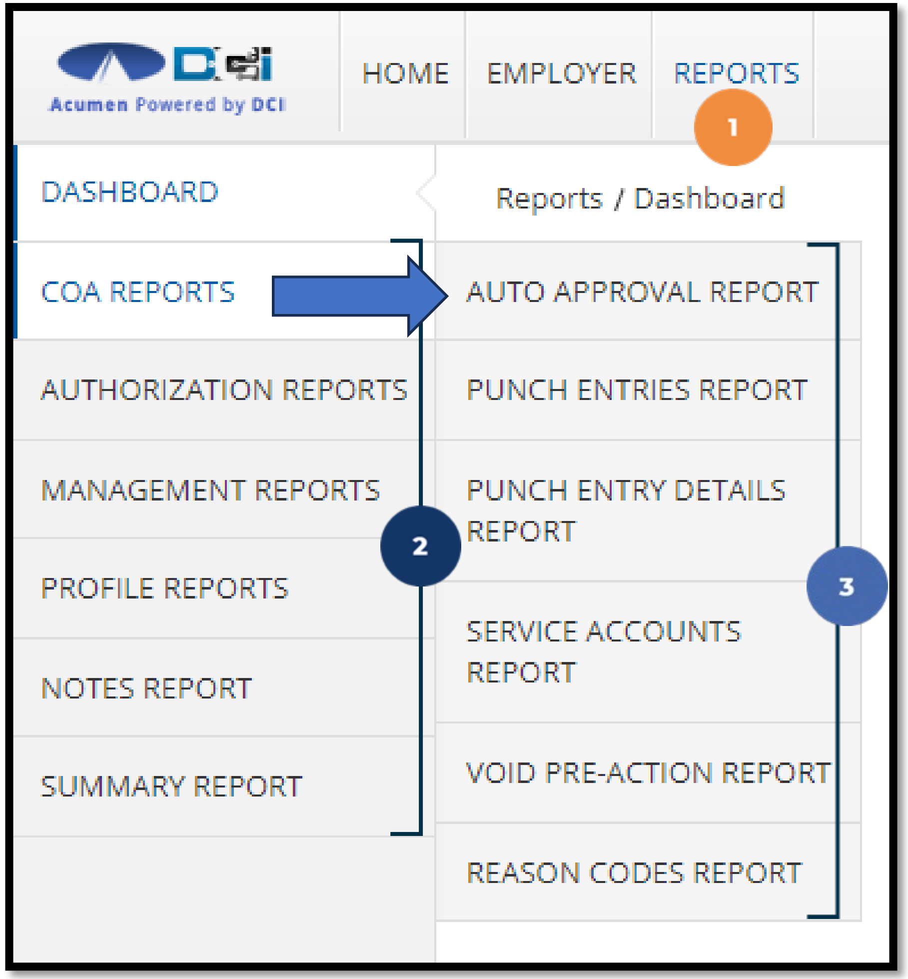
Reports

Using Reports

1. Select **Reports** on the main menu
2. Hover over a report category on the submenu
3. Select a report from the flyout menu

*Popular reports include:

- ✓ **COA Reports** (Chart of Account)
  - ➢ 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



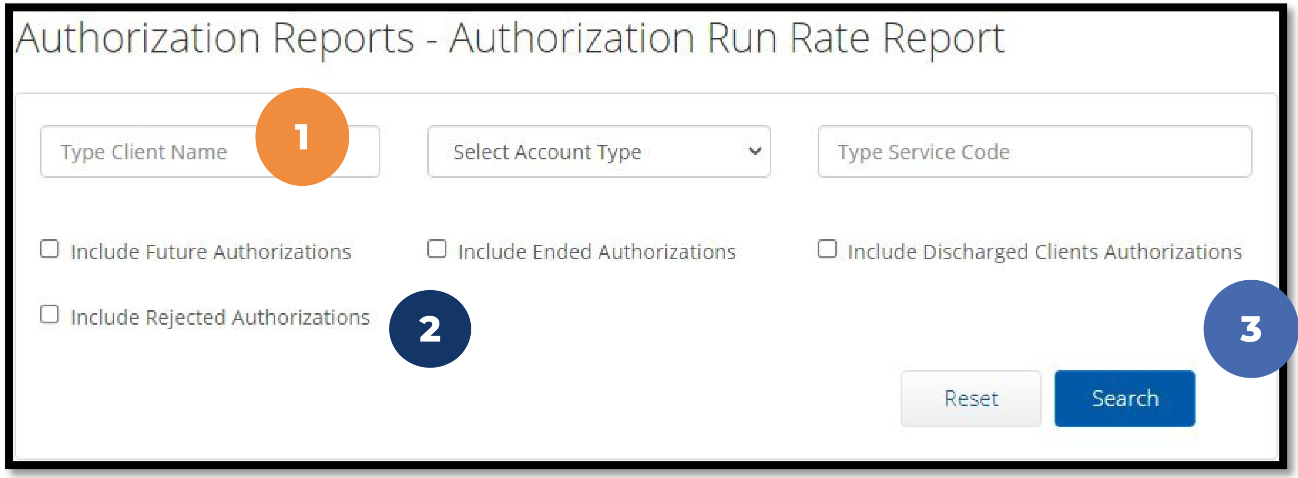
DCI Reports - Authorization

Most Common Auth Report

1. Type Client Name
   - Type 3 letters > Select Name
2. View other Authorizations
   - Not needed to view current Auth
3. Click Search

Pro Tip:

Searching without filters will pull ALL Authorizations in DCI



DCI Reports - Authorization

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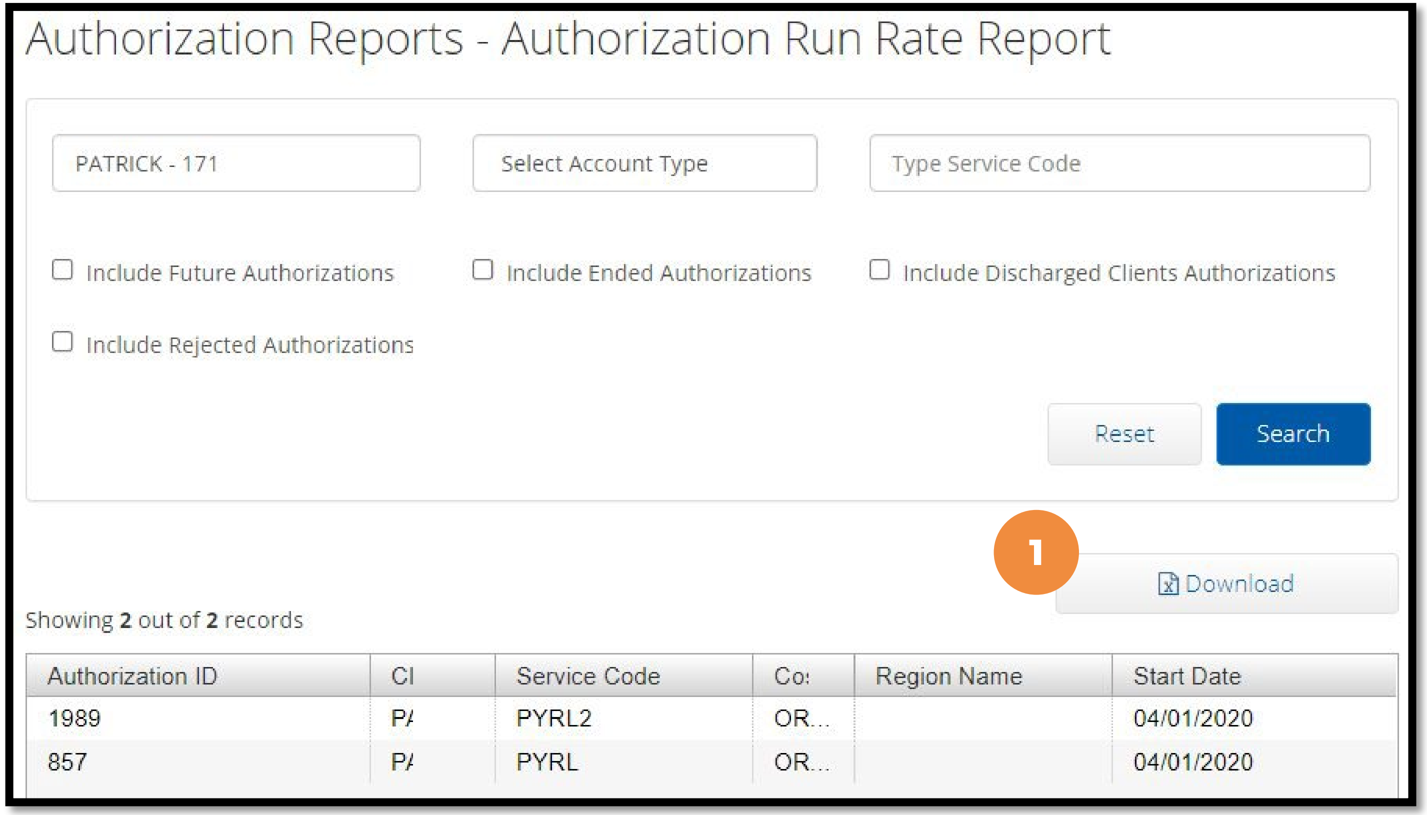
<u>Once Results are Listed</u>

1. Select Download button
2. Complete Download Wizard
   - Select Columns & Format
3. See Next Slide for details



DCI Reports - Authorization

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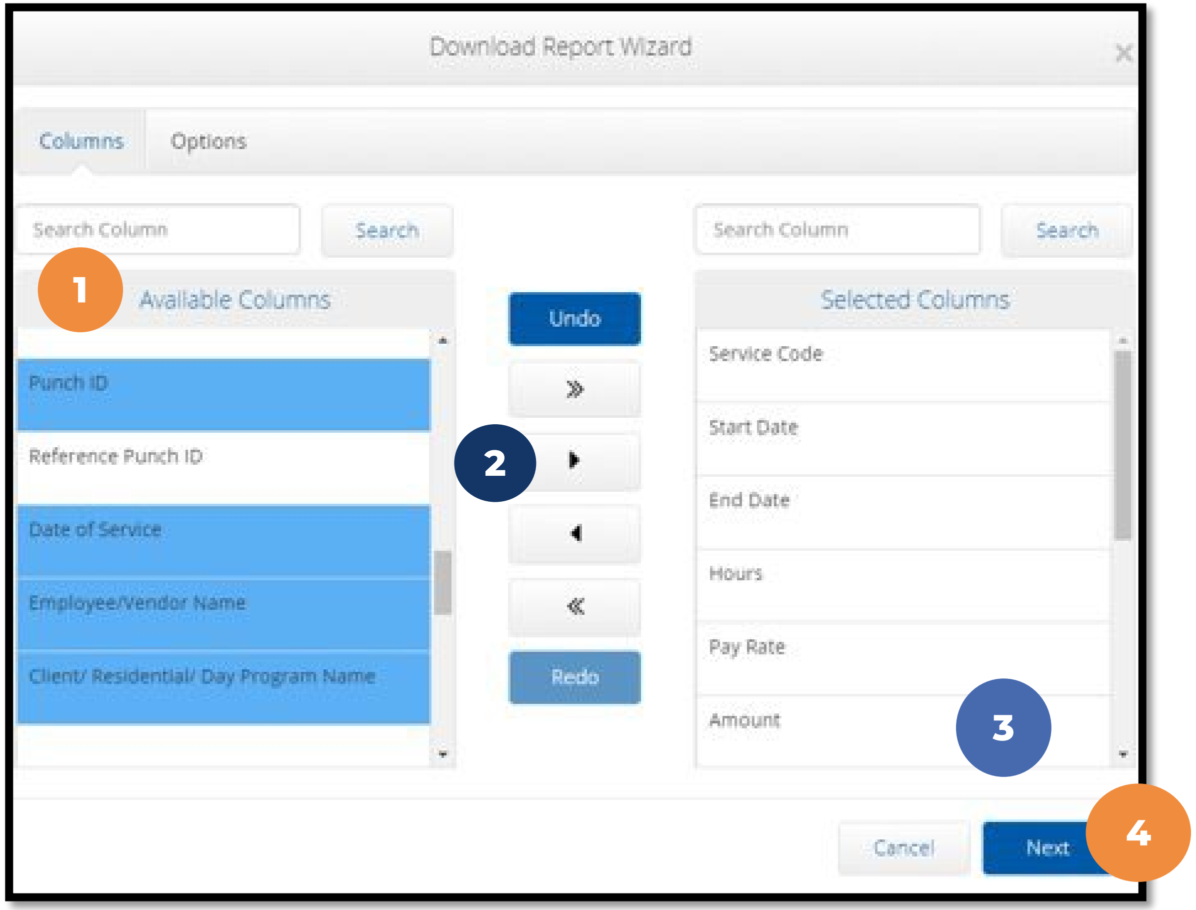
Once Report Wizard is open

1. Select all desired columns
2. Click single arrow to add
3. Rearrange columns as needed
4. Select Next for more



Recommended Columns

- Client Name
- Service Code
- Start & End Date
- Initial Balance
- Remaining Balance
- Holds
- Projected/Current Rate
- Weekly & Monthly

DCI Reports - Authorization

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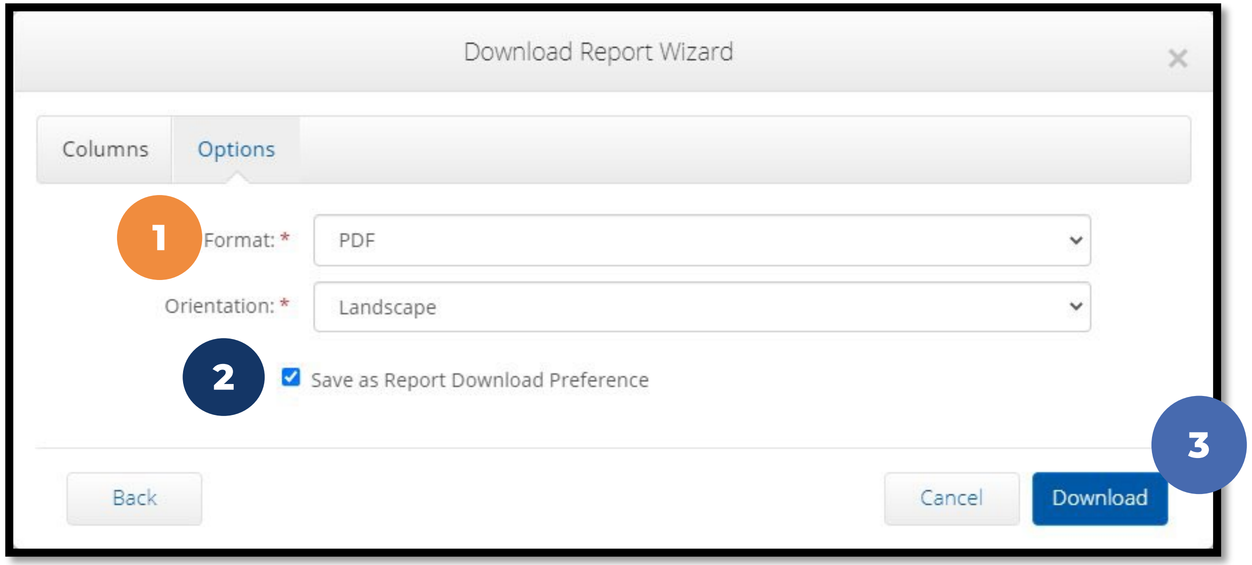
<u>Once Columns are Selected</u>

1. Select File Format
    - PDF/Landscape is Recommended
2. Save Report Preferences
3. Click Blue Download button
4. View, Save & Print Report

Pro Tip:
Keep Current Rates slightly below Projected Rates to ensure proper budget usage



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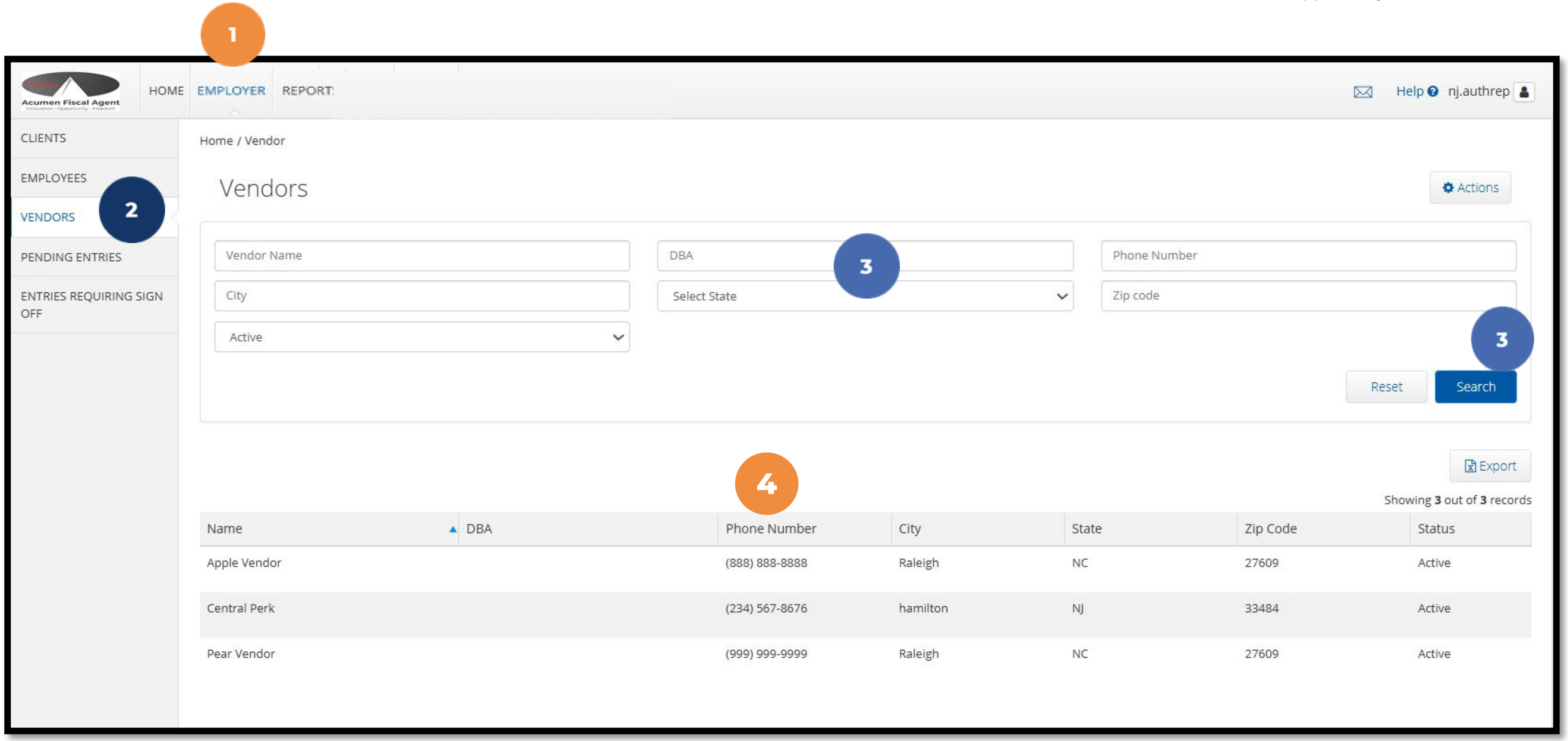
Client Name	Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Holds	Projected Weekly Run Rate	Current Weekly Run Rate	Projected Monthly Run Rate	Current Monthly Run Rate
PATRICK	PYRL2	04/01/2020	05/31/2022	12000.00	12000.00	0.00	106.19	0.00	455.06	0.00
PATRICK	PYRL	04/01/2020	05/31/2021	10000.00	10000.00	6407.87	164.31	0.00	704.23	0.00

Review Community Vendor List

Review Community Vendor List

1. Select **Employer** on the Main Menu
2. Select **Vendors** on the submenu
3. You can use the search filters to find a specific vendor
4. Find the list of all the Vendors your client has authorizations for below the search filters

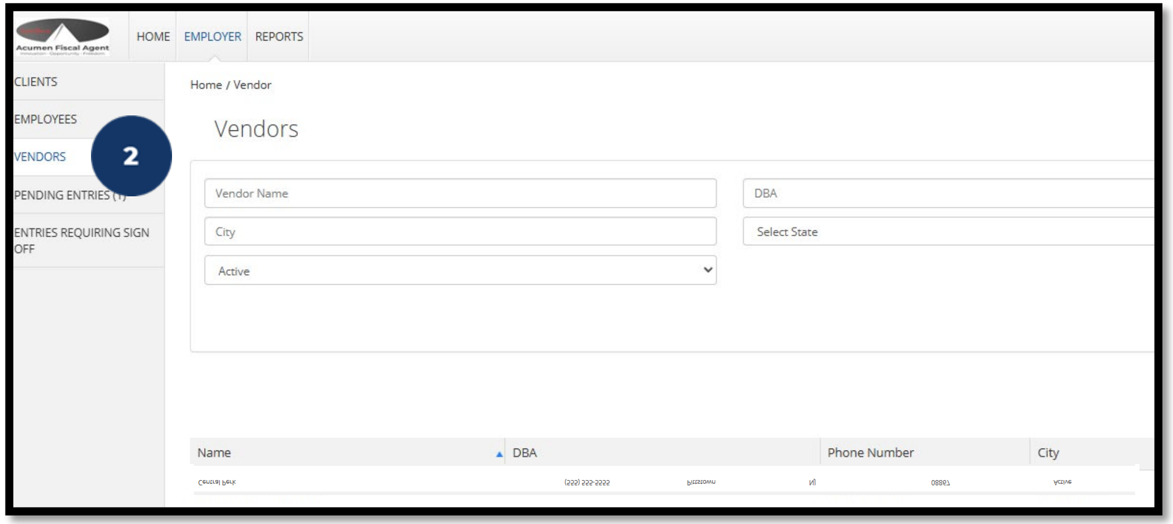


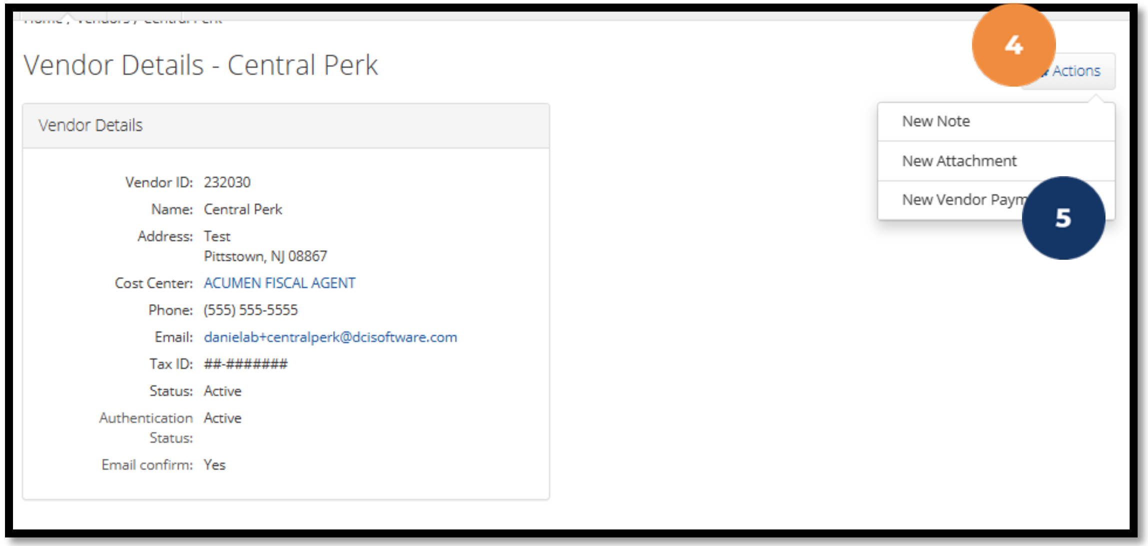
***Please note!** **If you do not see a Vendor on this list, please reach out to the Acumen NJ Agent team**

New Vendor Payment Entry

New Vendor Payment Entry

1. **From your home page,** Select **Employer**
2. Select Vendor from the submenu
3. Select **the Vendor you are submitting the payment entry for**
4. Select "Actions"
5. Select "Add New Vendor Payment"





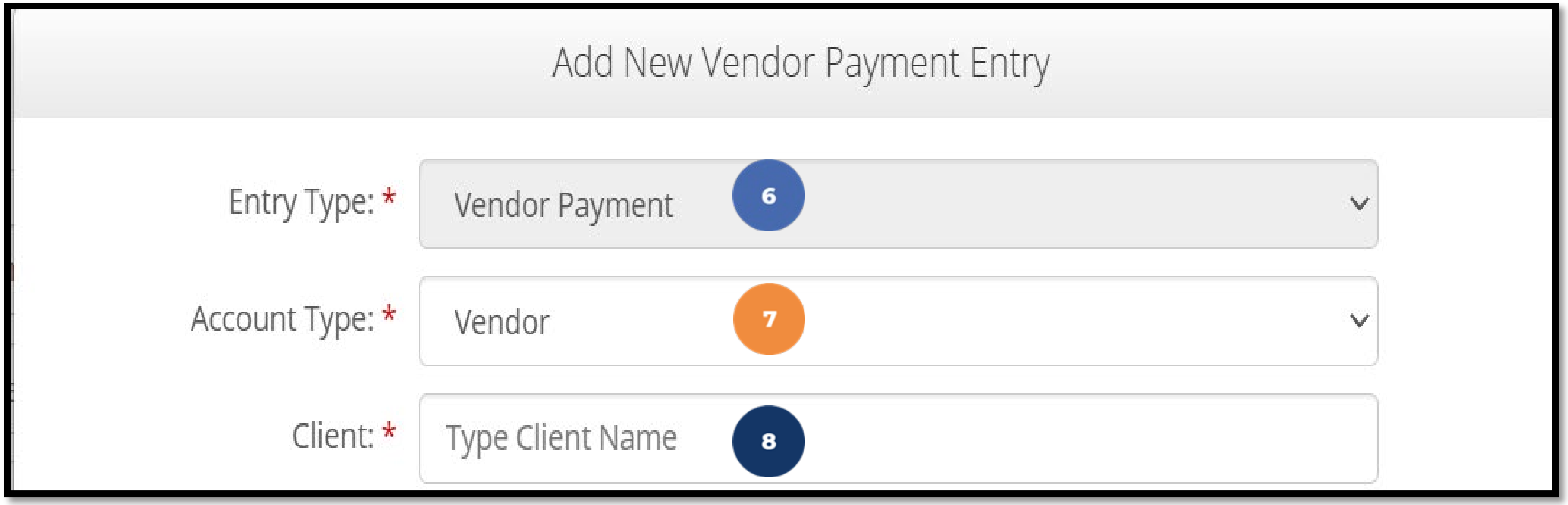
New Vendor Payment Entry

Complete the form:

6. Entry Type **(required):** Vendor Payment

7. Account Type **(required): Vendor**

8. Client **(required):** Type the client's name and select it from the drop-down



Please note: Only clients who have an active service account with you listed as the *vendor* will display. If you do not see your client's name appear in the drop down, please reach out to the **Acumen Support team.**

New Vendor Payment Entry

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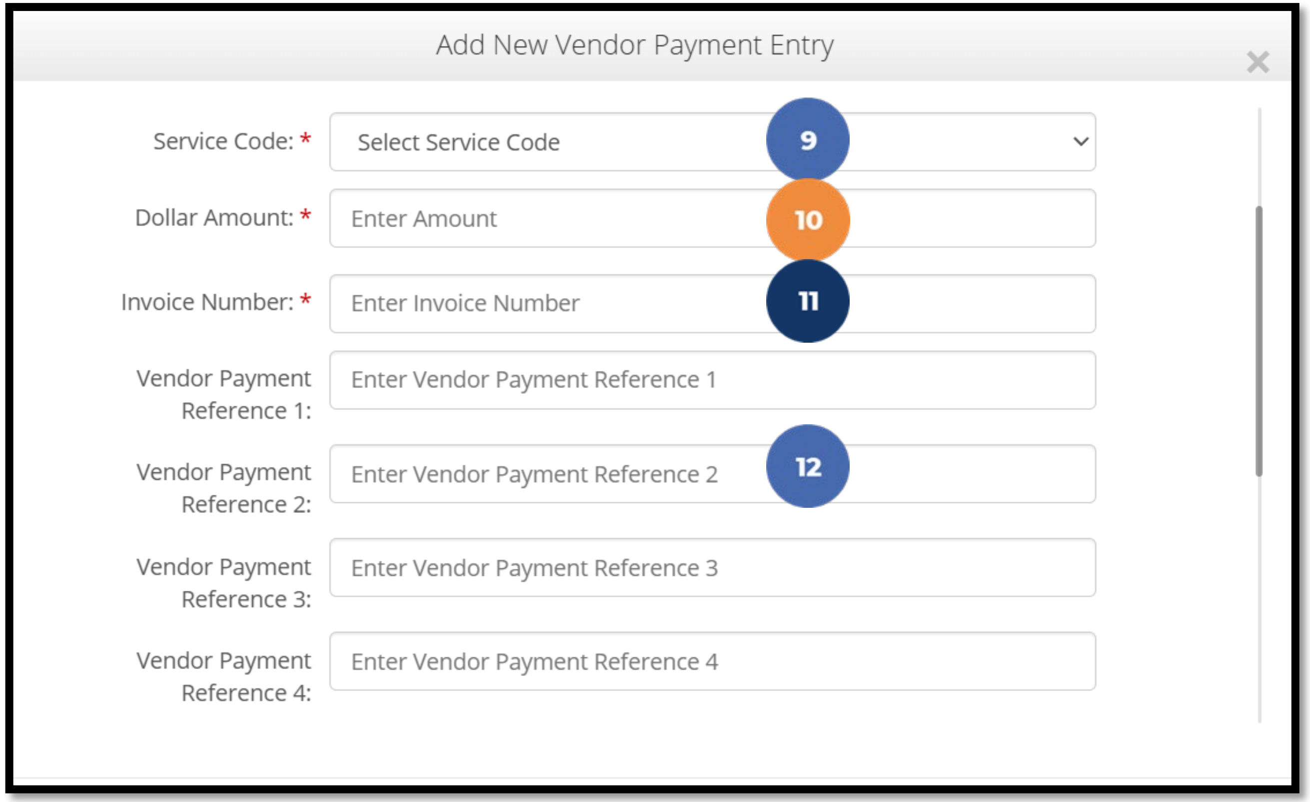
9. Service code (**required**): Select from the drop-down
10. Dollar Amount (**required**): Enter the total amount for the invoice for all dates of service
11. Invoice Number (**required**): Enter the invoice number
12. Vendor Payment Reference Fields 1-5 (*optional*): Optionally add any additional information regarding the vendor payment



New Vendor Payment Entry

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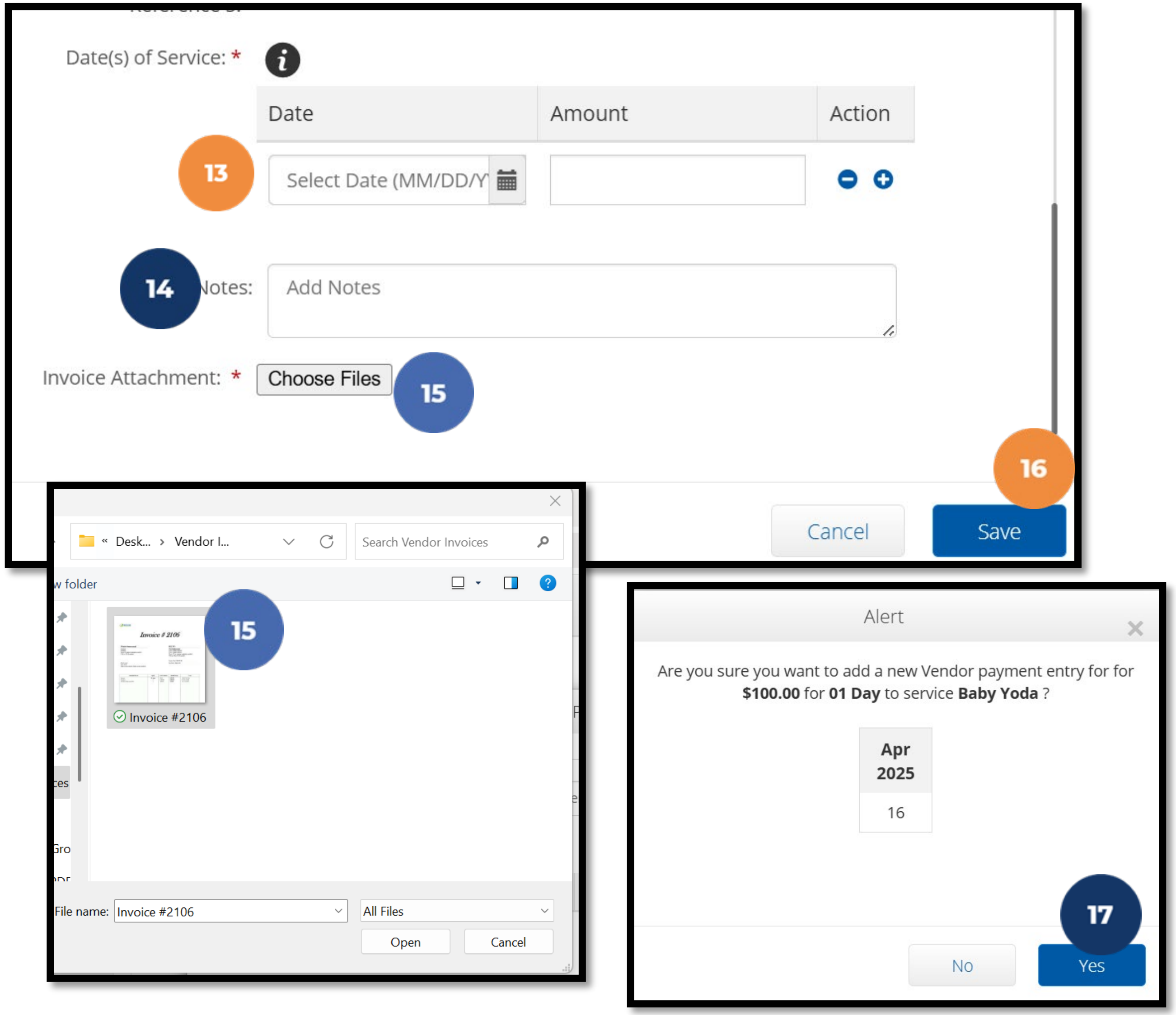
13. Date(s) of Service **(required):** This may be one date or multiple dates. Enter the date and the amount for that date then click the blue **plus sign (+)** to add more as needed.

- **Please note:** The sum of the dates of service must match the dollar amount entered in the Dollar Amount field

14. Notes (*optional*)
15. supporting documentation Attachment **(required):** Click the **Choose Files** button to select and upload the supporting documentation. Attachment must be in PDF, JPG, or PNG format.
16. Click **Save**
17. Click **Yes** to confirm

The entry is now submitted!

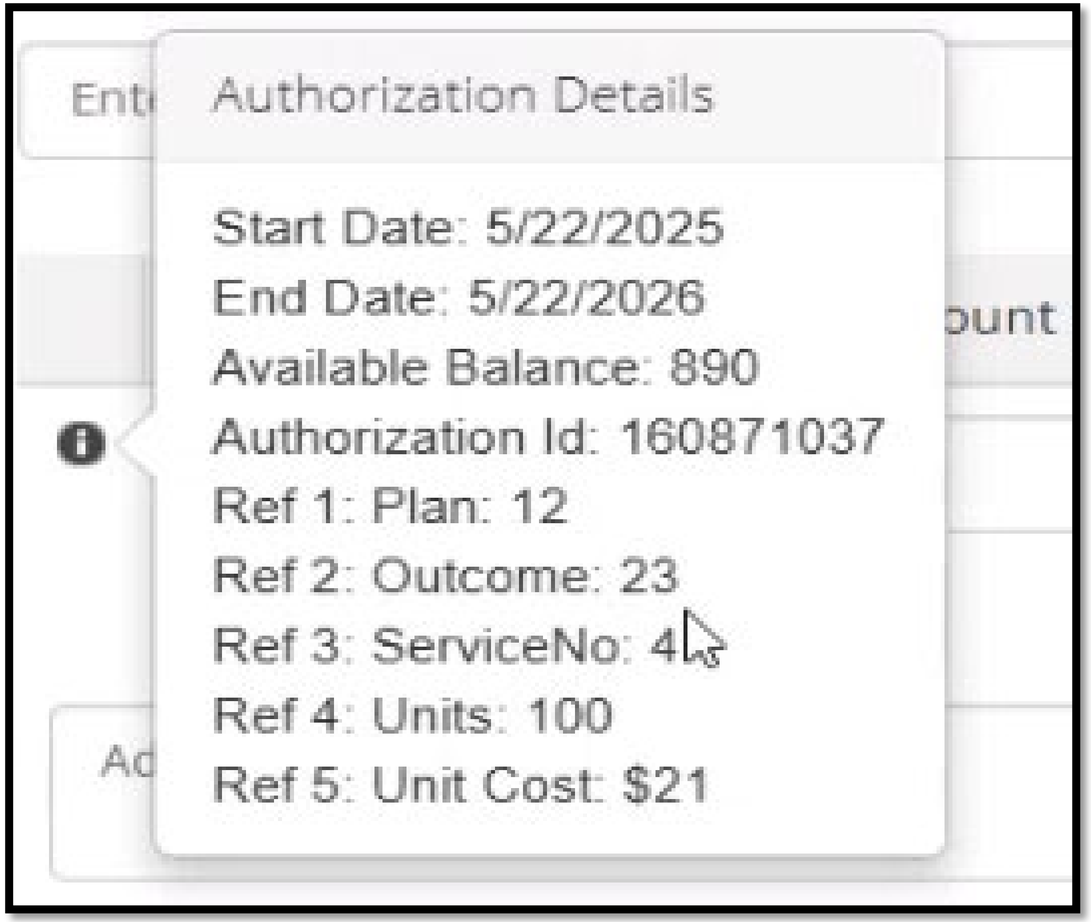


New Vendor Payment Entry

Hover over the **“i” icon** to see the authorization details!

Outcome Number and Service Number are related to the specific service code!

Refer to the SDR for the details on which service code to use!



Frequently Asked Questions

Auth Rep FAQ's

What is my role in DCI?

As an Individual or Authorized Representative, you are responsible for reviewing and approving Community Vendor supporting documentation submitted through DCI. Your approval is required before payment is issued.

How do I approve a Community Vendor supporting documentation?

Log into the DCI portal, navigate to the submitted invoice entry, review the attached documentation, and approve the supporting documentation if everything is correct.

What if I see an error in the vendor invoice?

You can reject the supporting documentation and contact the Community Vendor to make corrections before resubmitting.

Can I submit invoices on behalf of my vendor?

Yes. You may use the DCI Mobile App to create a Vendor Payment Entry, upload supporting documentations and receipts, and submit them for processing.

What is the Individual PIN used for?

The PIN is used for time validation and client attestation during supporting documentation submissions through the mobile app or Phone EVV system.

Auth Rep FAQ’s

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How do I know if all my vendors are in the system?
Review your vendor list upon logging into DCI. If someone is missing, reach out to your Agent immediately.

Where can I find help using the DCI system?
Training materials are available on the DCI Web Portal. Go to the **'Help'** section and select NJ DDD Vendor Fiscal/Employer Agent Model Training Materials.

What happens if I miss an invoice approval deadline?
The supporting documentation will be processed in the next payment cycle. To avoid delays, be sure to approve entries before the listed deadline.

Who should I contact if I have a question or issue?
Reach out to your Acumen Agent or contact Customer Service at **(866) 427-1739** or **customerservice@acumen2.net**.

When can I begin using DCI?
Once you receive your 'Good to Go' letter, you may begin using DCI on or after the stated start date. Do not approve or submit supporting documentations before this date.

Resources

NJ Payment Schedule

- Follow this payment schedule closely to ensure your employees and/or vendors are always paid on time
- Approve and submit all time entries/vendor payments/reimbursements **by 9 PM EST of the Timesheets Due date even if it falls on a weekend or holiday***
- Requests submitted after the due date will be handled in the following pay period
- Entries must be **entered and approved** within **60 days of the date of service**

NJ VF/EA Model Payment Schedule
Effective June 8, 2025 – June 6, 2026

To ensure that your employees and/or vendors are always paid on time, please submit and approve all employee time entries and Community Vendor/reimbursement requests by 9pm EST of the due date, **even if it falls on a weekend or holiday (see dates with an *).** Those received after 9pm EST of that date will be processed in the following payment period. Employees are required to have a direct deposit unless special approval is given.

To help ensure that the time worked gets to our offices by the due date, please use our Web Time Entry system through DCI, or the Mobile App option. To access DCI, go to https://acumen.dcisoftware.com/. Employers must be sure all hours are entered accurately and approved by the employer by 9pm EST for them to be paid on the payment date.

Please contact Acumen Customer Service Call Center at 833-892-0414 to confirm that your time sheet has been received. Contact your Acumen Agent at (848)-400-5903 or enrollment-nj@acumen2.net if you have any questions or concerns.

Month	Payroll Start	Payroll End	Timesheets Due (9pm EST)	Pay Date
JUN	06/08/25	06/21/25	Mon, 06/23/25	Thu, 07/03/25
	06/22/25	07/05/25	Mon, 07/07/25	Fri, 07/18/25
JUL	07/06/25	07/19/25	Mon, 07/21/25	Fri, 08/01/25
	07/20/25	08/02/25	Mon, 08/04/25	Fri, 08/15/25
	08/03/25	08/16/25	Mon, 08/18/25	Fri, 08/29/25
AUG	08/17/25	08/30/25	Mon, 09/01/25	Fri, 09/12/25
	08/31/25	09/13/25	Mon, 09/15/25	Fri, 09/26/25
SEPT	09/14/25	09/27/25	Mon, 09/29/25	Fri, 10/10/25
	09/28/25	10/11/25	Mon, 10/13/25	Fri, 10/24/25
OCT	10/12/25	10/25/25	Mon, 10/27/25	Fri, 11/07/25
	10/26/25	11/08/25	Mon, 11/10/25	Fri, 11/21/25
NOV	11/09/25	11/22/25	Mon, 11/24/25	Fri, 12/05/25
	11/23/25	12/06/25	Mon, 12/08/25	Fri, 12/19/25
DEC	12/07/25	12/20/25	Mon, 12/22/25	Fri, 01/02/26
	12/21/25	01/03/26	Mon, 01/05/26	Fri, 01/16/26
	01/04/26	01/17/26	Mon, 01/19/26	Fri, 01/30/26
JAN	01/18/26	01/31/26	Mon, 02/02/26	Fri, 02/13/26
	02/01/26	02/14/26	Mon, 02/16/26	Fri, 02/27/26
FEB	02/15/26	02/28/26	Mon, 03/02/26	Fri, 03/13/26
	03/01/26	03/14/26	Mon, 03/16/26	Fri, 03/27/26
MAR	03/15/26	03/28/26	Mon, 03/30/26	Fri, 04/10/26
	03/29/26	04/11/26	Mon, 04/13/26	Fri, 04/24/26
APR	04/12/26	04/25/26	Mon, 04/27/26	Fri, 05/08/26
	04/26/26	05/09/26	Mon, 05/11/26	Fri, 05/22/26
MAY	05/10/26	05/23/26	Mon, 05/25/26	Fri, 06/05/26
	05/24/26	06/06/26	Mon, 06/08/26	Thu, 06/18/26

Helpful Resources

Utilize our Websites

[New Jersey - Training Materials](#) for **more help**

- This will give you a full list of Training Materials for DCI

[New Jersey State Page](#)

- This will give you New Jersey specific details with Acumen Fiscal Agent

Contact the Acumen Customer Service Team

For help with enrollment questions, DCI system questions, or payment issues

Contact Us form at www.acumenfiscalagent.com/contact

Email us at customerservice@acumen2.net

By Phone: (833) 892-0413

Or contact your Acumen New Jersey Client Services Agent!

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THANK YOU!

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