New Jersey DDD DCI Systems Training for Self-Directed Employees

Welcome to Acumen!

Thank you for joining the Acumen Family!

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

Using Microsoft Teams

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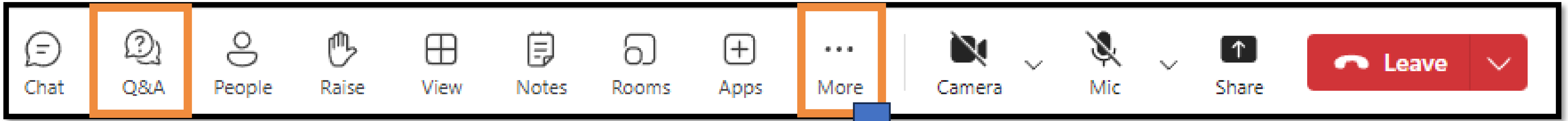
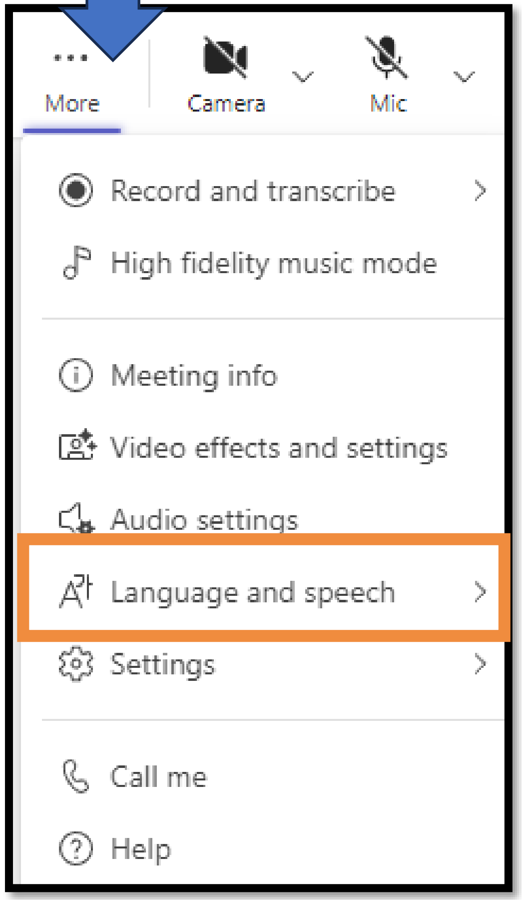


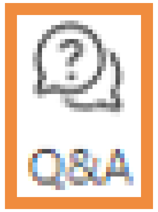
- Ensure both the Camera & the Mic are disabled (as pictured above with a line through them)
- Today we will not be using the Chat (disabled) or Raise hand features
- Click the **Q&A** button to type & send your question during the meeting

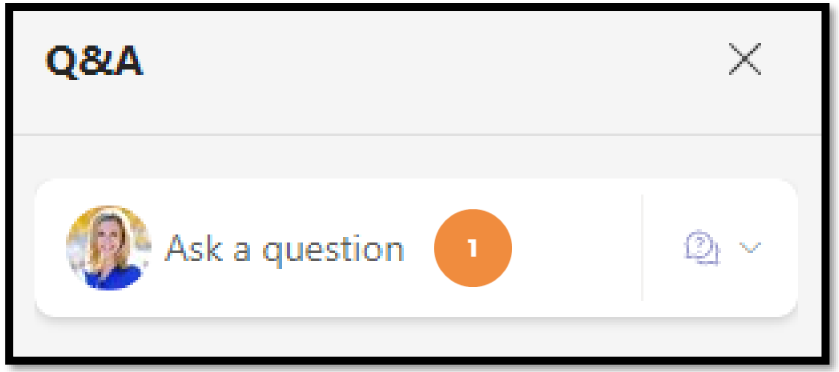


- To enable closed captioning:
  - ✓ Click the **More** button (three dots)
  - ✓ Select **Language and speech**
  - ✓ Click **Show live captions**

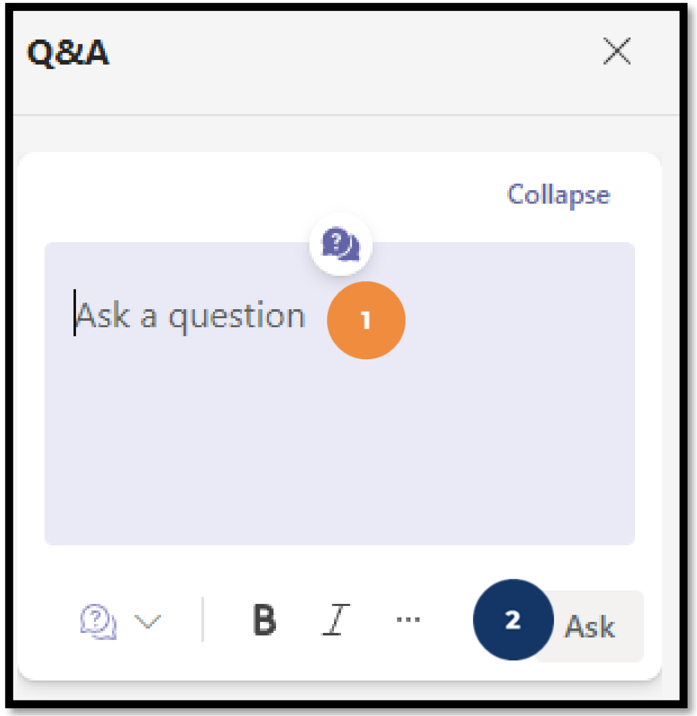
- OR press **ALT+Shift+C** on your keyboard

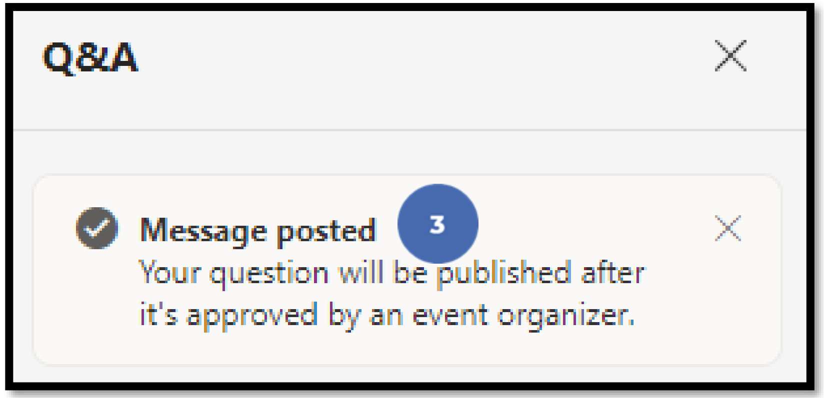
Using the Q&A button

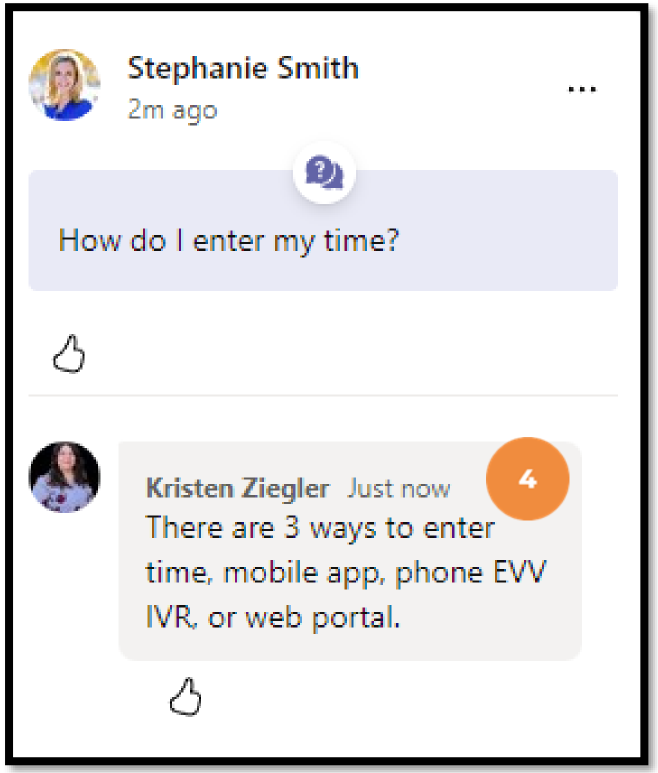




1. After clicking the Q&A button, **type your question** in the Ask a question field
   - Please do not include any confidential information or the question cannot be published & answered
2. Click the **Ask** button
3. Message posted displays
4. Moderators review, approve & post your question.







Agenda

- Why You Are Here & Acumen/DCI Overview
- Mobile App - Clocking In & Out
- Web Portal – Add, Edit, Reject, Review Historical Entry
- Mobile Web Entry – Add, Reject, Review
- Phone EVV (IVR) Resource
- Troubleshooting
- Payroll Schedule + Resources

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Quick Resources

- **View short step-by-step resource documents on the New Jersey - Training Materials page providing instructions for the punch entry process.**

  - ✓ Download the DCI Mobile EVV App & Log In
  - ✓ Logging into the Web Portal or the Mobile App
  - ✓ Mobile App Entries
  - ✓ Web Portal Entries
  - ✓ Phone EVV IVR Real Time & Historical Entries
  - ✓ Business Rule Alerts – Quick Reference

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Critical Information

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This training is specifically for **Self-Directed Employees**. If you are a *Vendor*, *Authorized Representative* or *Employer*, please refer to our training flyer for those training dates.

- Time must be **entered and approved** online **by the due date**, ***even if it falls on a weekend or holiday***.
  - ❖ Time entries approved after the due date will be processed on the following pay period's pay date
- After 60 days the entry will be prohibited as it will violate the timely filing business rule
  - ❖ All time entries must be **entered and approved** within **60 days of the date of service**

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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 is transitioning Fiscal Intermediary (**FI**) services from Public Partnerships, LLC (**PPL**) to Acumen Fiscal Agent (**Acumen**), this transition started 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 summer of 2025, 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**. 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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1. Attend a Training Session for Enrollment
2. Complete your Electronic Enrollment using EES
3. Attend a Training Session for the DCI System
4. You will receive a “Good to Go” letter when your enrollment is final
5. Self-Directed Employees submit their time entries via the DCI mobile app. Employers approve or reject entries via the DCI Portal.
6. Payments will be made bi-weekly

Note: *Submit and approve all time 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 the due date will be processed in the following payment period.

Overview

Who is Acumen?

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- 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

Why DCI?

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- DCI increases compliance with the 21st Century Cures Act by capturing real-time punch entries at Clock In/Out at the Start/End of the shift
- Greater accuracy in service tracking, reporting, and billing for in-home care workers
- Reduction of manual work needed with paper processes
- Faster corrections of pay issues ensuring timely payment

What is EVV?

- The 21st Century Cures Act, signed into law December 13th, 2016, by President Obama, requires state agencies to use a system of **electronic visit verification** (EVV) for all Medicaid personal care services (PCS) and home health care services (HHCS) that require an in-home visit by a provider.
- EVV uses electronic devices to verify a provider's visit
- The following data is collected for each visit:
  - ✓ The date of the service
  - ✓ The location of the service delivery
  - ✓ The time the service begins and ends
  - ✓ The individual receiving the service
  - ✓ The individual providing the service
  - ✓ The type of service performed

Ways Employees Enter Time

They select one per shift (each clock in/out)

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Mobile App		Phone EVV		Web Portal
	OR		OR	

Mobile App

- ***Preferred Method**
- Real Time Entry – **EVV compliant**
- Quick & Easy
- Mobile App Guide

Phone EVV

- Landline
- Real Time Entry – **EVV compliant**
- Historical Entry – Non-EVV compliant
- Option when access to a mobile device or computer is limited

Web Portal

- **Only used for service interruptions**
- Time Management
- Historical Entry & Corrections – Non-EVV compliant
- Manual Time Approval
- Profile Settings
- ***Includes Mobile Web Portal –** Mobile-friendly web portal version accessed via smartphone or tablet

DCI Requirements

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<u>Devices & Operating Systems (OS)</u>

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.

<u>Web Browsers</u>

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

DCI Mobile App

*Preferred Time Entry Method

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DCI Mobile App Basics

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- Used for clocking in and out for real-time entries
- Preferred, EVV-compliant method
- Can be downloaded on a mobile device or tablet
- View all entries including status & details

DCI Mobile App

Download & Login

Download DCI Mobile EVV

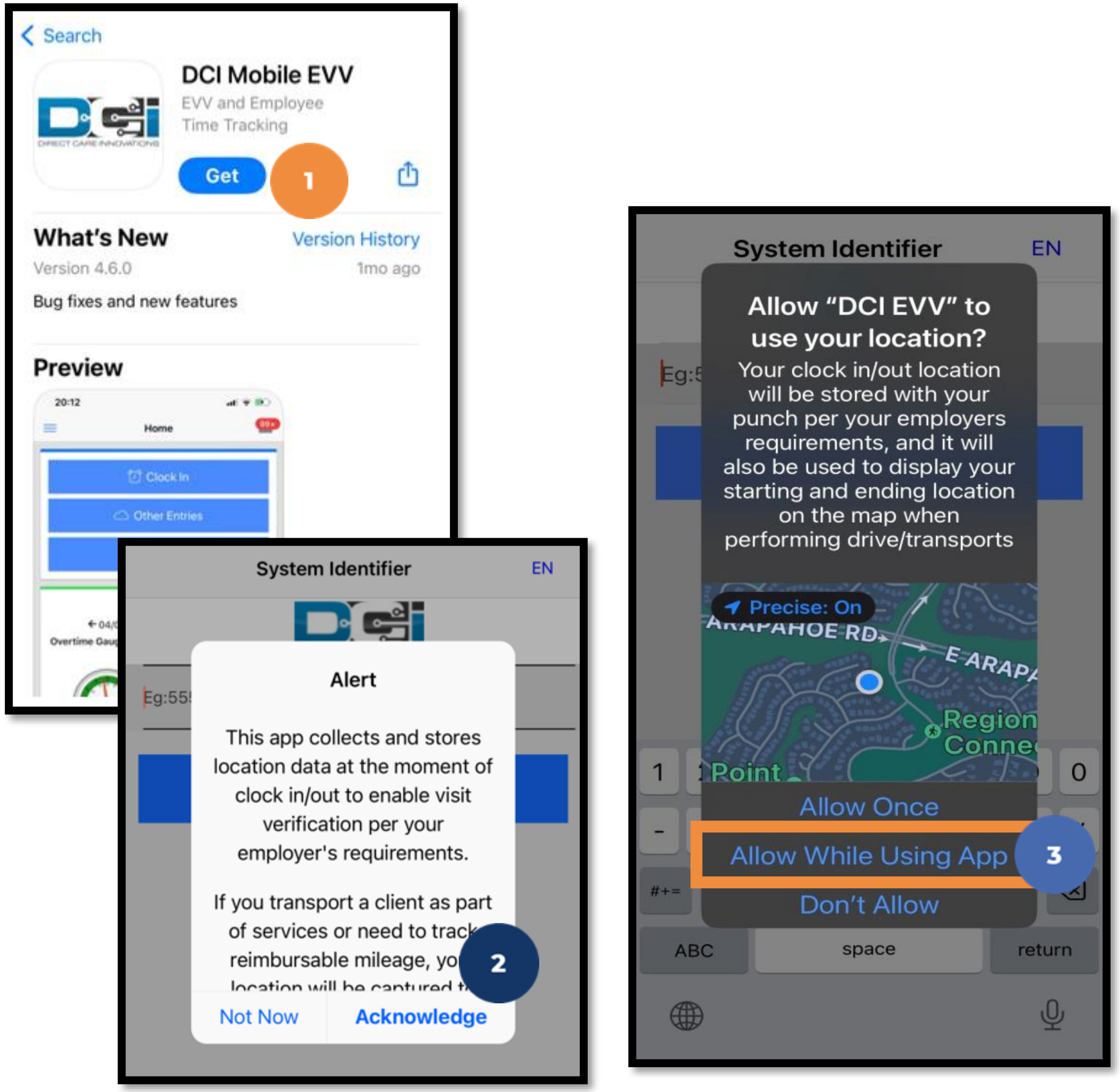
1. Download the ***DCI Mobile EVV*** App

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

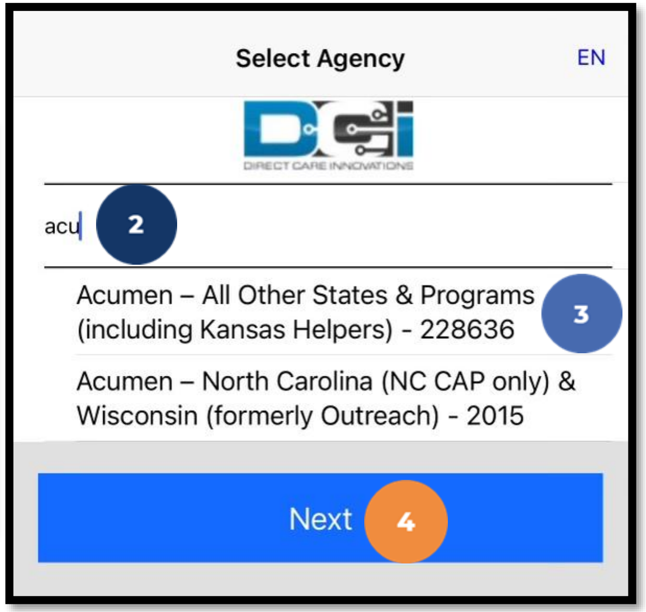
***Please note!**

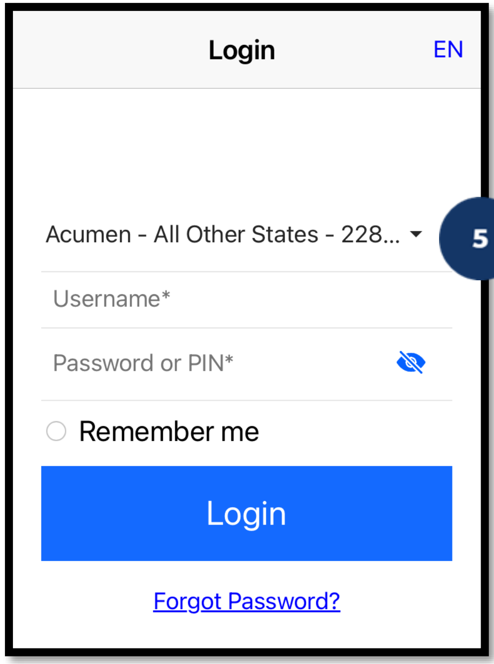
- There is more than one DCI app available. Please be sure to select the one labeled **DCI Mobile EVV.**
- Users may need to set app permissions. Media access is not necessary.



Initial Agency Selection

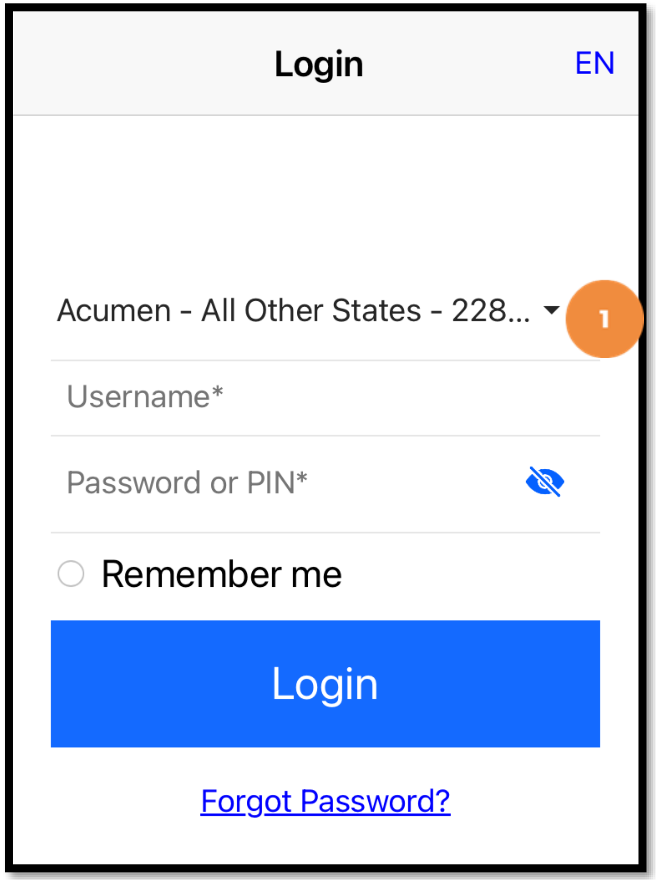
1. After downloading the app, the Select Agency screen appears with a Search Agency field.
2. **Type at least three consecutive characters of the agency name OR the system identifier** in the Search Agency field
   - ❖ The Acumen system identifier for All Other States & Programs (including Kansas Helpers) is **228636 – NJ DDD**
   - ❖ The consecutive characters can be located anywhere in the agency name or system identifier
3. **Select the agency** from the list
4. Click the blue **Next** button
5. The agency is now selected and appears on the login screen

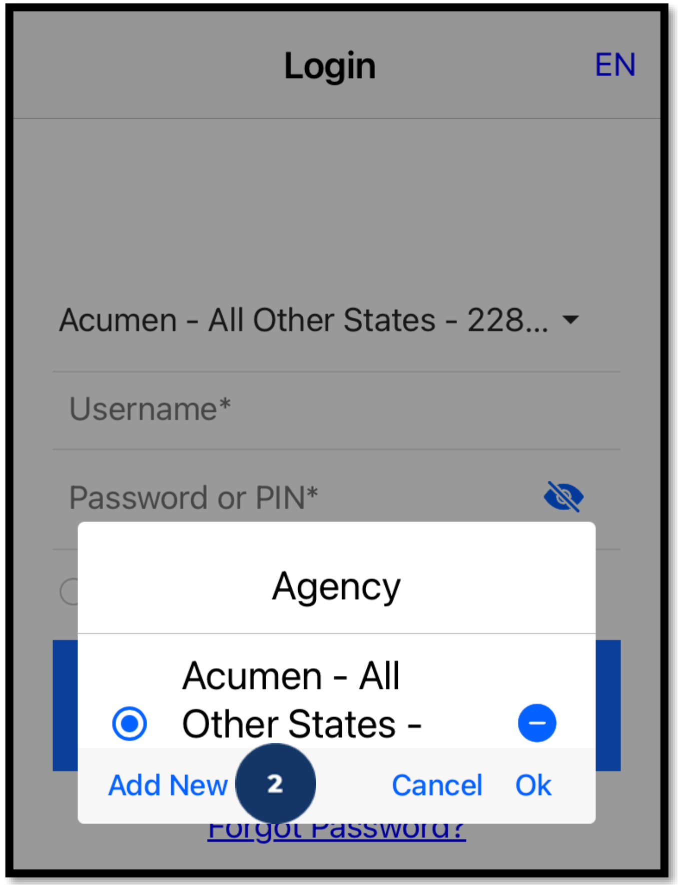




Add More Agencies

1. To add more agencies, click the **drop-down** on the agency field.
2. If the desired agency is not listed, click **Add New** on the Agency results list.





Add More Agencies

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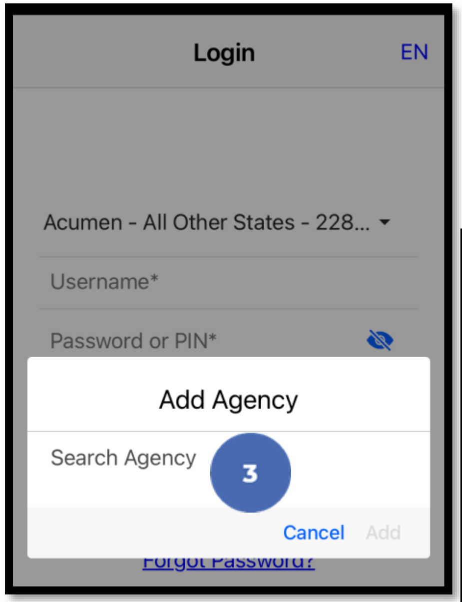
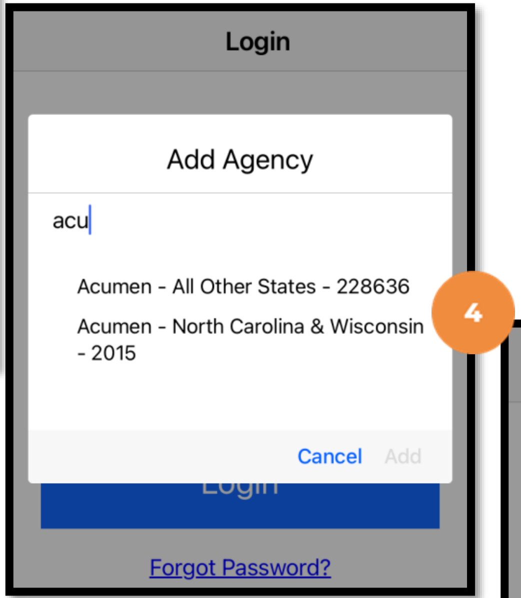
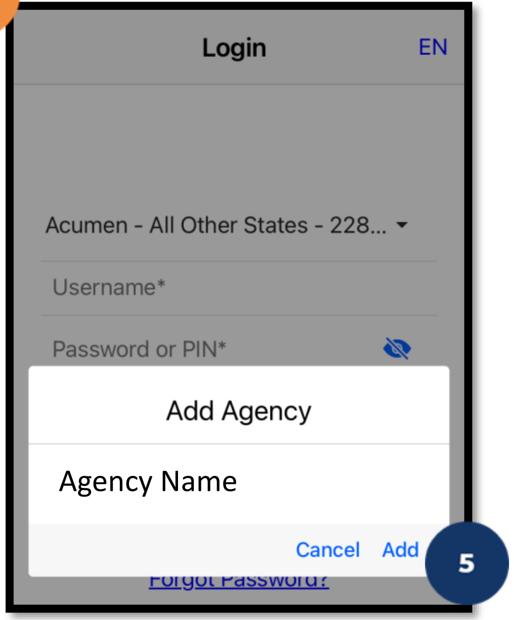
3. On the Add Agency window, **type at least three consecutive characters of the agency name OR the system identifier** in the Search Agency field.
   - ❖ The consecutive characters can be located anywhere in the agency name or system identifier
4. **Select the agency** from the list
5. Click **Add**







The agency is now added and displays on the agency drop-down menu. At each log in, select the appropriate agency.

Log into the DCI Mobile App

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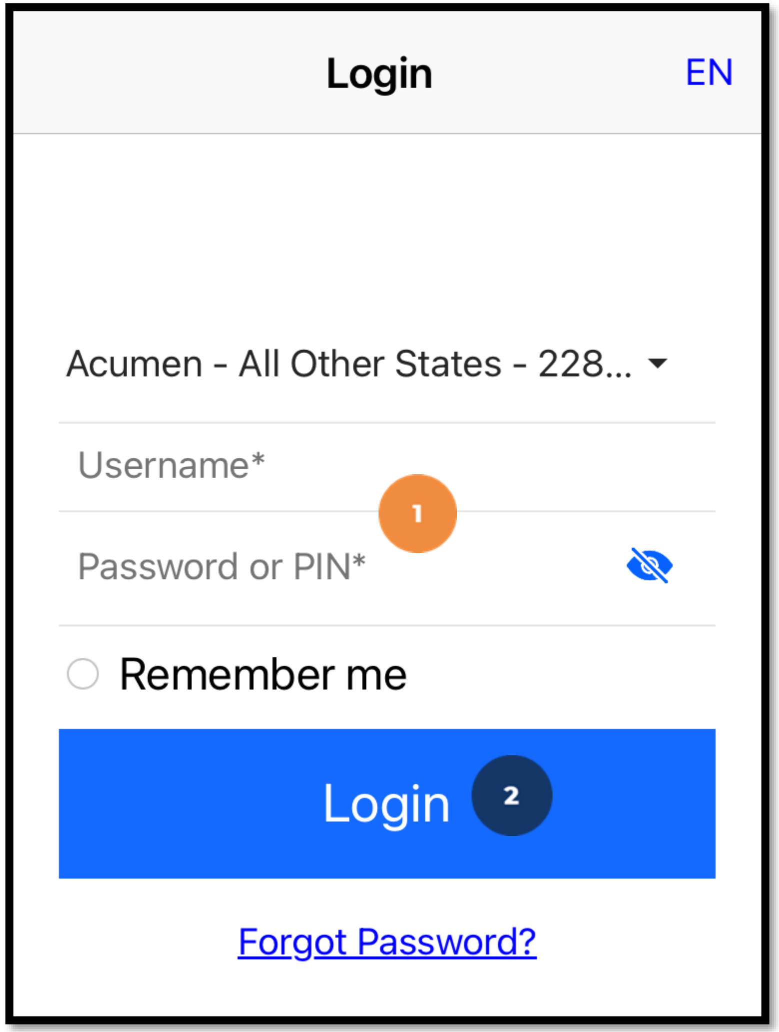
1. Enter Self-Directed Employee credentials
   - ✓ This was created by **you** during your electronic enrollment process
   - ✓ Optionally, select "Remember Me" to save the username

     ***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



Initial Log In

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

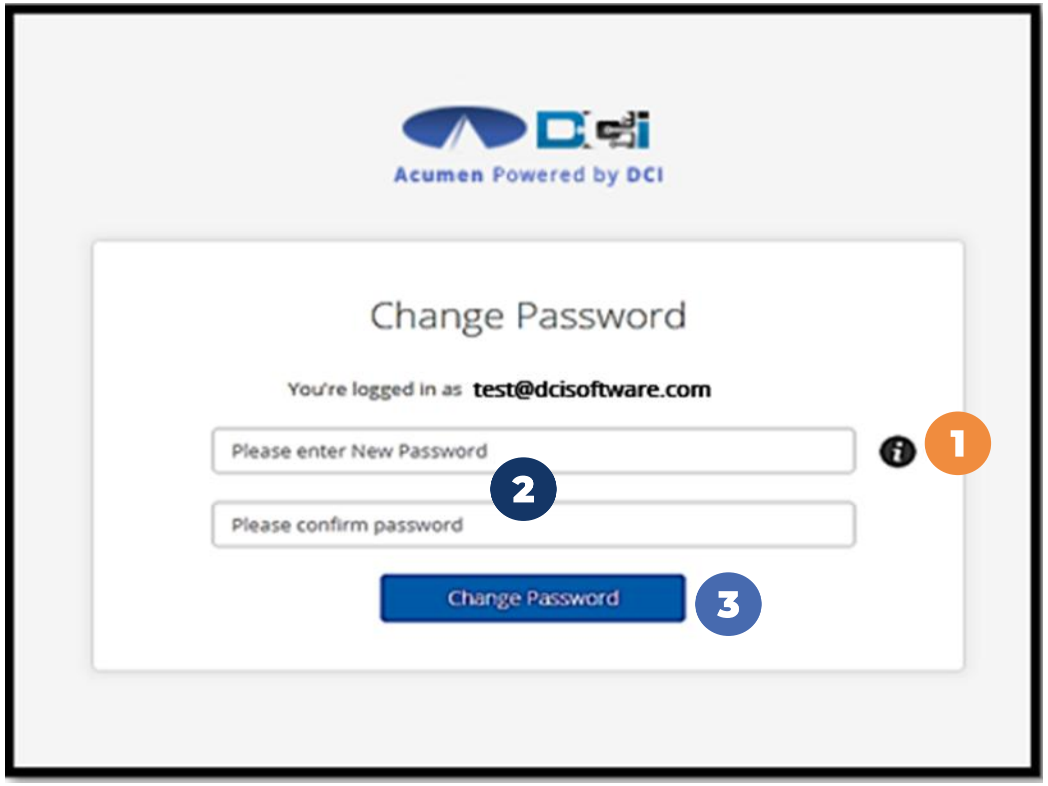
When logging in for the first time, you will be asked to change your password.

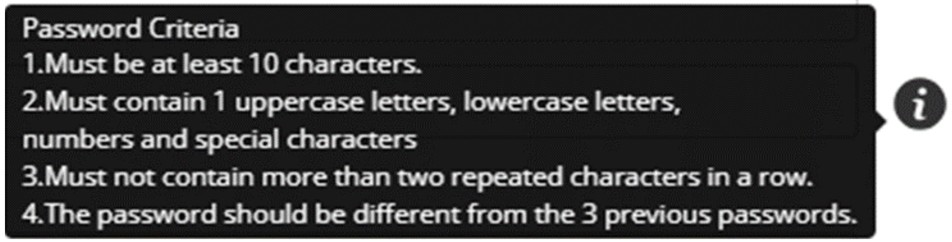
1. Hover over the circular “i” icon on the right to see the password requirements

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.



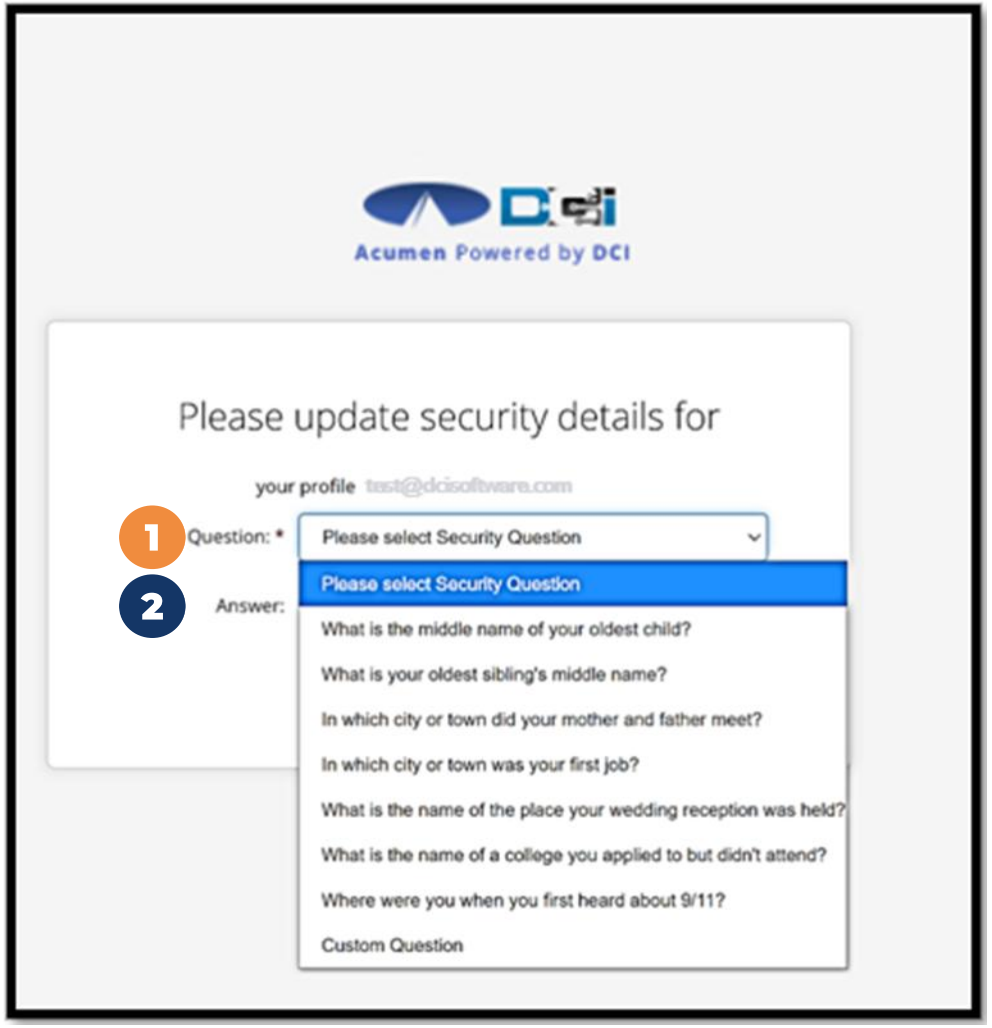


Security Question

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.



DCI Mobile App

Clock In/Out Process

Overview Mobile App Clock In

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Employee Arrives to Begin Shift

→ Open DCI Mobile EVV App on Smartphone or Tablet

→ Log in with Username & Password or PIN

→ Tap the blue "Clock In" button (top of the screen)

→ Select Individual's Name & Service Code then select the blue "Continue" button

→ Tap the blue "Confirm Clock In" button (time begins for the shift)

Overview Mobile App Clock Out

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End of Shift

Open DCI Mobile EVV App
on Smartphone or Tablet

Log in with Username
& Password or PIN

Tap the blue "Continue to Clock Out" button (top of screen) & then "Confirm"

Select one EVV Option:
- E-Signature
- Picture
- Voice
- Portal Signoff

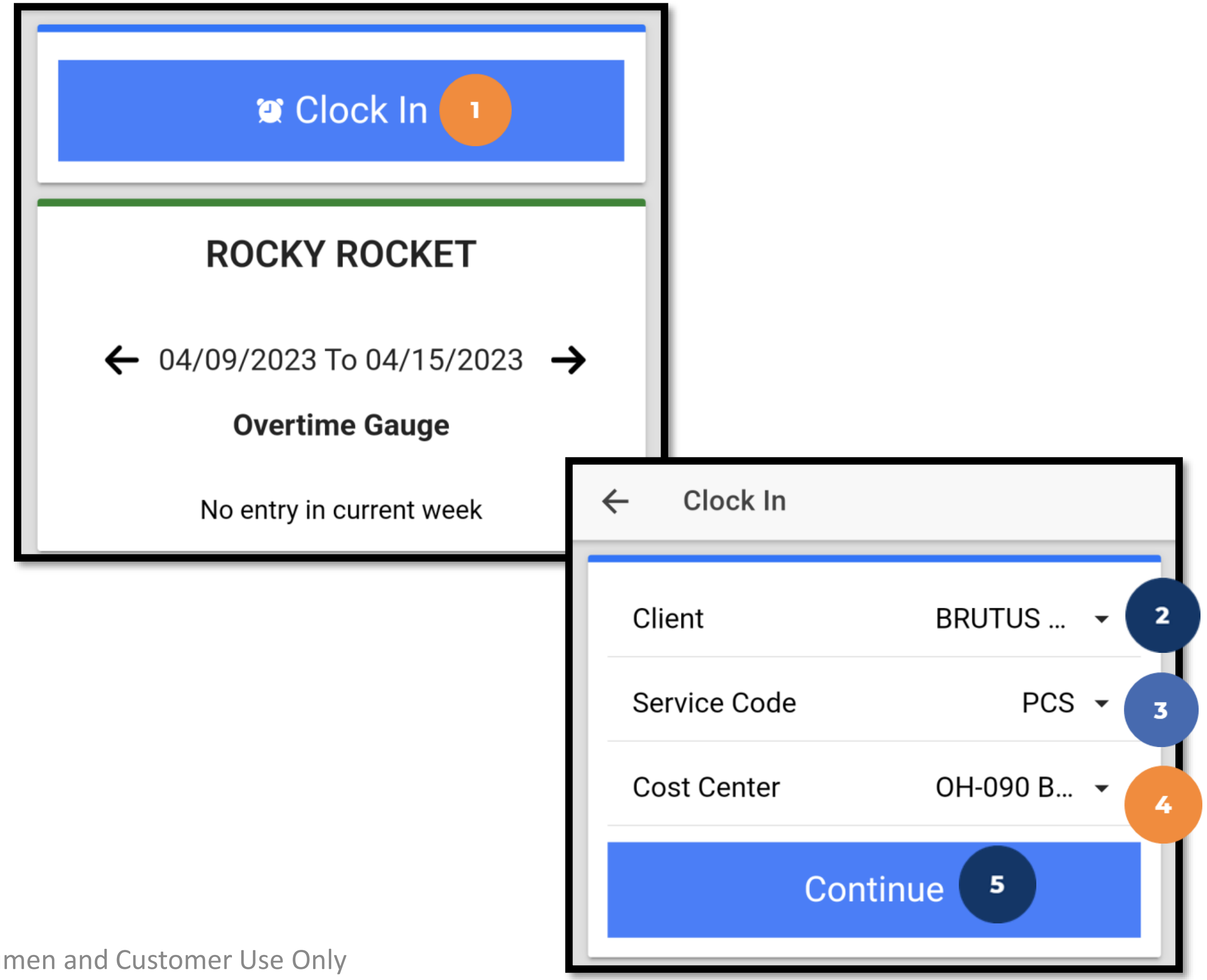
Ensure Verification Confirmation
- Alert will appear on screen

Optionally Add Notes or/and Attachments

Tap the blue "Confirm Clock Out" button (time ends for the shift)

Clock In on Mobile App

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



Clock In on Mobile App (cont.)

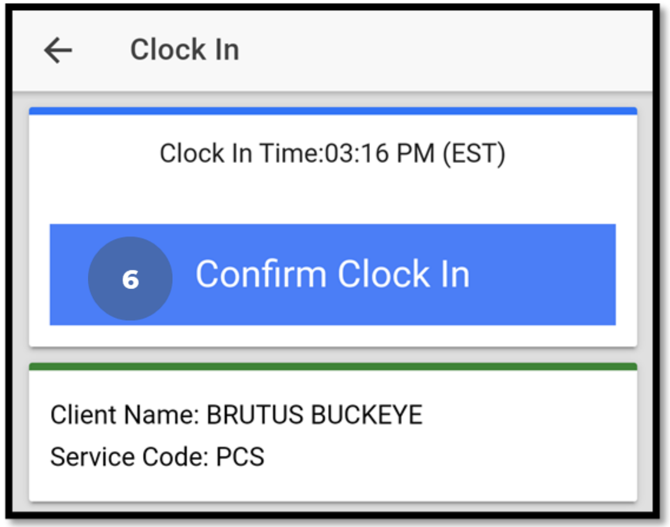
6. Select Confirm Clock In

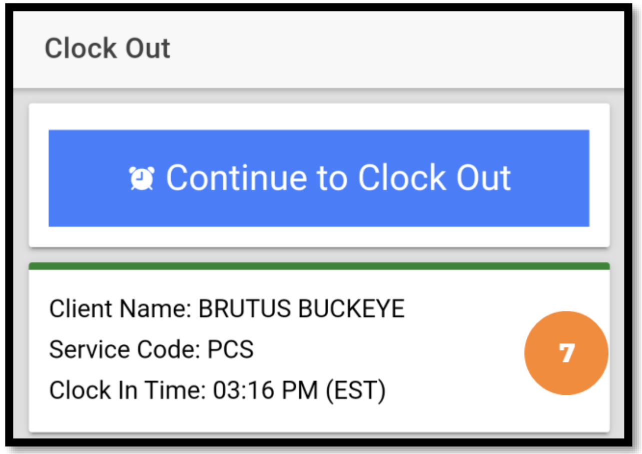
   * *This will start the time for the shift*

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.





Initial Clock Out Process

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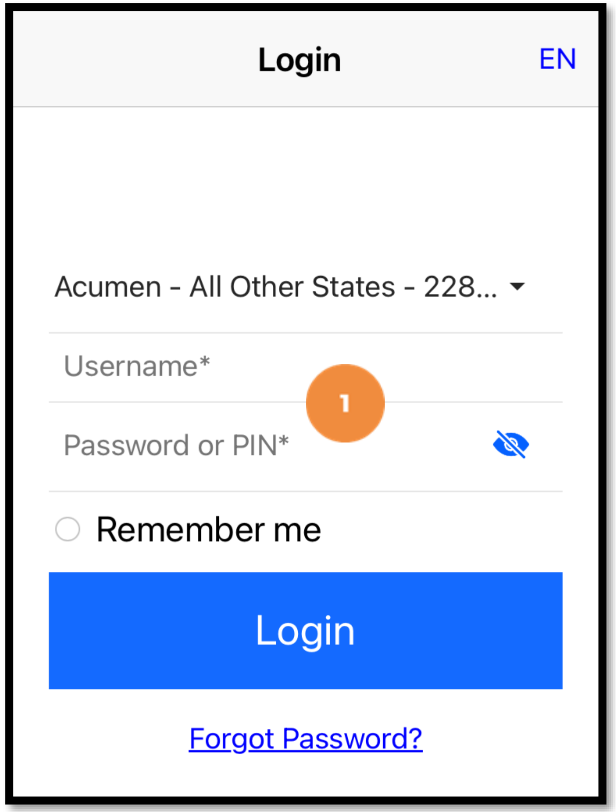
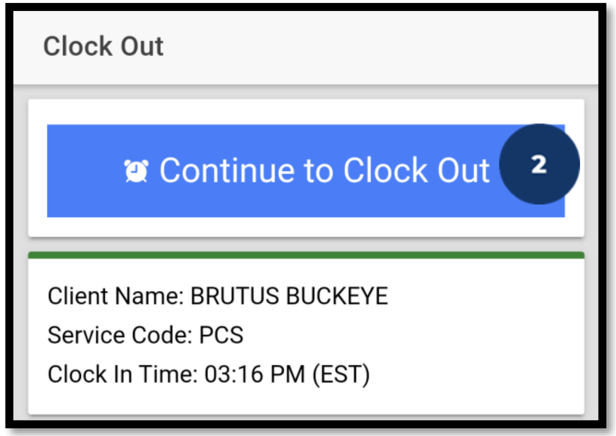
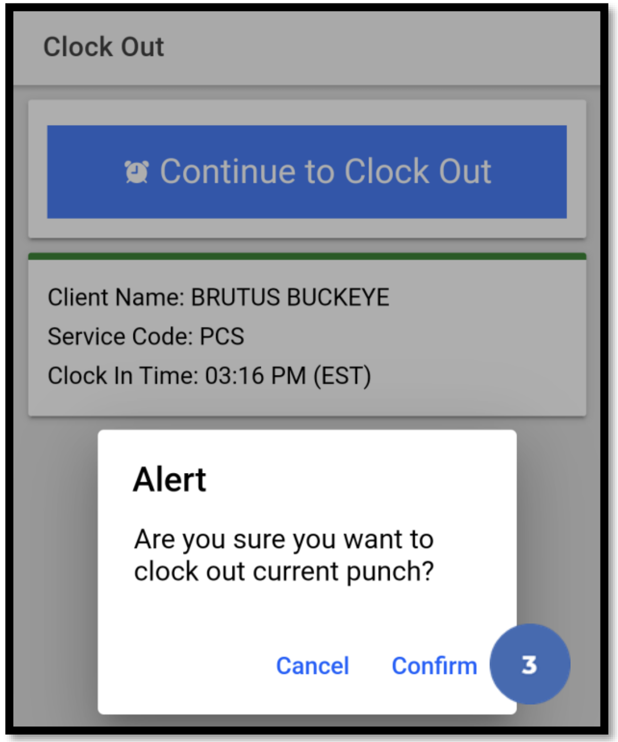
***The first three steps in the clock out process are the same regardless of the EVV (client attestation) option selected**

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







Clock Out – EVV Options

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- EVV (client attestation) options are visible if required by the program. They allow the client to verify that they received service.
  - ✓ Choose only **one** option per shift (each clock out)
- Client attestation is an extra layer of protection against potential fraud because the client/employer is "signing off" on the punch in real time

Please note:** **The employer must still review and may need to approve punch entries in their Pending Entries tab each pay period.

Choose one at clock out

Clock Out Process After the EVV (Client Attestation) Option is Selected

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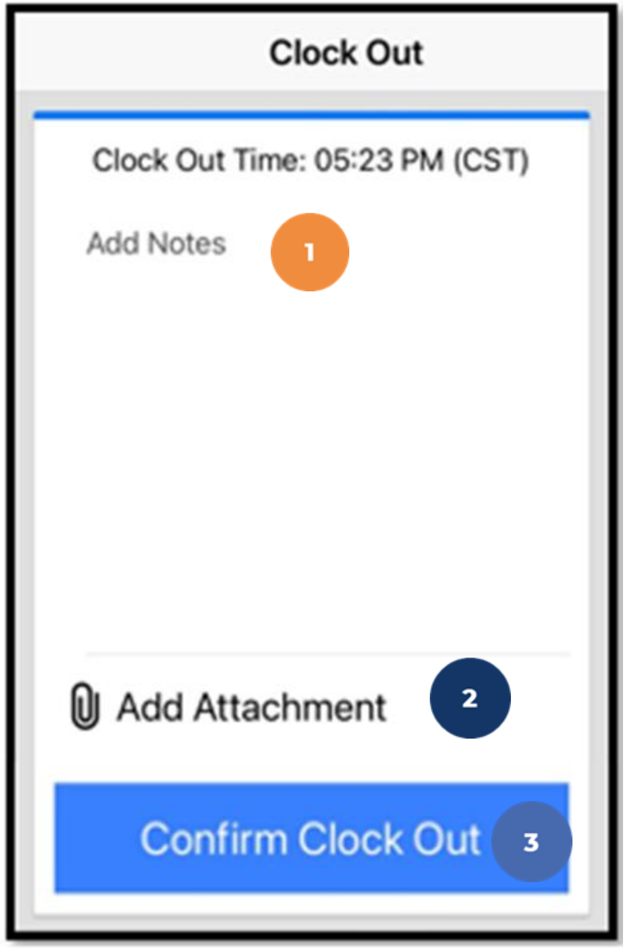
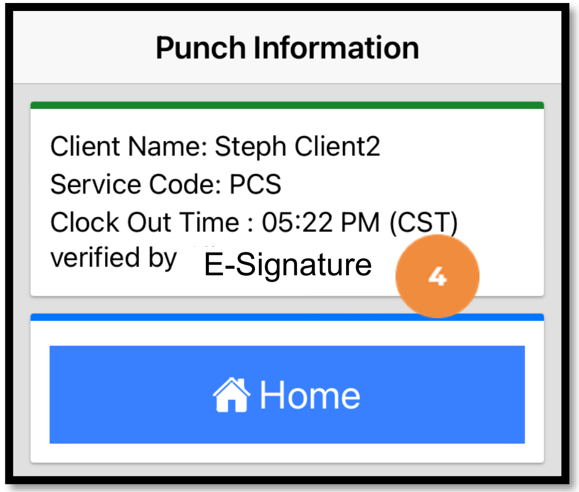
The employee:

1. Enters any notes for the punch. Add an attachment for the punch (optional)
2. Click the blue **Confirm Clock Out** button when ready
   - ✓ *This will stop the time for the shift*
3. Punch Confirmation
   - ✓ Punch details, including verification option selected, will display.
   - ✓ Optionally, click the blue **Home** button to return to the dashboard.





DCI Mobile App

EVV or Client/Employer Attestation Options

EVV Options (Client/Employer Attestation)

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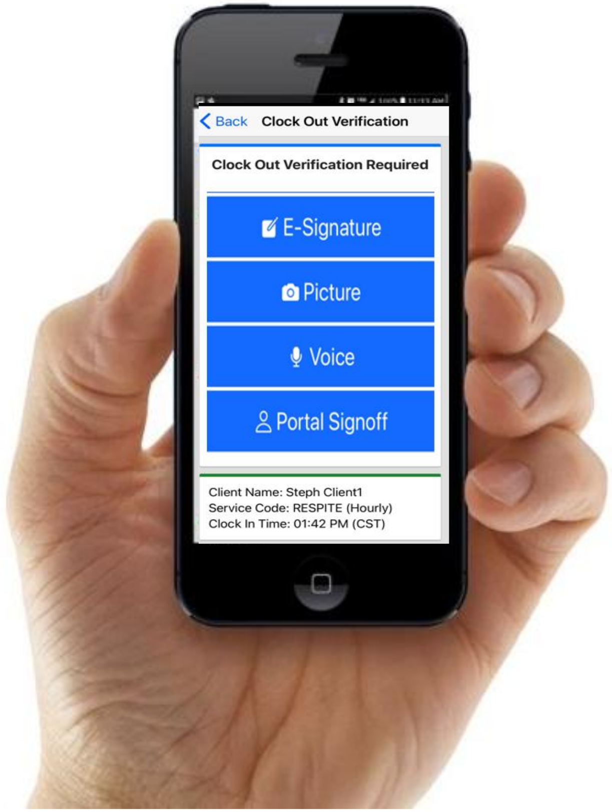
Choose only **one** at clock out:

- E-Signature
- Picture
- Voice
- Portal Signoff



Clock Out - EVV Option #1

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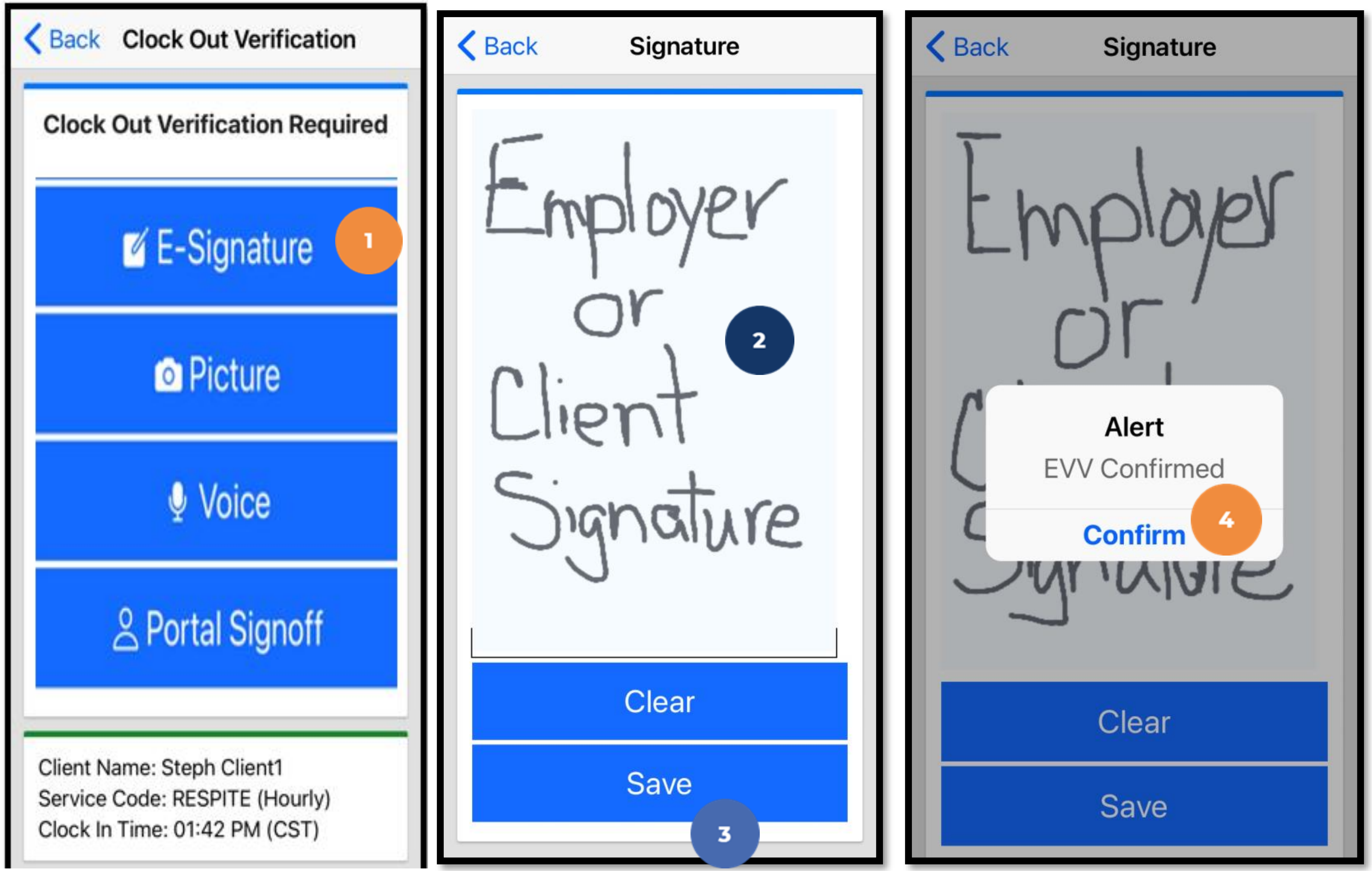
E-Signature

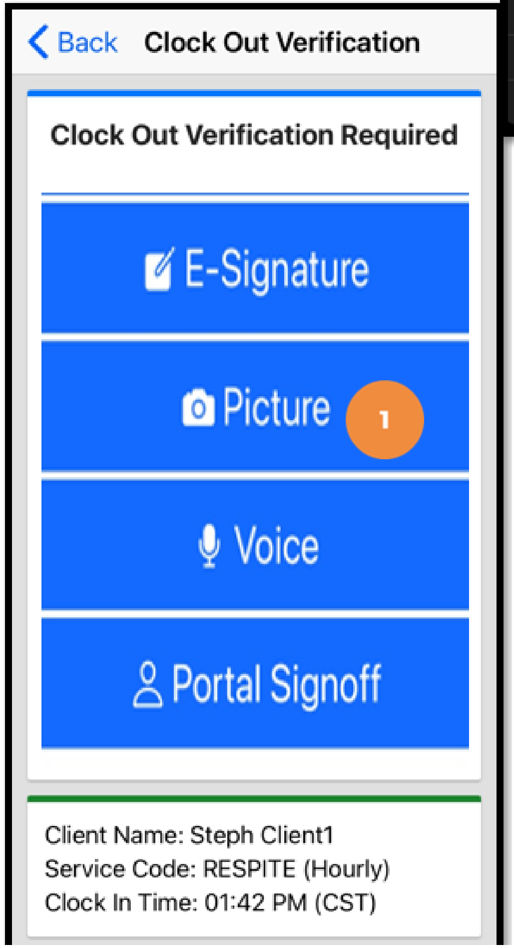
1. Select the clock out verification type:
   - ✓ E-Signature
2. Hand the mobile device to the client or employer, who signs their name on the device screen.
3. The client or employer clicks **Save** to accept the signature
   - ✓ Optionally, they may click **Clear** to rewrite their signature.
4. The client or employer clicks **Confirm** to validate the signature and hands the mobile device back to the employee

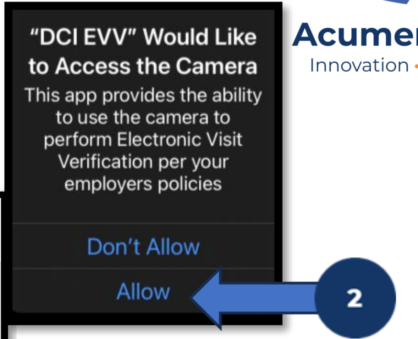


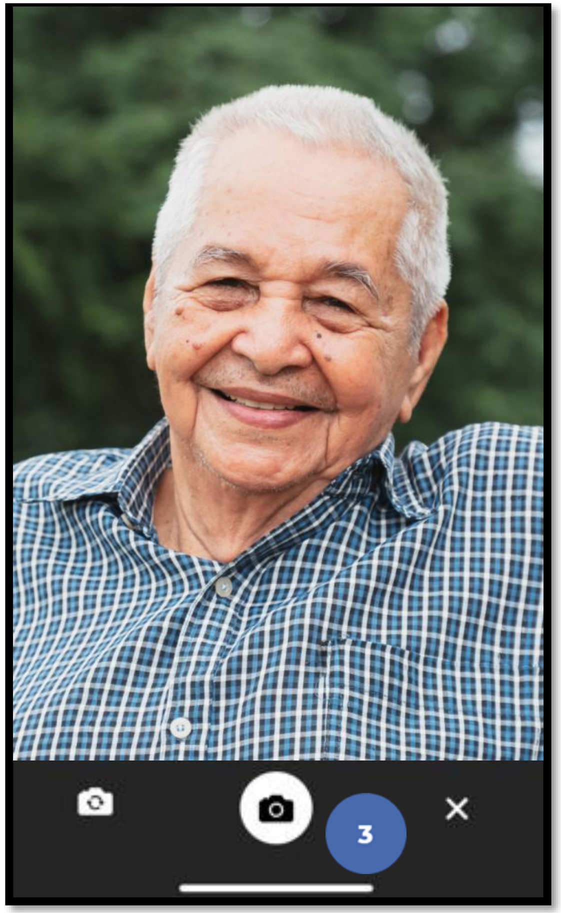
Clock Out - EVV Option #2

Picture

1. Select the clock out verification type:
   ✓ Picture
2. A pop-up stating "DCI EVV" Would Like to Access the Camera appears. Select **Allow**.
3. Click the **camera** icon to take a picture of the client







***Please note:** Client photos taken by the employee for electronic visit verification (EVV) are never stored on the employee's cell phone when using the DCI Mobile App

Clock Out - EVV Option #2

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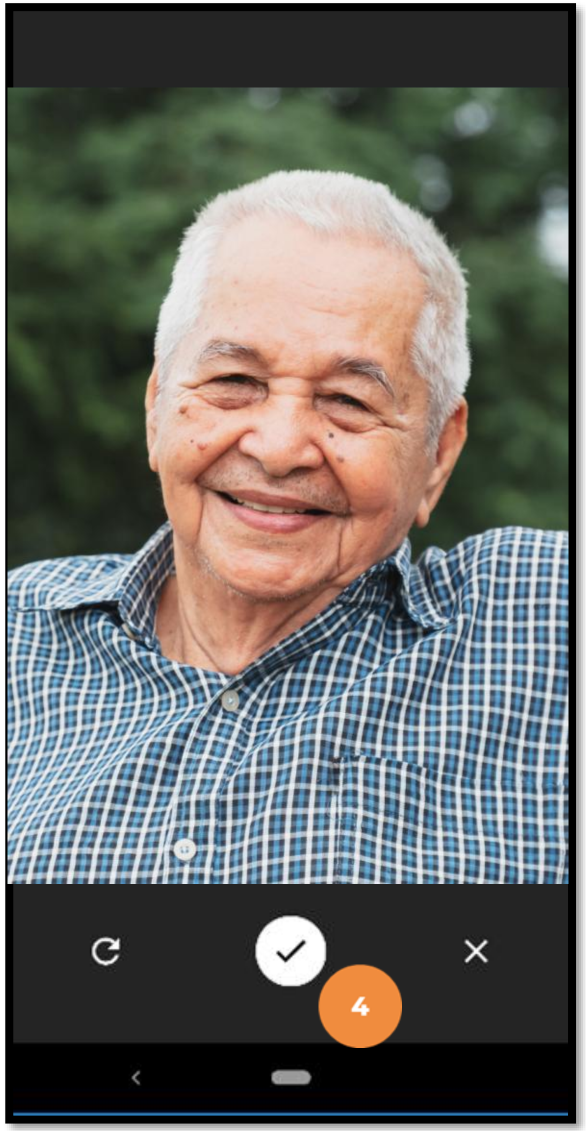
Picture

4. Click the **checkmark** to accept the picture, the X to cancel, or the circular arrow to retake the picture.
5. Click **Confirm** in the alert pop-up box to confirm the punch

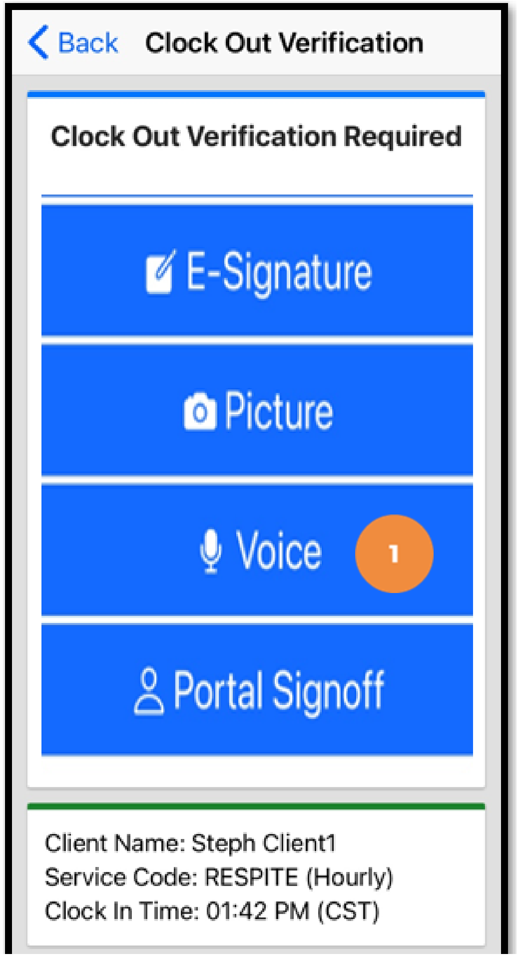
***Please note:** Client photos taken by the employee for electronic visit verification (EVV) are never stored on the employee's cell phone when using the DCI Mobile App

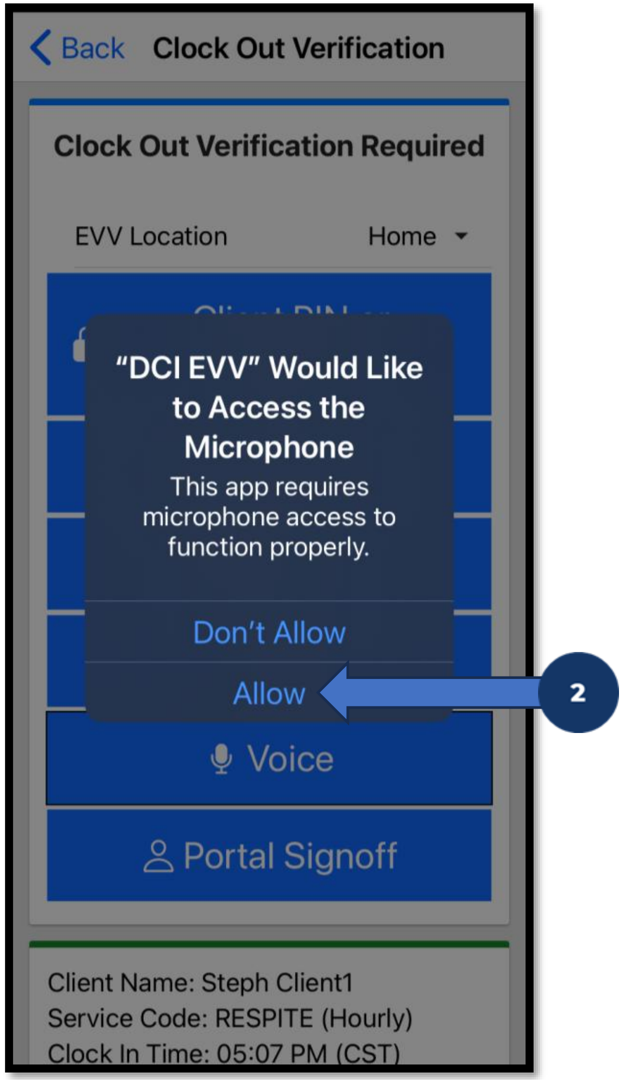


Clock Out - EVV Option #3

Voice

1. Select the clock out verification type:
   ✓ Voice
2. Hand the device to the client or employer. A pop-up stating "DCI EVV" Would Like to Access the Microphone appears. The client or employer selects **Allow**.

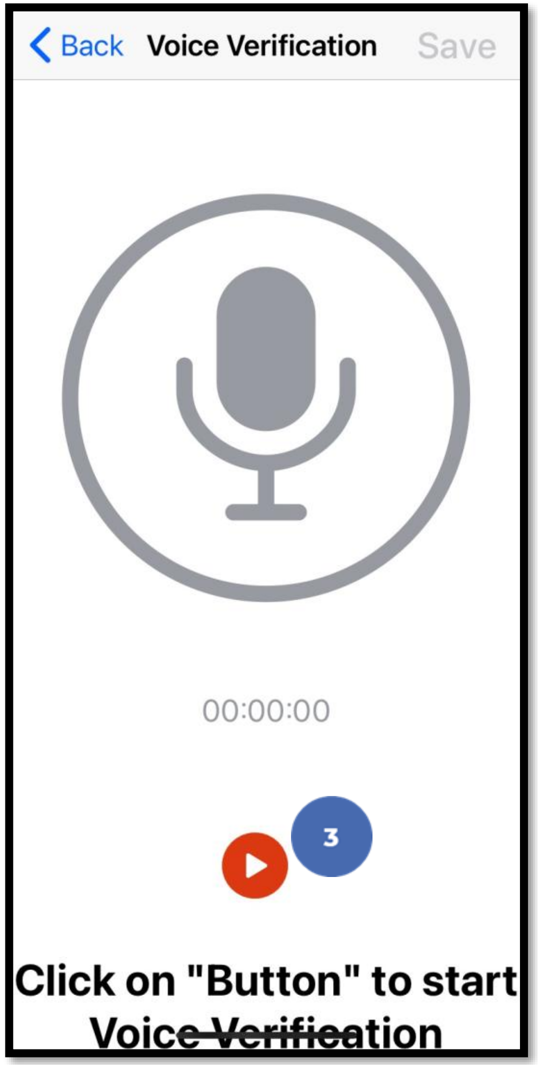




Clock Out - EVV Option #3

Voice

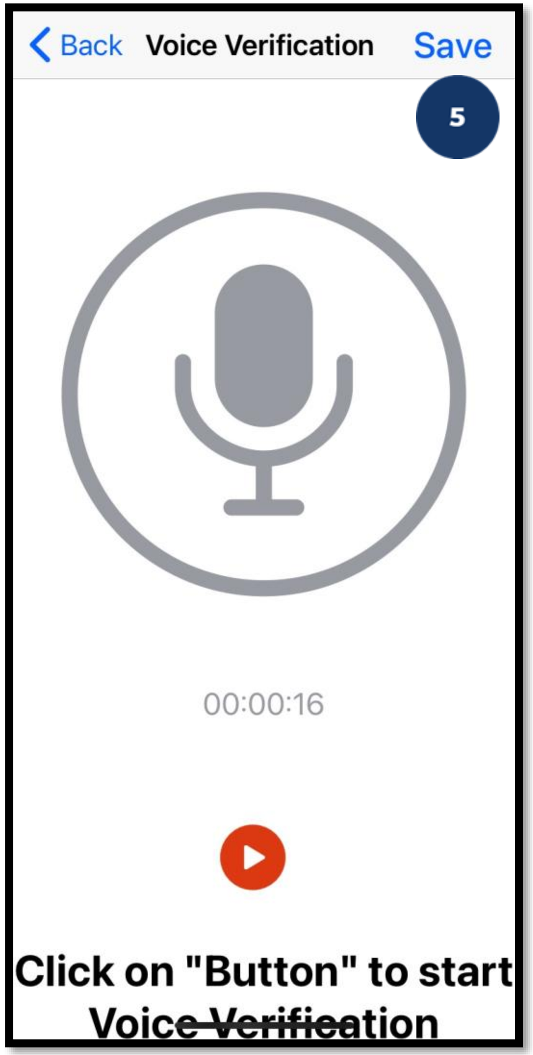
3. The client or employer clicks the **red play** button to start the voice verification
   - ✓ An automated voice will say “Please repeat after me. My name is (client name) and I am verifying this visit.”
4. The client or employer states “My name is (client or employer name) and I am verifying this visit.” When finished, they press the **red stop** button to stop the voice verification.

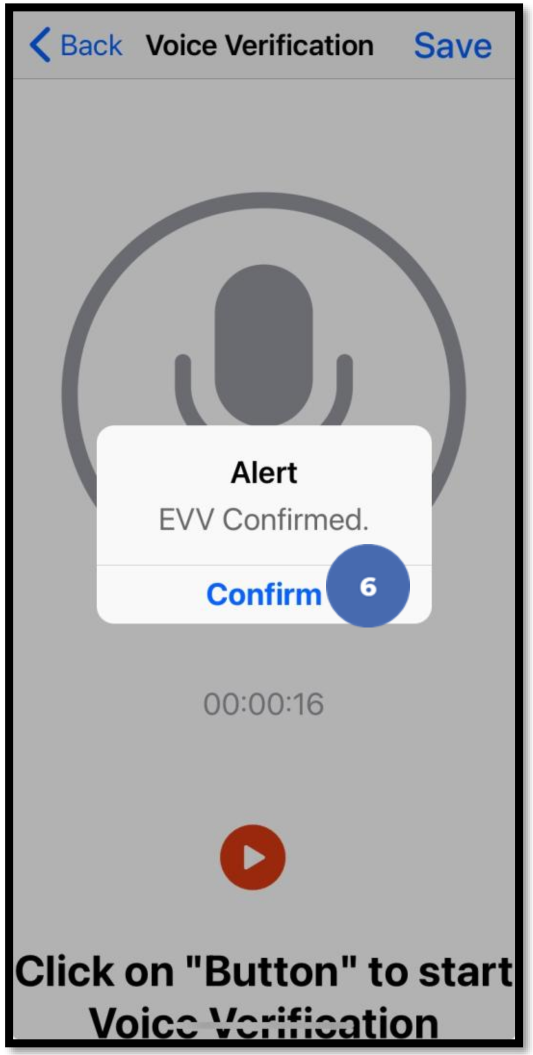


Clock Out - EVV Option #3

Voice

5. The client or employer clicks the blue **Save** button in the upper right corner to accept the voice verification, or the blue **<Back** button in the upper left corner to re-record it.
6. The client or employer clicks **Confirm** to validate the voice recording and hands the mobile device back to the employee

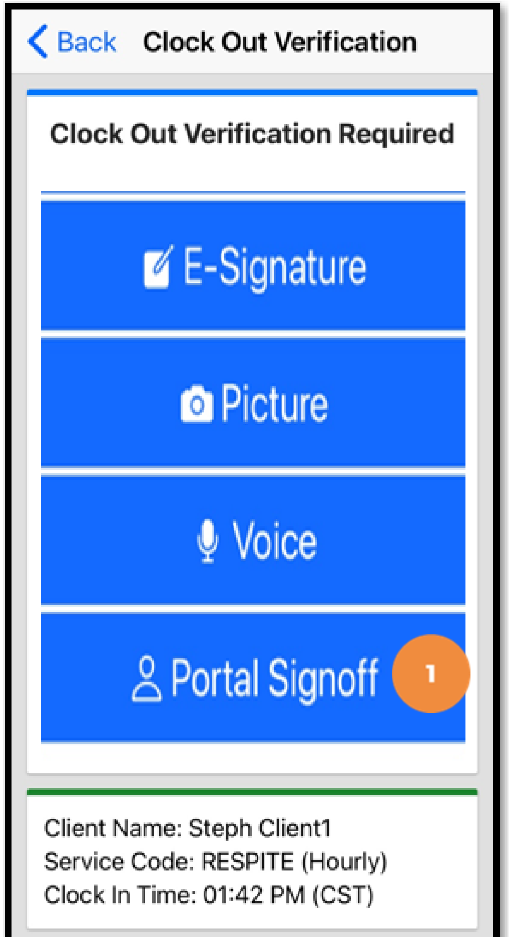


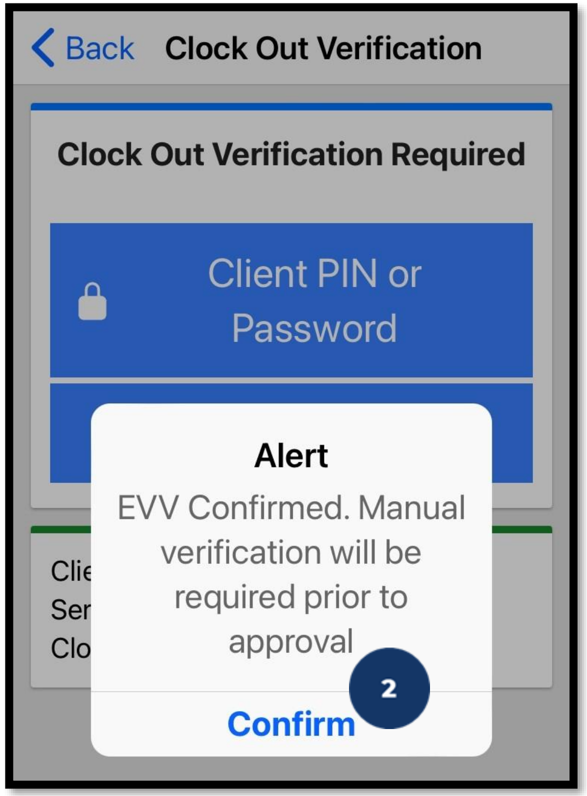


Clock Out - EVV Option #4

Portal Signoff

1. Select the clock out verification type:
   ✓ Portal Signoff
2. An alert will appear stating that EVV is confirmed, but manual verification will be required prior to approval. Click **Confirm.**

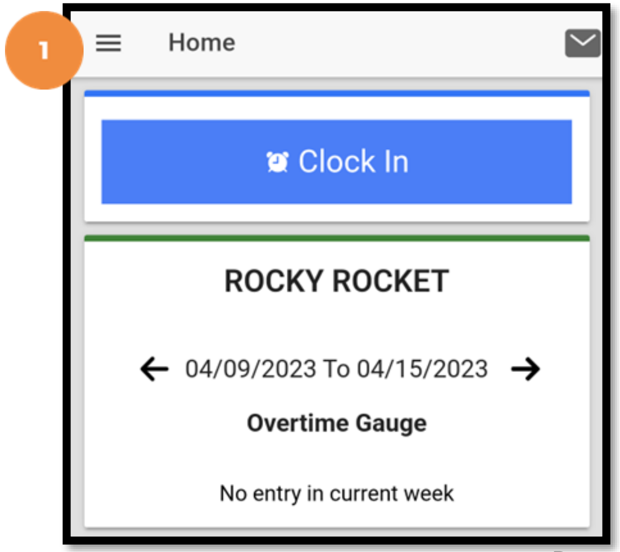


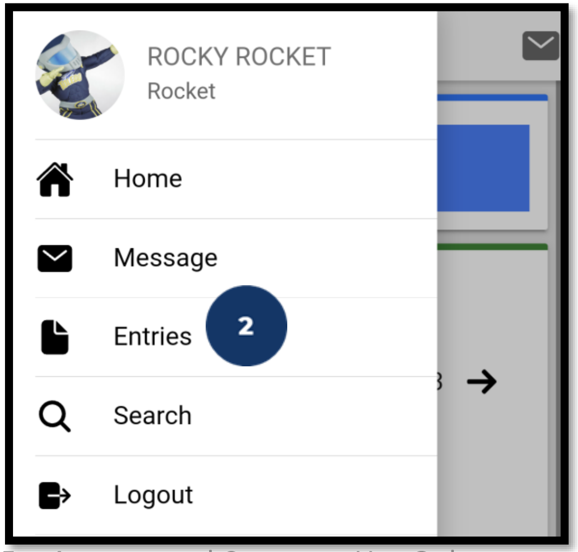


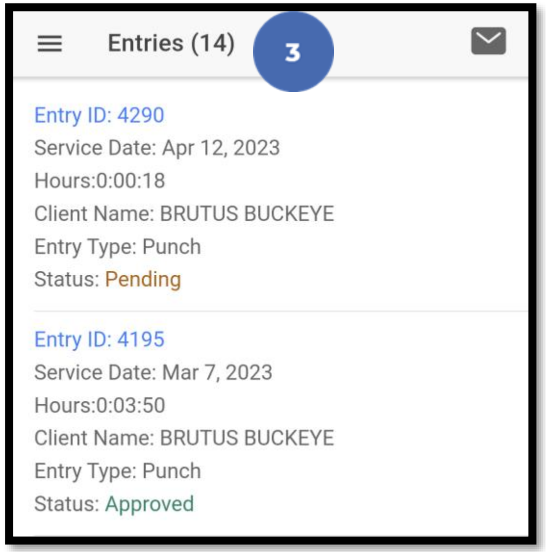
Review Entries

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

*Please note: Punches cannot be edited in the mobile app. Please edit the punch via the web portal.







Mobile App Offline Mode

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- 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 Wi-Fi 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.

Mobile App Digital ID Card

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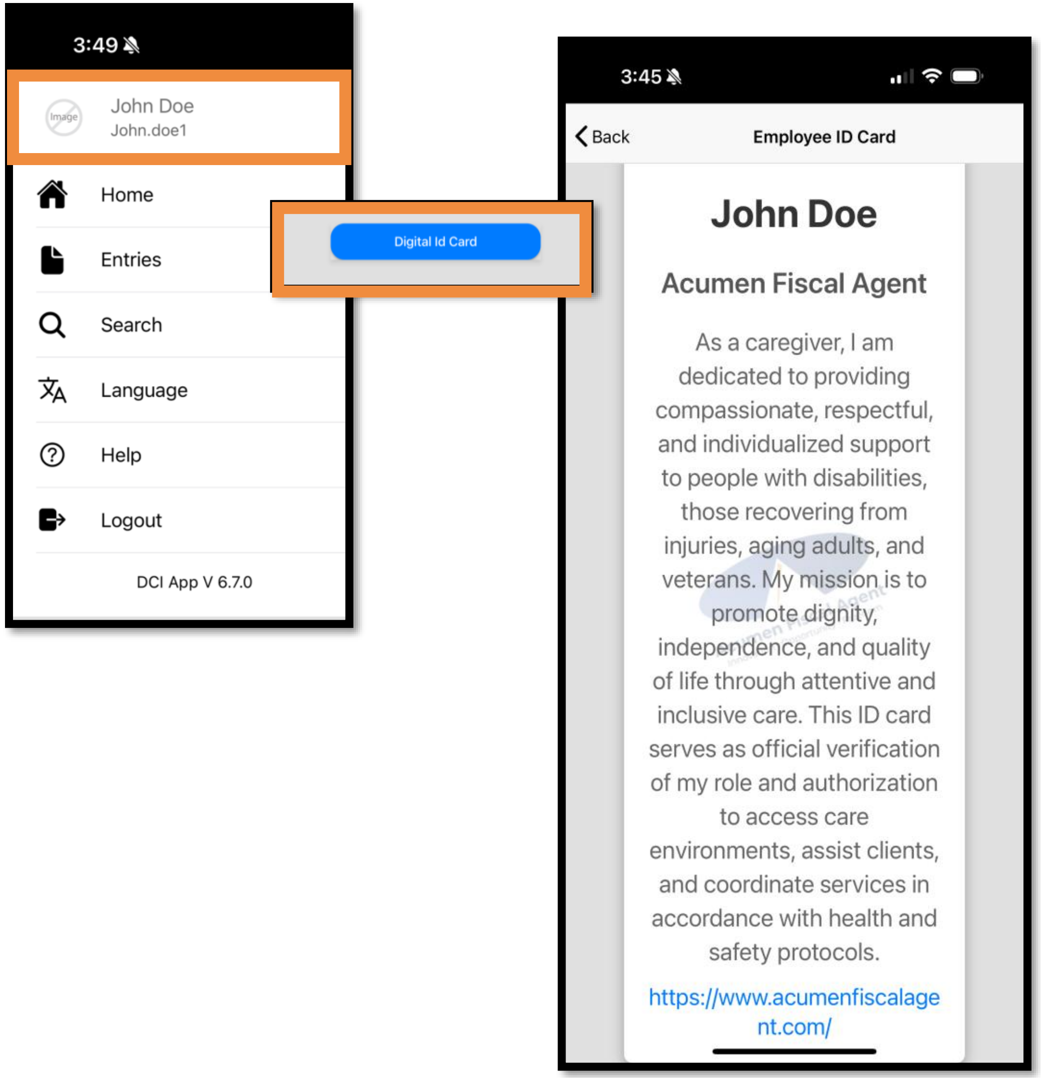
A **Digital ID Card** is now available so that employees can quickly and easily show their credentials via the mobile app if needed. This quick communication tool includes:

- The Employee's name
- Acumen Fiscal Agent
- Acumen's Website
- Statement explaining their role as a self-directed employee



DCI Web Portal

***Accessed on a Desktop or Laptop Computer**

DCI Web Portal

Logging In, Profile Settings & Messaging

Accessing the DCI Web Portal

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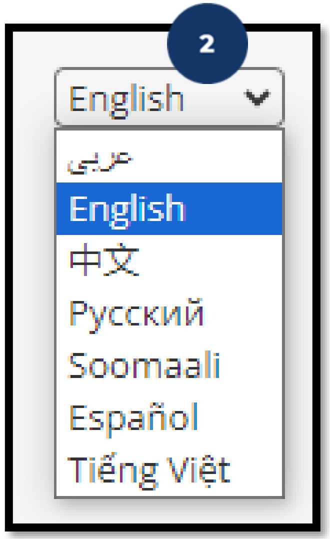
1. Open an internet browser on a computer or mobile device (Google Chrome is preferred) and navigate to the [DCI Web Portal]
2. Use the language drop-down in the top right corner to select the preferred language
   - The page will now display in the new language each time you log in
   - This feature 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

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

1 acumen.dcisoftware.com



Initial Log In

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

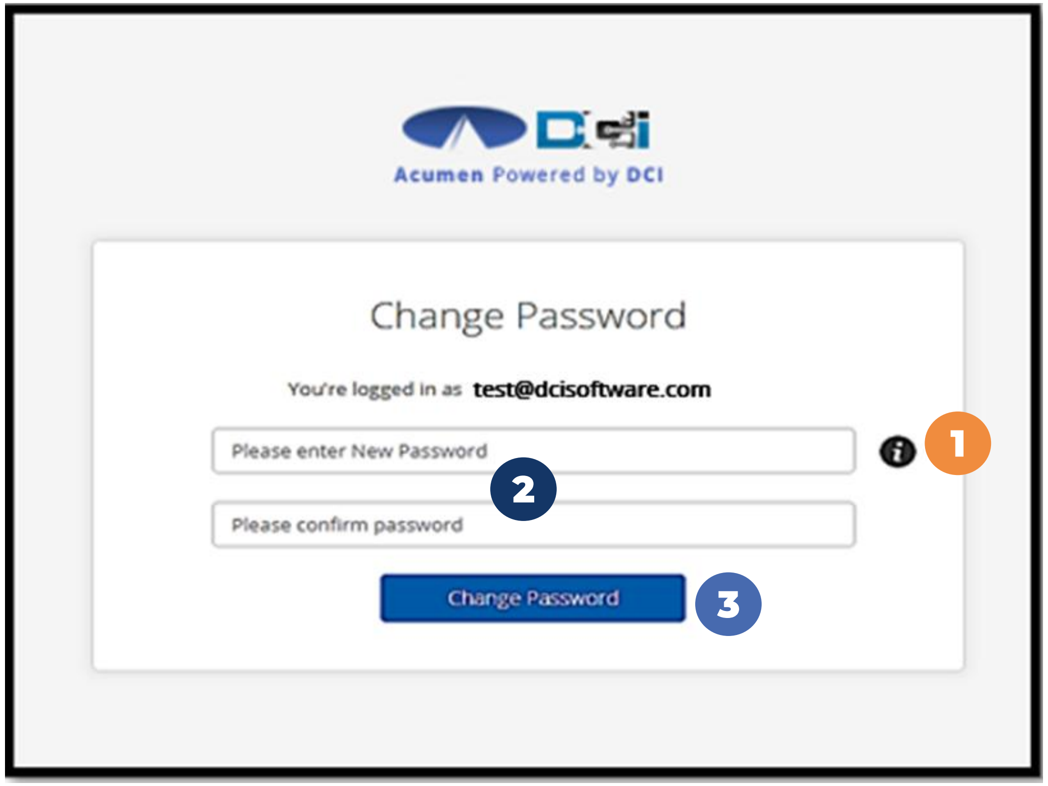
When logging in for the first time, you will be asked to change your password.

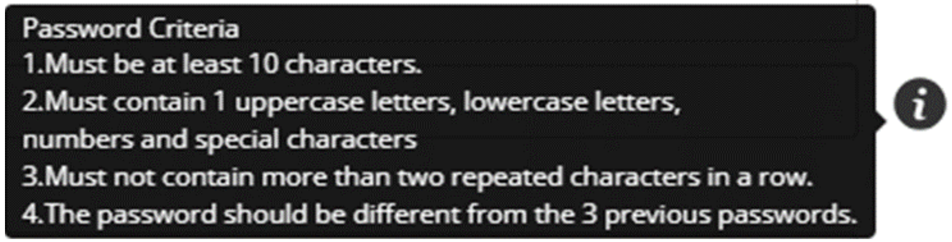
1. Hover over the circular "i" icon on the right to see the password requirements

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.



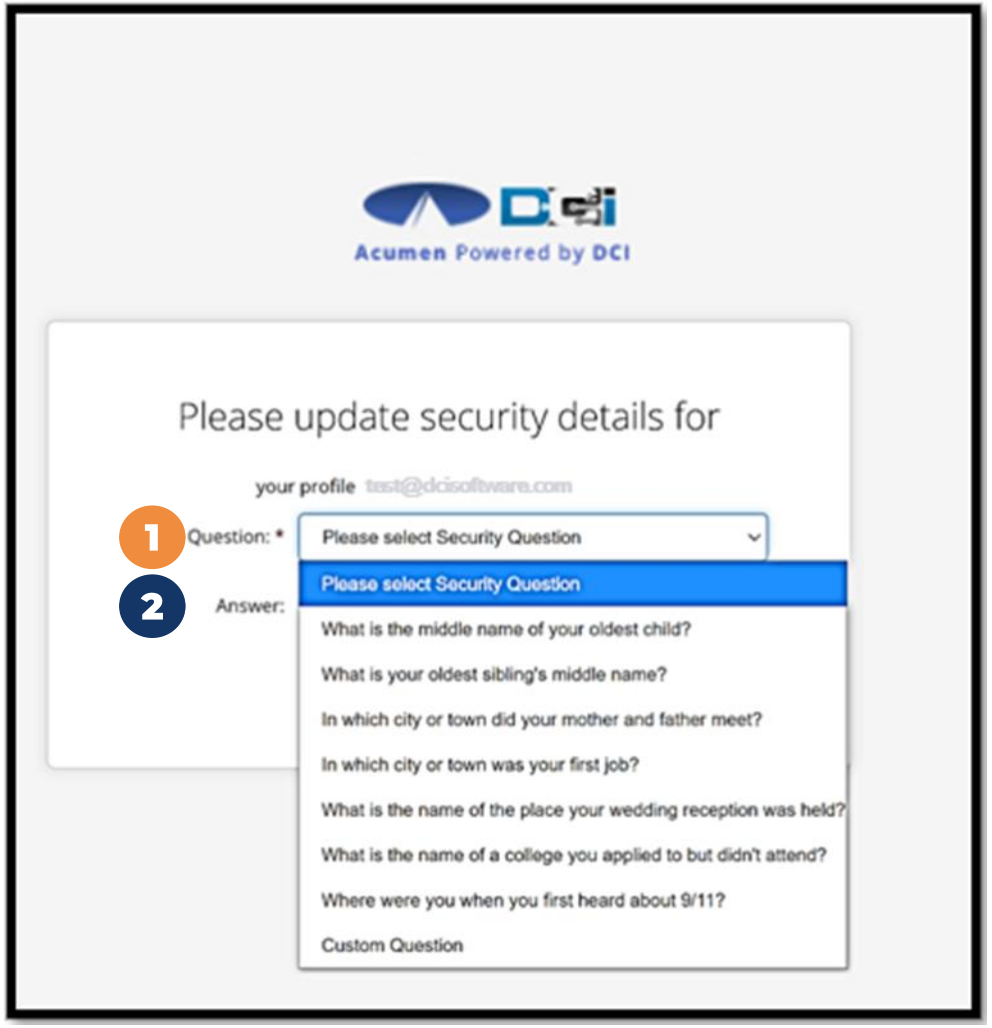


Security Question

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

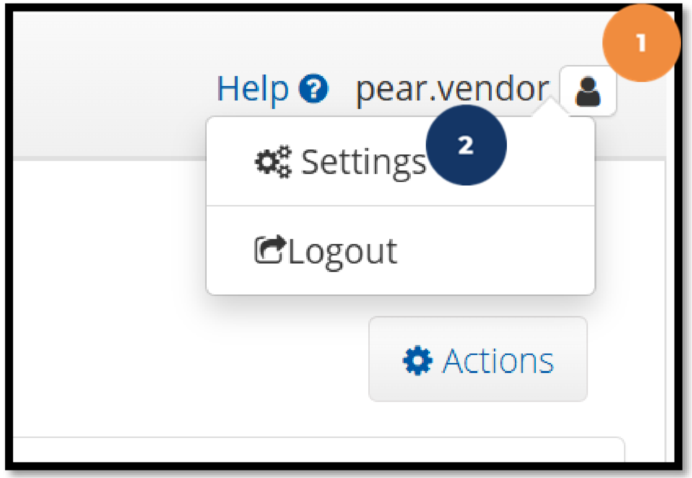
*Please note: Remember the answer to the security question you chose, to reset your password in the future.

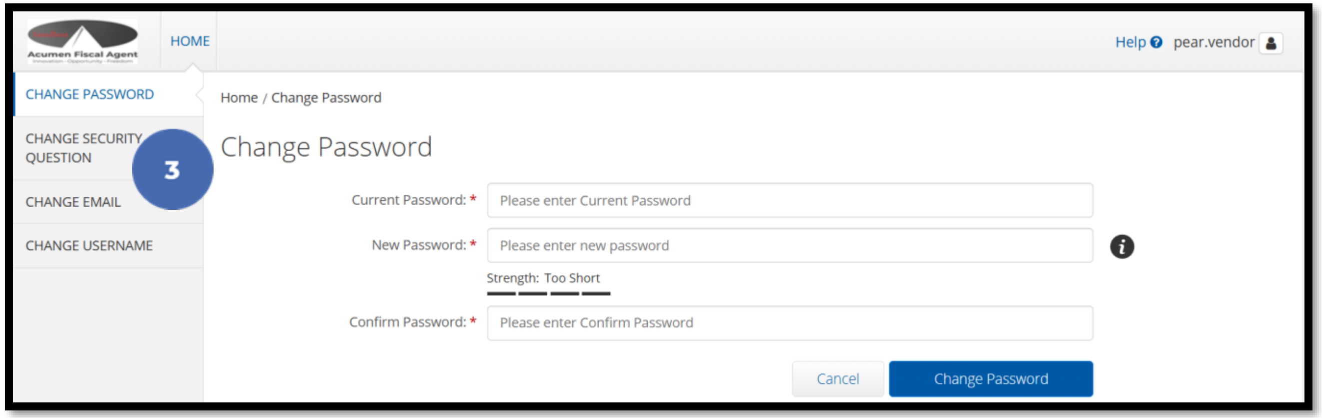


Profile Settings

***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 Security Question**
   - **Change Email** – A valid and correct email address is required for password recovery
   - **Change Username** – Used for login

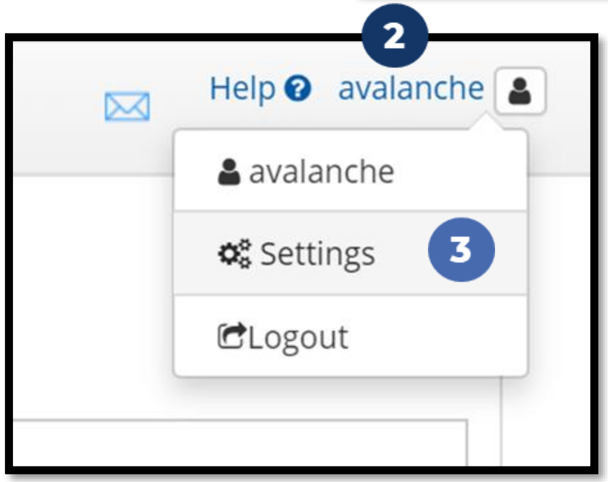




Add / Change PIN

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

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



Add / Change PIN (cont.)

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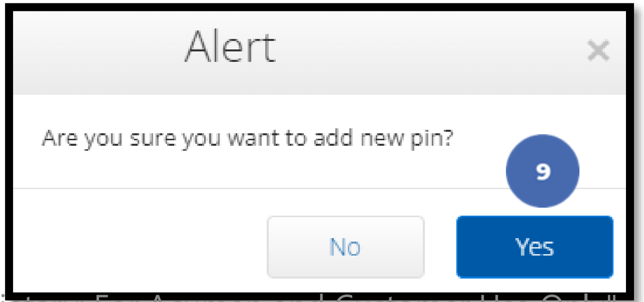
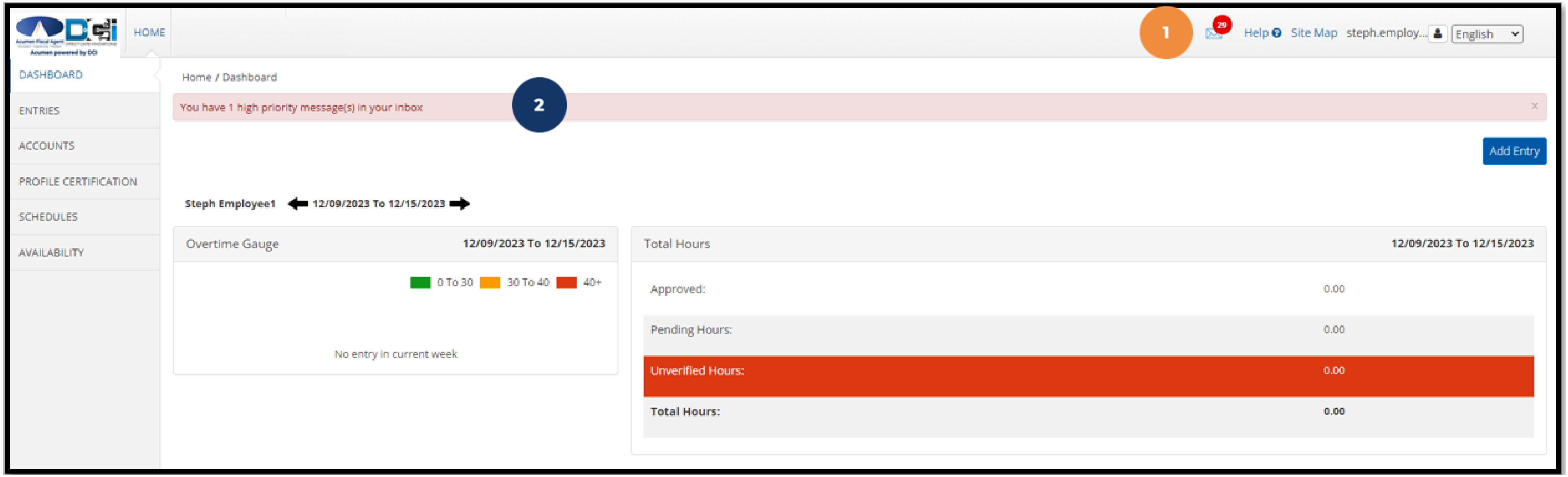
7. Complete the New Pin field and retype the pin in the Confirm Pin field
8. Click the blue **Change Pin** button
9. Select **Yes** to confirm the pin change
10. A green bar stating, "Pin Changed Successfully!" appears

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



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.



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**	**Paystub for check date XX/XX/XXXX**	**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	

View Paystubs via Messaging Module

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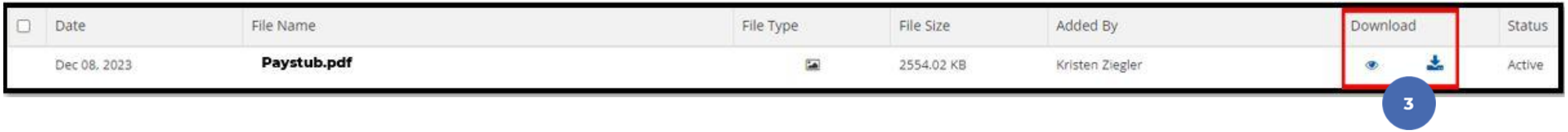
1. Locate the Paystub message in the inbox and click anywhere on the line to view it
2. Click the **Attachments** tab
3. Click the **eye** icon in the download column to view the paystub or the **download** icon to download it



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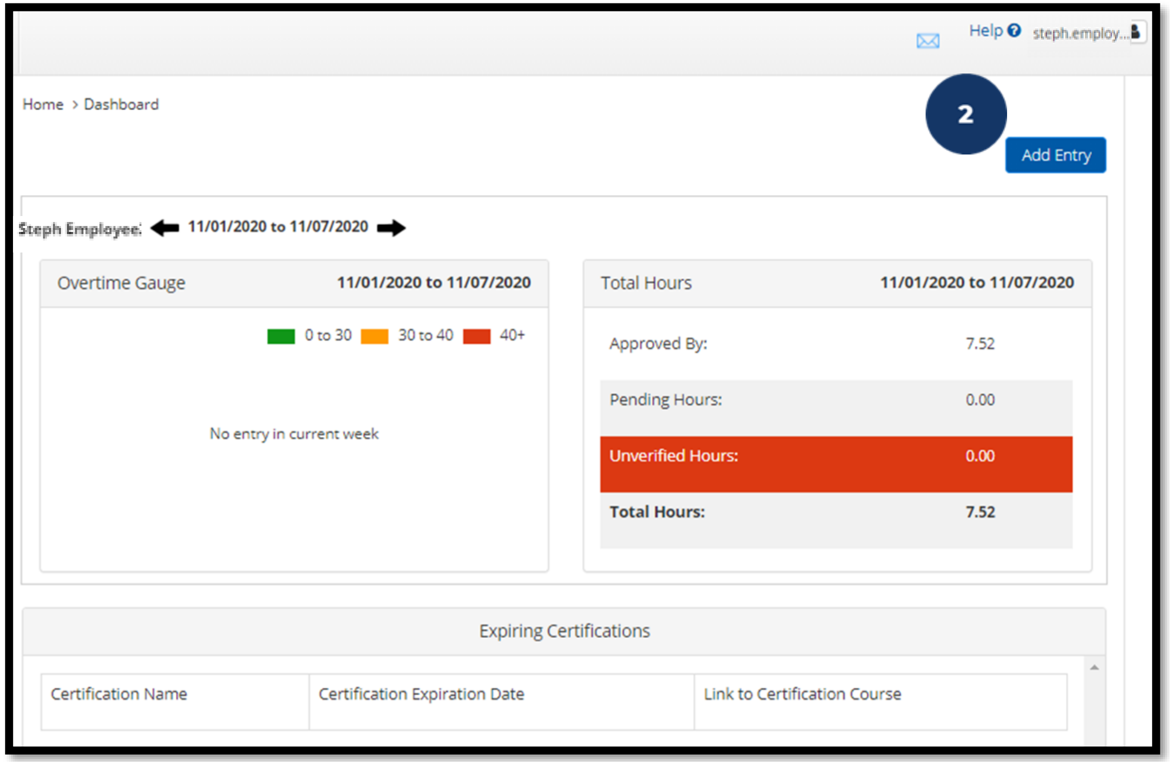
DCI Web Portal

Adding a New Entry

***Please note!** **Web Portal (historical) entries are only used for a missed punch or punch correction due to service interruption. The goal should always be to enter punches in real time (Mobile App) to maintain EVV compliance.**

Add New Entry

1. Log in to the DCI Web Portal
2. Click the blue **Add Entry** button



Add New Entry (cont.)

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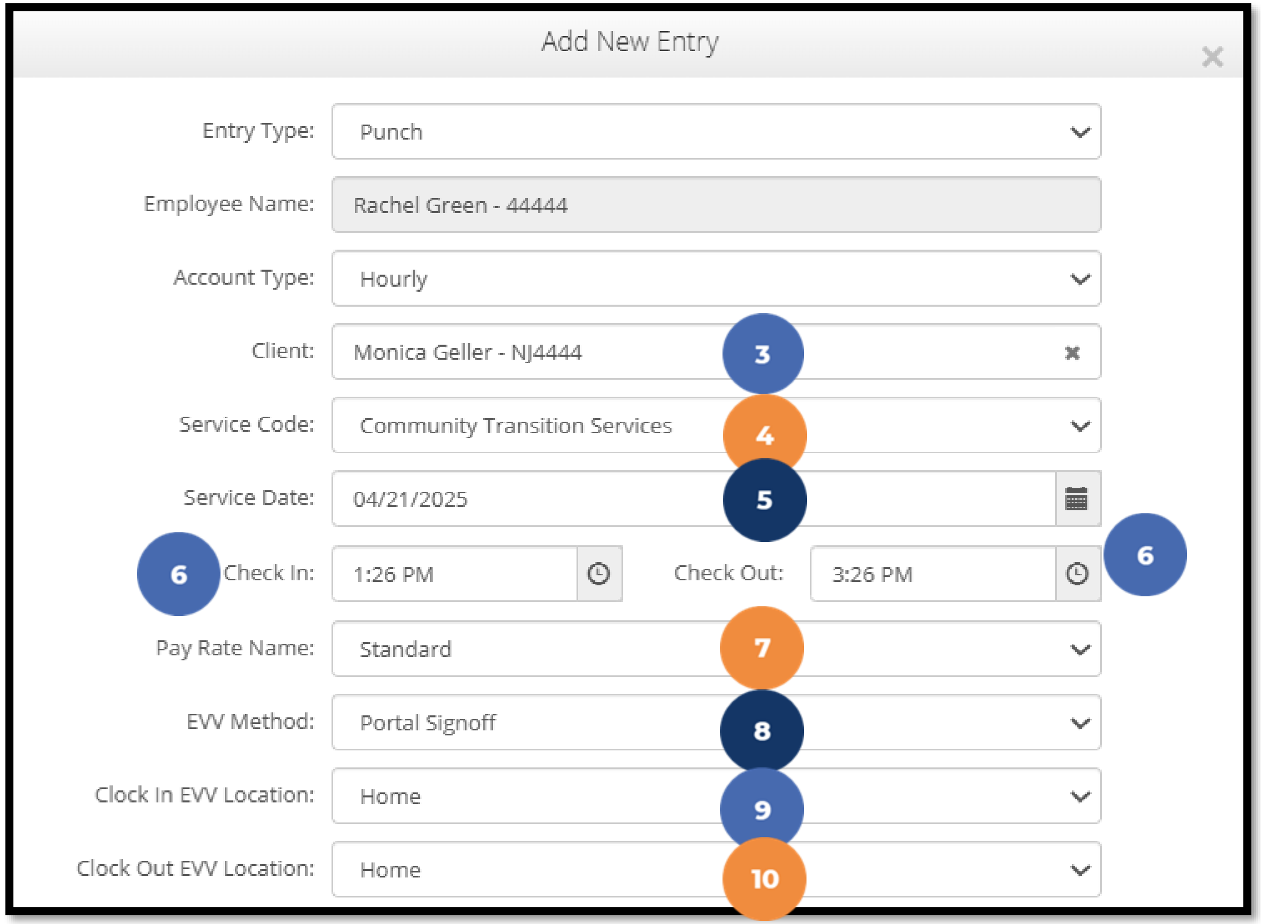
Note: The first three boxes will autofill

3. Type a minimum of three characters to generate results and select the **Client's name** from the list
4. Select the **Service Code** from the drop-down
5. Select the **Service Date**
6. Enter the **Check In** (start) and **Check Out** (end) times
7. Select the **Pay Rate Name**
8. Select **Portal Signoff** as the EVV Method
9. Select **Clock in EVV Location**
10. Select **Clock out EVV Location**



Add New Entry (cont.)

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11. Check Out Date is Auto Selected

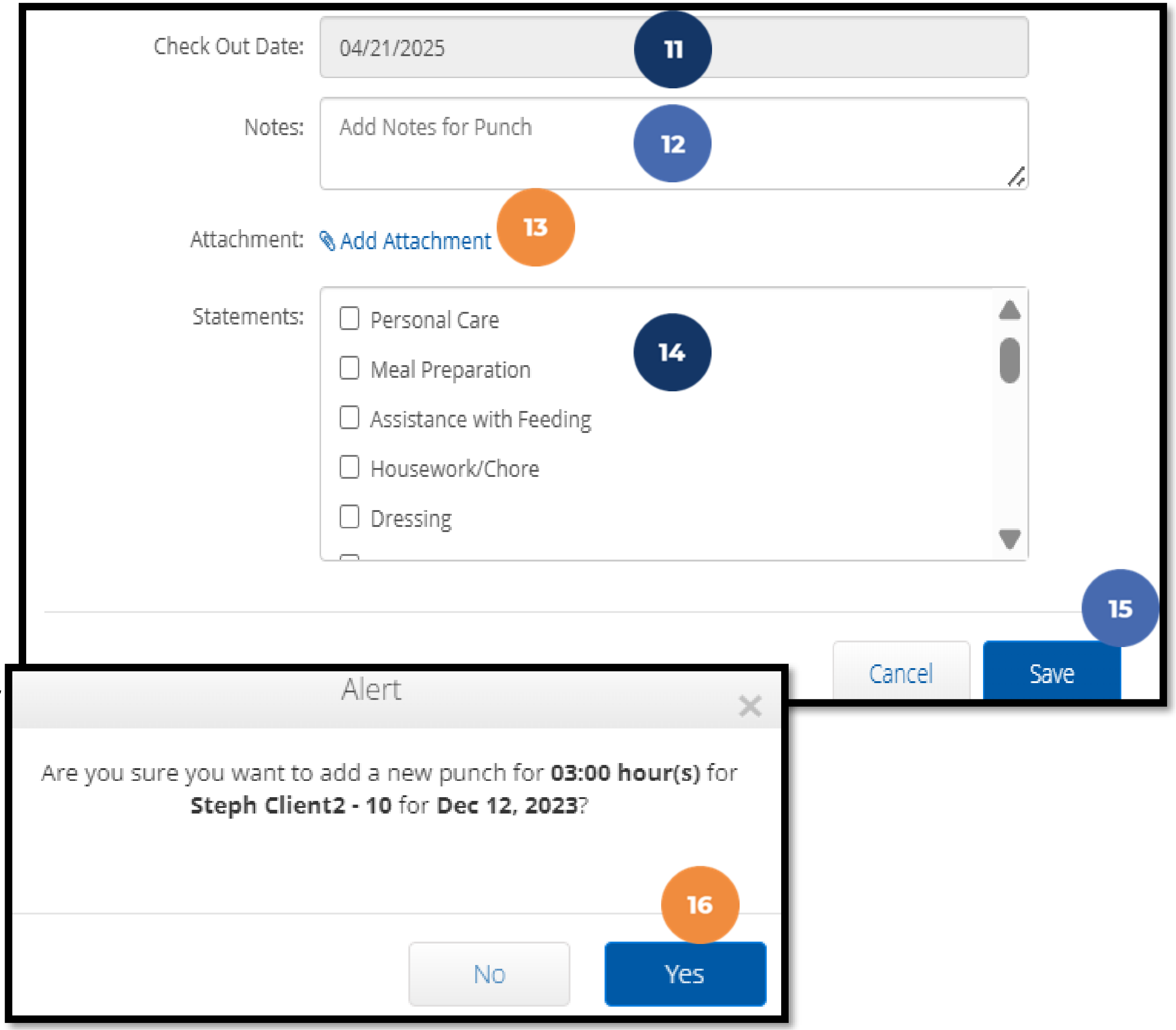
12. Add any Notes (optional)

13. Click the **Choose File** button to select and upload Attachments (optional)

14. Select at least one **statement/task** that occurred on the shift (Ex: Personal Care, Meal Preparation, Housework, Dressing, etc.) – *We will review on the next slide*

15. Click **Save** to save the Entry

16.Click **Yes** to submit



Canned Statements/Tasks

Must select at least **one** canned statement/task from the list, per shift (more than one can be selected if more than one were completed on the shift.

Canned Statements/Tasks
Meal Preparation
Assistance With Feeding
Housework/Chore
Dressing
Transportation
Personal Care (Shaving, Grooming, Etc.)
Shopping (Grocery, Supplies, Personal Items, Etc.)
Housekeeping/Cleaning
Accompany to Medical Appointment(s)
Accompany to Classes
Accompany to Recreational Activity
Community Outting
Mobility and Transfer Assistance
Educational Acitivites (Reading, Writing, etc)
Laundry
Interperter Service
Individaul Service Plan or Related Work
Service Procurment/Planning
Respite

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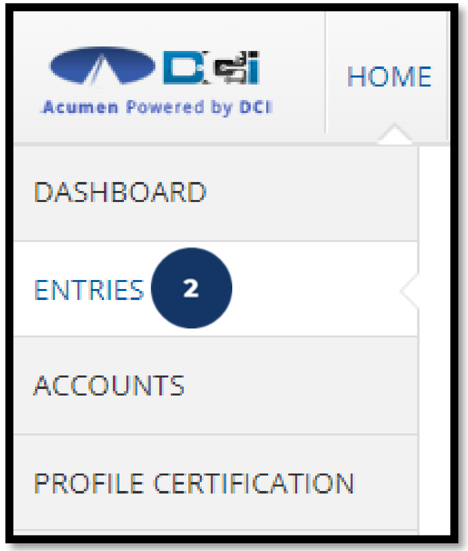
DCI Web Portal

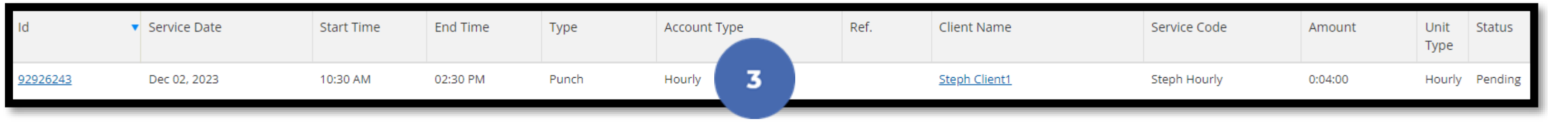
Edit or Reject Entry

Edit or Reject Entry

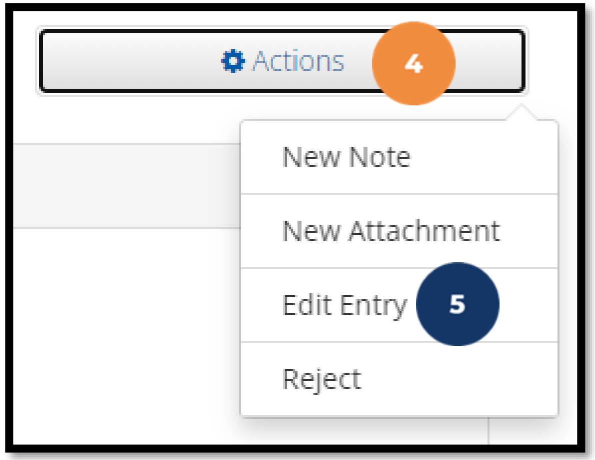
***Please note! Only entries in a <u>Pending</u> status can be edited by the employee. Contact Acumen for assistance if in any other status.**

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



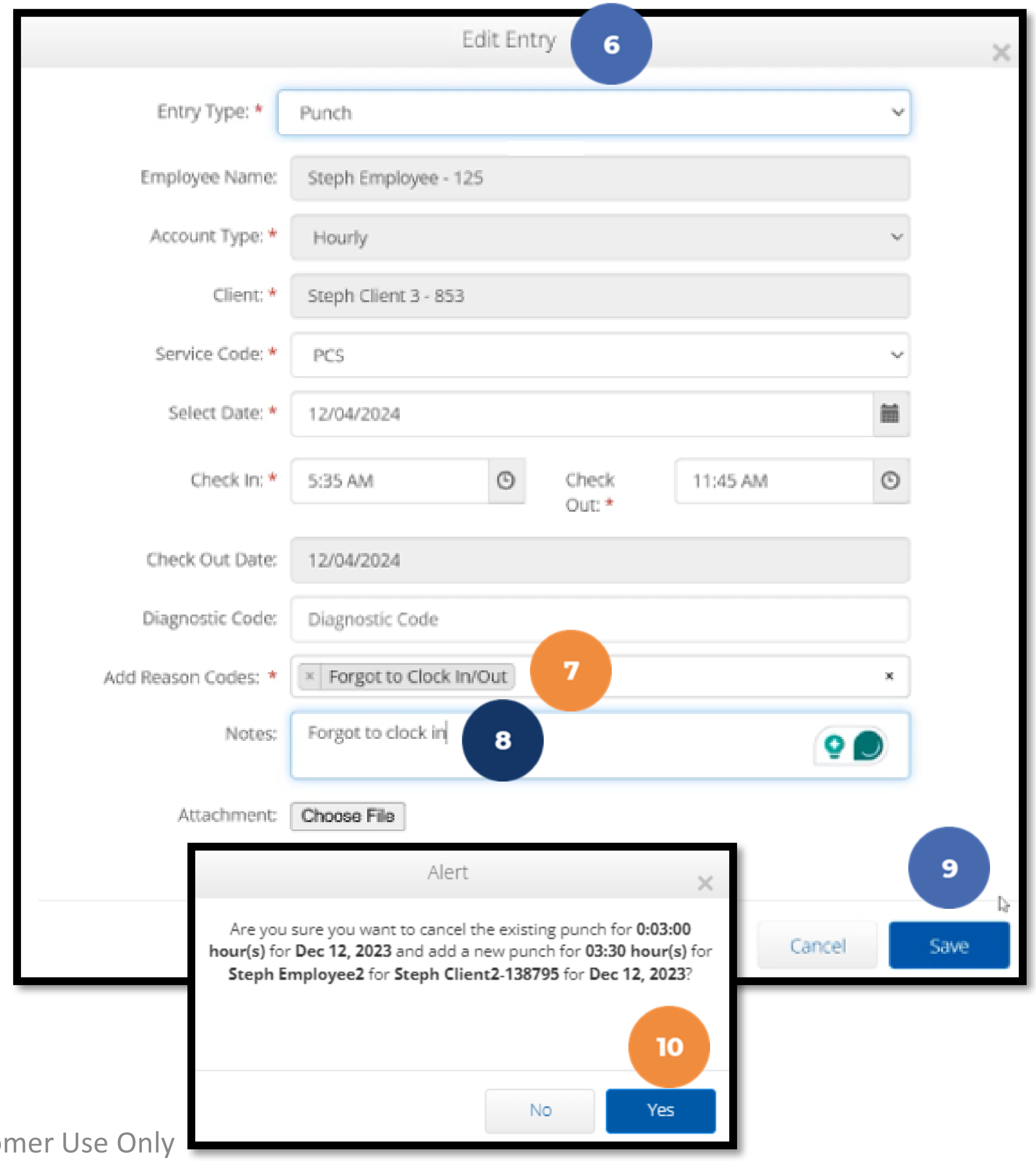
***Please note!** To reject an entry, select **Reject** from the drop-down menu. Click **Yes** to confirm rejecting the entry.

Edit Entry (cont.)

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

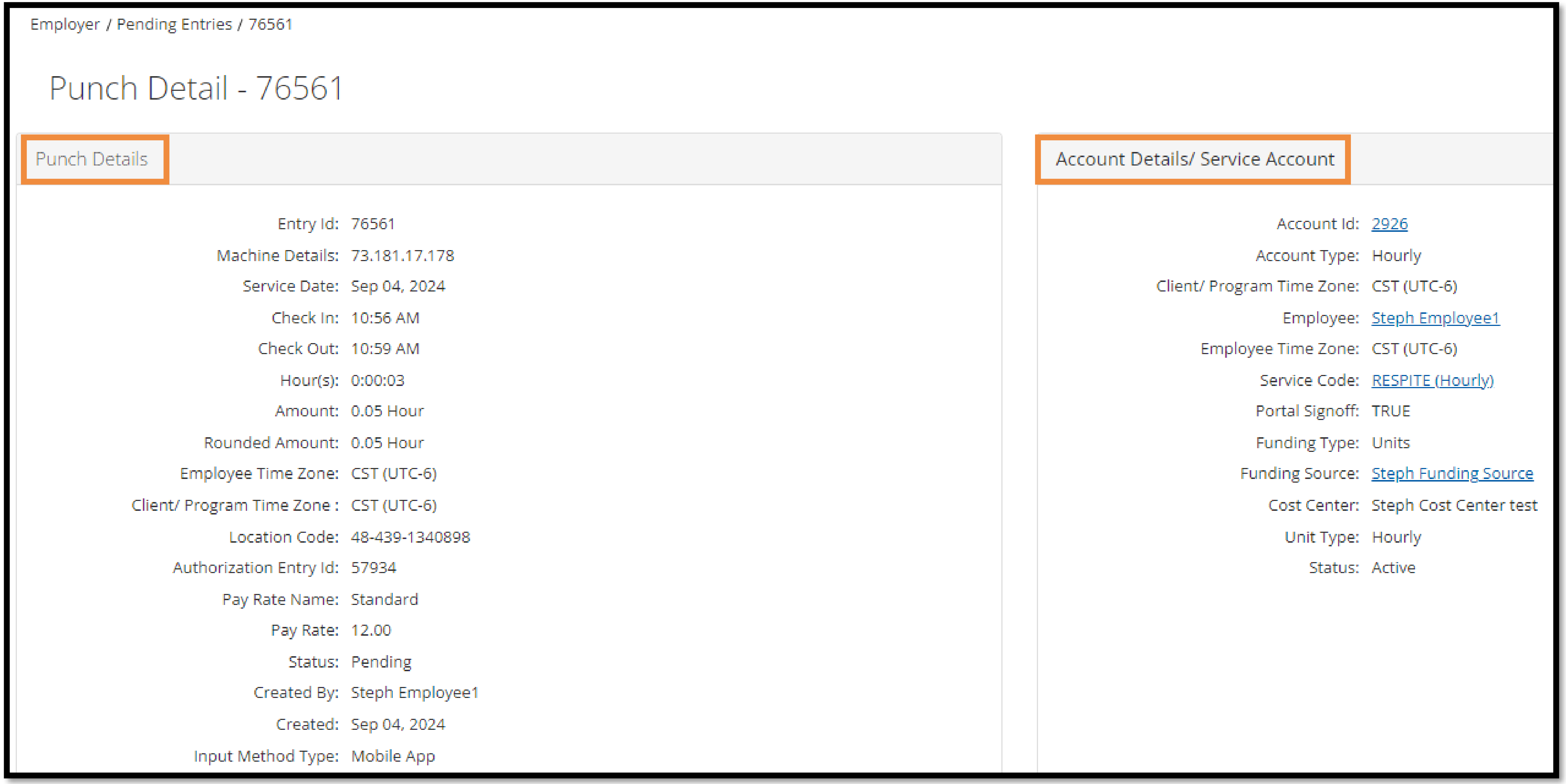
6. Complete the necessary changes in the Edit Entry form wizard
7. Select a Reason Code from the drop-down list
8. Add Reason Code Note
9. Click **Save**
10. Click **Yes** to confirm the changes

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



Punch Detail Page

- Widgets contain detailed information on the punch


Employer / Pending Entries / 76561

Punch Detail - 76561

Punch Details

Entry Id:	76561
Machine Details:	73.181.17.178
Service Date:	Sep 04, 2024
Check In:	10:56 AM
Check Out:	10:59 AM
Hour(s):	0:00:03
Amount:	0.05 Hour
Rounded Amount:	0.05 Hour
Employee Time Zone:	CST (UTC-6)
Client/ Program Time Zone :	CST (UTC-6)
Location Code:	48-439-1340898
Authorization Entry Id:	57934
Pay Rate Name:	Standard
Pay Rate:	12.00
Status:	Pending
Created By:	Steph Employee1
Created:	Sep 04, 2024
Input Method Type:	Mobile App

Account Details/ Service Account

Account Id:	2926
Account Type:	Hourly
Client/ Program Time Zone:	CST (UTC-6)
Employee:	Steph Employee1
Employee Time Zone:	CST (UTC-6)
Service Code:	RESPITE (Hourly)
Portal Signoff:	TRUE
Funding Type:	Units
Funding Source:	Steph Funding Source
Cost Center:	Steph Cost Center test
Unit Type:	Hourly
Status:	Active

Punch Detail Page

- Additional widgets

EVV Details

EVV Method:	Portal Signoff
EVV:	No
Clock In EVV Location :	Home
Clock In EVV Address:	835 White House Road Mansfield, TX 76063
Clock Out EVV Location :	Home
Clock Out EVV Address:	835 White House Road Mansfield, TX 76063
Employee Fail InHome Validation:	No
Supervisor Approved Failed InHome Validation:	NA
EVV Compliant:	No

Reason Codes

Reason Code Name:	Forgot device
Reason Code:	10
Free Text Note:	forgot

Ref Entries | Notes | Attachments | Events | Verifications | Map | Business Rules | Auto Approval | Custom Fields | History

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Mobile Web Portal*

*Web Browser on your mobile device

Adding a New Entry

Add New Entry - Mobile Web

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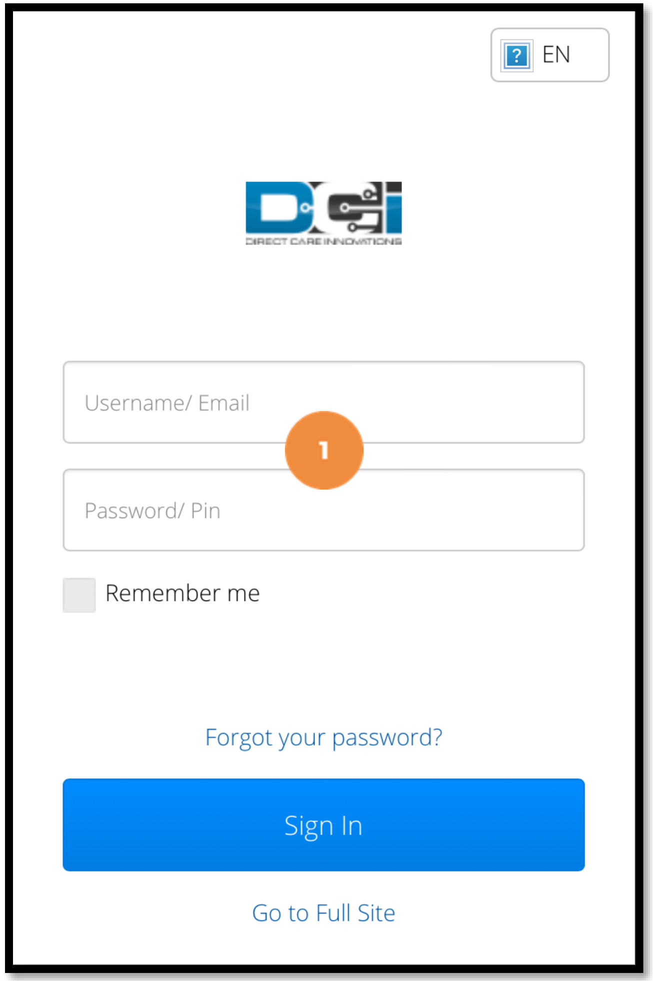
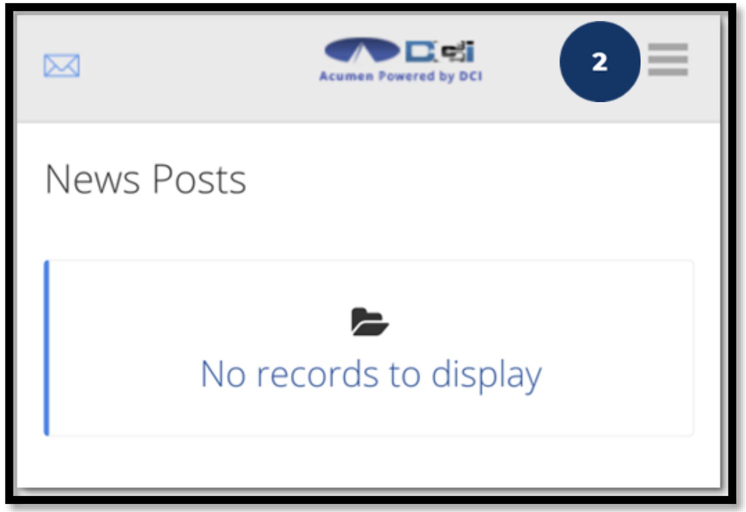
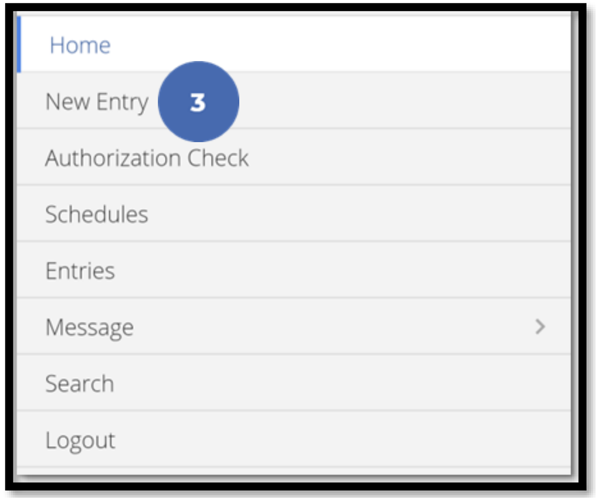


1. On a mobile device, open an internet browser & Log in to the DCI Web Portal
2. Click the **Menu** in the top right corner of the screen
3. Select the **New Entry** tab from the submenu





Add New Entry - Mobile Web (cont.)

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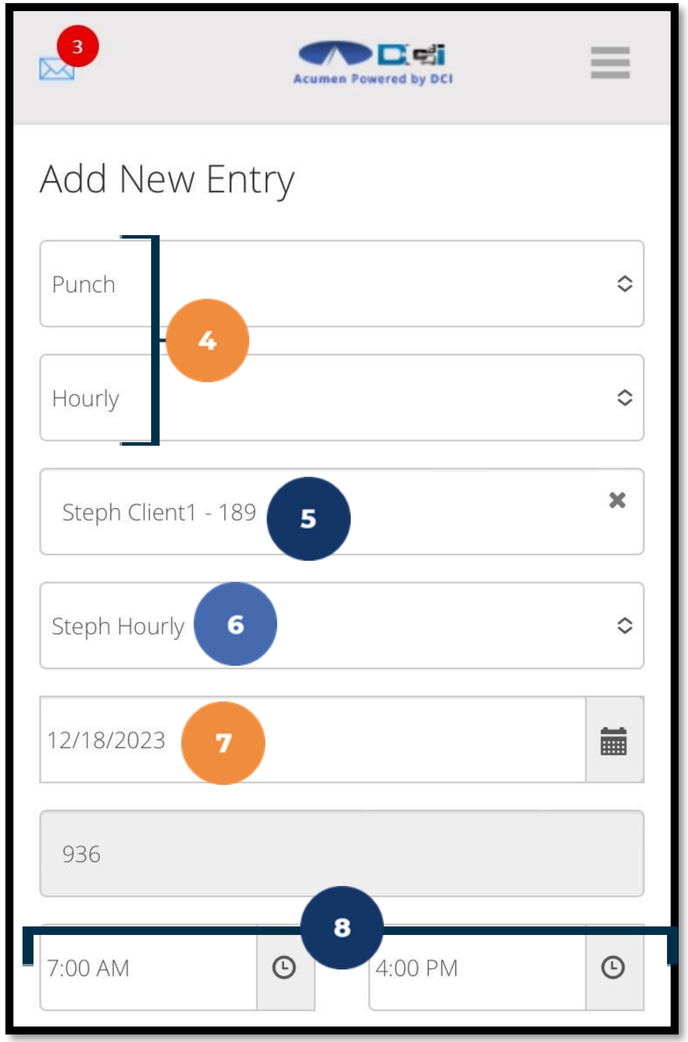
4. The first two fields are prefilled
5. Type a minimum of three characters to generate results and select the **Client's name** from the list
6. Select the **Service Code** from the drop-down
7. Select the **Service Date**
8. Enter the **Check In** (start) and **Check Out** (end) times



Add New Entry - Mobile Web (cont.)

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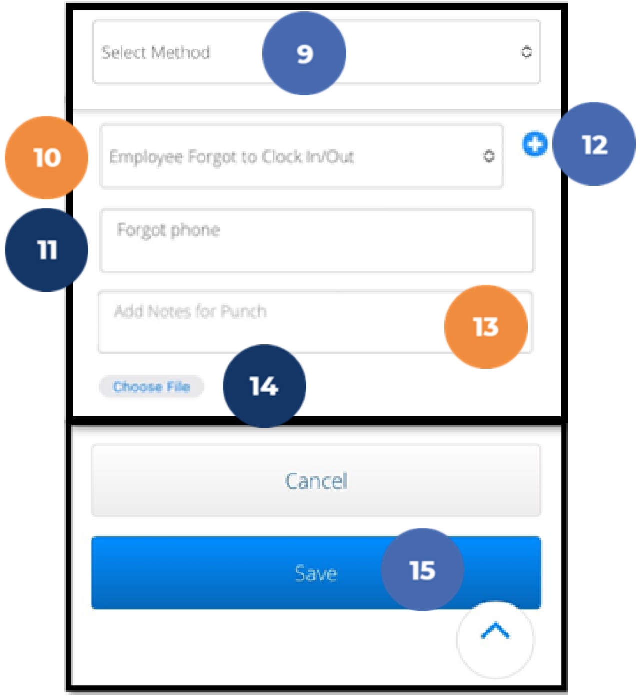
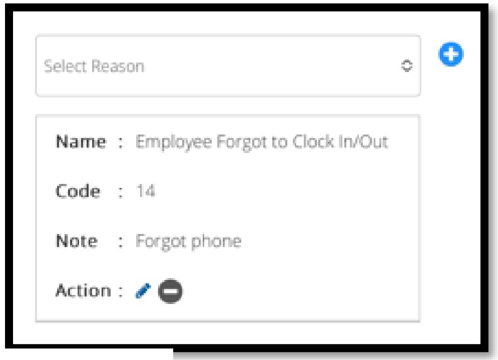
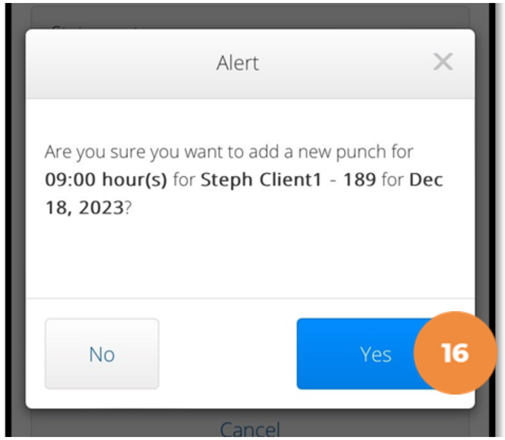
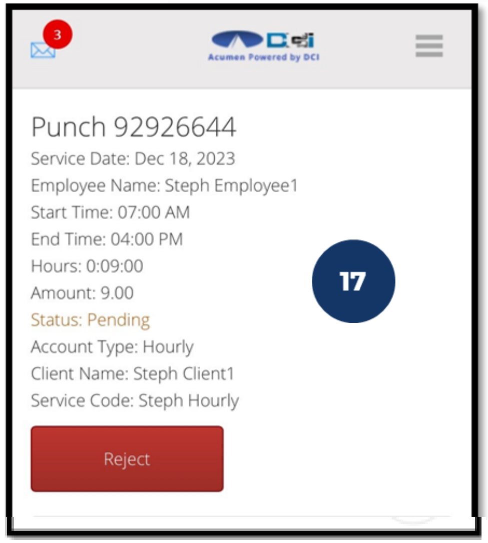
9. Select Portal Signoff as the Method
10. Select a Reason Code from the drop-down list
11. Add a Reason Code Note
12. Click the blue **plus sign (+)** to populate the reason code details
13. Enter Notes for the punch (optional)
14. Click the **Choose File** button to select and upload Attachments (optional)
15. Click **Save**
16. Click **Yes** to submit
17. The punch has been submitted









Mobile Web Portal*

*Web Browser on your mobile device

Reviewing Entries

Review Entries

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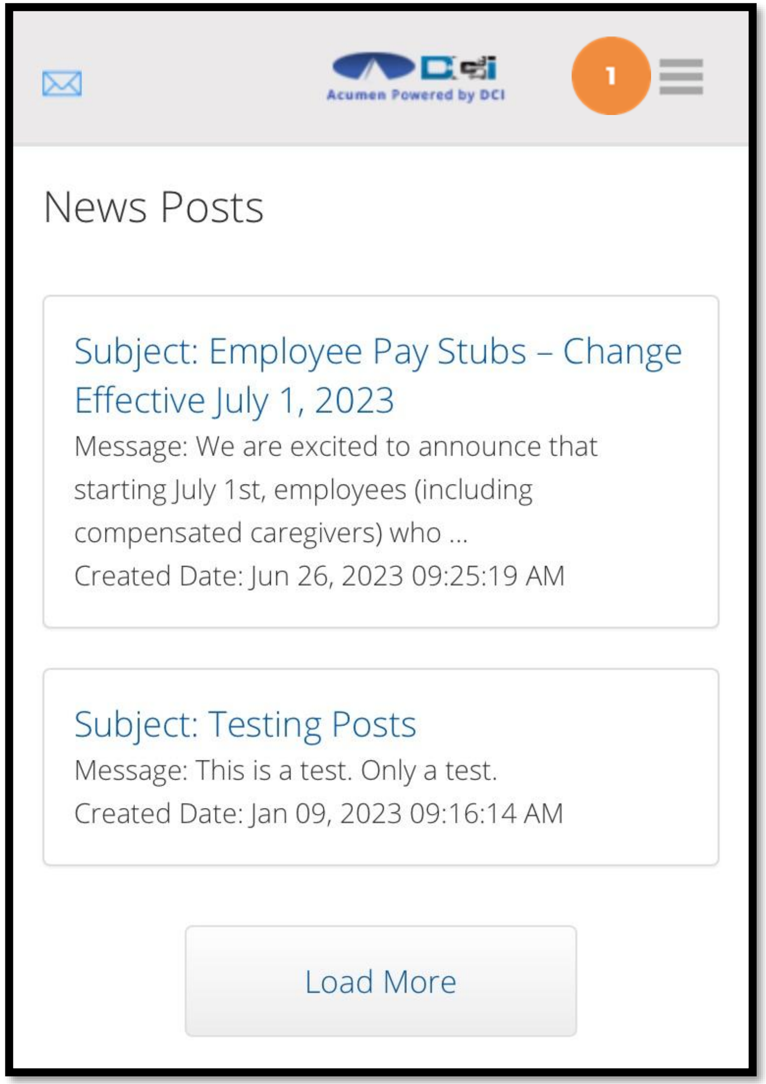
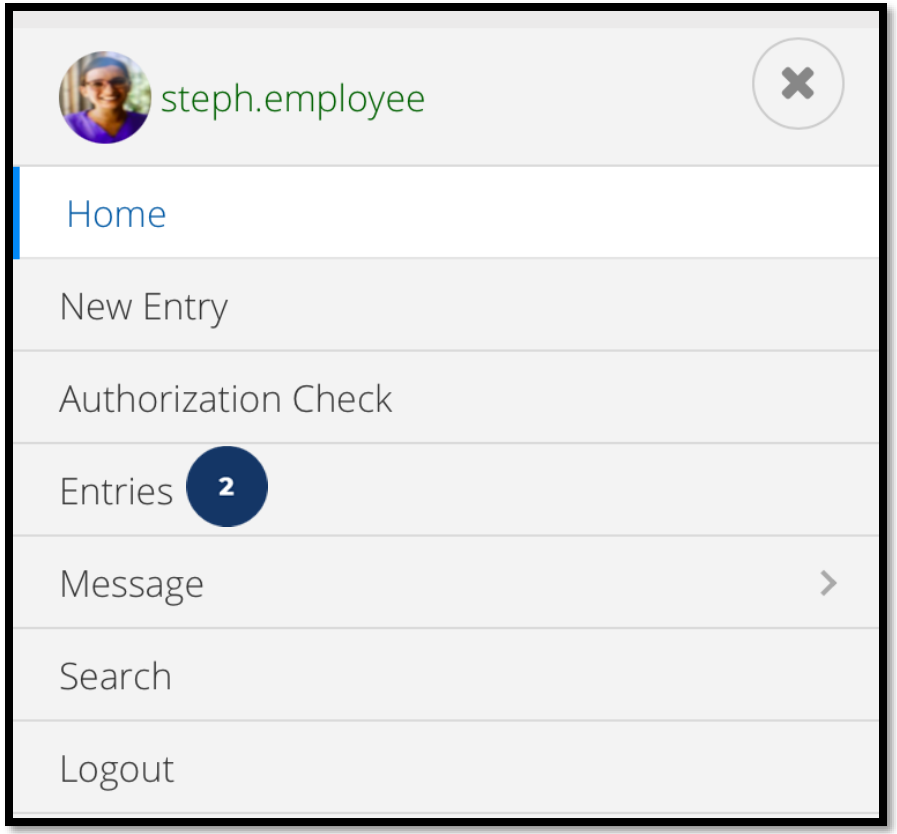
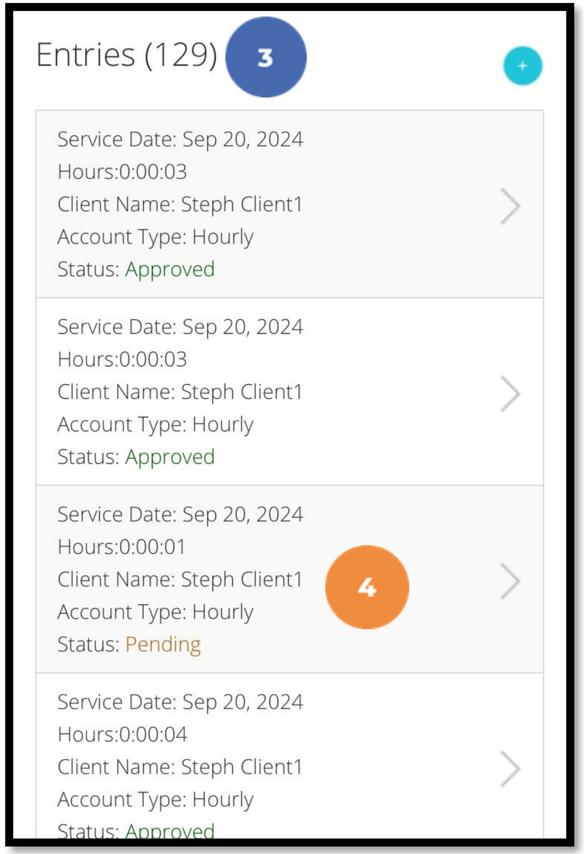


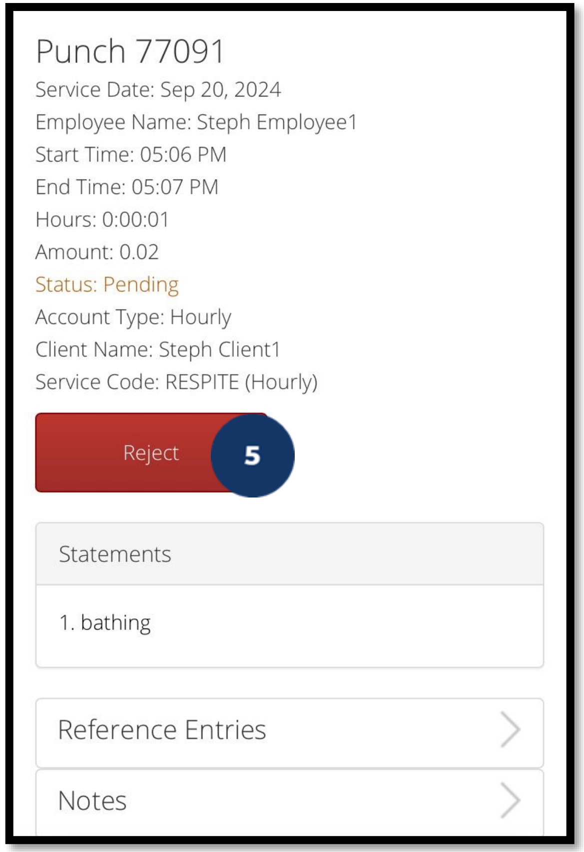
1. Click the **Menu** in the top right corner of the screen
2. Select the **Entries** tab from the submenu

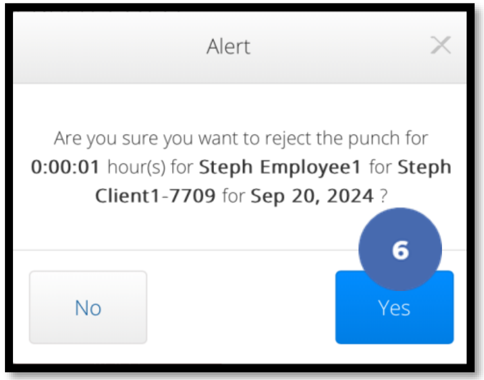


Review & Reject Entry

3. View the list of entries
4. Click on an entry to view the punch details
   - **Please note:** Entries in a Pending status will not be paid until approved
5. If needed, an entry in Pending status may be rejected. Click the red **Reject** button.
6. Click **Yes** to confirm the punch rejection







Check Entries

If a punch entry violates the **Authorization Weekly Max** business rule, it can be saved but is later rejected when the business rule runs. <u>You do not receive an alert</u> but can see that the punch was rejected and that the business rule failed.

Entries

Export

Showing **30** out of **380** records

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
39492	Apr 14, 2024	12:00 AM	11:30 PM	Hourly		Steph Cost Center test - Steph Cost Center test	Steph Client1	RESPITE (Hourly)	0:23:30	Rejected
39491	Apr 15, 2024	12:00 AM	11:30 PM	Hourly		Steph Cost Center test - Steph Cost Center test	Steph Client1	RESPITE (Hourly)	0:23:30	Rejected

Ref Entries | Notes | Attachments | Verifications | Map | Business Rules | Auto Approval | Custom Fields | History

Business Rules

Business Rule Name	Business Rule Result
Employee service account start date punch entry	Pass
Authorization Weekly Max	Fail
Max Hours Per Week Per Client Per Funding Source	Pass
Authorization Expiration Date	Pass

1. Always review your entries and check the status
2. Click on the **punch row** to review the punch details
3. Click the **Business Rules tab** to view the result

Contact your employer

Phone IVR
(Interactive Voice Response)

***Option if you do not have access to a mobile device or tablet. The Client must have a landline phone.**

Phone EVV Basics

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- **Employer - Confirm the <u>landline</u> phone number on file with Acumen is for the client**
    - ✓ Employees must call from a recognized number only

    ***Please note!** If calling from a number not associated with the client, the empl will receive an error message.
- **Employee - Will be asked to validate the following information:**
    - ✓ Last four digits of their social security number
    - ✓ PIN (add in the web portal under user settings)
    - ✓ MMDD of their birthday
    - ✓ Client Name & Service Code for the shift
- **Client or Employer – Need client PIN for historical (non-EVV-compliant) phone entries**
    - ✓ Client PIN is on the Employer Good To Go letter

Phone EVV (IVR)

Real-Time Entry

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. Depending on program settings, the available balance may be announced. Press 1 to continue.
7. Select "none" for the clock in EVV location
8. Press 1 to confirm and save the punch
9. The recording will read back the punch details and then disconnect

Clock Out: Real-Time Entry

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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. The system announces that there is an open punch. When prompted, press 1 to confirm closing the punch.
4. Select "none" for the clock out EVV location
5. The punch is now closed, and the employee is clocked out. Press 2 to disconnect or 1 to open a new punch.

Phone EVV (IVR)

Historical Entry (Not EVV Compliant)

Historical Entry

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***Please note!** Historical entries are only used for a missed punch or punch correction due to service interruption. The goal should always be to enter punches in real time to maintain EVV compliance.

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. Press 2 for historical entry
5. Select the service code with the prompts given
6. Depending on program settings, the available balance may be announced. Press 1 to continue.

Historical Entry (cont.)

7. Enter the date of service in MMDDYYYY format (i.e., September 18, 2024 = 09182024)
8. Enter the clock-in time in HH:MM (i.e., 0830)
9. Select 1 for AM or 2 for PM
10. Enter the clock-out time in HH:MM (i.e., 0530)
11. Select 1 for AM or 2 for PM
12. Select “none” for the clock in EVV location
13. Select ”none” for the clock out EVV location
14. The system will read back the punch details. Press 1 to confirm or 2 to edit.

Historical Entry (cont.)

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

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

Troubleshooting

Phone EVV (IVR)

Troubleshooting

Phone EVV Troubleshooting

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- **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
    - ➢ Call 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
- **Does the employee need to edit or reject an entry?**
  - ✓ Entries cannot be edited or rejected using Phone EVV. The employee must use the web portal instead.

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Business Rule Alerts

Troubleshooting

Alerts

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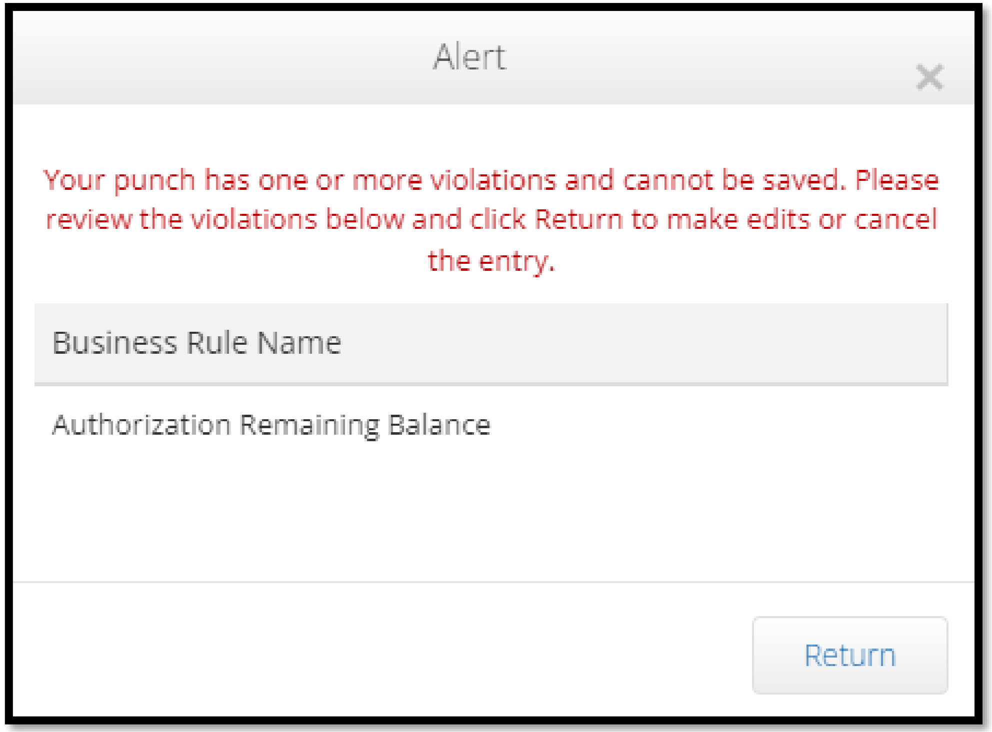
- Access the **Business Rule Alerts** article on the training page to learn more about alerts you may receive
- Many of these alerts pertain to the authorization (budget)
- Please reach out to your Employer for guidance

Alert	Business Rule Name	Reason	How to Proceed
"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."	Authorization Remaining Balance	There are not enough funds available in the authorization to cover the hours submitted	The entry cannot be saved. Ask the employer to review their budget utilization. Adjust entry as needed.
"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."	No valid pay rate punch entry	There is no pay rate for this employee for the punch date of service and service code.	Ensure the employee is submitting for the correct service and date, If the entry is correct, contact the employer.
"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."	Timely Filing Employees Punch Entry	Punches must be submitted within the number of days determined by the program, of the date of service.	The issue cannot be resolved. Ensure time is submitted promptly. Acumen cannot pay out hours that are submitted beyond the number of days past the date of service.

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 unit utilization

Alerts

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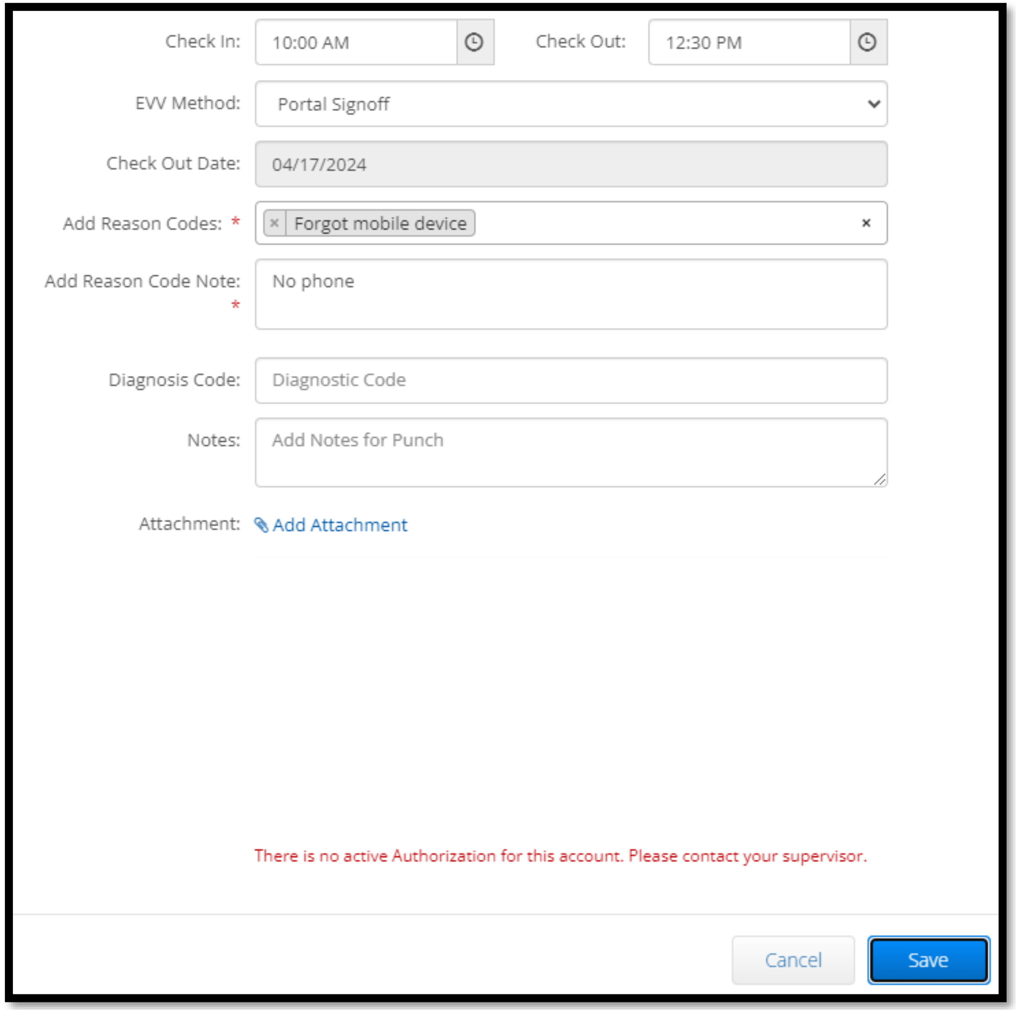
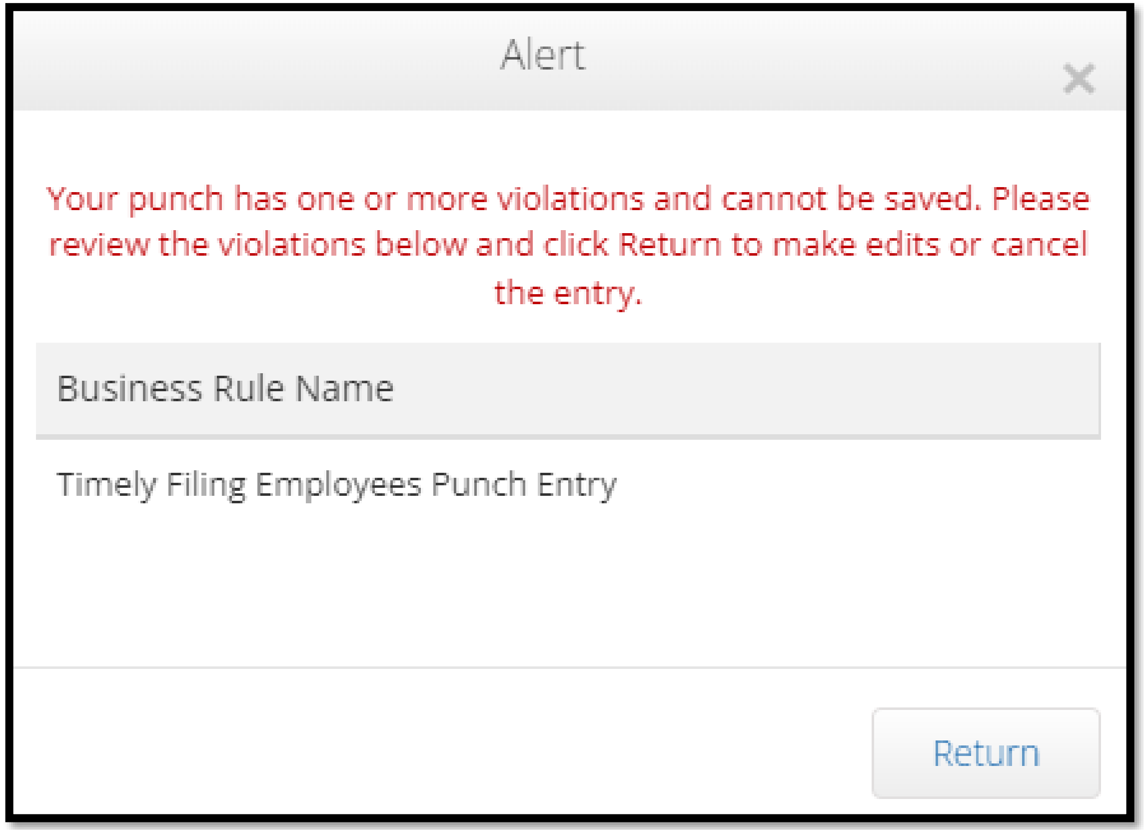
Many other business rules pertain to the authorization/service plan such as the **Authorization Expiration Date** rule.


Check In: 10:00 AM
Check Out: 12:30 PM
EVV Method: Portal Signoff
Check Out Date: 04/17/2024
Add Reason Codes: * Forgot mobile device
Add Reason Code Note: * No phone
Diagnosis Code: Diagnostic Code
Notes: Add Notes for Punch
Attachment: Add Attachment
There is no active Authorization for this account. Please contact your supervisor.
Cancel
Save

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

Alerts

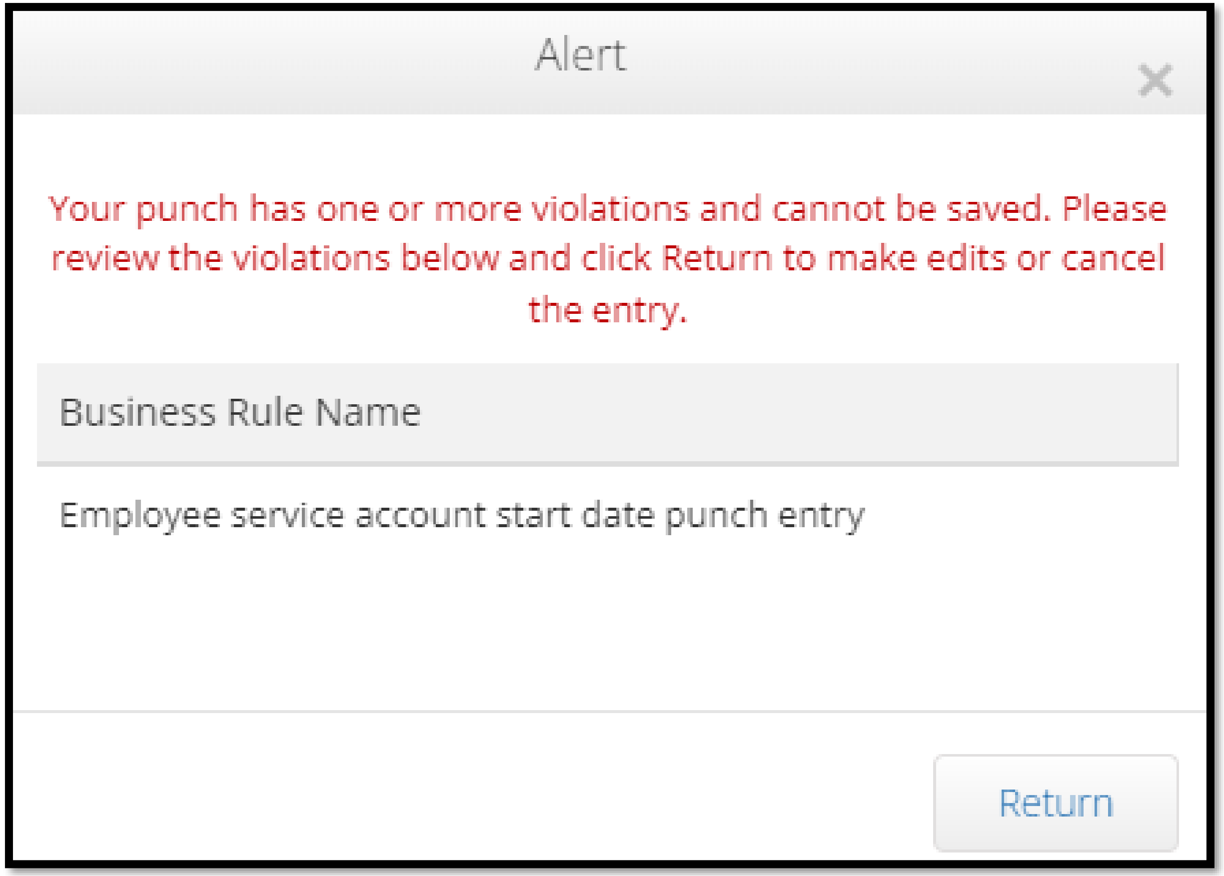
Punches must be **entered AND approved** within 30 days of the date of service. After 30 days the **Timely Filing Employees Punch Entry** or the **Timely Filing Employee Punch Approval** rules will prohibit the punch from being saved.



- The employee will receive this alert when attempting to punch for a date that is more than 30 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 30 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

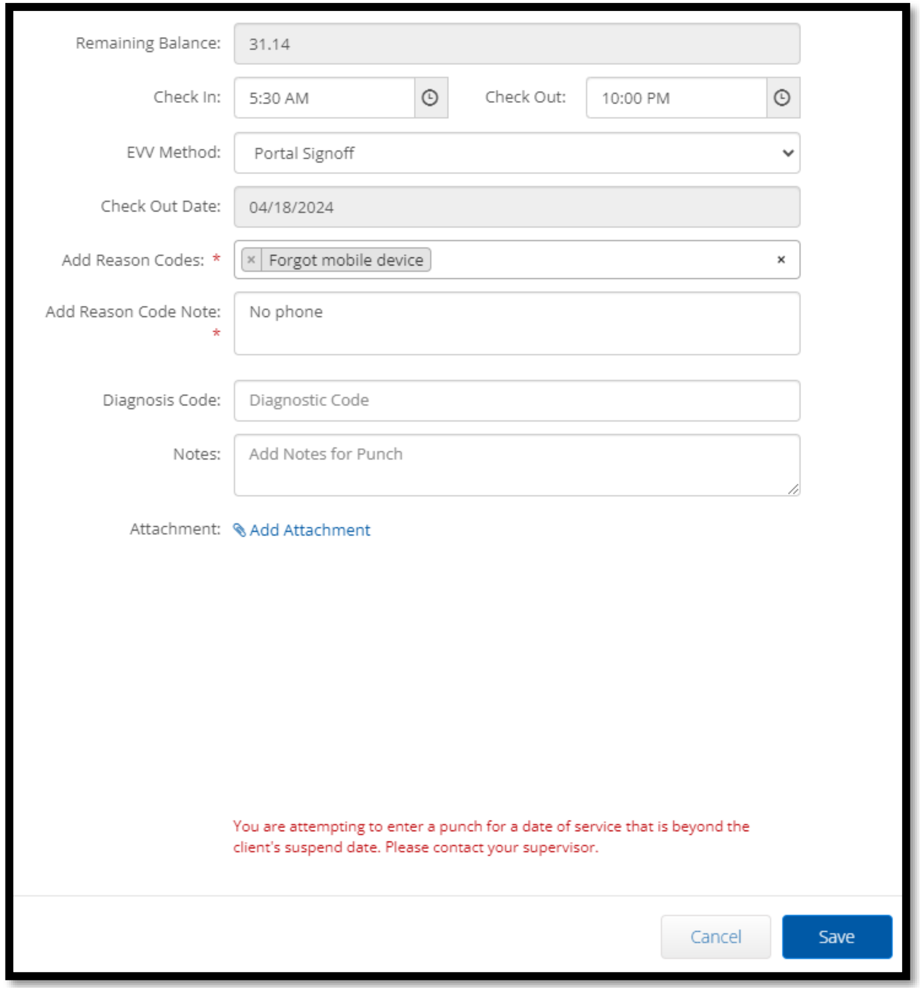
Punches may only be entered for an active service account. If the employee attempts to enter a punch before the start date or after the end date of the service account, they cannot save the punch. This triggers either the **Employee Service Account Start Date Punch Entry** rule or the **Employee Service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



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

Alerts

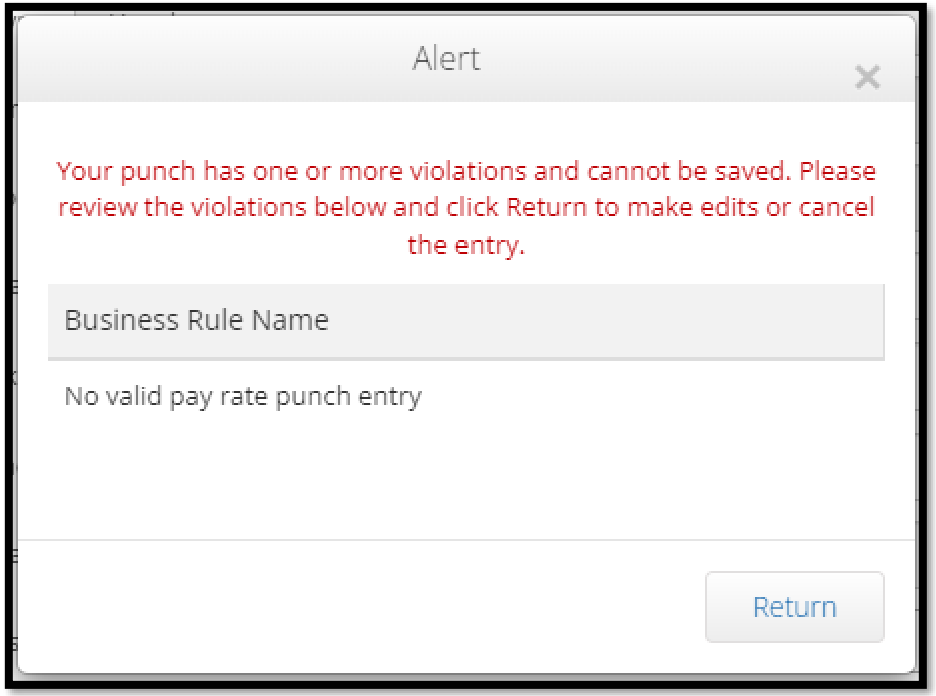
If enrollment is on hold, or the client cannot receive service, the client profile will be suspended. Punch entries cannot be added after the suspension date.



- The 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

Alerts

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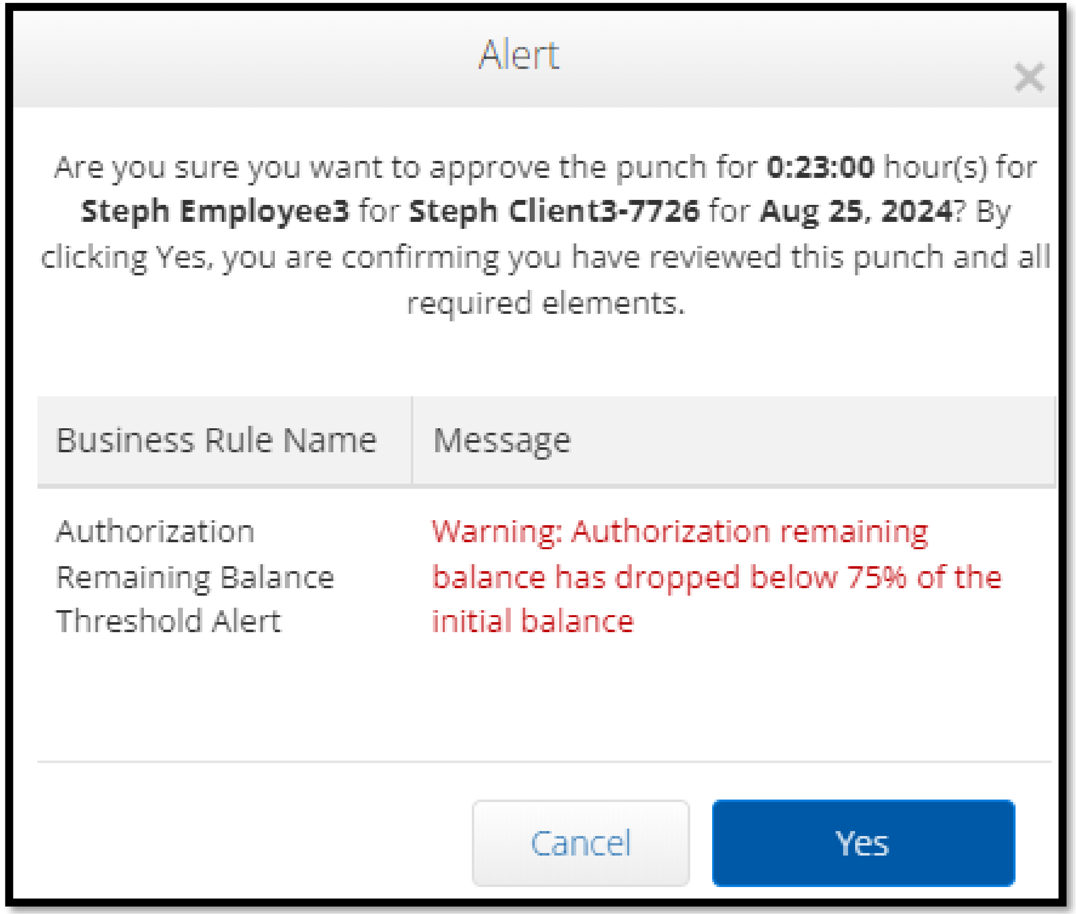
If the punch causes the authorization remaining balance to drop below 75% of the initial balance, an alert displays at the time of approval. It does not stop the punch from being approved.



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SDE's Frequently Asked Questions

Self-Directed Employee FAQ’s

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What is DCI and why do I need to use it?

DCI (Direct Care Innovations) is the platform you’ll use to log work hours, submit them for payroll, and ensure your employer approves them. It replaces the old paper timesheets.

How do I clock in and out for work?

You can:
- Use the **DCI Mobile App** for real-time clock-in/out at the beginning and end of your shift.
- Use the **DCI Web Portal** to enter shifts manually after your shift is over (historical entries, ***not*** EVV-compliant).

Where can I find the DCI login page?

Go to: **https://acumen.dcisoftware.com**

What if I forget my password or PIN?

Use the password reset option on the login screen in the **Profile Settings**. If needed, contact Acumen Customer Service at (833) 892-0413.

Can I use both the app and the website?

Yes. The app is best for real-time entries; the web portal is best for manual (historical) entries after a shift is done.

Self Directed Employee FAQ's

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How does my employer approve my time?

Your employer must log into DCI and approve your submitted shifts before the payroll deadline.

What happens if my employer doesn't approve my time?

Your hours will not be processed for payroll. Always remind your employer to approve your shifts on time.

Where can I find training if I missed the virtual session?

Log in to DCI Web Portal and click "**Help**" in the upper-right corner. Look for New Jesey training materials page.

When will I get paid?

Payments follow the Acumen payroll schedule. Refer to the payment calendar sent to you or visit www.acumenfiscalagent.com under your state's section.

Who do I contact if I have issues with DCI or payroll?

- Phone: **(833) 892-0413**
- Email: customerservice@acumen2.net

Self Directed Employee FAQ's

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If a Self-Directed Employee is a live-in caregiver, will they be exempt from Electronic Visit Verification (EVV)?

A SDE can be eligible for an exemption from EVV due to live-in caregiver status, if they reside on the same premises as the Client to whom services are provided. They must live in the premises seven days per week and have no home of their own *or* live-in for extended periods of time of at least five days per week (120 hours).

How does a Self-Directed Employee apply for the live-in caregiver exemption to EVV?

The employee needs to provide documentation of live-in status to the individual's Support Coordinator. For employees eligible for the live-in exemption, completion of the EVV Live-In Caregiver Attestation is required at plan development and annually thereafter, as well as any time there is a change in live-in caregiver status.

How do I enter my time if I am EVV exempt?

The employee does not need to use the mobile app to clock-in or clock-out during their shift, however, they need to enter their time within 24 hours of the service provided in the DCI web portal for approval. They will need to enter their service code (the service provided during the shift).

Payroll Schedule & Resources

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NJ DDD Payment Schedule

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- Ensure payment requests are received by the Submissions Due Date
- Requests submitted after the due date will be handled in the following pay period
- First paycheck from Acumen will be **10/10/2025**
- Pay day is every other Friday
- Employee's time must be <u>**entered and approved**</u> within <u>**60 days of the date of service**</u>

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

IMPORTANT

Resources

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 Support 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

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DIRECT CARE INNOVATIONS

Acumen powered by DCI

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THANK YOU!

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