

NJ DDD DCI

Systems

Training for

Employers

Welcome to Acumen!

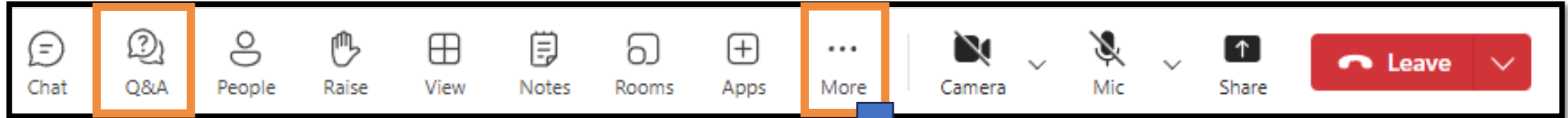
Thank you for joining the Acumen Family!



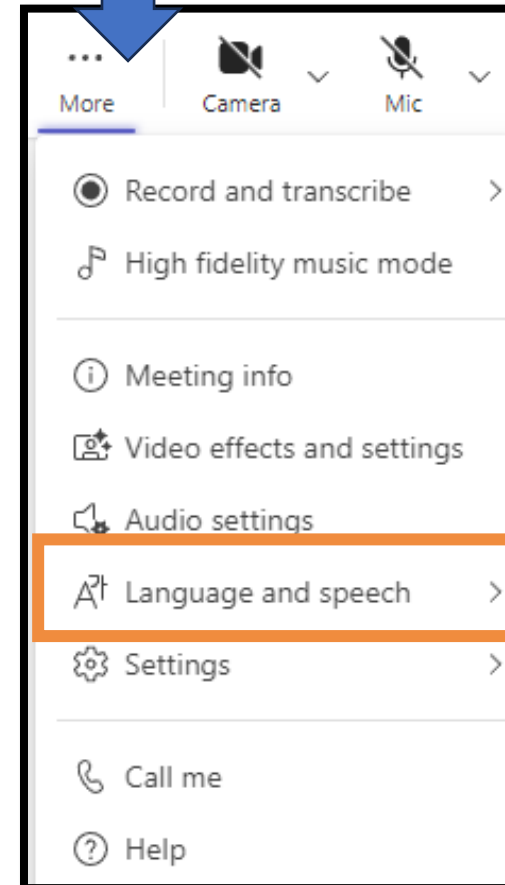
Acumen powered by DCI

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

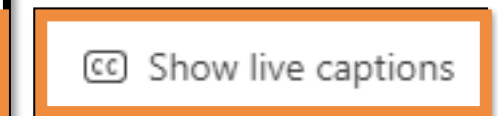
Using Microsoft Teams



- 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

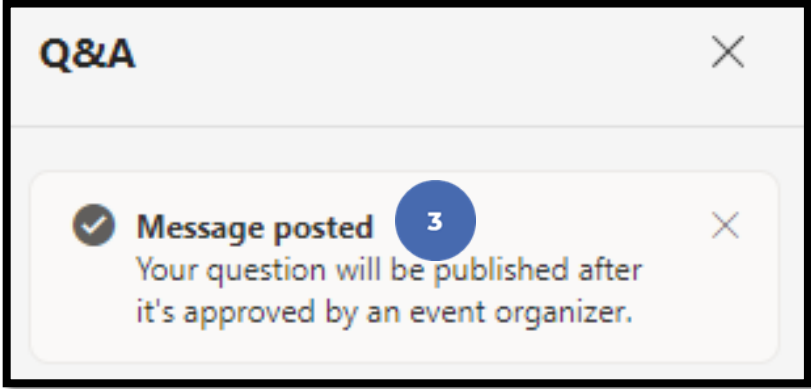
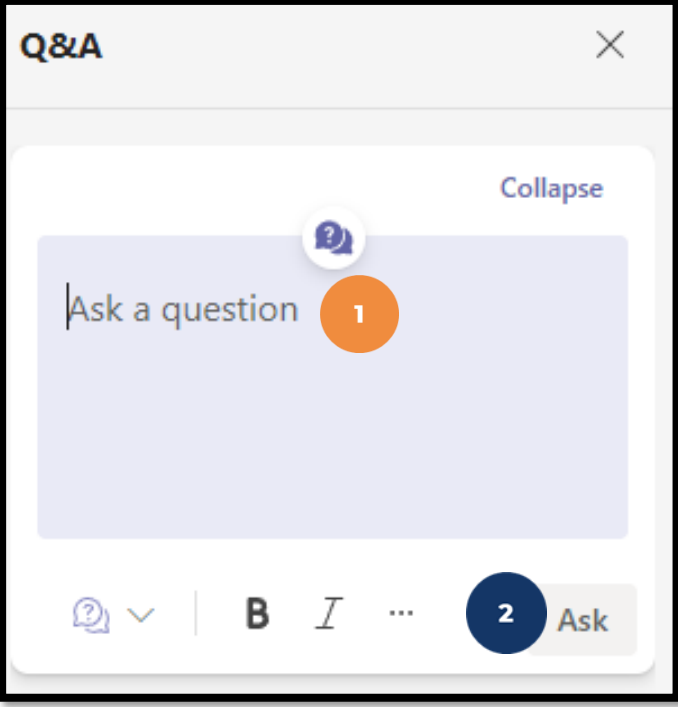
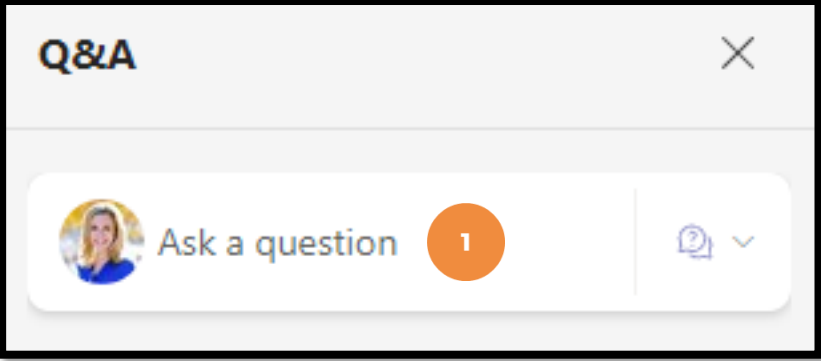


- To enable closed captioning:
 - ✓ Click the **More** button (three dots)
 - ✓ Select **Language and speech**
 - ✓ Click **Show live captions**



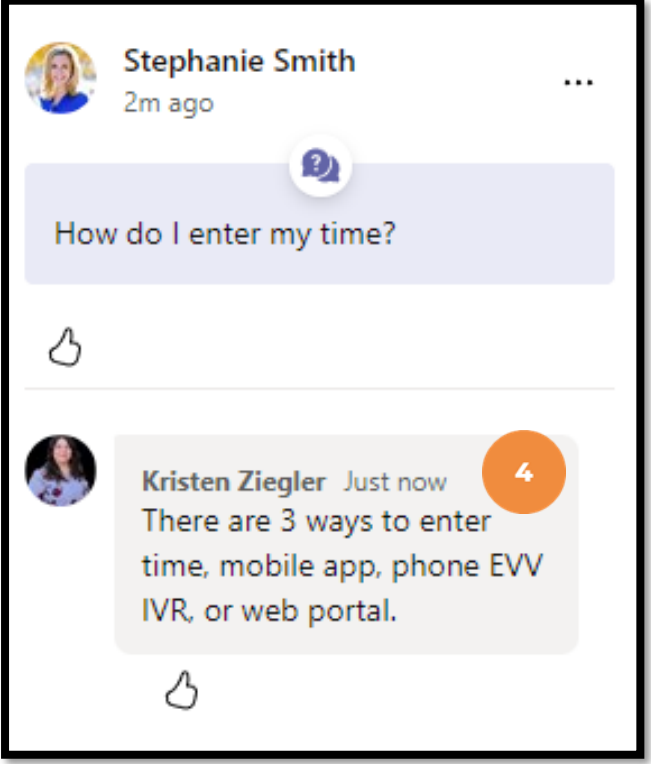
- OR press **ALT+Shift+C** on your keyboard

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 & post your question



Agenda



✓	Overview
✓	Mobile App Download & Login
✓	Mobile App – Manage & View Entries
✓	Web Portal – Navigation, Profile Settings, Messaging & Dashboard
✓	Web Portal – Facial Recognition Setup
✓	Web Portal – Manage Entries
✓	Web Portal – Employees, Clients & Reports
✓	FAQs and Resources

Why Are You Here?

Why Are You Here?



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



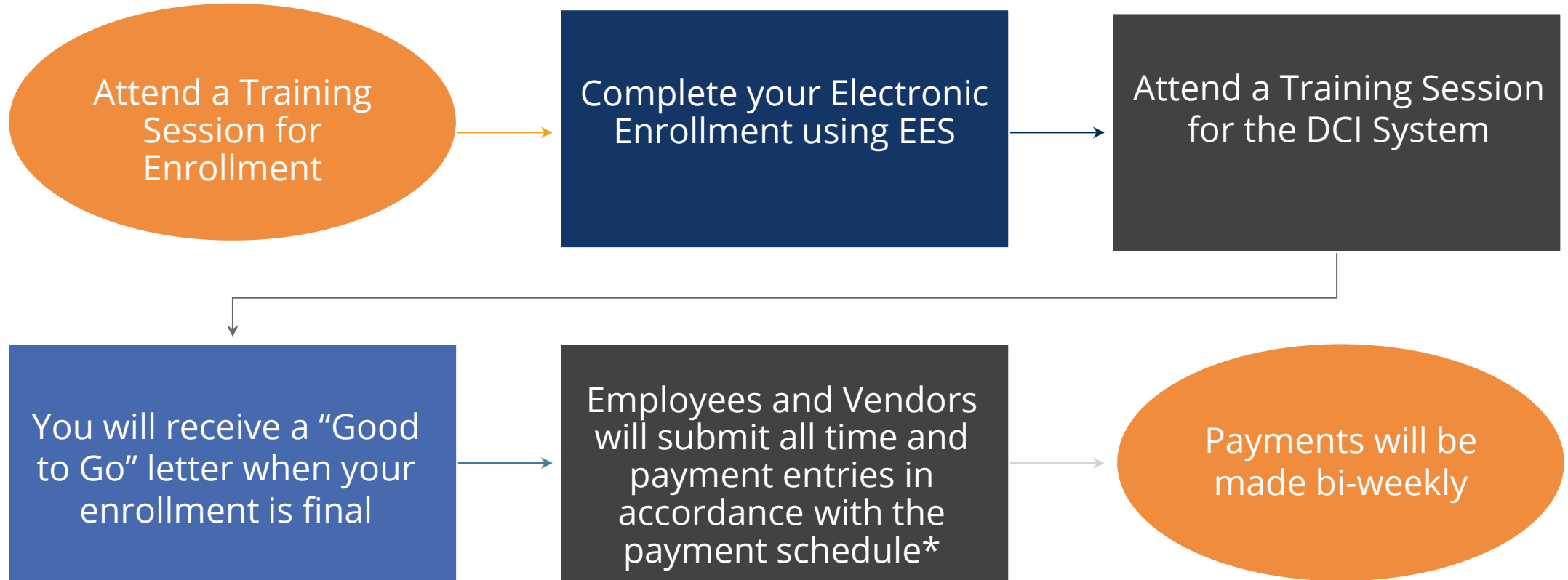
Enrollment

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. Some sessions may include a live demonstration, and you'll have the chance to ask questions along the way. Other sessions will be more informative. By the end of the trainings, 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



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.

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?

DCI is the electronic invoicing system that allows self-directed employees and community vendors to securely submit documentation for payment approval by the Employer.

Web Browsers



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



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



DCI Requirements

Devices & Operating Systems (OS)

Apple

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

Android

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



Self-Directed Employees - Enter Time

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

Mobile App



OR

Phone EVV



OR

Web Portal



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

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

- 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

Mobile App Download & Login

- 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

Download DCI Mobile EVV

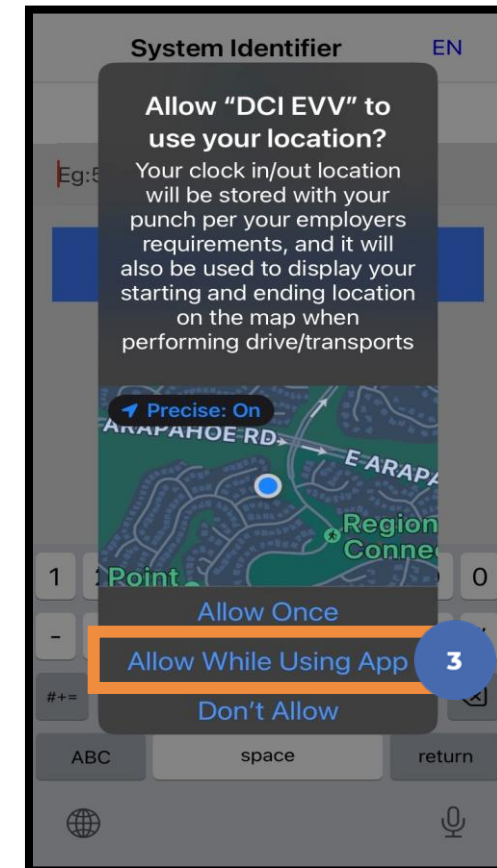
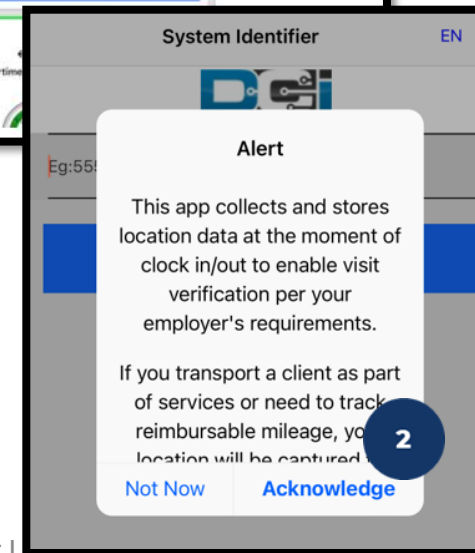
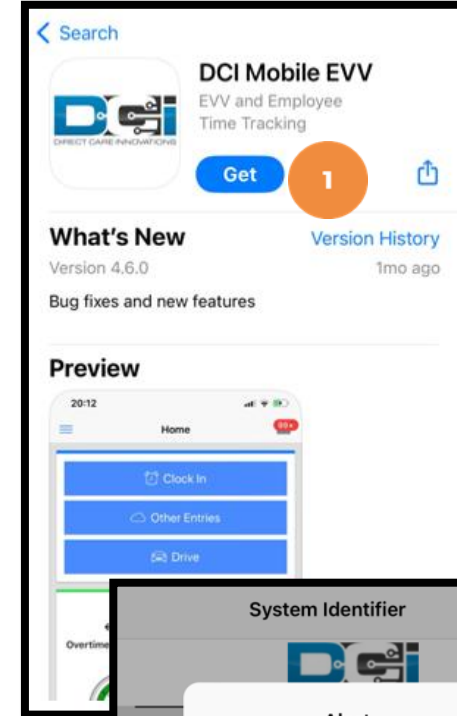
1. [Download](#) the **DCI Mobile EVV** App



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

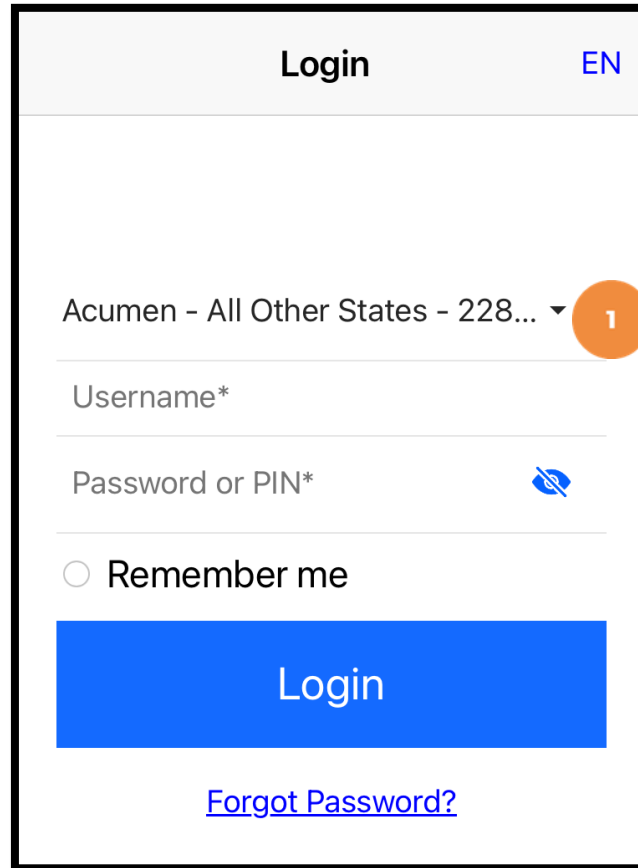


1. After downloading the app, the Select Agency screen appears with a Search Agency field.
2. Type at least three consecutive characters of the agency name OR the system identifier in the Search Agency field
 - ❖ The Acumen system identifier for North Carolina (NC CAP only) & Wisconsin (formerly Outreach) is **2015**
 - ❖ The Acumen system identifier for All Other States & Programs (including Kansas Helpers) is **228636**
 - ❖ 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

The first screenshot shows the 'Select Agency' screen with a search field and a 'Next' button. The second screenshot shows the search results for 'acu' with two options: 'Acumen - All Other States & Programs (including Kansas Helpers) - 228636' and 'Acumen - North Carolina (NC CAP only) & Wisconsin (formerly Outreach) - 2015'. The third screenshot shows the 'Login' screen with fields for 'Username*' and 'Password or PIN*', a 'Remember me' checkbox, and a 'Login' button.

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.



Login EN

Acumen - All Other States - 228... ▾ 1

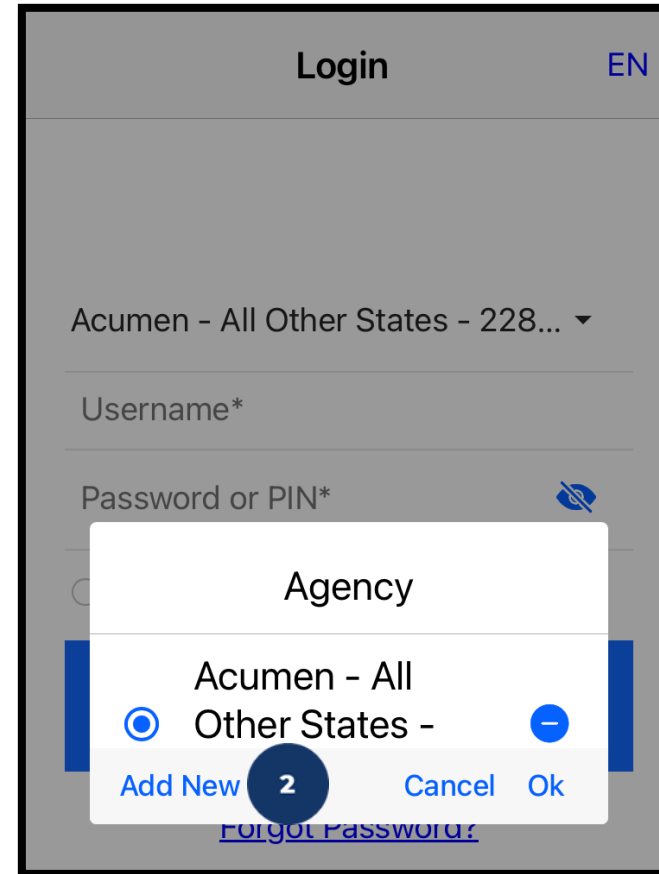
Username*

Password or PIN* 

☐ Remember me

Login


[Forgot Password?](#)



Login EN


Acumen - All Other States - 228... ▾

Username*

Password or PIN* 

☐ Remember me

Agency

☒ Acumen - All Other States - 

[Add New](#) 2 [Cancel](#) [Ok](#)

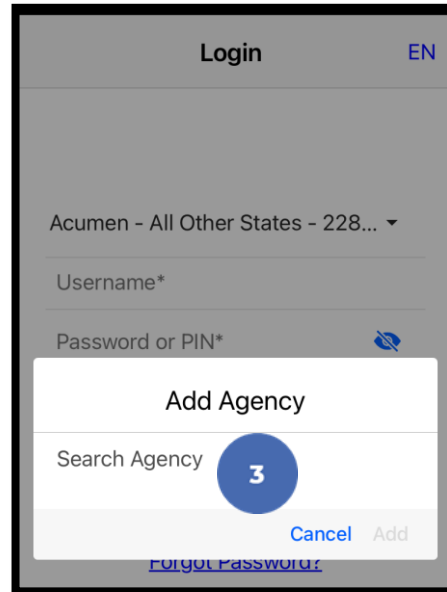
[Forgot Password?](#)

Add More Agencies

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



Login EN

Acumen - All Other States - 228... ▾

Username*

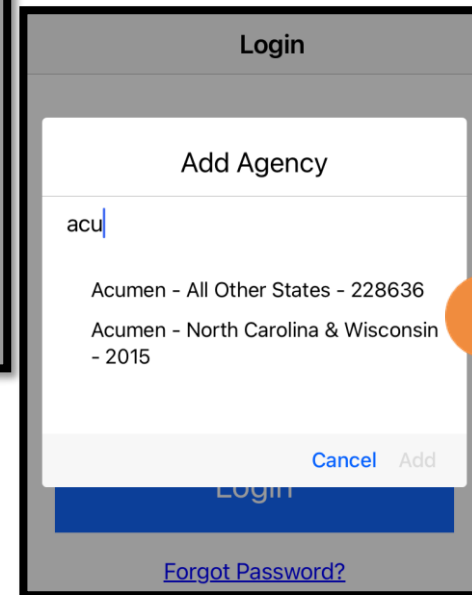
Password or PIN* 

Add Agency

Search Agency **3**

Cancel Add

[Forgot Password?](#)



Add Agency

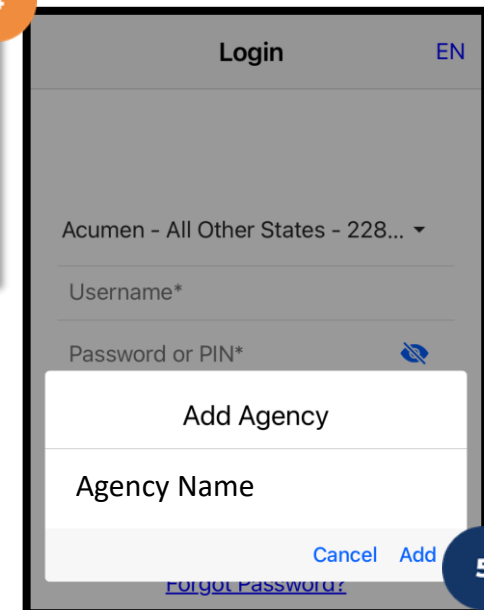
acu

Acumen - All Other States - 228636

Acumen - North Carolina & Wisconsin - 2015 **4**

Cancel Add


[Forgot Password?](#)



Login EN

Acumen - All Other States - 228... ▾

Username*

Password or PIN* 

Add Agency

Agency Name

Cancel Add **5**

[Forgot Password?](#)

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



1. Enter employer credentials
 - ✓ Acumen provided a **username** and **password** on the Good To Go/Welcome letter
 - ✓ Optionally, select "Remember Me" to save the username

***Please note:** Do not use on a shared device
2. Click the blue **Login** button to access the mobile app
 - ✓ The **Forgot Password** link is available if necessary but requires a valid email address to be on file

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

A screenshot of the DCI Mobile App login interface. At the top, it says "Login" with a language selector "EN". Below this is a dropdown menu showing "Acumen - All Other States - 228...". There are two input fields: "Username*" and "Password or PIN*", with an orange circle containing the number "1" next to the password field. Below the password field is a radio button labeled "Remember me". At the bottom is a large blue "Login" button with a dark blue circle containing the number "2" next to it. Below the button is a blue link that says "Forgot Password?".

EN

Acumen - All Other States - 228... ▾

Username*

1

Password or PIN*

☐ Remember me

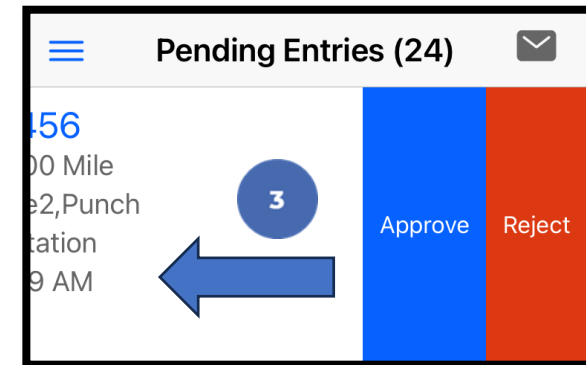
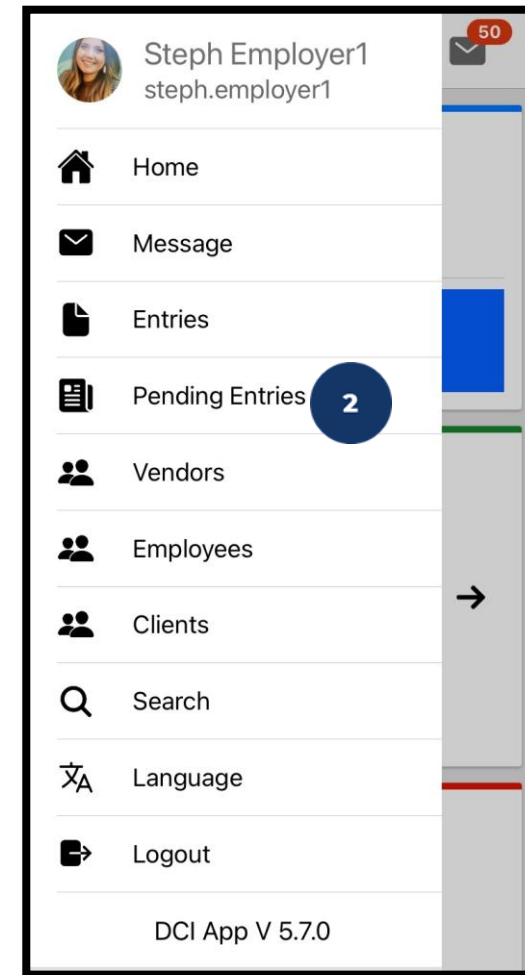
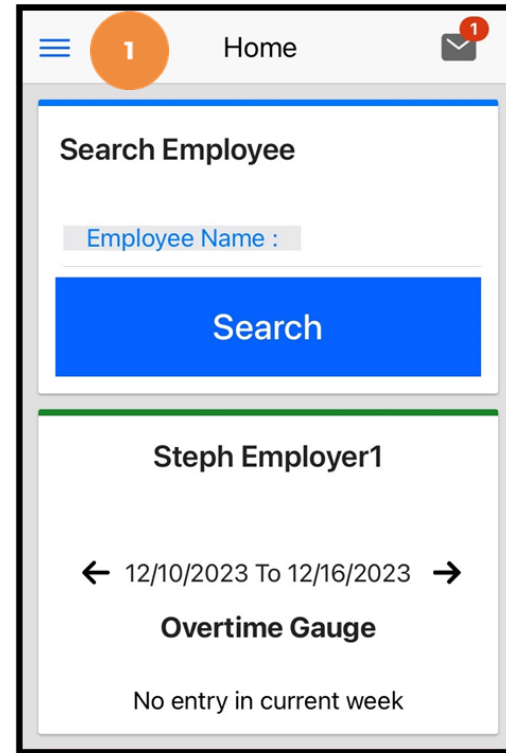
Login 2

[Forgot Password?](#)

Manage & View Entries

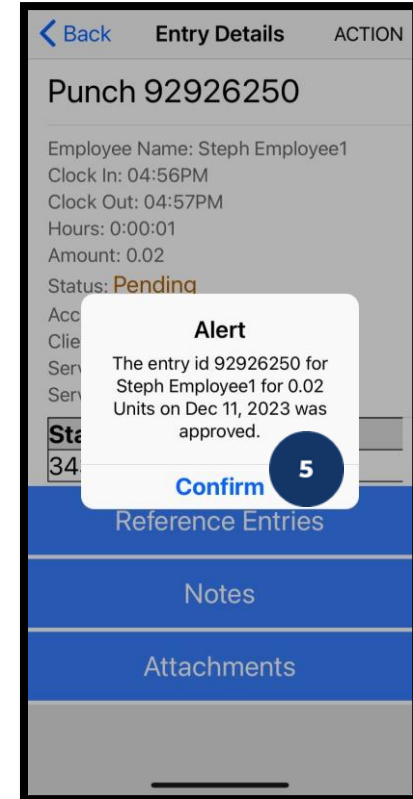
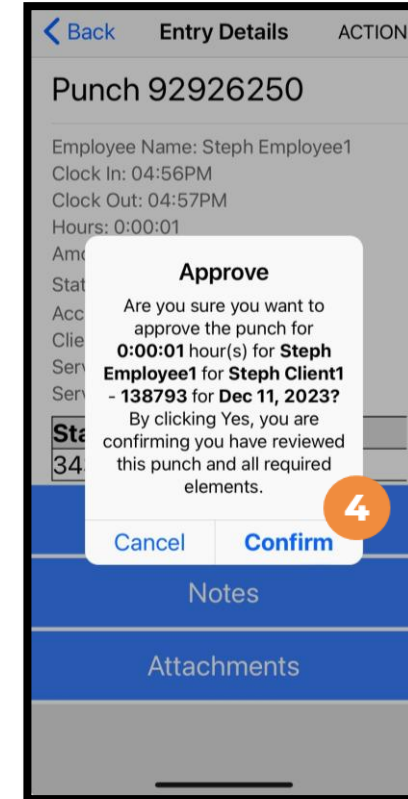
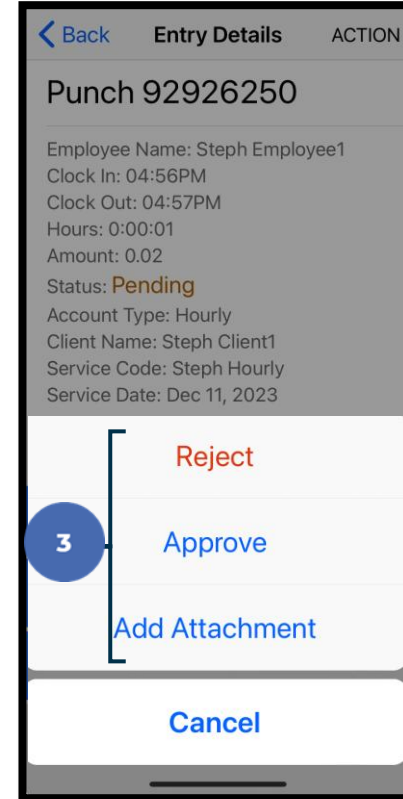
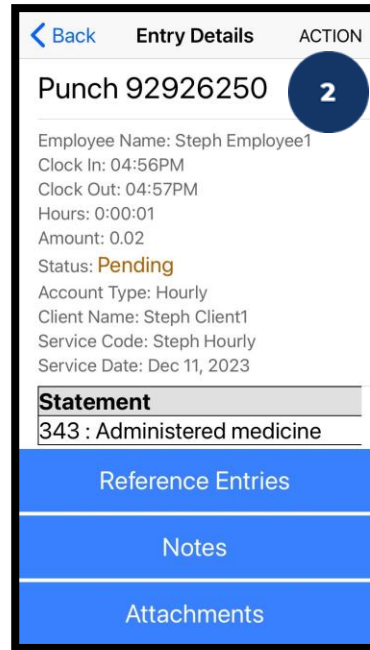
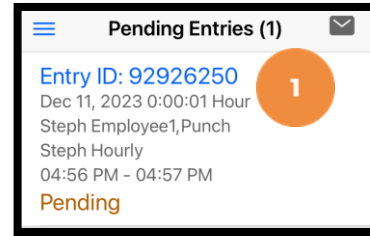
Review & Approve Entries

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



Review & Approve Entries (cont.)

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



*Please note:

If the action taken was to approve the entry, the status changes to Approved and the entry will be processed for payment.

*The program may have a timely filing rule meaning that entries must be approved within a certain number of days from the date of service.

Entry Status



- **Unverified:** Entries that the Employer or Admin (someone other than the employee) enters or edits on behalf of an employee. The employee must resolve the unverified entries so the employer can review.
- **Unvalidated:** Temporary status. Entries that are waiting for the business rule validation process to complete. This process runs multiple times an hour. Moves to pending or rejected status after processes run.
- **Pending:** Entries that are awaiting review and approval by the Employer. Display on the Pending Entries page.
- **Rejected:** Entries that have been rejected by the Employer or a system process
- **Approved:** Entries that have been approved by the Employer and are ready to be processed
- **Batched:** An approved entry that has been included in a pending payroll batch
- **Processed:** Entries that have been processed and are ready for payroll

Web Portal - Navigation, Profile Settings, Messaging & Dashboard

Full Site – Most compatible when accessed via desktop or laptop

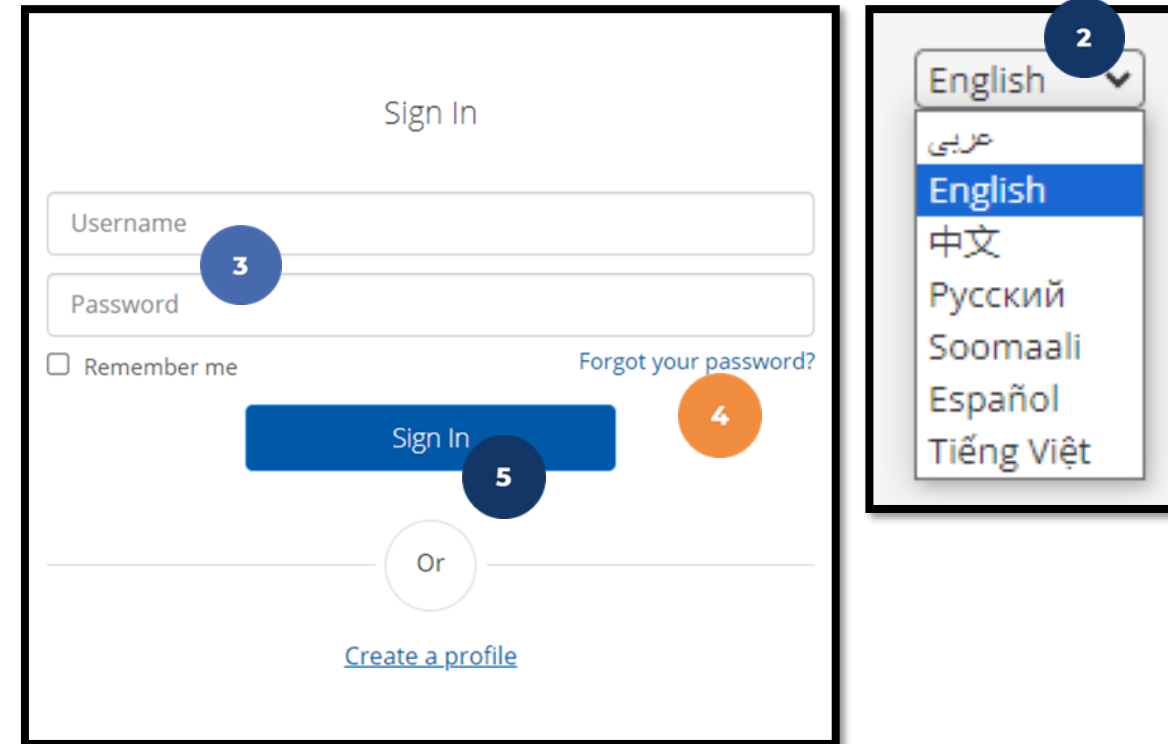
- The employer reviews and manages time
- Employees correct punches and/or enter historical time
- All users may update profile settings

Accessing the DCI Web Portal

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



The screenshot shows the login interface of the DCI Web Portal. It includes a 'Sign In' header, a 'Username' field (callout 3), a 'Password' field (callout 3), a 'Remember me' checkbox, a 'Forgot your password?' link (callout 4), and a blue 'Sign In' button (callout 5). Below the button is an 'Or' separator and a 'Create a profile' link. To the right, a language drop-down menu (callout 2) is open, showing options: English (selected), العربية, 中文, Русский, Soomaali, Español, and Tiếng Việt.

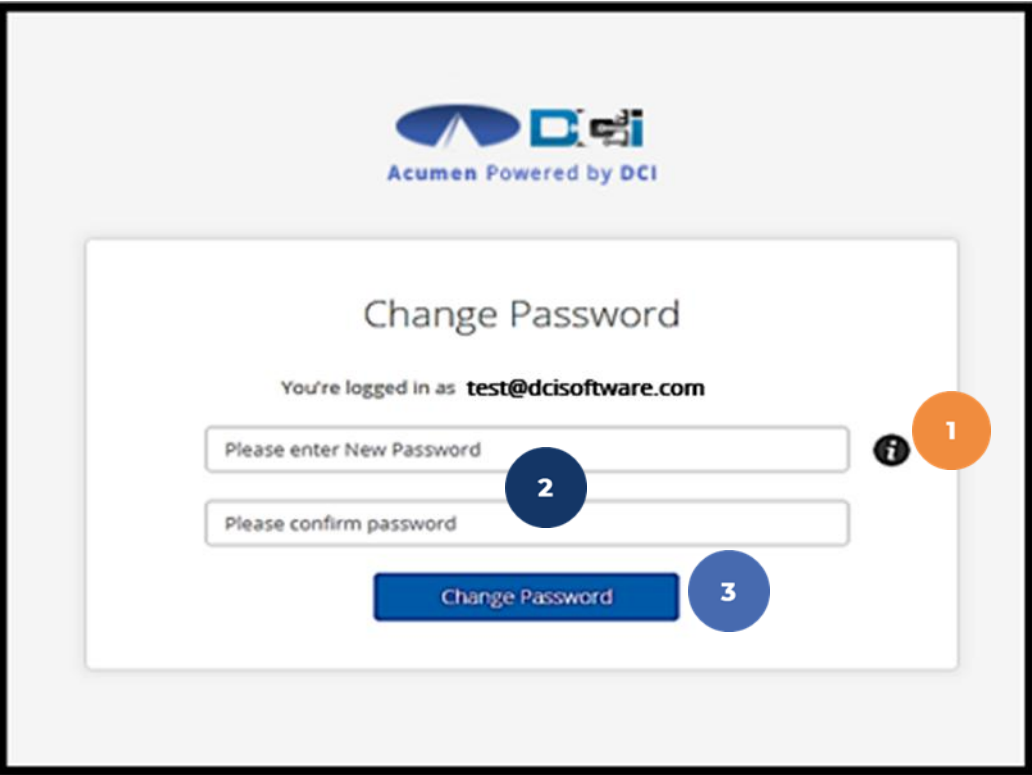
Initial Log In

***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.



Password Criteria

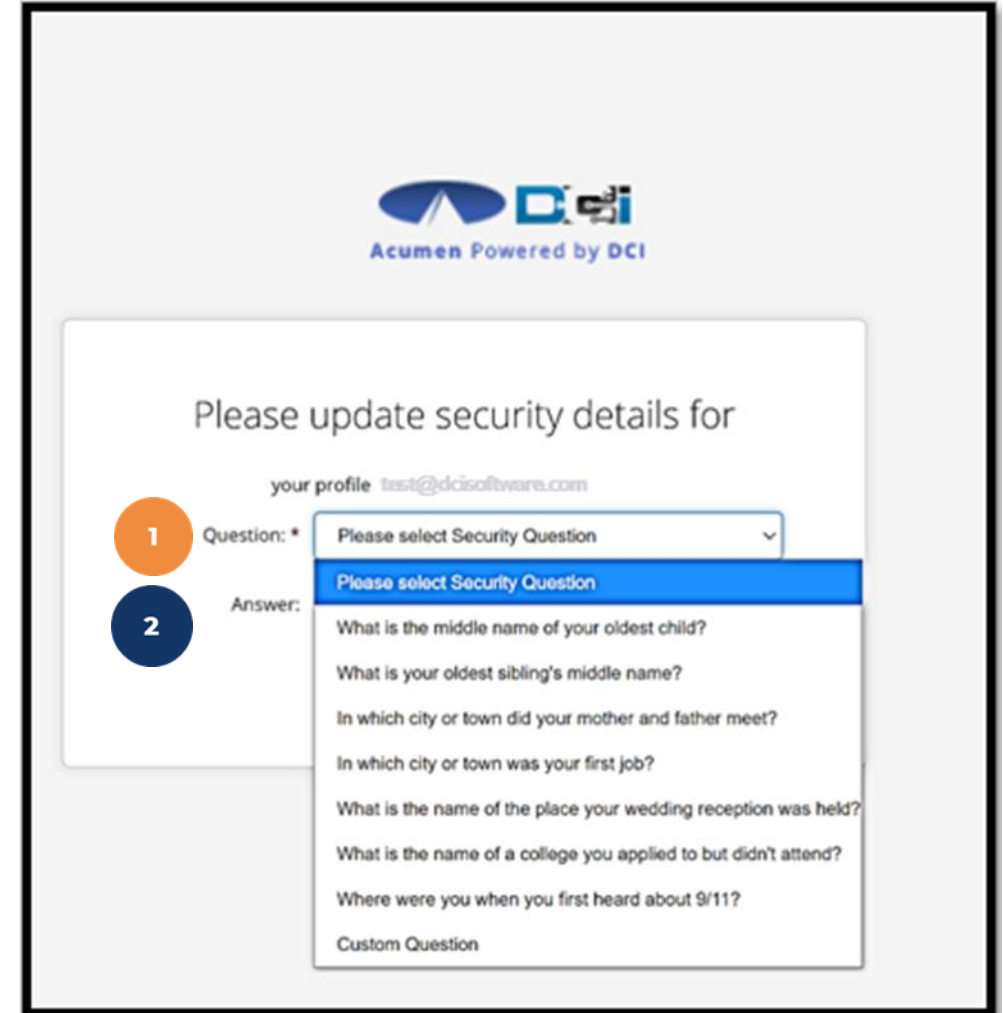
1. Must be at least 10 characters.
2. Must contain 1 uppercase letters, lowercase letters, numbers and special characters
3. Must not contain more than two repeated characters in a row.
4. The password should be different from the 3 previous passwords.

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.



The screenshot shows the Acumen login interface with the DCI logo and the text "Acumen Powered by DCI". Below this, a white box contains the heading "Please update security details for" followed by "your profile test@dcisoftware.com". There are two numbered steps: 1. "Question: *" with a dropdown menu showing "Please select Security Question". 2. "Answer:" with a list of security questions: "What is the middle name of your oldest child?", "What is your oldest sibling's middle name?", "In which city or town did your mother and father meet?", "In which city or town was your first job?", "What is the name of the place your wedding reception was held?", "What is the name of a college you applied to but didn't attend?", "Where were you when you first heard about 9/11?", and "Custom Question".

Profile Settings

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

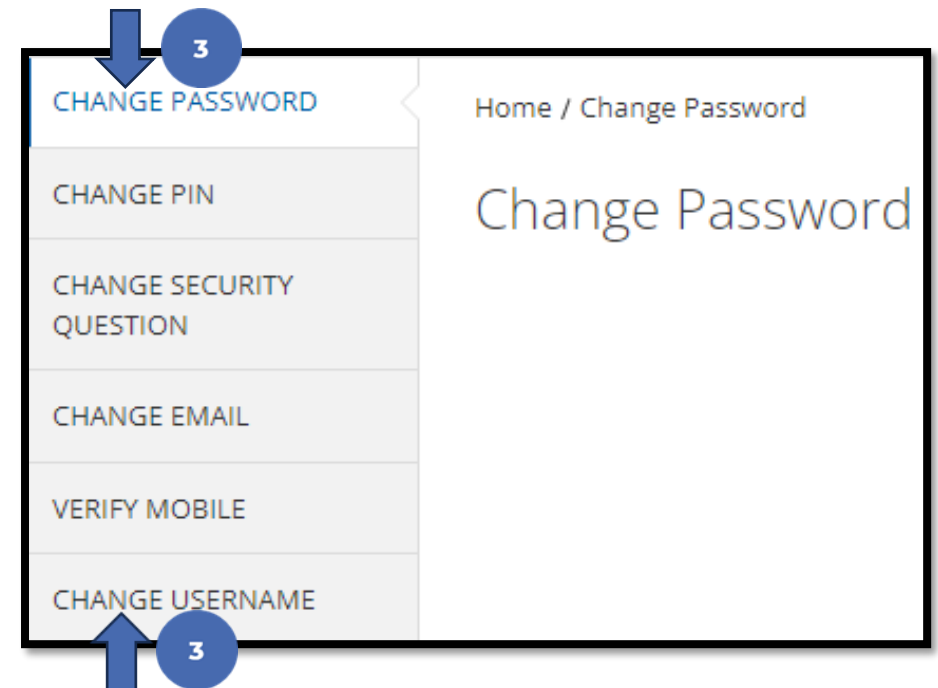
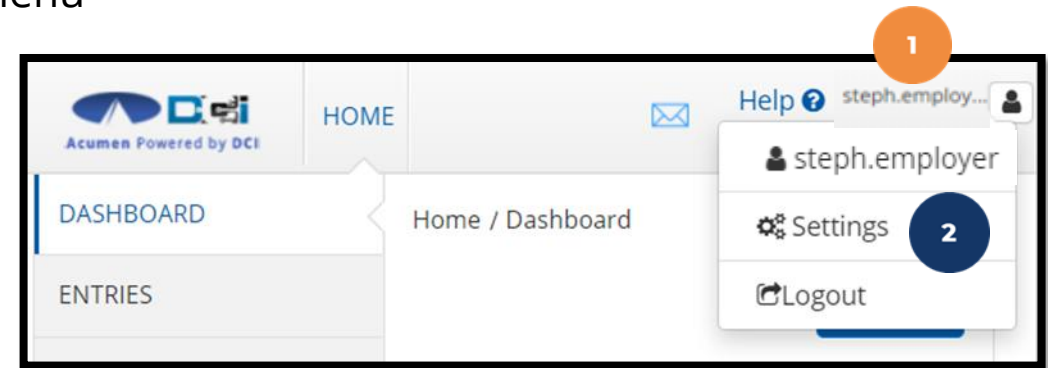


1. Click the **username** in the top right corner of the main menu

2. Click **Settings**

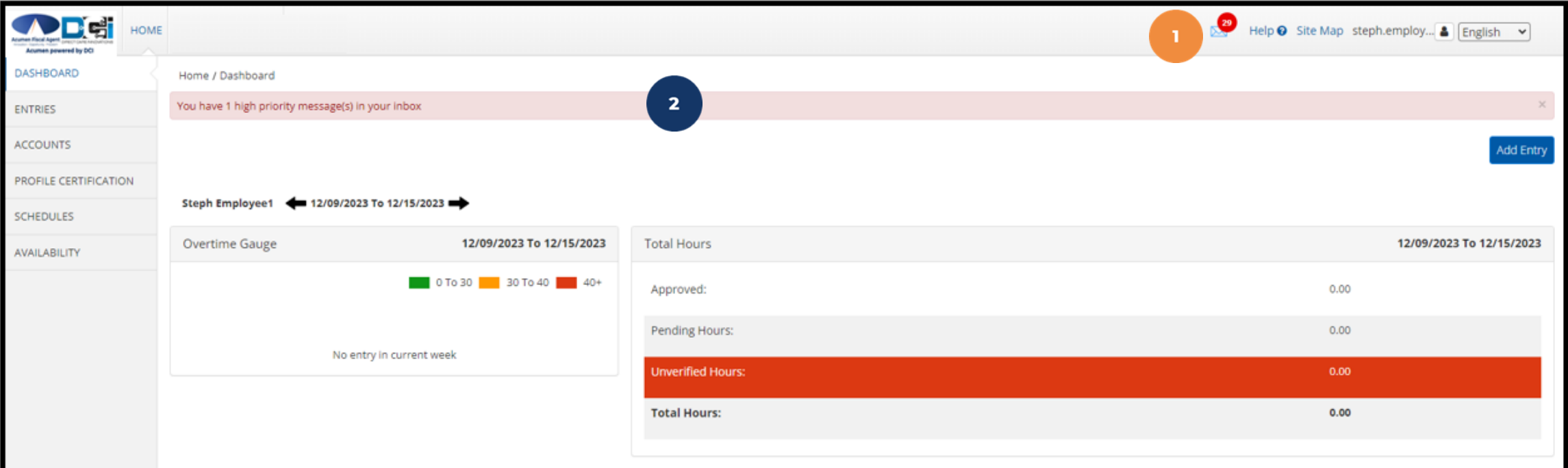
3. Select a submenu tab to update:

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



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.



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

Web Portal Messaging Module

Select a message to view by clicking anywhere on the line

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









Archive

Delete




Export

Showing 30 out of 72 records

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

View Paystubs/Statements via Messaging Module




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

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>			DCI Support	Account Statement	07:42 AM	 

Notes

Attachments

2

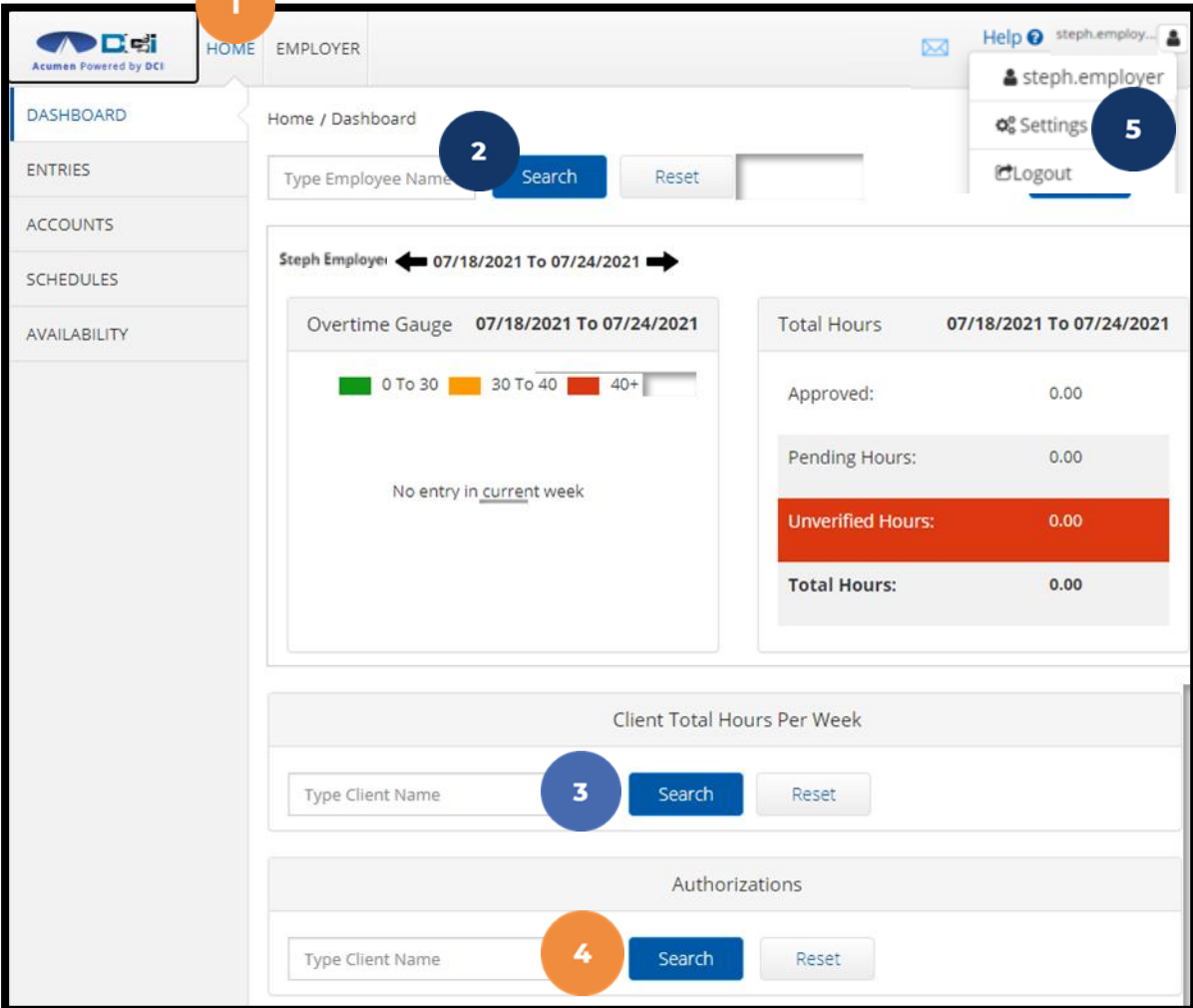
<input type="checkbox"/>	Date	File Name	File Type	File Size	Added By	Download	Status
<input type="checkbox"/>	Aug 27, 2024	Account Statement.pdf		82.16 KB	Stephanie Smith	 	Active

3

Dashboard

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

The Dashboard is the landing page



The screenshot shows the Acumen Fiscal Agent Dashboard. It features a sidebar menu on the left with options: DASHBOARD, ENTRIES, ACCOUNTS, SCHEDULES, and AVAILABILITY. The main content area is titled 'Home / Dashboard' and includes a search bar for 'Type Employee Name' with a blue 'Search' button and a 'Reset' button. Below this, there's a section for 'Steph Employee' with a date range selector '07/18/2021 To 07/24/2021'. This section contains an 'Overtime Gauge' with a legend (0 To 30, 30 To 40, 40+) and a message 'No entry in current week'. To the right, there's a 'Total Hours' breakdown table for the same date range.

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

Below the main content, there's a 'Client Total Hours Per Week' section with a search bar for 'Type Client Name' and a blue 'Search' button. At the bottom, there's an 'Authorizations' section with another search bar for 'Type Client Name' and a blue 'Search' button. A user profile dropdown is visible in the top right corner with options for 'steph.employee...', 'Settings', and 'Logout'.

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.

Authorizations

KZ Client2 - T45158

Date of Service

Search

Reset

Display as Time

Authorization for Client: KZ Client2

1

2

3

4

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

Facial Recognition Setup

What is Facial Recognition?

- Facial recognition is the process of identifying or verifying a person's identity by comparing their face to a collection of pictures of them
- It “learns” over time and becomes more accurate with each submission
- Acumen collects but does not share photos
 - Photos are stored in a secure business cloud and are only used by our facial recognition technology to verify that the client was present for the employee's visit
 - Photos are not stored on the employee's device



Facial Recognition Setup

Take a picture of the client (participant). Photos must comply with the requirements below:

- ✓ Participant is the only individual in the photo
- ✓ Participant is facing the camera directly with a full face in view
- ✓ Participant is not wearing sunglasses, hat, or any other accessory that alters the Participant's appearance.
- ✓ Photos are taken with a solid color background
- ✓ Photo size is 2MB or less
- ✓ JPG format



Facial Recognition Setup

Email the picture to Acumen Customer Service at customerservice@acumen2.net

***Please note!** A valid email must be on file for the employer/client (participant) to set up facial recognition. The photo must be sent from the email on file.

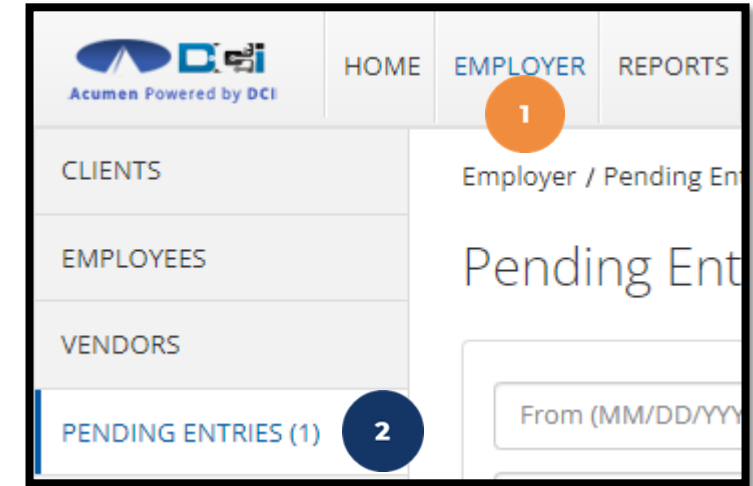
- Type “Photo - Facial Recognition Setup” in the email subject line
- Enter the client’s name, state, and program in the body of the email.
- Acumen will send notification when setup is complete
 - ✓ Your employee will now be able to use Picture as an EVV option at clock out when using the mobile app



Manage Entries

Navigate to Pending Entries

1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
 - ✓ The number of pending entries displays in parenthesis on the submenu
 - ✓ All entries requiring review/action appear in the table
3. Hover over the icon in the Needs Review column to see what specifically requires review
 - ✓ Gray Question Mark indicates Portal Signoff Pending. The entry can be approved.
 - ✓ Red Eye indicates that action must be taken to resolve the issue before the punch can be approved



Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Estimate)	Client Name	Employee Name	Service Code	Account Type	Needs Review
A R	Sep 04, 2024	10:56 AM	10:59 AM	12.00	0:00:03		Steph Client1	Steph Employee1	RESPIRE (Hourly)	Hourly	?
A R	Jun 05, 2024	10:52 AM	10:53 AM	26.00	0.02	0.52	Steph Client1	Steph Employee4	RESPIRE (Dollars)	Hourly	?
A R	Sep 25, 2024	01:11 PM	01:13 PM	12.00	0:00:02		Steph Client2	Steph Employee1	RESPIRE (Hourly)	Hourly	👁
A R	Sep 25, 2024	01:09 PM	01:10 PM	12.00	0:00:01		Steph Client2	Steph Employee1	RESPIRE (Hourly)	Hourly	👁

Verify Signature, Picture, or Voice

1. If an entry has a red eye icon in the Needs Review column, hover over it to see why it needs review. If it states, "Signature Unverified", "Picture Unverified", or "Voice Unverified", click anywhere on the entry row to open the punch details page.
2. Scroll down to select the **Verifications** tab
3. Click the **attachment** to review the signature or picture. Click the **download** icon to download, open, and listen to the voice recording.
4. Click the **A** to approve the attachment or the red **R** to reject it. The punch may now be approved or rejected.

Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Estimate)	Client Name	Employee Name	Service Code	Account Type	Needs Review
 	Feb 25, 2025	11:18 AM	11:19 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code	- Voice Unverified	
 	Feb 25, 2025	11:17 AM	11:18 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code	- Picture Unverified	
 	Feb 25, 2025	11:16 AM	11:17 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code	- Signature Unverified	

Ref Entries

Notes

Attachments

Events

Verifications

Map

Business Rules

Auto Approval

Custom Fields

History

From (MM/DD/YYYY)

To (MM/DD/YYYY)

Verification Type

Select Status

Reset

Search

EWV Verifications

Showing 1 out of 1 record

Approve

Date

Verification Type



Status

Attachments

Compare

Approved By


Approved Date


 

Dec 21, 2023 09:31:46 AM

Picture

Unverified

 [6bdde351-0119-483c-b3b2-e31d99223e9d.jpeg](#)



Manage Pending Entries



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

Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Estimate)	Client Name	Employee Name	Service Code	Account Type	Needs Review
<input type="button" value="A"/> <input type="button" value="R"/>	Sep 05, 2024	01:49 PM	01:51 PM	20.00	0:00:02	0.60	Steph Client3	Steph Employee3	SDFSS	Hourly	
<input type="button" value="A"/> <input type="button" value="R"/>	Sep 05, 2024	01:41 PM	01:43 PM	20.00	0:00:02	0.60	Steph Client3	Steph Employee3	SDFSS	Hourly	
<input type="button" value="A"/> <input type="button" value="R"/>	Sep 04, 2024	10:56 AM	10:59 AM	12.00	0:00:03		Steph Client1	Steph Employee1	RESPITE (Hourly)	Hourly	

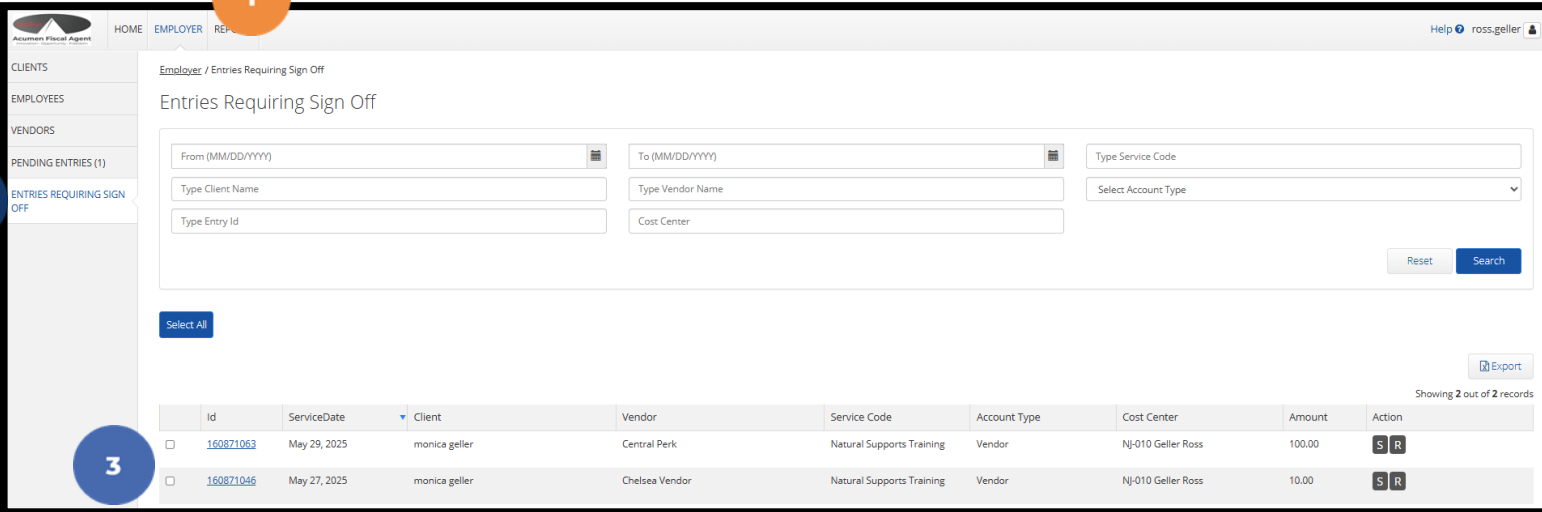
- View high-level punch information on the entry row
- After needed verifications have been performed, click the **A** to approve the entry or the red **R** to reject it.
- Optionally, click anywhere on the entry row to view the details.

Sign Off or Reject Vendor Payment Entries – Web Portal

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.



	Id	ServiceDate	Client	Vendor	Service Code	Account Type	Cost Center	Amount	Action
<input type="checkbox"/>	160871063	May 29, 2025	monica geller	Central Perk	Natural Supports Training	Vendor	NJ-010 Geller Ross	100.00	S R
<input type="checkbox"/>	160871046	May 27, 2025	monica geller	Chelsea Vendor	Natural Supports Training	Vendor	NJ-010 Geller Ross	10.00	S R

Sign Off or Reject Payment Entries

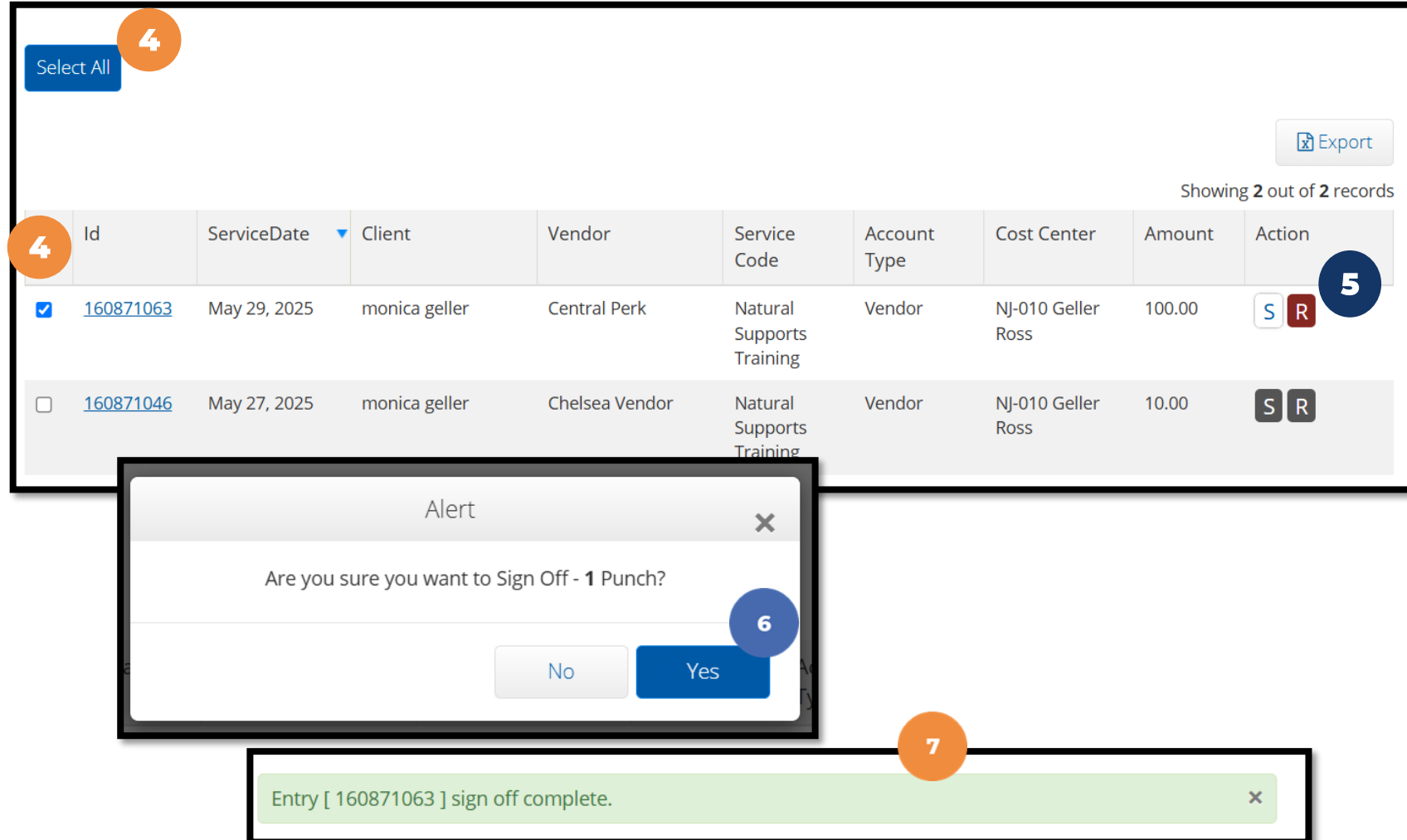
4. Check the box for the entry to sign off on (you can **select all** to sign off or reject on all entries)

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.



The screenshot displays the Acumen Fiscal Agent interface. At the top left, there is a blue button labeled "Select All" with an orange circle containing the number 4. To the right is an "Export" button. Below these is a table with the following columns: Id, ServiceDate, Client, Vendor, Service Code, Account Type, Cost Center, Amount, and Action. The table shows two records. The first record has Id 160871063, ServiceDate May 29, 2025, Client monica geller, Vendor Central Perk, Service Code Natural Supports Training, Account Type Vendor, Cost Center NJ-010 Geller Ross, and Amount 100.00. The second record has Id 160871046, ServiceDate May 27, 2025, Client monica geller, Vendor Chelsea Vendor, Service Code Natural Supports Training, Account Type Vendor, Cost Center NJ-010 Geller Ross, and Amount 10.00. In the Action column, the first record has buttons "S" and "R", and the second record has buttons "S" and "R". An orange circle with the number 4 is next to the first record's checkbox, and a blue circle with the number 5 is next to the "S" button of the first record. Below the table, an "Alert" dialog box is open, asking "Are you sure you want to Sign Off - 1 Punch?". It has "No" and "Yes" buttons. A blue circle with the number 6 is next to the "Yes" button. At the bottom, a green bar displays the message "Entry [160871063] sign off complete." with a close button. An orange circle with the number 7 is next to this bar.

	Id	ServiceDate	Client	Vendor	Service Code	Account Type	Cost Center	Amount	Action
<input checked="" type="checkbox"/>	160871063	May 29, 2025	monica geller	Central Perk	Natural Supports Training	Vendor	NJ-010 Geller Ross	100.00	S R
<input type="checkbox"/>	160871046	May 27, 2025	monica geller	Chelsea Vendor	Natural Supports Training	Vendor	NJ-010 Geller Ross	10.00	S R

Alert

Are you sure you want to Sign Off - 1 Punch?

No Yes

Entry [160871063] sign off complete.

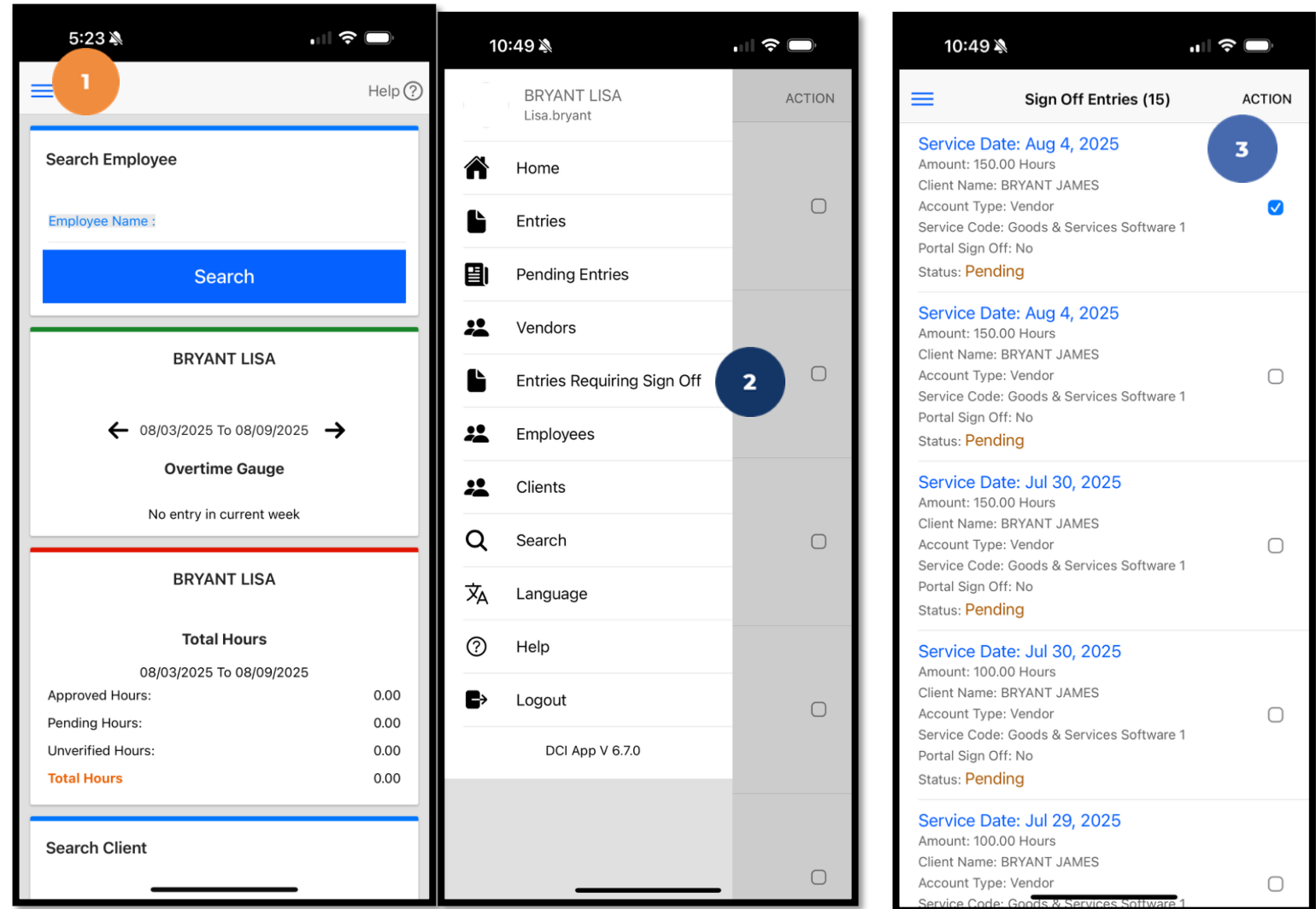
Sign Off or Reject Vendor Payment Entries – Mobile App

Sign Off or Reject Payment Entries (App)



Once you are logged into the Mobile App:

1. Select the menu in the upper left corner
2. Select Entries Requiring Sign Off
3. Find the vendor entry to sign off on and select the entry



Sign Off or Reject Payment Entries (Mobile App)

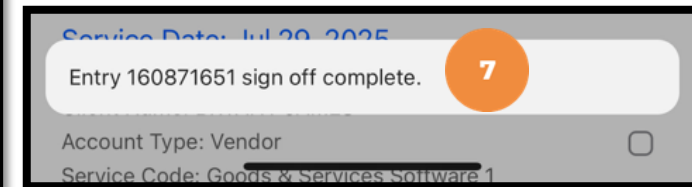
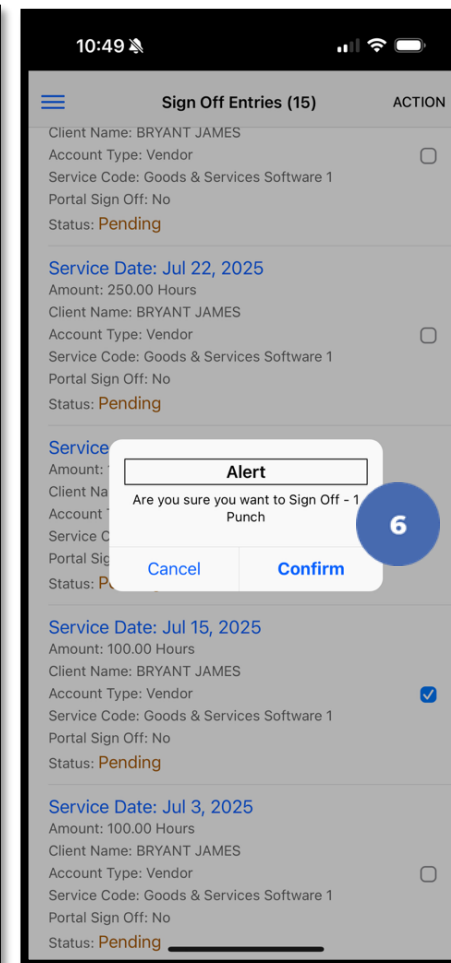
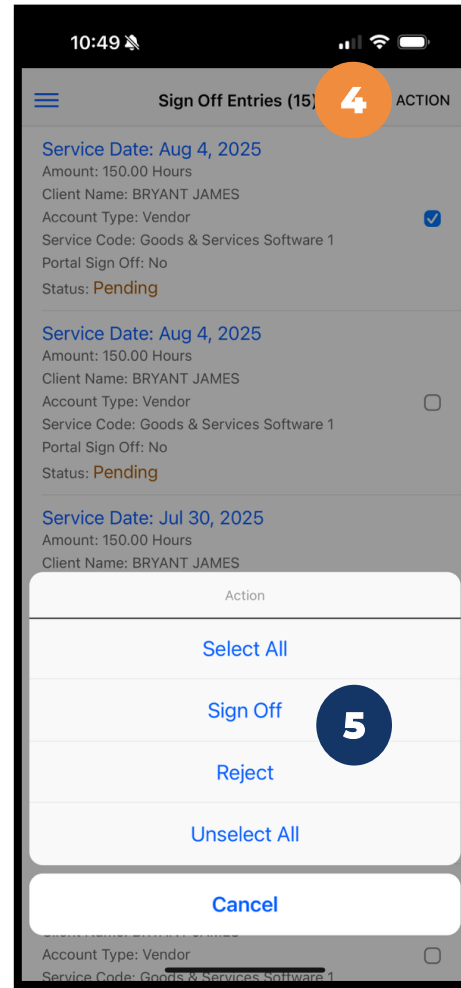
4. Select **Action** in the top right

5. Select **Sign Off** or **Reject**

Note: You can also select all or unselect all from here!

6. An Alert box appears to confirm. Press **Confirm** on the alert

7. Now the entry has been **signed off** on and you will see a confirmation!



Update or Reinstall The App!



Mobile App Note:

The DCI EVV mobile app was updated on August 5th, 2025. To see “Entries Requiring Sign Off”, ensure you are using the most up to date version of the app!

Important Reminder!

***Important!**

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

Vendor's can *NOW* utilize the send sign off reminder button to remind Employers/Auth Reps to sign off on entries in a pending status!



Send Sign-Off Reminder

Employees, Clients & Reports

Employee Details Page

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



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

Employee Details Page

4. View the employee details page including widget boxes (Basic Demographics, Other Details) containing important information
5. Unlock Employee Profile if needed

Home / Employees / Steph Employee1

Employee Details - Steph Employee1

[Actions](#)

Basic Demographics

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

GNIS: 08-005-204737

Phone: (222) 222-2222

Email: stephanies+68@dcisoftware.com

Username: steph.employee1

Time Zone: MT (UTC-07)

Type: Hourly Non Exempt

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

Allow SSN Retrieval: No

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

Status: Active

Other Details

Average Caregiver Rating: 0

Domestic Worker: No

Domestic Worker 7 Day Exemption: No

Domestic Worker Preferred Day of Rest: Sunday

Employee Number: 216

Weekly Hours Available: 40.00

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

Cost Center: [Steph Cost Center](#)

Custom Reports List: None

Employment Status: Active

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

Photo Set: No

Signature Set: No

Email confirm: Yes

Employee Details Page

6. Scroll beneath the widgets to the tabs:

- **Entries** – All punch entries for the employee. 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 employee and is useful for troubleshooting
- **Certifications** - All certifications the employee has on file
- **Notes** – View notes regarding the employee entered by the employer
- **Attachments** – View attachments pertaining to the employee
- **History** – View modifications made to the employee profile

6

Entries	Accounts	Certifications	Notes	Attachments	Custom Fields	History
---------	----------	----------------	-------	-------------	---------------	---------

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



Name	Client Id	Status
Steph Client	125	Active

Client Details Page

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

Employer / Clients / Steph Client

Client Details - Steph Client 4

[Actions](#)

Basic Demographics

Client Id: 125
Address: 5416 E Baseline Road
Mesa, AZ 85206-4700
GNIS: 04-013-7890
Phone: (222) 222-2222
Email: stephanies+51@dcisoftware.com
Date of Birth: May 01, 2001
Allow SSN Retrieval: No ⓘ
No. of Funding Accounts: 2
No. of Service Accounts: 4
Status: Active

Other Details

Cost Center: Steph Employer Cost Center
Username: steph.client
Client Status: Active
Authentication Status: Active
Email confirm: Yes
Photo Set: No
Signature Set: No
Enable Caregiver Rating Emails: No
Enable Vendor Payment: Yes
Enable Employer Reimbursement: Yes

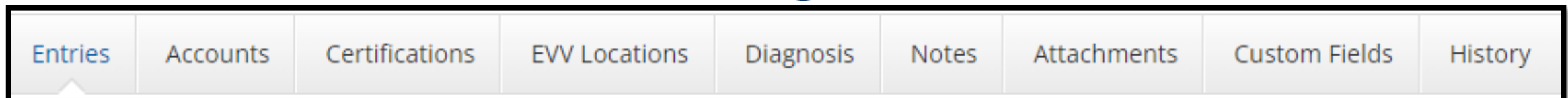
[Entries](#) [Accounts](#) [Certifications](#) [EVV Locations](#) [Diagnosis](#) [Notes](#) [Attachments](#) [Custom Fields](#) [History](#)

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

5

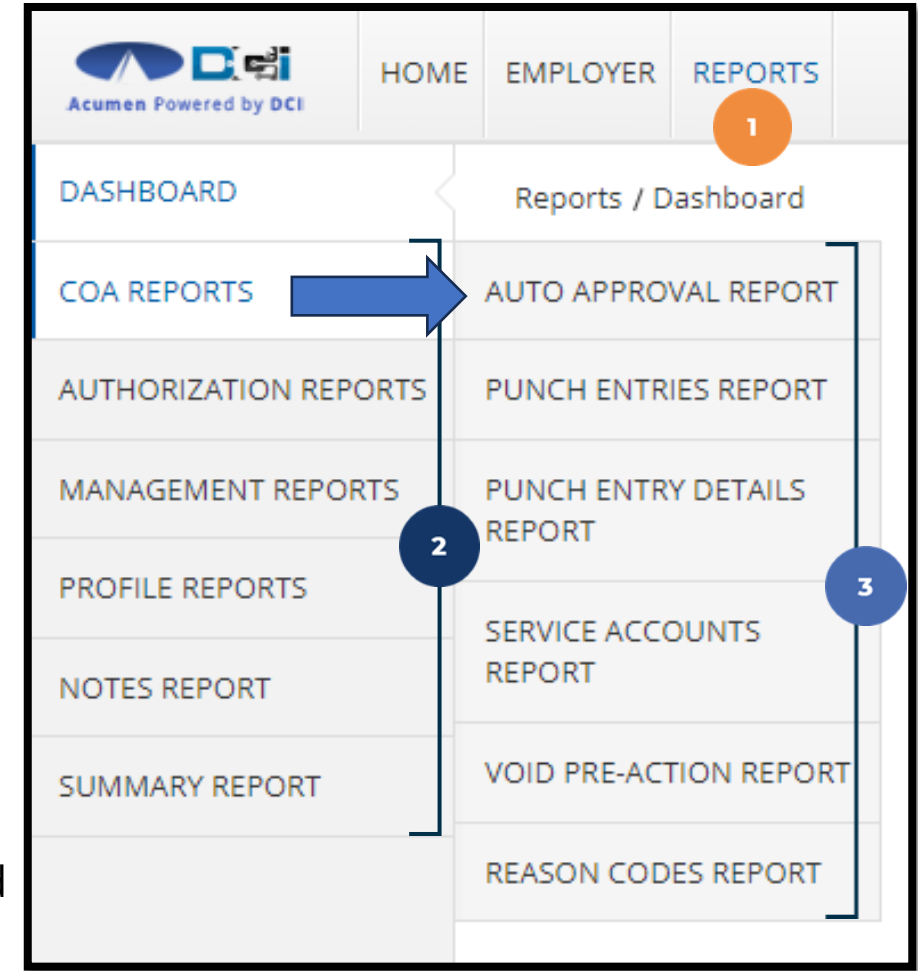


Using Reports

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

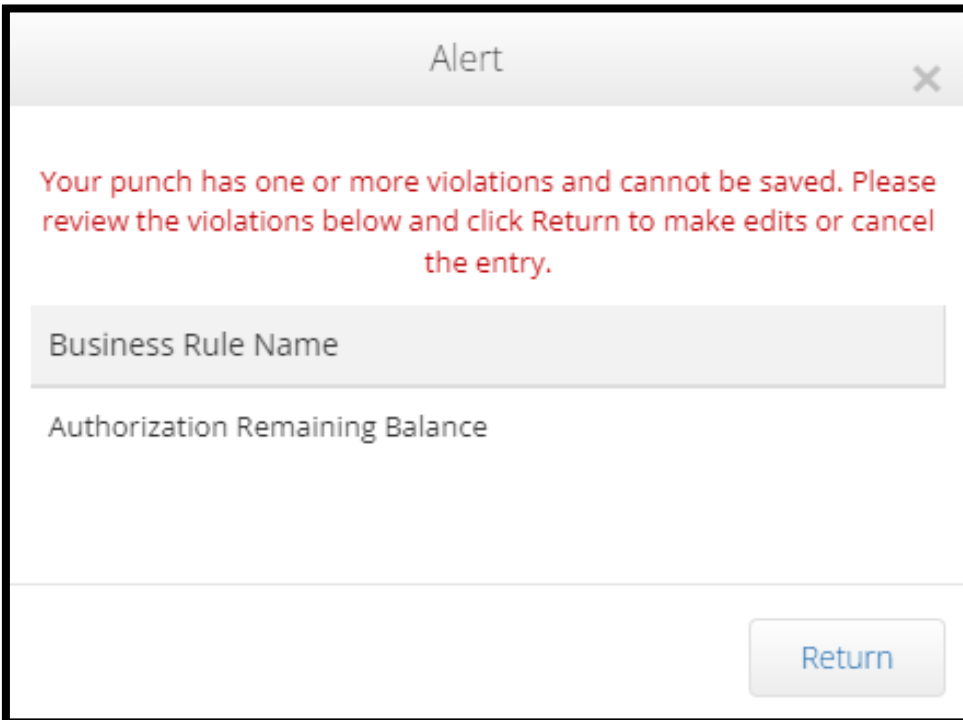


Troubleshooting

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/service plan to cover the punch.



Alert

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

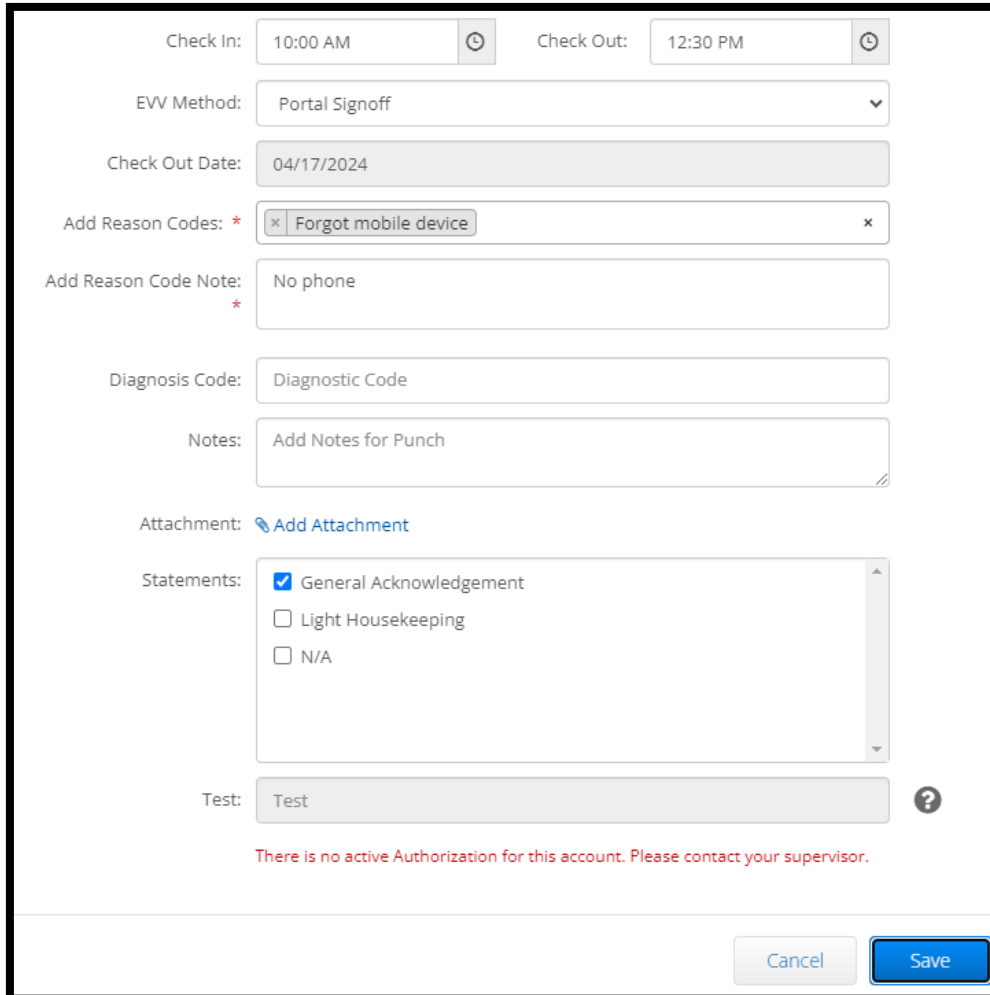
Business Rule Name
Authorization Remaining Balance

Return

- 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

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

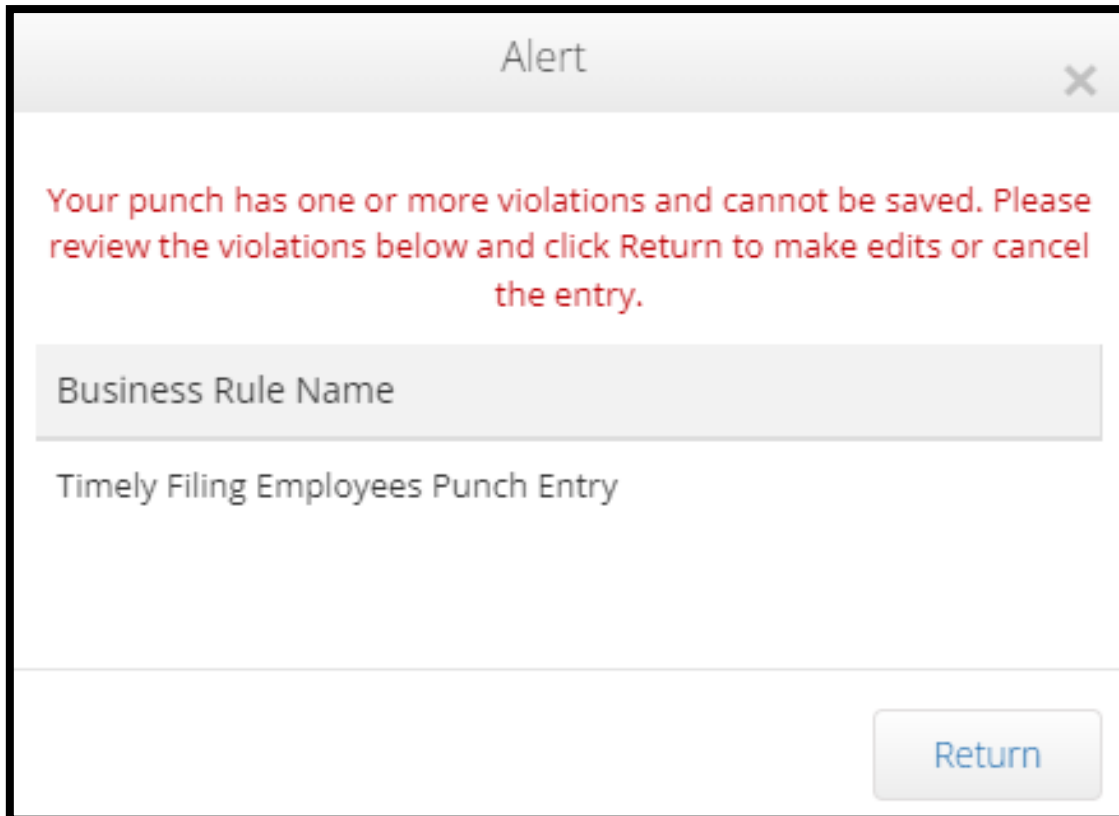


The screenshot displays a web-based punch clock interface. At the top, there are fields for 'Check In' (10:00 AM) and 'Check Out' (12:30 PM). Below these is a dropdown for 'EVV Method' set to 'Portal Signoff'. The 'Check Out Date' is 04/17/2024. Under 'Add Reason Codes', a code 'Forgot mobile device' is entered. The 'Add Reason Code Note' field contains 'No phone'. The 'Diagnosis Code' is 'Diagnostic Code'. The 'Notes' field is empty. An 'Attachment' link is present. The 'Statements' section has three checkboxes: 'General Acknowledgement' (checked), 'Light Housekeeping', and 'N/A'. A 'Test' dropdown is set to 'Test'. A red error message at the bottom states: 'There is no active Authorization for this account. Please contact your supervisor.' At the bottom right are 'Cancel' and 'Save' buttons.

- 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

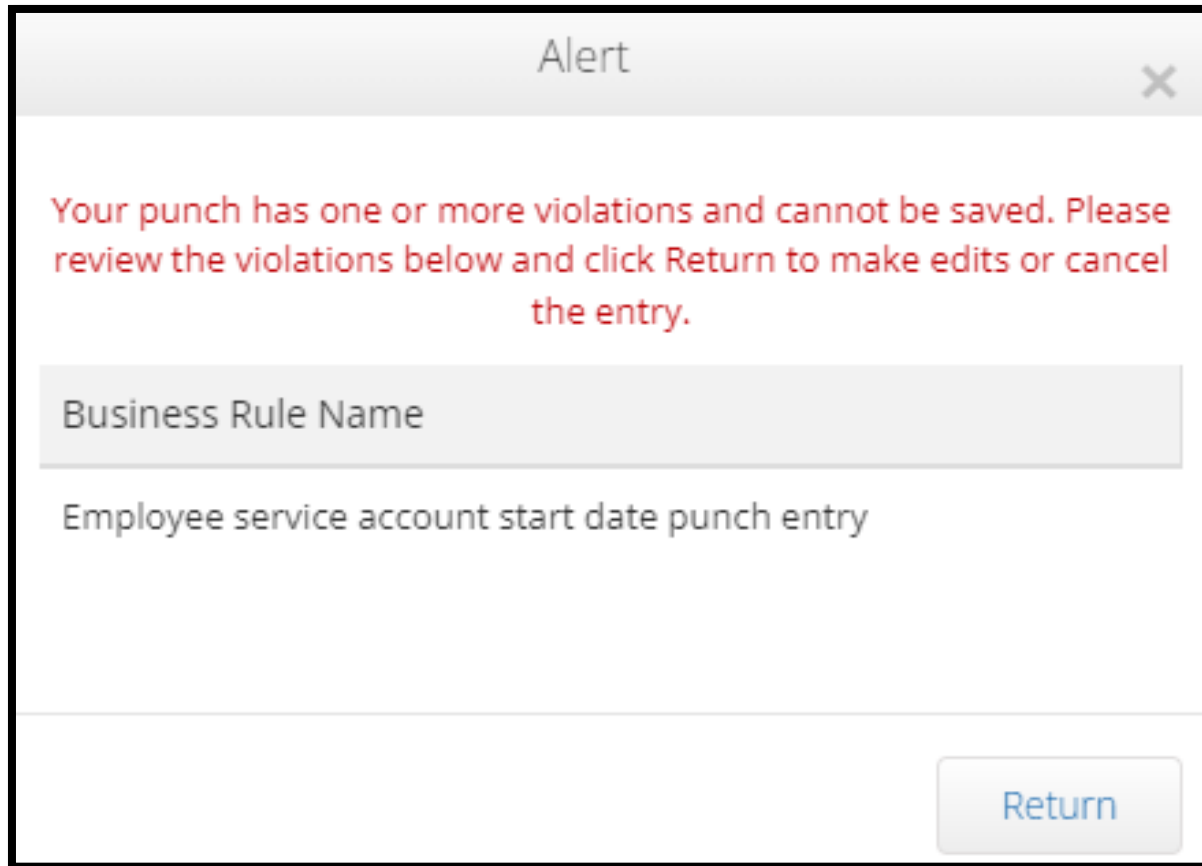
Punches must be **entered AND approved** within a certain number of days of the date of service (program-determined). After that number of days has passed, the **Timely Filing Employees Punch Entry** or the **Timely Filing Employee Punch Approval** rules will prohibit the punch from being saved.



- The employee will receive this alert when attempting to punch for a date after the deadline
 - 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 after the deadline.
- The employee cannot save the punch
 - Or, in the case of the Timely Filing Employee Punch Approval alert, the employer would be unable to approve the punch.
- No action can be taken

Alerts

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



Alert

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

Business Rule Name

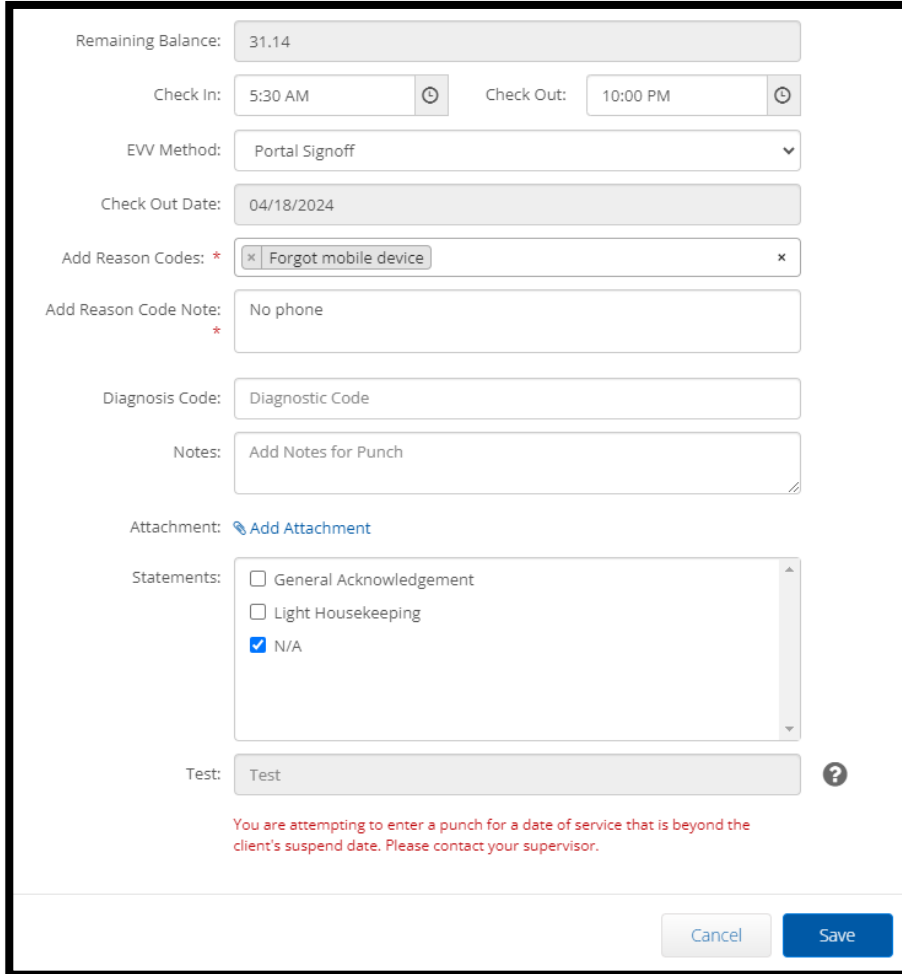
Employee service account start date punch entry

Return

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

Alerts

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



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

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

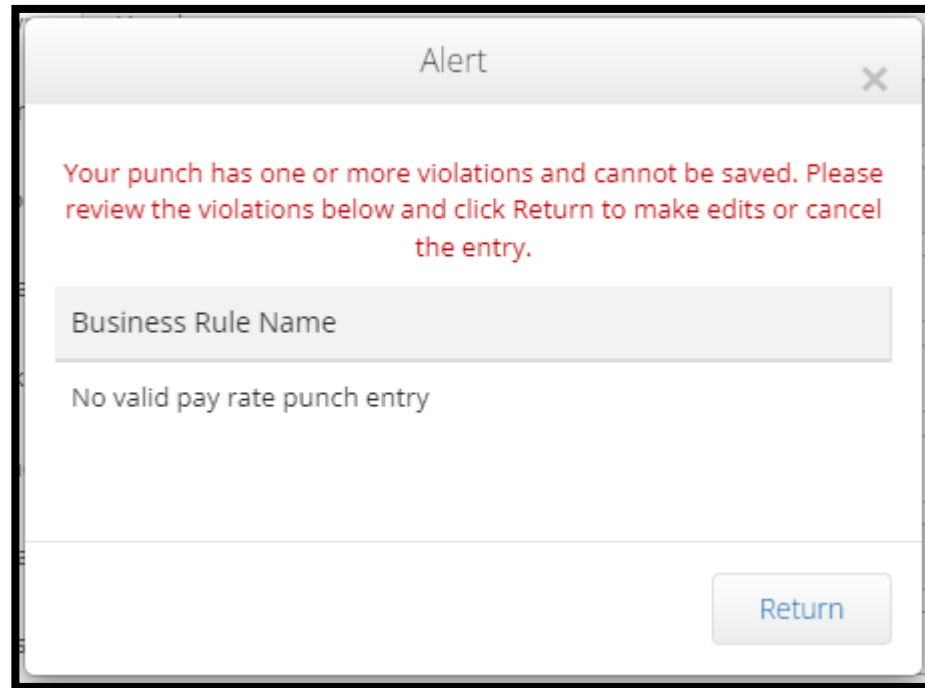
A red error message at the bottom states: "You are attempting to enter a punch for a date of service that is beyond the client's suspend date. Please contact your supervisor."

Buttons: Cancel, Save

- 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

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.

Alert

×

Are you sure you want to approve the punch for **0:23:00** hour(s) for **Steph Employee3** for **Steph Client3-7726** for **Aug 25, 2024**? By clicking Yes, you are confirming you have reviewed this punch and all required elements.

Business Rule Name	Message
Authorization Remaining Balance Threshold Alert	Warning: Authorization remaining balance has dropped below 75% of the initial balance

Cancel

Yes

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. The employee does not receive an alert 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	RESPIRE (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	RESPIRE (Hourly)	0:23:30	Rejected

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

Business Rules

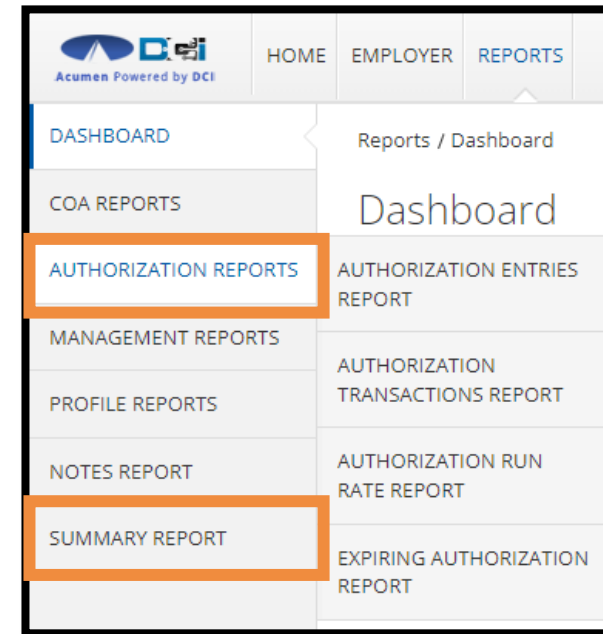
Business Rule Name	Business Rule Result
Employee service account start date punch entry	Pass
Authorization Weekly Max	Fail
Max Hours Per Week Per Client Per Funding Source	Pass
Authorization Expiration Date	Pass

1. The employee should always review their 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

The employee should contact the employer

Alerts in Review

- Employees and employers should communicate as needed regarding alerts and the client's authorization/budget
- To review the authorization/budget for the client:
 - ✓ Run the Summary Report and/or Authorization Reports
 - ✓ Use the Authorizations widget on the Dashboard
- Use the tools in DCI to stay informed



Authorizations									
<div>Steph Client - 125 ✕ <input type="text" value="Date of Service"/> <input type="button" value="Search"/> <input type="button" value="Reset"/> <input type="button" value="Display as Time"/></div>									
Authorization for Client: Steph Client									
Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
SDFSS	09/01/2024	09/06/2025	1000.00 Dollars	1000.00 Dollars	706.21 Dollars	293.79 Dollars	1000.00 Dollars	1000.00 Dollars	1000.00 Dollars
PCS	02/01/2024	02/27/2029	1000.00 Units	1000.00 Units	60.00 Units	940.00 Units	1000.00 Units	40.00 Units	24.00 Units

Employer Frequently Asked Questions

Frequently Asked Questions for Employers of SDE's and Vendors



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

DCI is a secure web-based platform used to manage time entries and payment requests for your self-directed employees. It replaces paper timesheets.

How do I approve hours in DCI?

Log in to the DCI Web Portal, review submitted hours, and either approve or reject each entry before the payroll deadline.

What if one of my employees is not showing in DCI?

Contact your assigned Client Service Agent. Their contact info is listed in your 'Good to Go' letter.

How do I use the Client PIN?

Use the Client PIN to verify time entries either through the DCI Mobile App or phone-based EVV system. It confirms that services were actually provided.

What if I approve hours beyond the participant's budget?

You are responsible for ensuring hours submitted stay within the participant's approved budget. Any hours worked outside the budget may become your financial responsibility.

Frequently Asked Questions for Employers of SDE's and Vendors



Where can I find training materials?

Click the 'Help' link in the top-right corner of the DCI portal and select 'NJ' for walkthroughs.

What happens if I miss the payroll deadline?

Your employee's hours will not be processed until the next payroll cycle. Be sure to review the payment schedule and approve hours on time.

Who do I contact for support?

Reach out to your assigned Agent or contact Acumen Customer Service 24/7 at (833) 892-0413 or email customerservice@acumen2.net.

Can I start approving hours before my worker's Good-to-Go letter?

No. Your worker must be officially cleared and marked as active in the system before you approve or submit any hours.

Frequently Asked Questions for Employers of SDE's and Vendors



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 does an Employee enter their time if they are 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).

Frequently Asked Questions for Employers of SDE's and Vendors



Would unused accrued units from the original PPL service automatically transfer to Acumen due to the transition?

No. For participants whose plans were revised due to the transition, the unused accrued units from the original PPL service line do not automatically transfer to the new Acumen service line.

How can I request to rollover units that should be restored?

Please submit a request to the individual's Support Coordinator. The support Coordinator will then follow the formal process to request restoration.

Where can my Support Coordinator find the request form and instructions?

The request form and instructions are available on the Division's Fiscal Intermediary Transition website under the section titled "**Restoration of Rollover Units Request.**"

[Division of Developmental Disabilities | 2025 Fiscal Intermediary Transition \(PPL to Acumen\)](#)

Who should I contact if I have a question or issue?

Reach out to your Acumen Agent or contact Customer Service at **(833) 892-0413** or **customerservice@acumen2.net**.

Resources

NJ DDD Payment Schedule

- Ensure payment entries are received by the 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
- Pay day is every other Friday
- Time Entries/Vendor payments must be entered and approved within 60 days of the date of service

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



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 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





Acumen Fiscal Agent

Innovation • Opportunity • Freedom

THANK YOU!

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