



DCI Employer Portal Guide

What is DCI?

**DCI is an online platform to help manage
Employee Time and Service Budget**

- Better tools for both Employers & Employees
- Faster and easier time entry & payroll processing

**DCI will also help keep you compliant with the
21st Century Cures Act**

- As long as you use DCI to properly enter and manage time using EVV.



Important Terms

- **Client (CLT)** - This individual receives the care. Some programs refer to this individual as a Participant or Member. Clients may be their own Employer.
- **Employee (EE)** - This person is hired & trained to provide services to the Client. EE's also are responsible for entering their own time into the system.
- **Employer (ER)** - This is the leader who hires the Employee(s) & manages the process. The Employer will approve time & manage the budget in DCI.
- **Authorized Representative (AR)** - This individual helps the Employer complete various tasks. This is common in families & when a CLT is their own ER.
- **Electronic Visit Verification (EVV)** - This is how punches are verified in the system. Verification is a vital part of the Clock In/Out process.



Multiple Ways to Enter Time

Mobile App



- Preferred Method
- Real Time Entry
- Auto-Approved Time
- EVV Compliant

Phone EVV



- Alternate Method
- Real Time & Historical
- Auto-Approved Time
- EVV Compliant

Web Portal



- Time Management
- Historical Entries
- Manual Time Approval
- Non-EVV Compliant

DCI Mobile App

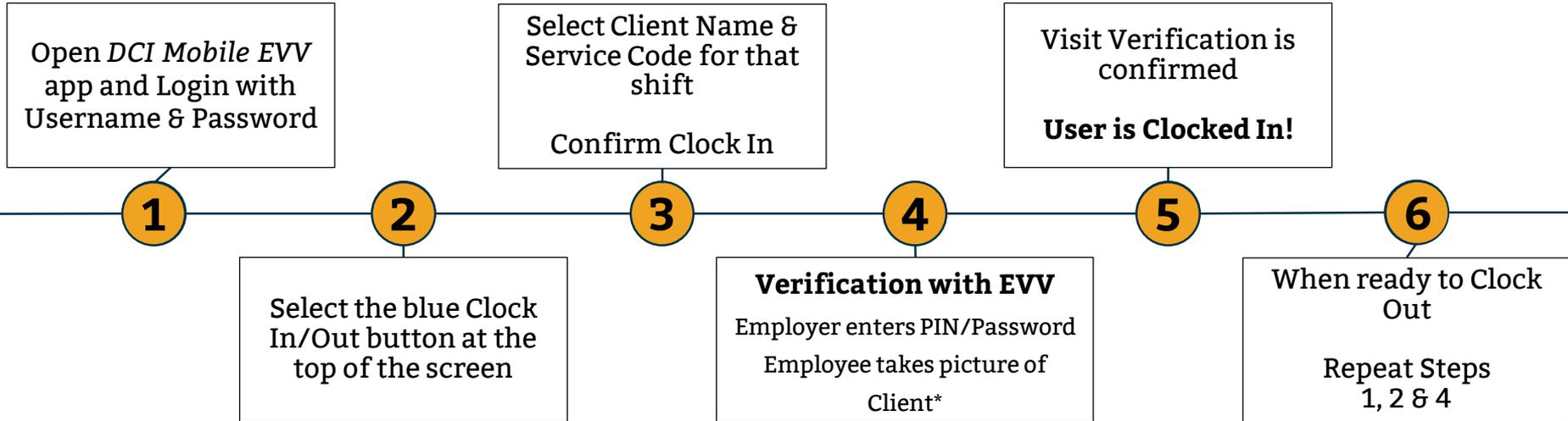
Mobile App Basics

- **The DCI Mobile App is meant for Real-Time Entry**
 - Missed punches are entered in Web Portal
- **Employees will Clock In/Out with Mobile App**
 - Employers can review time in Web Portal
- **2 Options for Verification with EVV**
 - PIN/Password entered by Employer
 - Picture taken of Client by Employee
- **Employers do not need to use the Mobile App**
 - All Employer tasks completed the Web Portal
- **For more detail view the *Mobile App Guide***



Mobile App Process Timeline

Process starts when the Employee is ready to begin their shift.



*Requires Facial Recognition



Facial Recognition Setup

1. Employer will take the Initial picture of Client
 - Should be a headshot on a plain background
2. Email Picture to Customer Service
3. Enter “Facial Recognition Setup” into Subject Line
4. Enter Client Name & State in the body of the email to prevent confusion with any other clients.
5. Outreach will notify Employer once complete



DCI Phone EVV

Phone EVV Basics

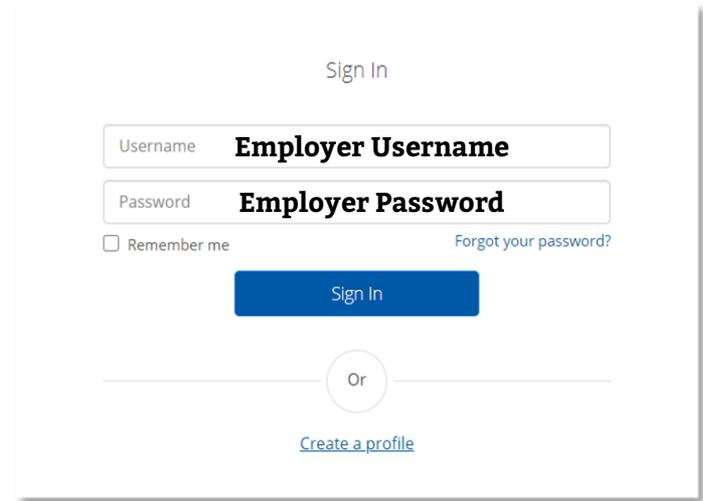
- **Phone EVV is an alternative option for both Real-Time & Historical time entry**
 - Only used by those with limited access to smartphone or computer
- **Real-Time = Clock In/Out at Start/End of Shift (Preferred)**
 - Historical = Entering a full shift after that fact
 - Used only for missed punches and corrections
- **Client Phone number must be a Landline or VOIP**
 - Landline & VOIP phones meets all EVV Requirements
- **For more detail view the *Phone EVV Guide***



Employer Web Portal

Accessing the DCI Web Portal

1. Open up an Internet Browser on a computer or mobile device
2. Navigate to the [DCI Web Portal](#)
3. Enter Employer Username and Password
4. Utilize Forgot Password link if necessary*
 - * Requires email to be on file
5. Contact Customer Service with login issues



The screenshot shows the 'Sign In' page of the DCI Web Portal. At the top center, the text 'Sign In' is displayed. Below it are two input fields: the first is labeled 'Username' and contains the text 'Employer Username'; the second is labeled 'Password' and contains the text 'Employer Password'. To the left of the password field is a checkbox labeled 'Remember me'. To the right of the password field is a link that says 'Forgot your password?'. Below the input fields is a blue button labeled 'Sign In'. Underneath the button is a horizontal line with a circle containing the word 'Or' in the center. Below this line is a link that says 'Create a profile'.

Approve Pending Entries

Pending Entries is the landing page

- What shows up here?
 - Any punch that requires approval
- Scroll down to view list of Entries
 - Review each entry and Approve or Reject
 - Click any entry for more detail
- If Rejected, inform Employee to re-enter time correctly via DCI Portal

Approve	Id	Service Date	Start Time	End Time
 	3596	May 08, 2019	05:00 AM	11:00 AM
 Click Here to Approve Punch				
 	1448	Feb 08, 2019	08:35 AM	04:45 PM
 Click Here to Reject Punch				

How to Use “Employees” Page

- Select the “Employees” Tab from the Home Page**
 - Located on the left side of the screen
 - Select Employee name from the list displayed
- Scroll Down to View List of Entries**
 - Here you will see a list of punches for this Employee
- Great Resource for Payroll Deadlines**
 - Ensure all time for pay period is entered and “Approved”
- Enter time for Employee on this page (Computer Only)**
 - Select “Actions” button and then select new entry
 - Employee should enter time themselves
 - Only use if necessary

The screenshot displays the Acumen HR system interface. At the top, there is a navigation bar with the Acumen logo and the text "Acumen Powered by DCI". The main navigation menu includes "HOME", "EMPLOYER", and "REPORTS". The "EMPLOYER" tab is active, and the breadcrumb trail shows "Employer > Employees". On the left side, there is a sidebar menu with "EMPLOYEES" highlighted, and a blue arrow points to it. Below the sidebar, there are sections for "CLIENTS", "VENDORS", and "PENDING ENTRIES". A search box labeled "Type Employee Name" is visible. The main content area shows "Employee Details - TEST EE" with a "Basic Demographics" section containing the following information:

Address:	1234 TEST DRIVE NEW ORLEANS, LA 70126
Phone:	(555) 555-5555
Alternate Phone:	
Mobile Number:	
Email:	
Username:	EE.TEST.1114
Time Zone:	CST (UTC-6)
SSN:	###-##-####

Add New Entry

1. Account Type Always Hourly
2. Type Client Name > Select from list
3. Select Service Code from dropdown
4. Select Service Date from calendar
5. Input Clock In/Out Times
 - Always after shift is completed
6. Select Client Portal Signoff as EVV Method
7. Skip to “Reason” > Select appropriate reason
8. Select “Save” to Submit Entry

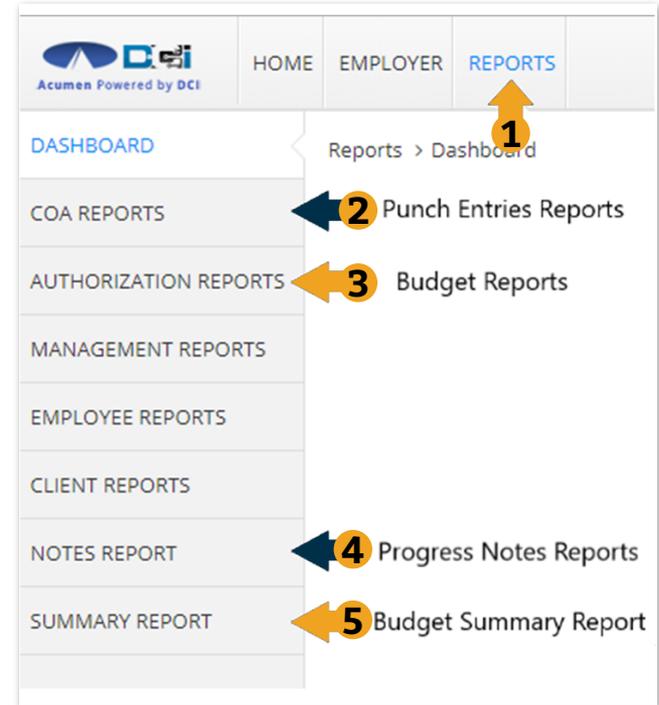
The screenshot shows a web form titled "Add New Entry" with the following fields and callouts:

- Entry Type: Punch (dropdown)
- Employee Name: BART SIMPSON - OK8887 (text input)
- Account Type: Hourly (dropdown) **1**
- Client: Type Client Name (dropdown) **2**
- Service Code: Select Service Code (dropdown) **3**
- Service Date: 08/12/2020 (calendar icon) **4**
- Check In: HH:MM AM (time picker) **5**
- Check Out: HH:MM PM (time picker) **5**
- EVV Method: Select Method (dropdown) **6**
- Clock In EVV Location: Select Location (dropdown)
- Clock Out EVV Location: Select Location (dropdown)
- Check Out Date: Check Out Date (MM/DD/YYYY) (text input)
- Diagnostic Code: Diagnostic Code (text input)
- Reason: Select Reason (dropdown) **7**
- Notes: Add Notes for Punch (text area)
- Attachment: [Add Attachment](#) (link)
- Buttons: Cancel, Save **8**



How to Use Reports (Computer/Laptop)

1. Select “Reports” Tab from **Employer Tab**
2. **COA Reports** - This will show you a full list of punches from the previous month or pay period. Simply select date range to view.
3. **Authorization Reports** - Authorization Run Rate Report is the most valuable. The Projected Weekly Run Rate is the amount of units available weekly.
4. **Note Reports** - Here you can pull any notes entered by the Employee or Employer. This is similar to progress notes required by some states.
5. **Summary Report** - Gives a breakdown of punches and percentages of budget remaining.



Home Page Basics

1. Select Home Tab
2. Search for Employee Name
 - View EE's weekly time
3. Overtime Gauge & Total Hours breakdown for selected Employee
4. Authorization Widget
 - View a snapshot of all active budgets
5. Profile Settings

The screenshot displays the Home Page interface with the following elements and callouts:

- 1**: HOME tab selected in the top navigation bar.
- 2**: Search input field for Employee Name.
- 3**: Overtime Gauge and Total Hours breakdown for the period 08/09/2020 to 08/15/2020.
- 4**: Authorizations widget with a search input for Client Name.
- 5**: Profile Settings icon (donald.duck) in the top right corner.

The Overtime Gauge shows a legend with three categories: 0 to 30 (green), 30 to 40 (yellow), and 40+ (red). The Total Hours breakdown shows:

Category	Hours
Approved Hours:	0.00
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	0.00

DCI Tips & Tricks

1. All Employers and Employees must have a unique valid email address in DCI
2. Login and take action as often as possible to become familiar with DCI and the tasks
3. Users have 3 attempts to login until they are locked out and need to contact Customer Service
4. Employers will exclusively use the DCI Web Portal and Employees will use the Mobile app
5. Employees will always enter their own time
 - Employers will Approve or Reject



Where to go for help?

- **Utilize our DCI Training Materials for more help**
 - This will give you a full list of Training Materials for DCI
- **Contact your Customer Service for more help**



NC Phone: (877) 901-5827

WI Phone: (877) 901-5826



acumenfiscalagent.zendesk.com



Thank you!

Visit the **Help Center** to learn more at:
acumenfiscalagent.zendesk.com