



DCI Time Entry Guide

MT SDEO

Welcome to EVV Training!

**We are committed to helping
guide you through this process**

Acumen Fiscal Agent facilitates freedom,
choice and opportunity through
innovative fiscal agent solutions.

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



Acumen Fiscal Agent
Innovation • Opportunity • Freedom

What is DCI?

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

- Better tools for both Employers & Employees
- Quick & easy time entry & payroll processing

**DCI also keeps you compliant with EVV
regulations in the 21st Century Cures Act**

- Our Real-Time Entry options will help you enter EVV compliant time with ease.



Roles & Responsibilities

Client



- This is the person who is receiving the care
- Sometimes referred to as participant or individual
- DCI profile is not logged into very often

Employer



- This is the person who manages the process
- Some Clients may be their own Employer
- Logs into DCI to manage budgets and time entries
- Authorized Reps can also help complete these tasks

Employee(s)



- This is the person who provides the care
- Sometimes referred to as the attendant or aide
- Logs into DCI often to enter time & notes
- Employee PIN can be used for easier DCI login

Three Ways to Enter Time

Mobile App



- Preferred Method
- Real Time Entry
- Quick & Easy
- EVV Compliant

Phone EVV



- Alternate method
- Landline use only
- Must be approved by program (MT DPHHS)
- 90-day exception

Web Portal



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

DCI Mobile App

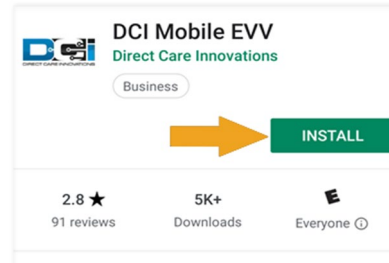
Mobile App Basics

- **The DCI Mobile App is meant for Real-Time Entry**
 - Clocking In/Out of each shift
- **Time Management is done in the DCI Web Portal**
 - ER/DR will review time in DCI Web Portal
- **The Time Entry process is very quick & easy**
 - Clocking In/Out should take less than 60 seconds



Download DCI Mobile EVV

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



1. Set App Permissions



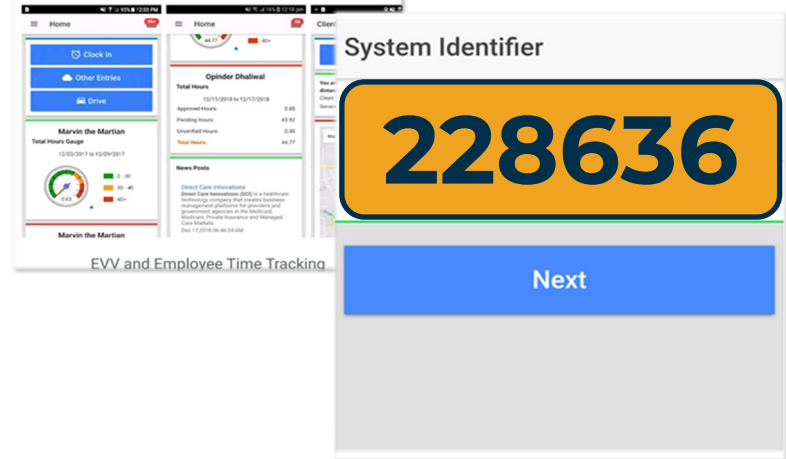
- Location is Required



- Media access is not necessary

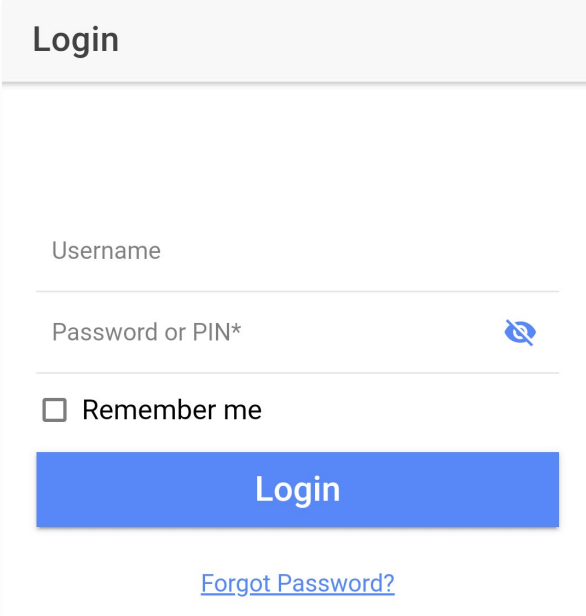
3. Enter System Identifier: **228636**

4. Select Next to login



Log into the DCI Mobile App

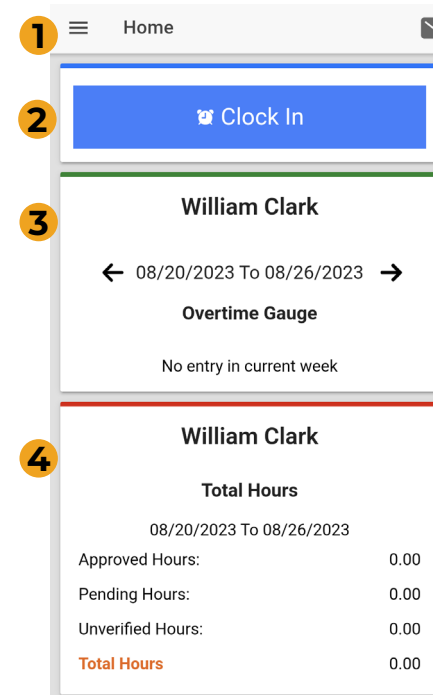
- Enter Employee credentials
 - Provided by Acumen on GTG Letter
- Select Login to access Mobile App
- Select “Remember Me” on your device
- Use Forgot Password link if necessary
 - Requires a valid email on file
- Contact Acumen with any login issues



The screenshot shows a mobile app login interface. At the top, there is a header labeled "Login". Below the header, there are two input fields: "Username" and "Password or PIN*", each with a horizontal line underneath. To the right of the "Password or PIN*" field is a blue eye icon for toggling password visibility. Below the input fields is a checkbox labeled "Remember me". At the bottom of the form is a large blue button with the text "Login" in white. Below the button is a blue underlined link that says "Forgot Password?".

Mobile App Home Page

1. Menu Button
 - Use to navigate in Mobile App
2. Clock In Button
 - Begin Clock In/Out process
 - See next slide for details
3. Overtime Gauge
 - Shows OT hours
4. Total Hours Breakdown
 - Shows the current calendar week



Clock In/Out Process

Clock In on Mobile App

1. Tap Blue Clock In Button
 - Auto-filled for a single client
2. Select Client Name
 - Auto-filled for a single service
3. Select Service Code
4. Cost Center is always auto-filled
5. Select Continue

The screenshot shows the mobile app interface for clocking in. It consists of several screens and a dropdown menu:

- Screen 1:** A blue button labeled "Clock In" with a clock icon and a yellow circle containing the number "1".
- Screen 2:** Displays the name "William Clark" and a date range "08/20/2023 To 08/26/2023". Below this is the heading "Overtime Gauge" and the text "No entry in current".
- Screen 3:** A dropdown menu titled "Clock In" with a back arrow. It contains three rows of data:
 - Client: Meriweth... (with a yellow circle containing "2")
 - Service Code: RSP (with a yellow circle containing "3")
 - Cost Center: MT-030 T... (with a yellow circle containing "4")
- Screen 4:** A blue button labeled "Continue" with a yellow circle containing the number "5".

Confirm Clock In

1. Select Confirm Clock In
 - * *This will Start the time for the shift*
2. Punch Confirmation
 - Clock Out page is shown with Clock In time displayed

Congratulations!
You are now on the
clock.

← Clock In

Clock In Time: 03:34 PM (MT)

Confirm Clock In 1

Client Name: Meriwether Lewis
Service Code: RSP

Clock Out

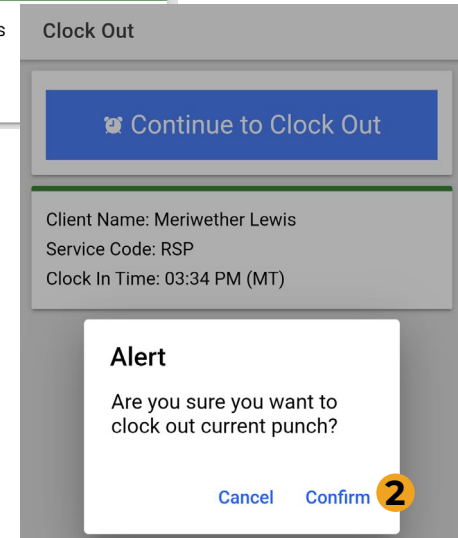
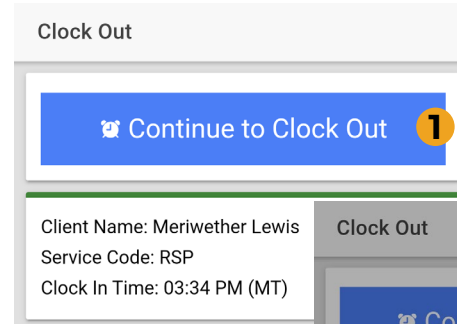
Continue to Clock Out

Client Name: Meriwether Lewis
Service Code: RSP
Clock In Time: 03:34 PM (MT) 2

Clock Out on Mobile App

Employee logs into Mobile App

1. Select Continue to Clock Out
2. Alert will ask to confirm



Confirm Clock Out

1. Notes are Optional
 - Discuss w/ ER if necessary
2. Select Confirm Clock Out
 - * *This will Stop the time for the shift*
3. Punch Confirmation
 - Punch details are shown
 - Select Home when ready

Clock Out

Clock Out Time: 03:41 PM (MT)

Notes are optional 1

Add Attachment

Confirm Clock Out 2

Client Name: Meriwether L
Service Code: RSP
Clock In Time: 03:34 PM (M)

Punch Information

Client Name: Meriwether Lewis
Service Code: RSP

Home 3

Congratulations!
Your shift is complete.

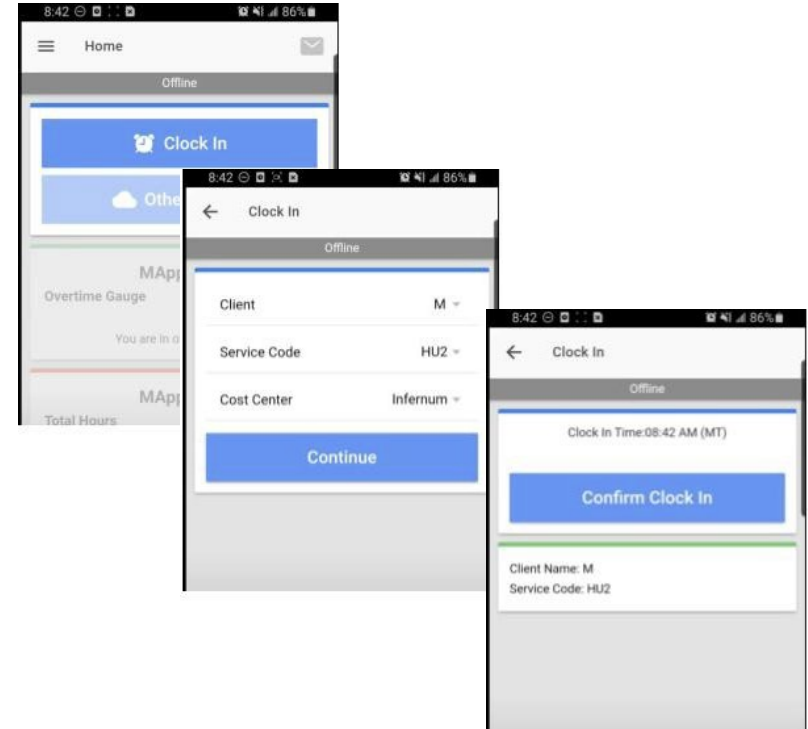
Review Employee Entries

1. Select Menu on top left of screen
2. Select Entries to view list
3. View complete list of entries
 - Employees should verify all time is submitted
 - Employer will approve time as needed

The screenshot displays a mobile application interface for an employee named William Clark. At the top left, a menu icon is highlighted with a yellow circle containing the number '1'. Below the menu, there is a 'Clock In' button. The main content area shows the employee's name, a profile picture, and a navigation menu with options: Home, Message, Entries (highlighted with a yellow circle containing the number '2'), Search, and Logout. Below the navigation menu, a list of entries is shown. The first entry is highlighted with a yellow circle containing the number '3'. The entry details are: Entry ID: 4492, Service Date: Aug 24, 2023, Hours: 0:00:07, Client Name: Meriwether Lewis, Entry Type: Punch, Status: Pending. The second entry is: Entry ID: 4481, Service Date: Aug 10, 2023, Hours: 0:02:30, Client Name: Meriwether Lewis, Entry Type: Punch, Status: Approved.

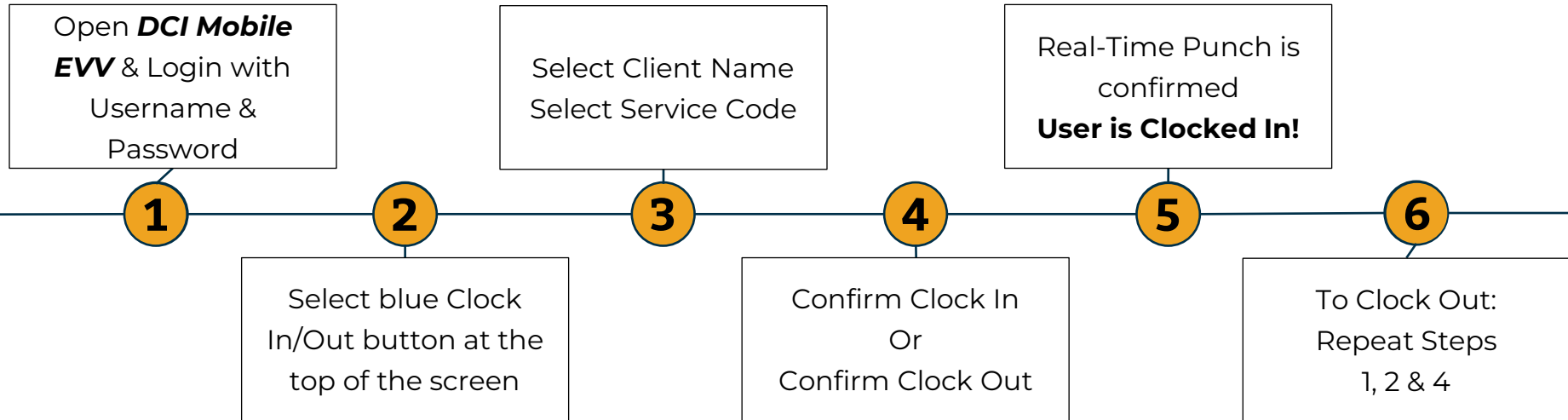
Mobile App Offline

- Offline Mode is available if needed
- Users can Clock In/Out offline
- Entries will sync when back online
- Offline mode will only work on the Employee's "Registered Device"
- Contact Acumen if issues arise with Offline Mode



Mobile App Process Timeline

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



Telephone EVV

- *Must be approved by MT DPHHS**
- *Landline required**

Telephone EVV Setup

- **Telephone EVV must be approved by MT DPHHS before use**
 - 90-day exception for Landline available
- **Confirm Client phone number on file w/ Acumen**
 - This is the number all Employees must call from
- **Client Phone number must be a Landline or VOIP**
- **Employees need the of the following details:**
 - Employee last 4 of SSN
 - Employee PIN (MMDD of Birthday)
 - MMDD of Birthday (Same as above)
- **Contact Acumen to setup Phone EVV for use**
 - Training Materials will be provided after setup is complete



DCI Web Portal

Web Portal Basics

- The DCI Web Portal is accessible via the internet on multiple devices
- Desktop and laptop computers will give you access to the Full Site
- The Mobile Web Portal is optimized for smartphones & tablets
- Employees use this portal to view, enter, or edit their time as needed
- Employers use this to manage their employee's time and service budget



acumen.dcisoftware.com

Accessing the DCI Web Portal

1. Open up an Internet Browser on a computer or mobile device
 - Google Chrome is preferred
2. Navigate to the [DCI Web Portal](#)
3. Enter Username and Password
 - Credentials provided by Acumen
4. Utilize Forgot Password link if necessary
5. Contact Acumen with login issues

Sign In

Username

Password

Remember me [Forgot your password?](#)

Or

[Create a profile](#)

Employee Web Portal

Full Site – Computer or Laptop

Home Page Details

Employee Dashboard is the landing page

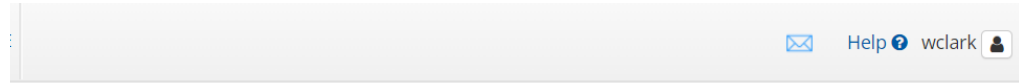
1. Entries tab to view a complete list of submitted time entries
2. Overtime Gauge & Total Hours for the current calendar week
3. Add Entry to enter a Historical time punch - See next slide

The screenshot displays the Employee Dashboard interface. At the top left is the Acumen logo with the tagline 'Acumen Powered by DCI'. A navigation menu on the left includes 'DASHBOARD', 'ENTRIES' (marked with a yellow '1'), 'ACCOUNTS', and 'PROFILE CERTIFICATION'. The main content area shows the user 'William Clark' for the period '08/20/2023 To 08/26/2023'. Below this is an 'Overtime Gauge' (marked with a yellow '2') for 'MT-030 Thomas Jefferson' showing a value of 0.12. To the right is a table of 'Total Hours' (marked with a yellow '3') for the same period.

Total Hours	08/20/2023 To 08/26/2023
Approved:	0.00
Pending Hours:	0.12
Unverified Hours:	0.00
Total Hours:	0.12

Add New Entry

Add New Entry (Computer/Laptop)



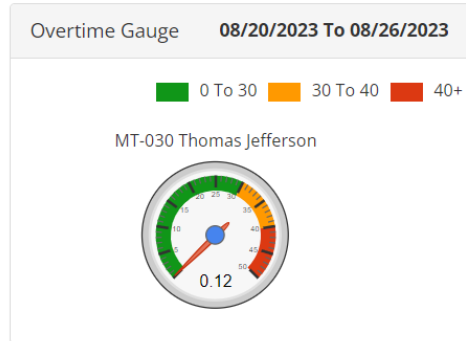
Home / Dashboard



Once logged in


1. Select Add New Entry

William Clark ← 08/20/2023 To 08/26/2023 →



Total Hours	08/20/2023 To 08/26/2023
Approved:	0.00
Pending Hours:	0.12
Unverified Hours:	0.00
Total Hours:	0.12

Complete New Entry

1. Enter Client Name & Select
2. Select Service Code
3. Select Service Date
4. Enter Start & End Time
5. Select  to choose reason code

Add New Entry

Entry Type: *

Employee Name:

Account Type: *

Client: * **1**

Service Code: * **2**


Service Date: * **3**


Check In: * Check Out: * **4**



Check Out Date:

Reason: **5**

Add Reason Code


1. Select Reason code from list
2. Select  to add reason code
3. Select Yes to add code
4. Reason code should be displayed below w/ note

Reason: 


Add Reason Codes: *  

Added Reason Codes:


Name	Code	Note	Actions
------	------	------	---------


Add Reason Code 

Are you sure you want to add reason code - **Mobile App Malfunction - 310**



Added Reason Codes:

Name	Code	Note	Actions
Mobile App Malfunction	310		



Add Notes and Submit

After Reason Code is added

1. Notes are Optional
2. Attachment are Optional
3. Select Save
4. Select Yes to Submit

Diagnostic Code:

Notes: 1

Attachment: 2

3

Alert

Are you sure you want to add a new punch for **04:00 hour(s)** for **Meriwether Lewis - MT1234** for **Aug 22, 2023**?

4

Mobile Web Portal

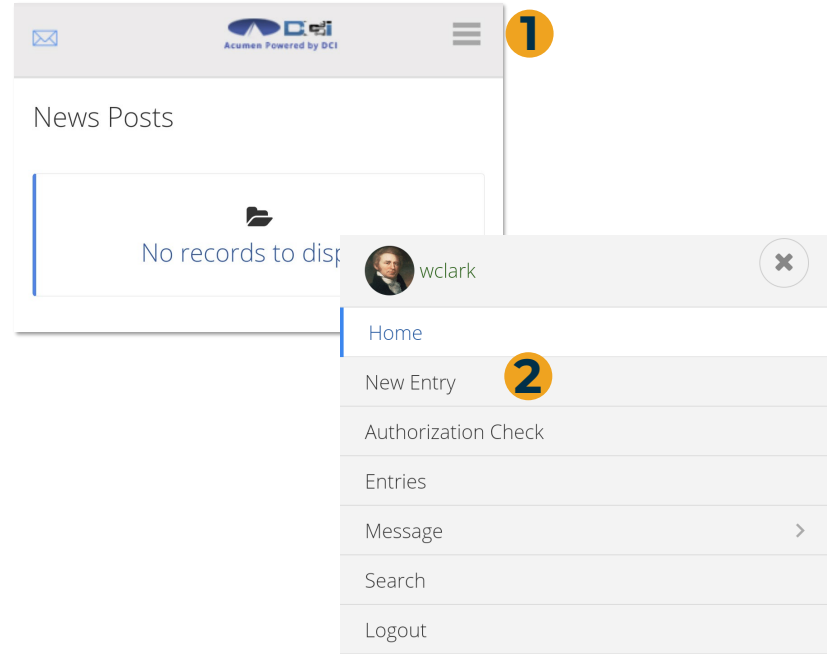
On a Smartphone or Tablet

Add New Entry (Mobile Device)


Once logged in

1. Select the Menu in the top right corner
2. Select New Entry



Complete the Add New Entry Wizard







Add New Entry Wizard



1. First 2 boxes are preset
2. Enter Client Name
3. Select Service Code
4. Select Service Date
5. Enter Start & End Time
6. Select  to add reason code



Add New Entry




Punch  


Hourly  


Meriwether Lewis - MT1234  

RSP  

08/21/2023  

11:30 AM  3:30 PM  

08/21/2023 

Reason: 

Add Reason Code

1. Select Reason Code from list
2. Select **+** to add Reason Code
3. Reason Code will be displayed
4. Proceed to Save & Submit

Reason: **-**

Select Reason **1** **+** **2** **∨**

Name : Mobile App Malfunction

Code : 310 **3**

Note :

Action : **-**

Save & Submit

1. Enter Notes if necessary
2. Select Save
3. Select Yes to confirm
4. Punch will be submitted

Diagnosis Code

Add Notes for Punch **1**

Choose File

Cancel

Save **2**

Alert X

Are you sure you want to add a new punch for 04:00 hour(s) for Meriwether Lewis - MT1234 for Aug 21, 2023?

No Yes **3**

Punch 4493

Service Date: Aug 21, 2023

Employee Name: William Clark

Start Time: 11:30 AM

End Time: 03:30 PM

Hours: 0:04:00

Amount: 4.00

Status: Pending **4**

Account Type: Hourly

Client Name: Meriwether Lewis

Service Code: RSP

Reject



Employer Web Portal

Full Site – Computer or Laptop

Approve Pending Entries

Pending Entries is the Employer 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	
<input type="button" value="A"/>	<input type="button" value="R"/>	3596	May 08, 2019	05:00 AM	11:00 AM
 Click Here to Approve Punch					
<input type="button" value="A"/>	<input type="button" value="R"/>	1448	Feb 08, 2019	08:35 AM	04:45 PM
 Click Here to Reject Punch					

How to Use “Employees” Page

1. Select the “Employees” Tab from the Home Page

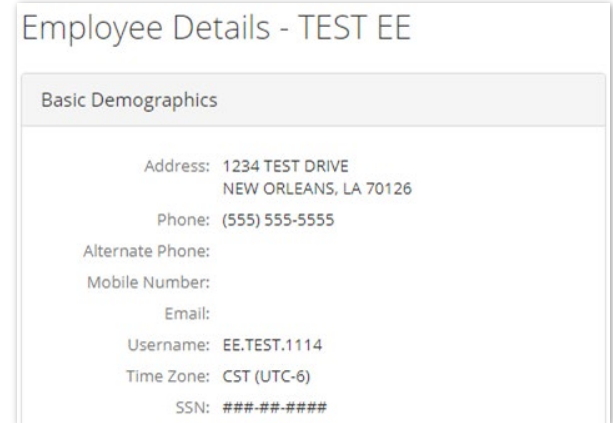
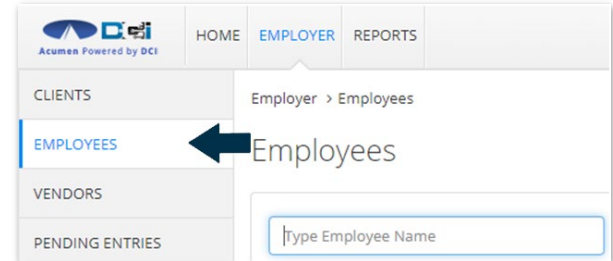
- Located on the left side of the screen
- Select Employee name from the list

2. Scroll Down to View List of Entries

- Here you will see a complete list of punches for this Employee

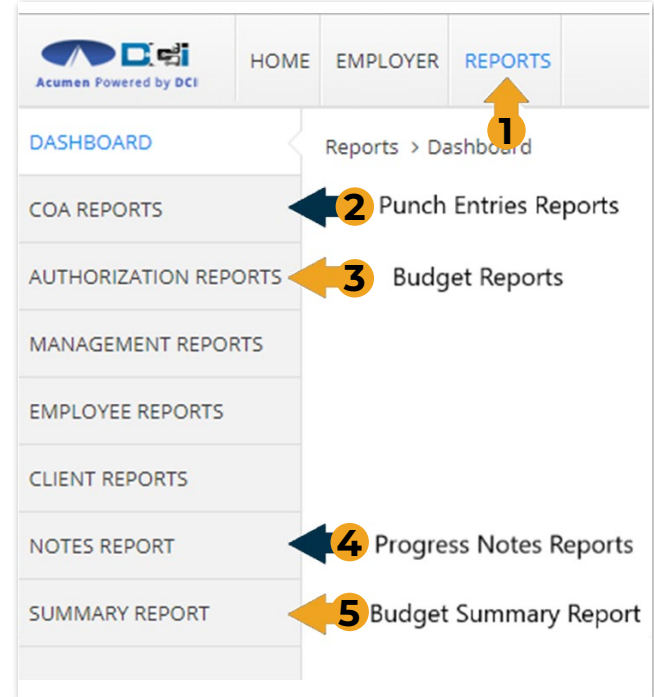
3. Great Resource for Payroll Deadlines

- Ensure all time for pay period is entered and “Approved” before submission due date



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 selected date range.
3. **Authorization Reports** - Authorization Run Rate Report will show budget usage breakdown.
4. **Note Reports** - Here you can pull any Service Notes entered on entries
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. Client Total Hours Per Week
 - Total hours worked for client
5. Authorization Widget
 - View details of all active budgets
6. Profile Settings

The screenshot shows the Acumen Home Page interface. On the left is a navigation menu with 'HOME' selected. The main content area includes a search bar for employee names, an overtime gauge for 'MR. KRABS' for the week of 07/18/2021 to 07/24/2021, and a table of total hours. Below these are widgets for 'Client Total Hours Per Week' and 'Authorizations', each with a search bar. A user profile icon in the top right corner is also highlighted.

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

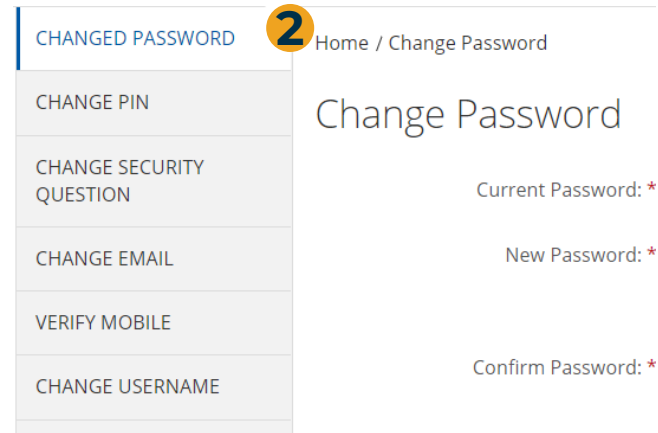
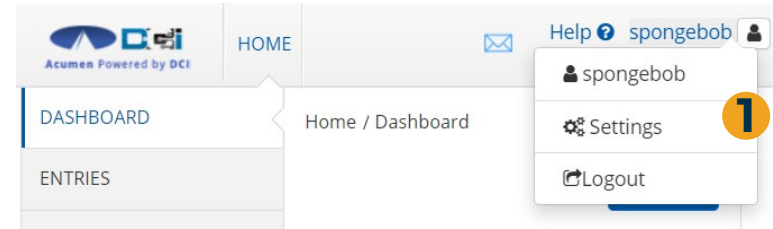
Profile Settings

Only available on Full Site

Profile Settings

Log into DCI with Username & Password

1. Select Username > Then Settings
 - Located in the top right corner
2. Select profile setting to change
 - Username/Password is used for login
 - Employee PIN can make the login process easier on a mobile device
 - Email is needed for password recovery



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 Acumen Agent for more help
 - Contact Customer Service if you don't know your assigned agent



Phone: (877) 824-9356



[acumenfiscalagent.com](https://www.acumenfiscalagent.com)



Thank you!

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