Acumen Fiscal Agent

Innovation · Opportunity · Freedom

DIRECT CARE INNOVATIONS

Acumen powered by DCI

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.

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What is DCI?

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

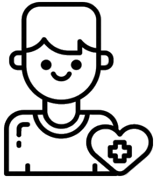
- Better tools for both Employers & Employees
- Quick & easy time entry & payroll processing

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

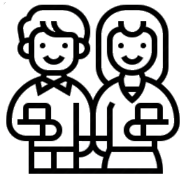


- This is the person who is receiving the care
- Sometimes referred to as participant or individual
- DCI profile is not logged into very often

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
- <u>Non-EVV Compliant</u>

DCI Mobile App

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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

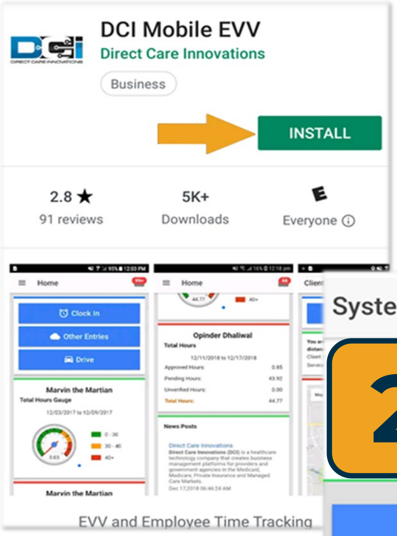
Available on the App Store | GET IT ON Google Play

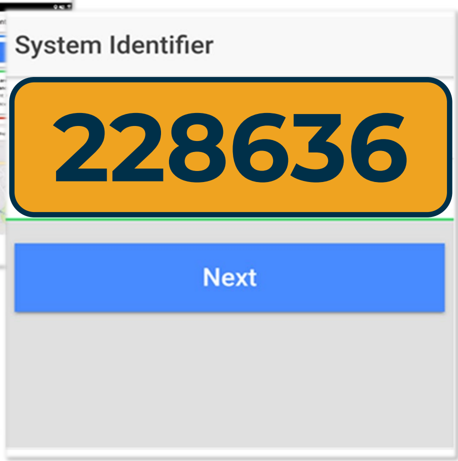
1. Set App Permissions

   - Location is Required
   - Media access is not necessary

3. Enter System Identifier: **228636**

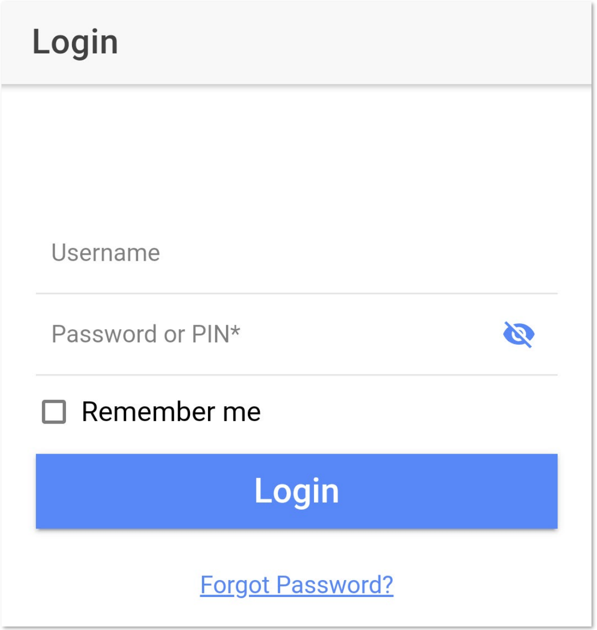
4. Select Next to login





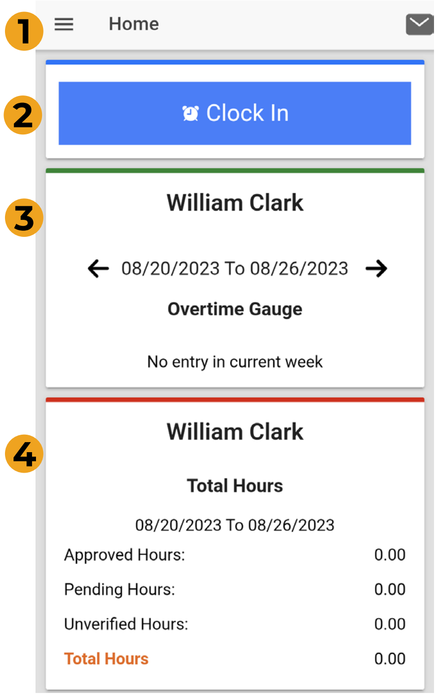
Log into the DCI Mobile App

- 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



Mobile App Home Page

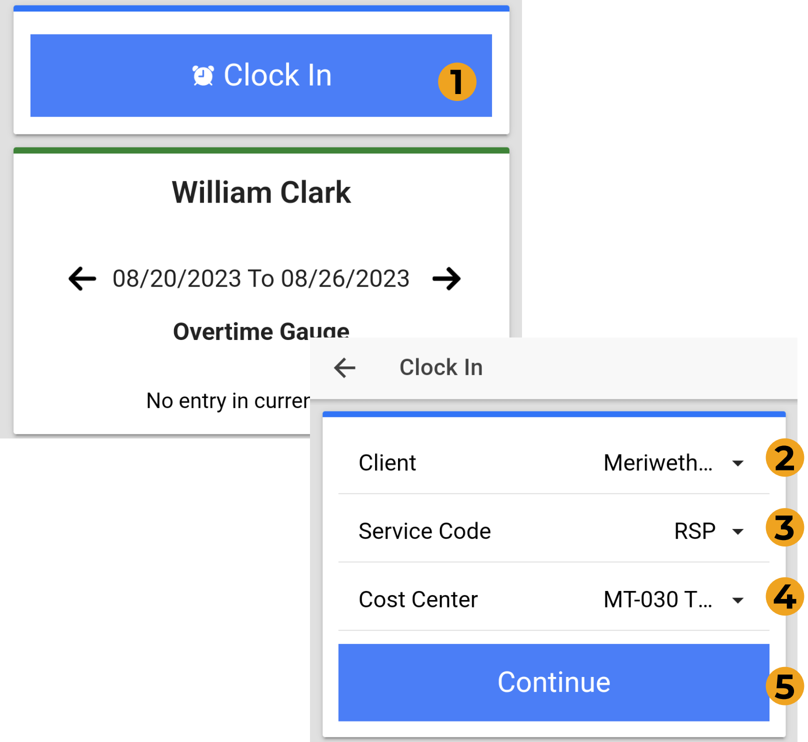
1. Menu Button
   - Use to navigate in Mobile App
2. Clock In Button
   - Begin Clock In/Out process
     - See next slide for details
3. Overtime Gauge
   - Shows OT hours
4. Total Hours Breakdown
   - Shows the current calendar week



Clock In/Out Process

Clock In on Mobile App

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

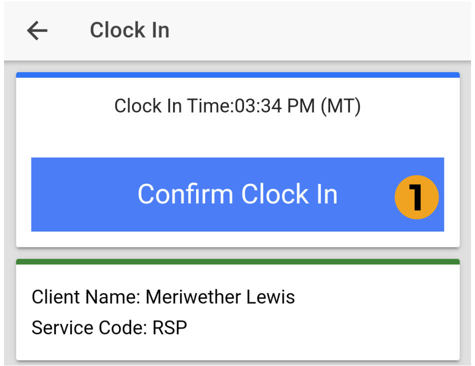


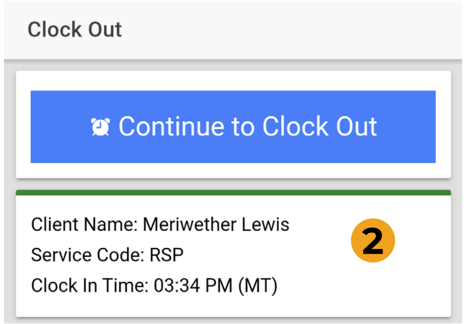
Confirm Clock In

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.



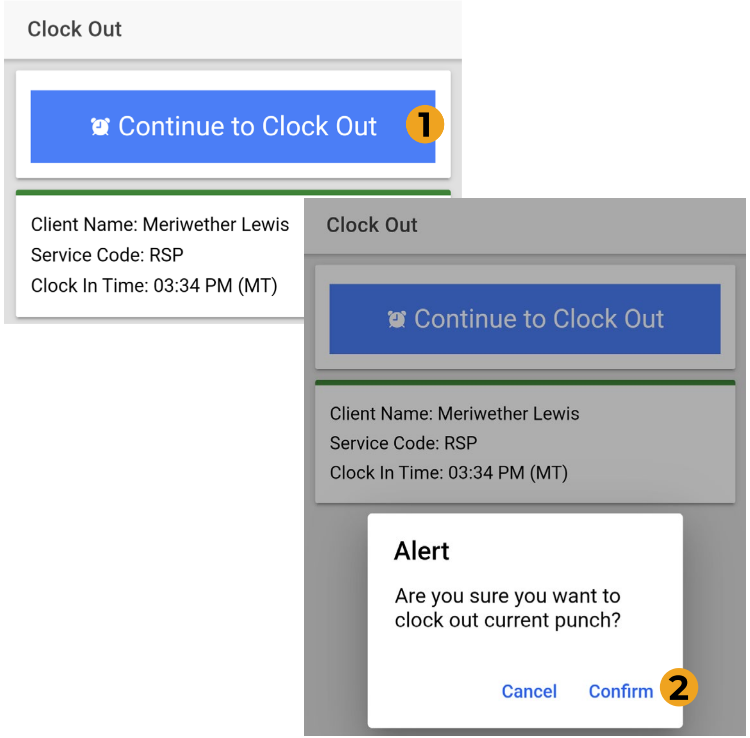


Clock Out on Mobile App

<u>Employee logs into Mobile App</u>

1. Select Continue to Clock Out

2. Alert will ask to cofirm



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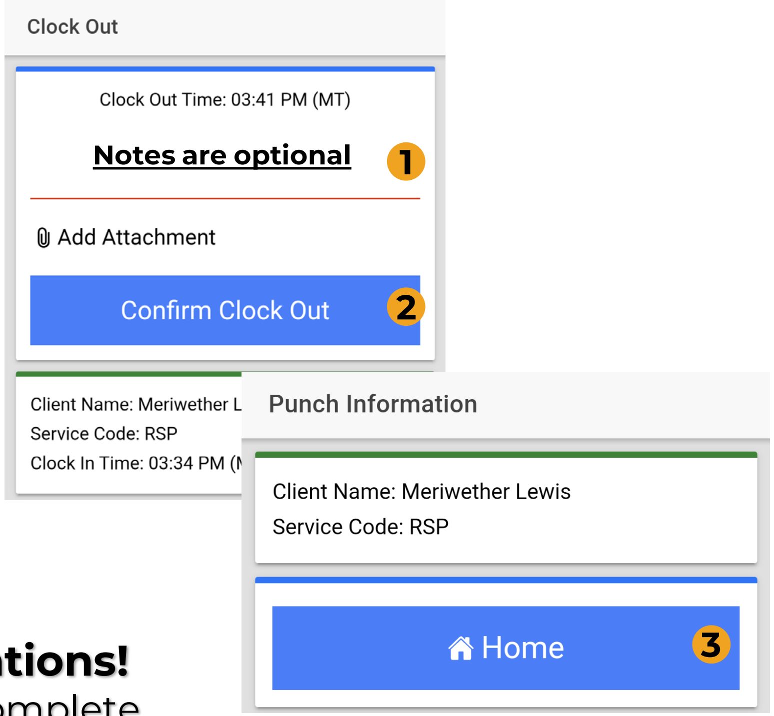
Confirm Clock Out

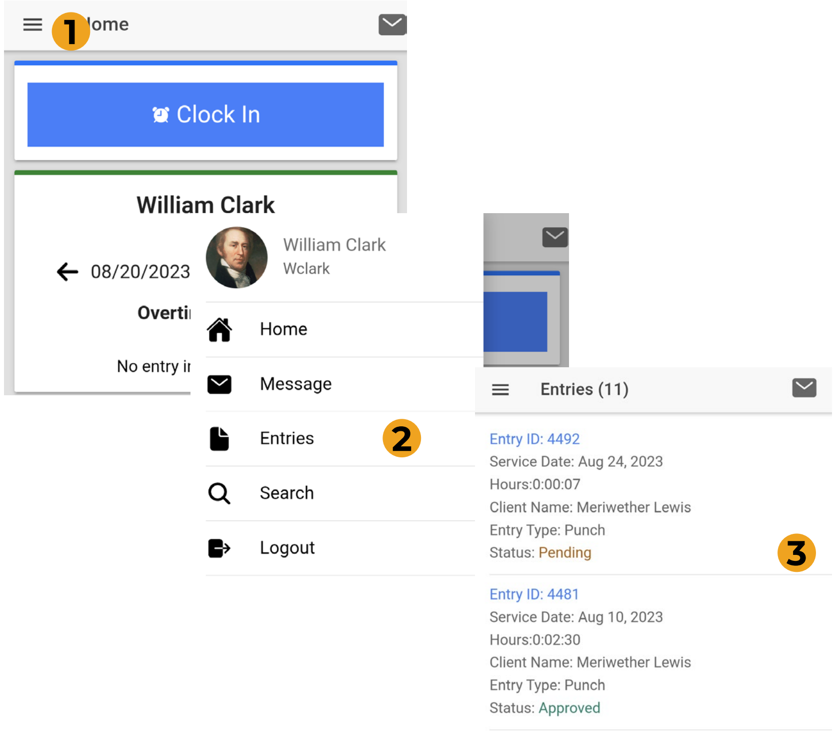
1. Notes are Optional
   - Discuss w/ ER if necessary
2. Select Confirm Clock Out
   * *This will Stop the time for the shift*
3. Punch Confirmation
   - Punch details are shown
   - Select Home when ready



Congratulations!
Your shift is complete.

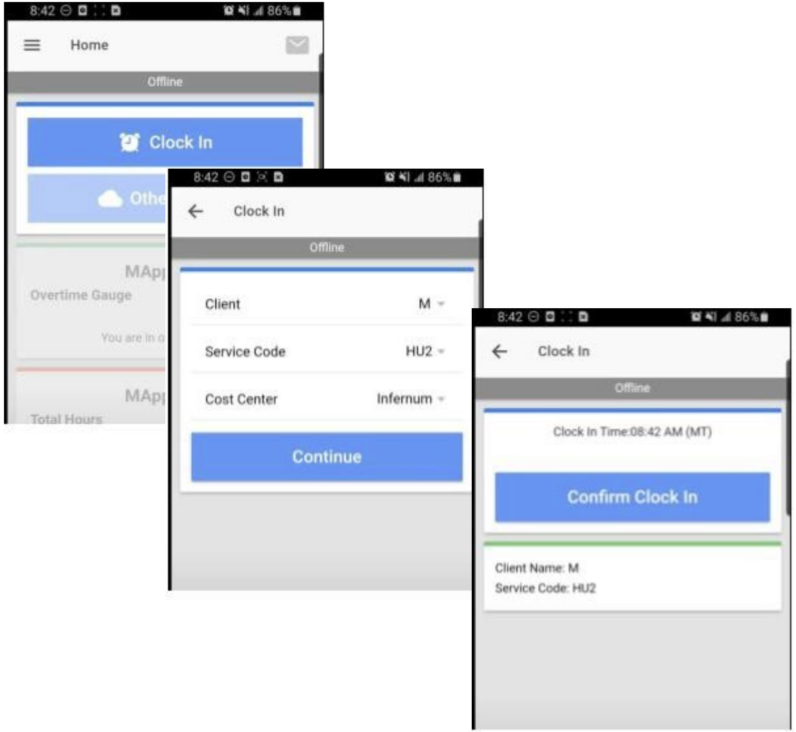
Review Employee Entries

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



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.

1. Open ***DCI Mobile EVV*** & Login with Username & Password
2. Select blue Clock In/Out button at the top of the screen
3. Select Client Name
Select Service Code
4. Confirm Clock In
Or
Confirm Clock Out
5. Real-Time Punch is confirmed
User is Clocked In!
6. To Clock Out: Repeat Steps 1, 2 & 4

Telephone EVV

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

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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

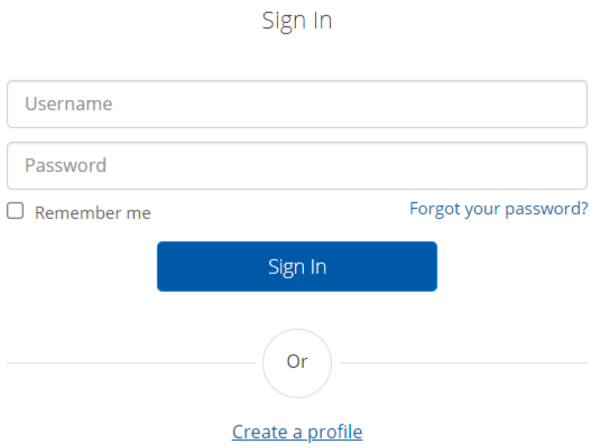
Web Portal Basics

- 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



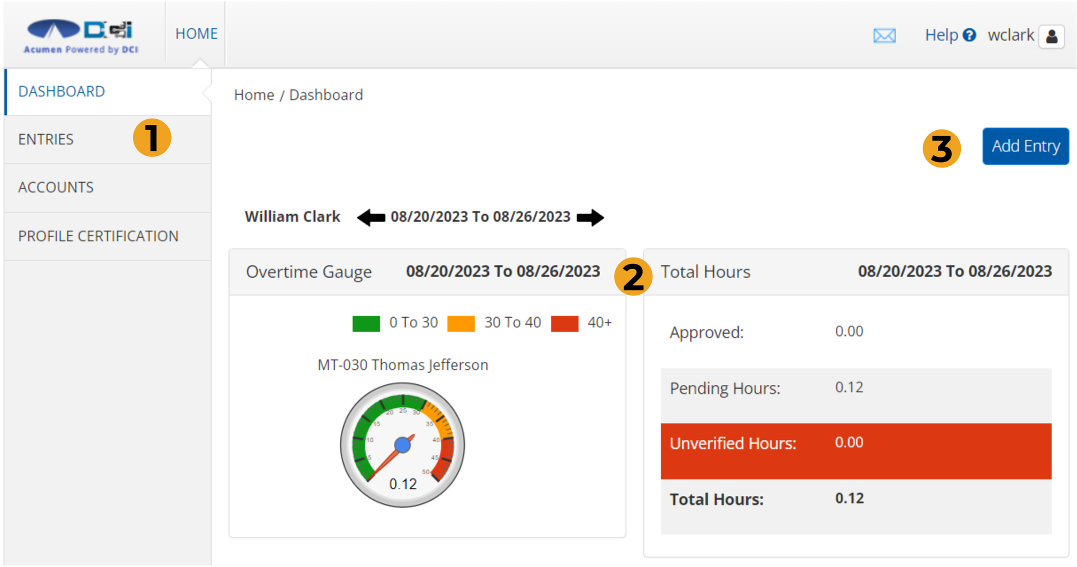
Employee Web Portal

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*

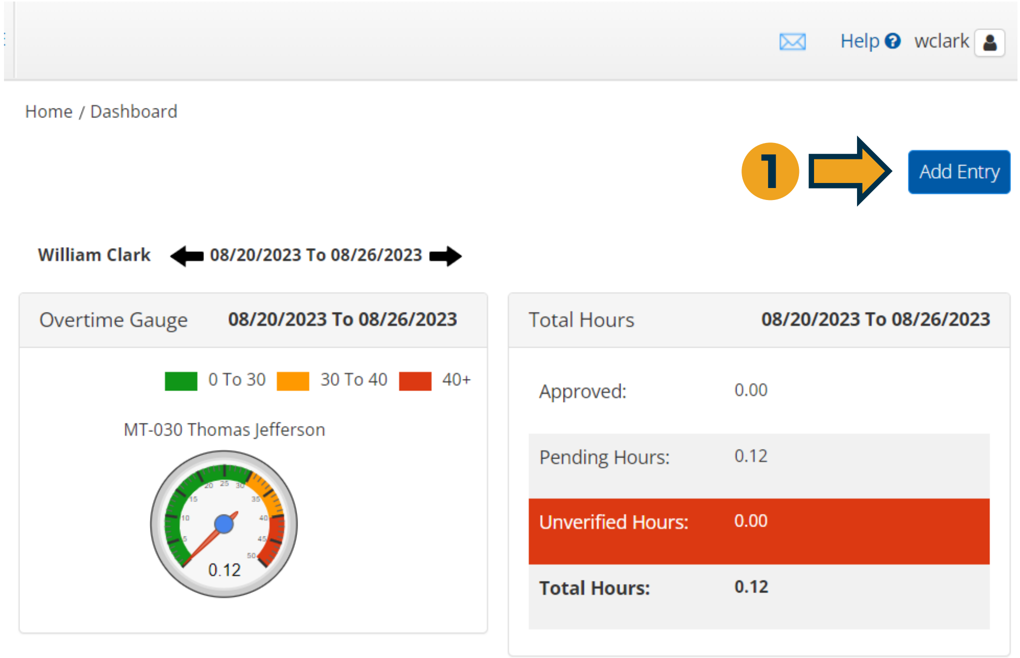


Add New Entry

Add New Entry (Computer/Laptop)

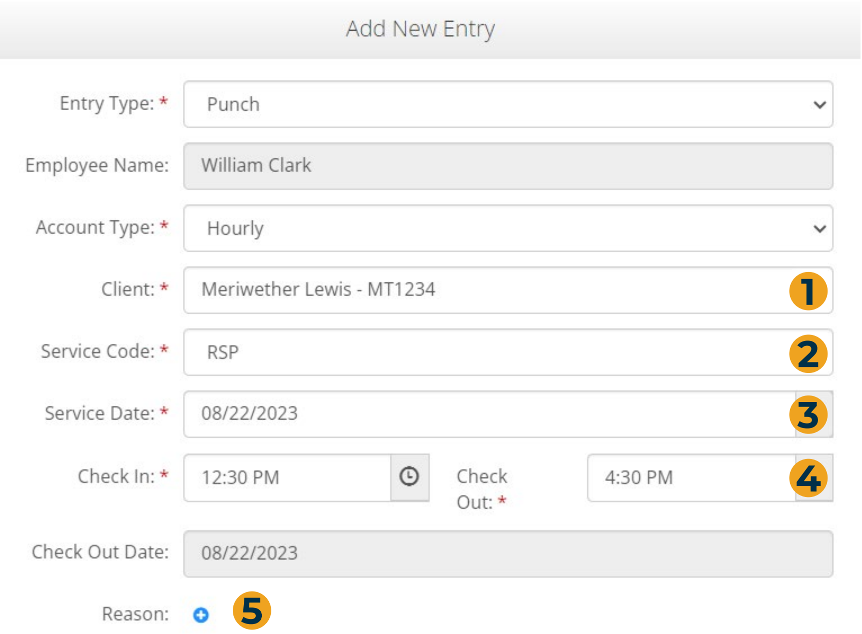
Once logged in

1. Select Add New Entry



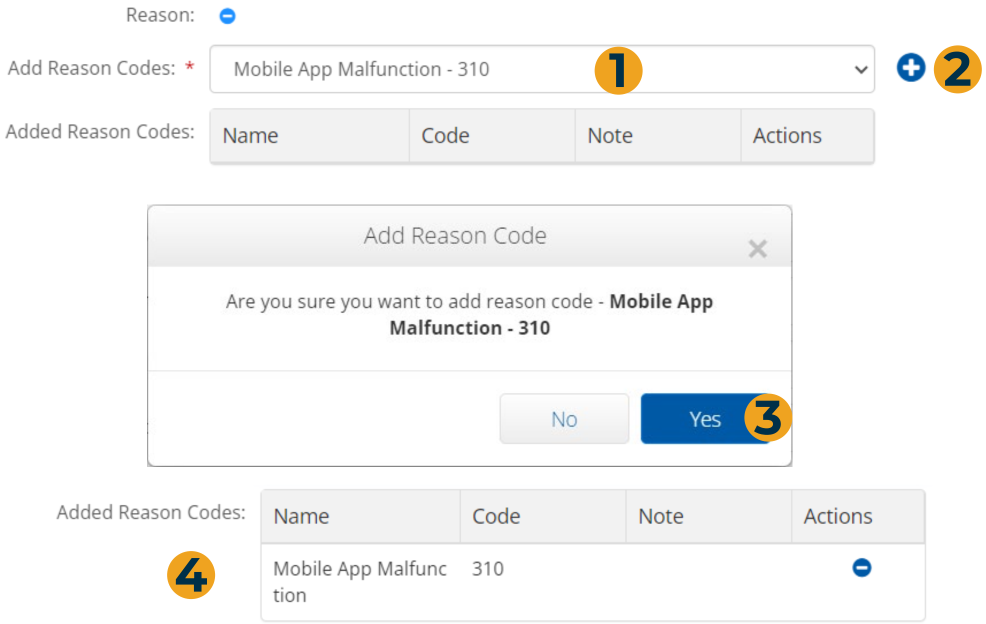
Complete New Entry

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 Reason Code

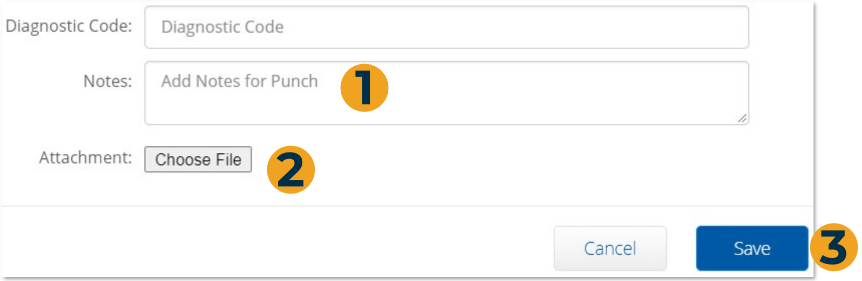
1. Select Reason code from list
2. Select ⊕ to add reason code
3. Select Yes to add code
4. Reason code should be displayed below w/ note

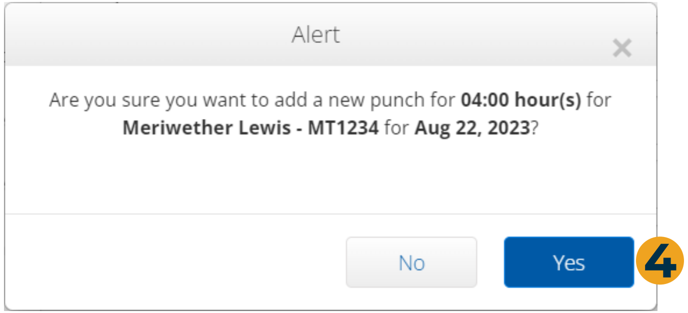


Add Notes and Submit

After Reason Code is added

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





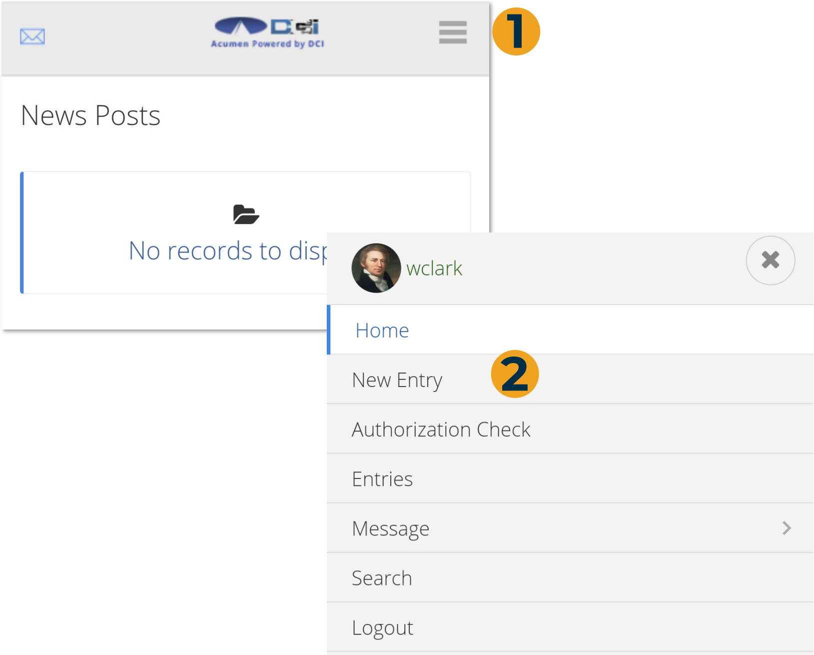
Mobile Web Portal

On a Smartphone or Tablet

Add New Entry (Mobile Device)

<u>Once logged in</u>

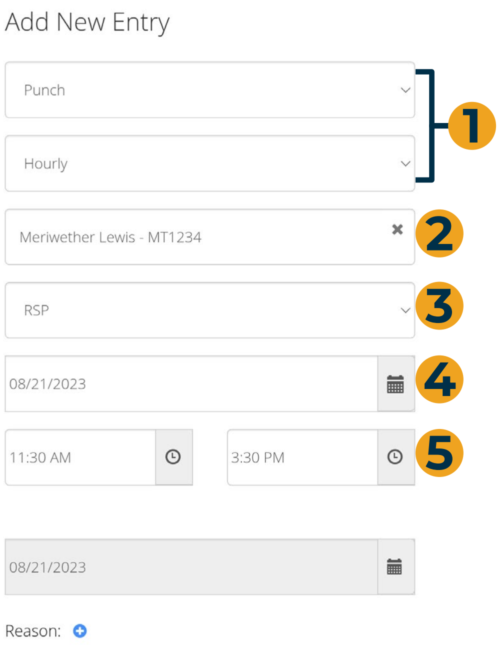
1. Select the Menu in the top right corner
2. Select New Entry



Complete the Add New Entry Wizard

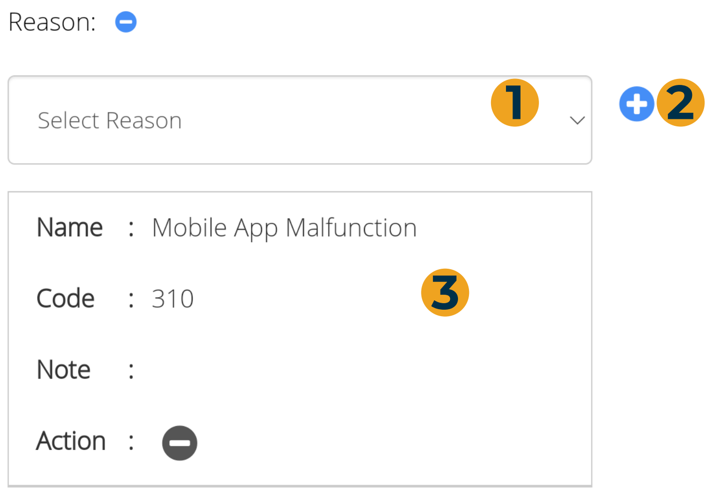
Add New Entry Wizard

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



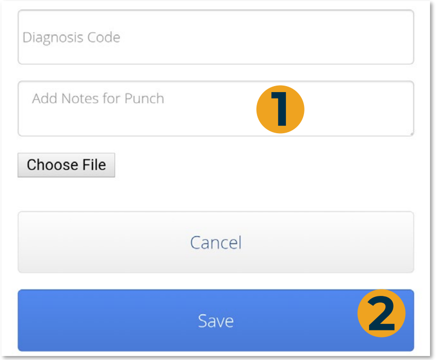
Add Reason Code

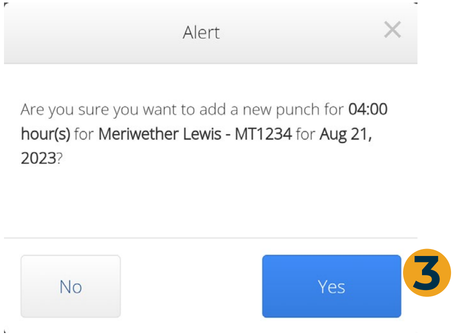
1. Select Reason Code from list
2. Select ⊕ to add Reason Code
3. Reason Code will be displayed
4. Proceed to Save & Submit

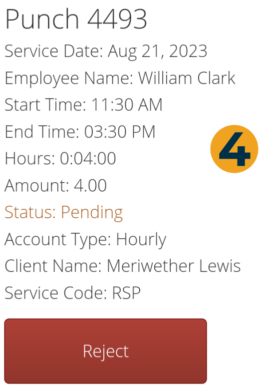


Save & Submit

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







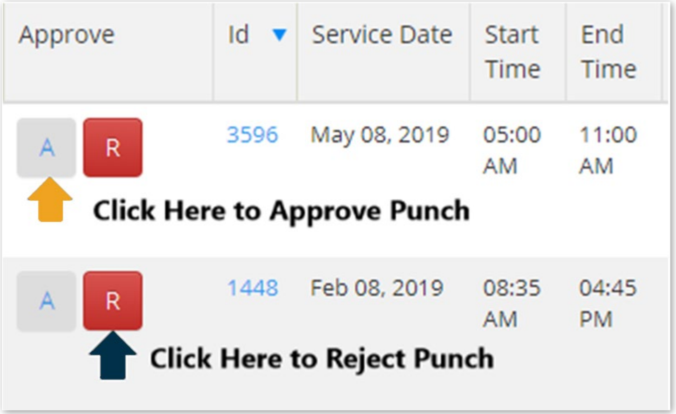
Employer Web Portal

Full Site – Computer or Laptop

Approve Pending Entries

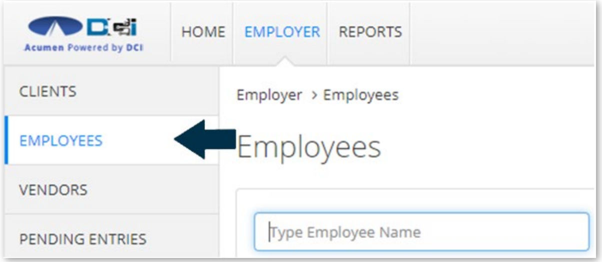
Pending Entries is the Employer landing page

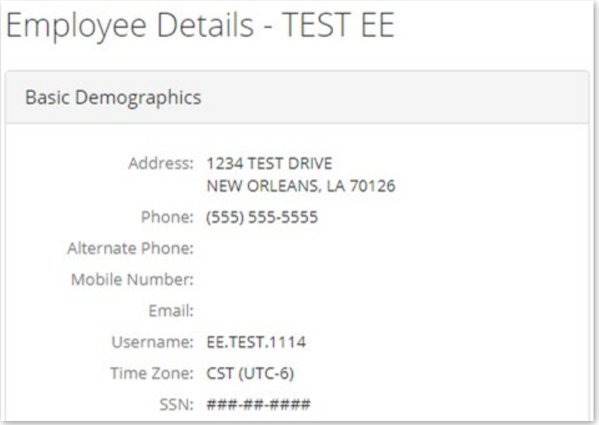
- What shows up here?
    - Any punch that requires approval
- Scroll down to view list of Entries
    - Review each entry and Approve or Reject
    - Click any entry for more detail
- If Rejected, inform Employee to re-enter time correctly via DCI Portal



How to Use “Employees” Page

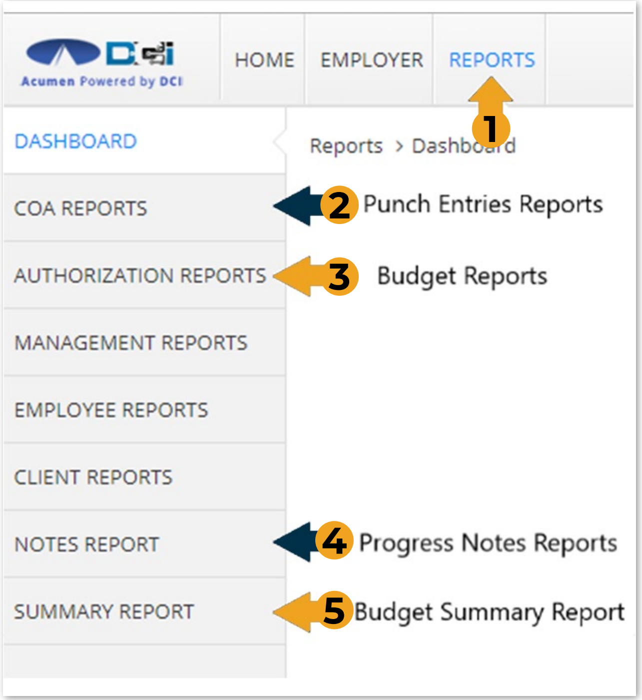
1. **Select the “Employees” Tab from the Home Page**
   - Located on the left side of the screen
   - Select Employee name from the list
2. **Scroll Down to View List of Entries**
   - Here you will see a complete list of punches for this Employee
3. **Great Resource for Payroll Deadlines**
   - Ensure all time for pay period is entered and “Approved” before submission due date





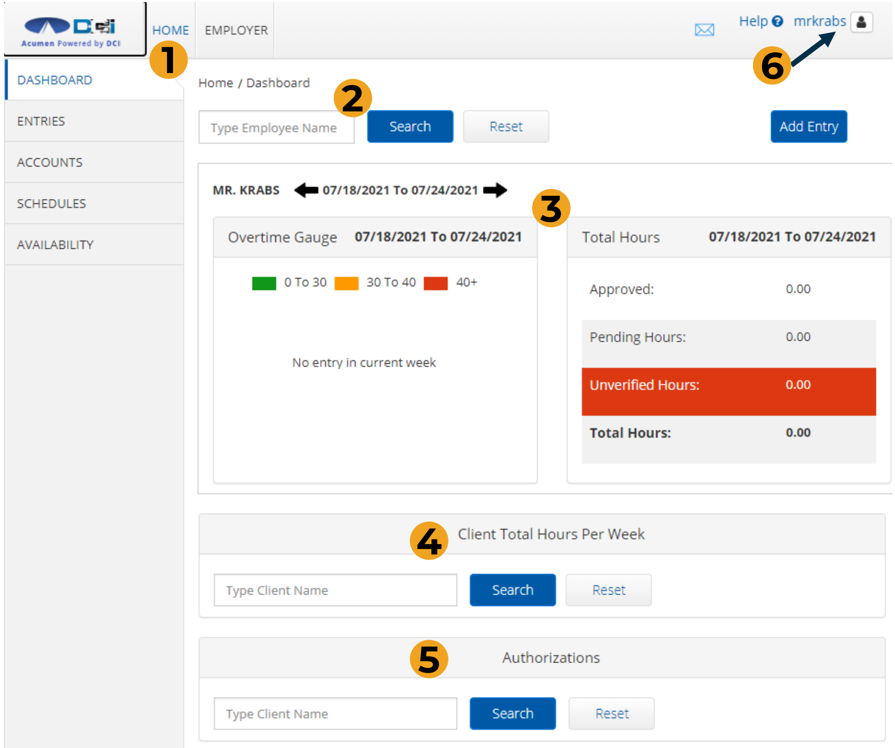
How to Use Reports (Computer/Laptop)

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



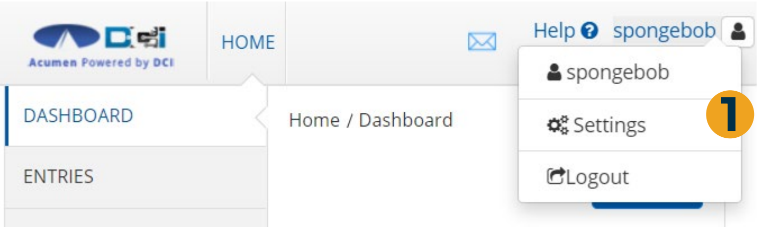
Profile Settings

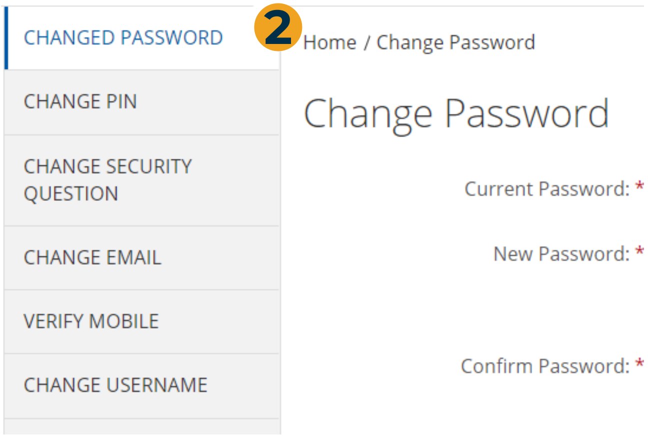
Only available on Full Site

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

Thank you!

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