



Acumen powered by DCI Software

DCI Employer Portal Guide

Welcome to Acumen!

Thank you for joining the Acumen
Family!

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

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



What is DCI?

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

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

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

- Our EVV compliant time entry options will keep you compliant with your program requirements



Roles & Responsibilities

Client



- This is the person who is receiving the care
- Sometimes referred to as Member or Individual
- DCI profile is not logged into very often
- Client PIN/Password is used for EVV

Employer



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

Employee(s)



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

Multiple Ways to Enter Time

Mobile App



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

Phone EVV



- Alternate Method
- Real Time & Historical
- Low-tech Option
- EVV Compliant

Web Portal

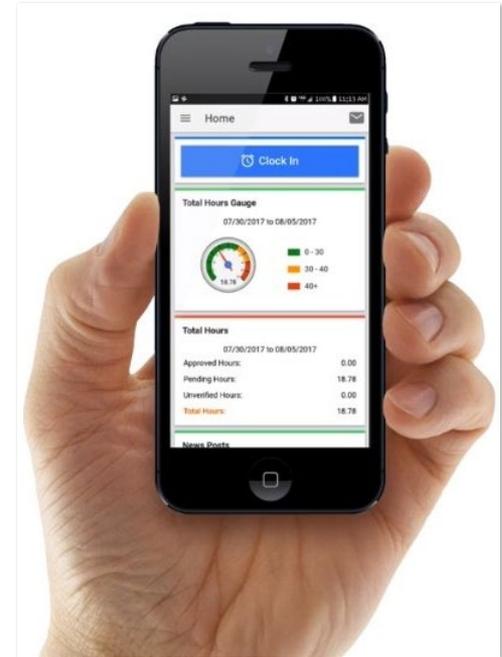


- Time Management
- Historical Entries
- Manual Time Approval
- **Not EVV Compliant**

DCI Mobile App

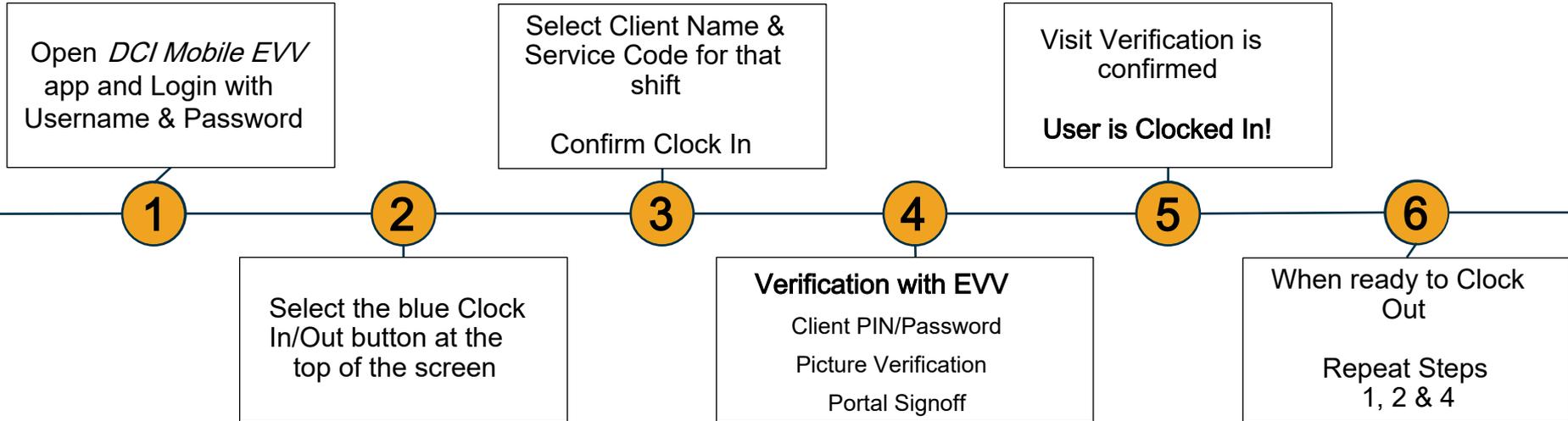
Mobile App Basics

- 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
- Multiple Options for Verification with EVV
 - PIN/Password entered by Client
 - Picture taken of Client by Employee
 - Portal Signoff selected by Employee
- View [Mobile App Guide](#) in Employee Materials for more



Mobile App Process Timeline

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



DCI Phone EVV

Phone EVV Basics

- Phone EVV is an alternative option for both Real Time & Historical time entry
 - Typically used by those with limited internet access
- Real-Time Entry is the best Phone EVV option
 - Only use Historical Entry for missed punches
- Client Phone number must be a Landline or VOIP
 - Landline & VOIP phones meets all EVV Requirements
- View [Phone EVV Complete Guide](#) for more



Employer Web Portal

Accessing the DCI Web Portal

1. Open up an Internet Browser on your computer or mobile device
 - Google Chrome is preferred
2. Navigate to the DCI Web Portal
 - acumen.dcisoftware.com
3. Enter Employer Username and Password
 - Credentials provided by Acumen
4. Utilize Forgot Password link if necessary
5. Contact Acumen Agent with login issues

Sign In

Employer Username

Employer Password

Remember me [Forgot your password?](#)

Sign In

Or

[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

View Approving Pending Entries below for more details

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

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

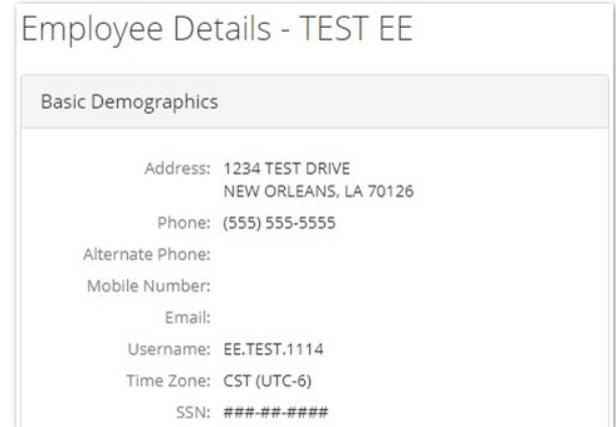
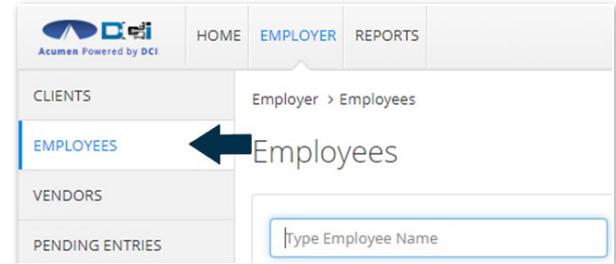
- Located on the left side of the screen
- Select Employee name from the list

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

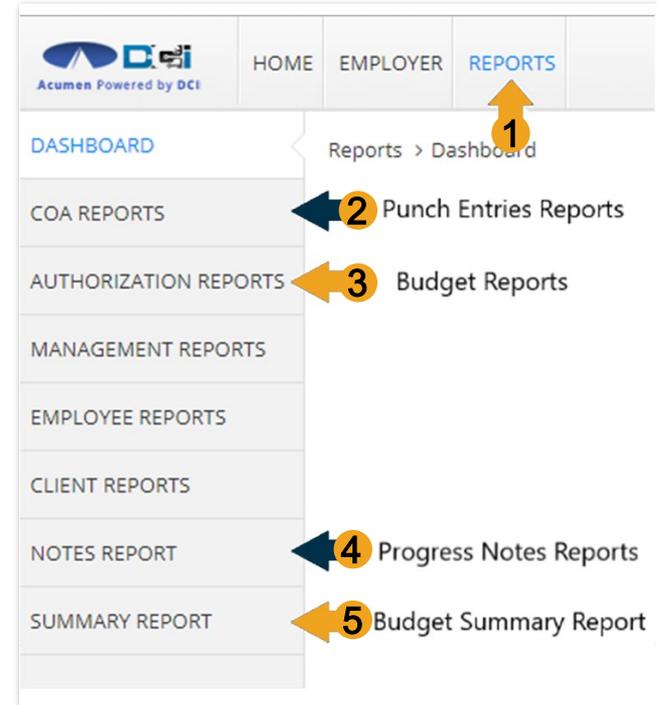


How to Use Reports

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.

View Reports Guide below for more details

(Computer/Laptop)



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. The top navigation bar includes 'HOME' (1), 'EMPLOYER', 'Help', and a user profile 'mrkrabs' (6). The left sidebar contains 'DASHBOARD' (1), 'ENTRIES', 'ACCOUNTS', 'SCHEDULES', and 'AVAILABILITY'. The main content area features a search bar for 'Employee Name' (2) with 'Search' and 'Reset' buttons, and an 'Add Entry' button. Below this is a section for 'MR. KRABS' (3) for the week of 07/18/2021 to 07/24/2021, including an 'Overtime Gauge' and a 'Total Hours' table. The 'Client Total Hours Per Week' widget (4) has a search bar for 'Client Name' and 'Search'/'Reset' buttons. The 'Authorizations' widget (5) also has a search bar for 'Client Name' and 'Search'/'Reset' buttons.

Total Hours	07/18/2021 To 07/24/2021
Approved:	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 Acumen 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 Acumen Agent for more help
 - Contact Customer Service if you don't know your assigned agent



Phone: (866) 414-2541



acumenfiscalagent.com



Thank you!

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