



DCI Time Entry Guide

**North Carolina
MCOs**

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.

Thank you for taking the time to learn
more about our time-entry process



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 of Record
- 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
- Real-Time & Historical
- EVV Compliant

Web Portal



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

DCI Mobile App

Most Common Time-Entry Method

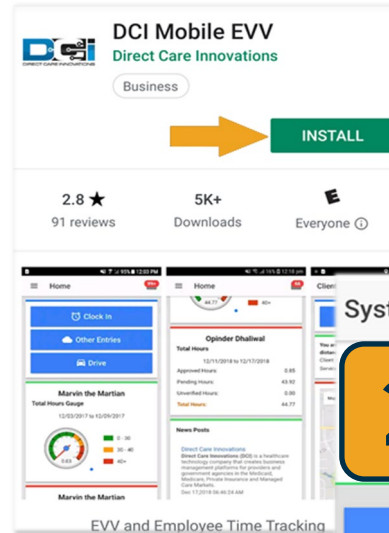
Mobile App Basics

- **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**
 - Should take less than 60 seconds to clock in/out



Download DCI Mobile EVV

1. Download the *DCI Mobile EVV* App



1. Set App Permissions



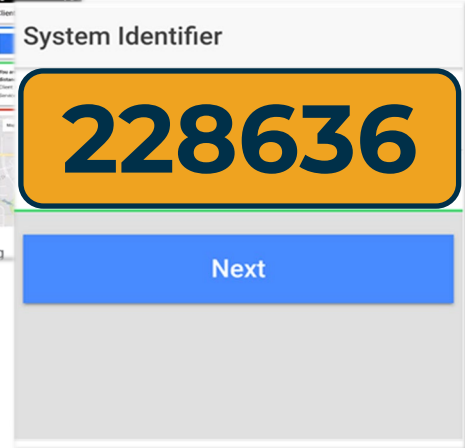
- Location is Required



- Media access is not necessary

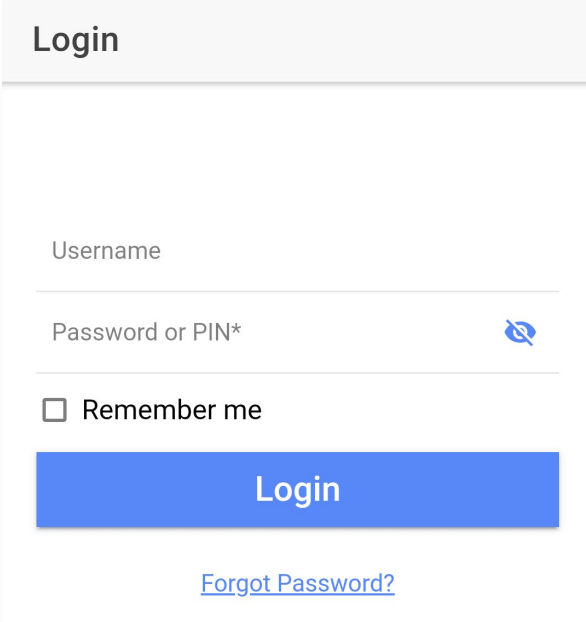
3. Enter System Identifier: **228636**

4. Select Next to login



Log into the DCI Mobile App

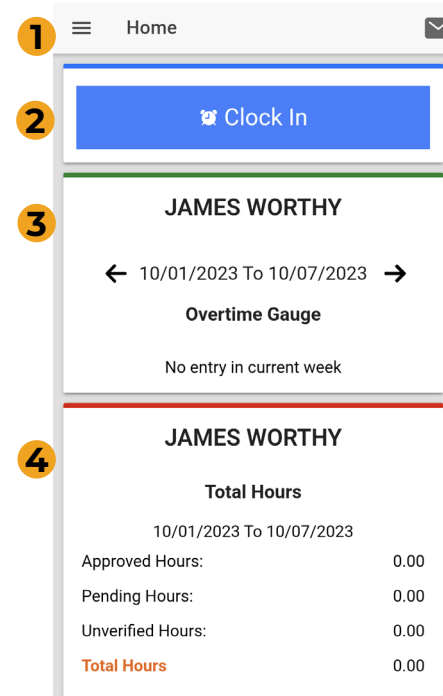
- Enter Employee credentials
 - Provided by Acumen on GTG Letter
- Select Login to access Mobile App
- Select “Remember Me” on your device
- Use Forgot Password link if necessary
 - Requires a valid email on file
- Contact Acumen with any login issues



The screenshot shows a mobile app login interface. At the top, there is a header with the word "Login" in a dark font. Below the header, there are two input fields: "Username" and "Password or PIN*", each with a light gray border and a small blue eye icon to the right of the second field. Below the input fields, there is a checkbox labeled "Remember me". At the bottom of the form, there is a large blue button with the word "Login" in white text. Below the button, there is a blue 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
 - Auto-filled for a single service
4. Cost Center is auto-filled
5. Select Continue

1

Clock In

JAMES WORTHY

← 10/01/2023 To 10/07/2023 →

Overtime Gauge

No entry in current

← Clock In

Client MICHAEL... 2

Service Code CLS 3

Cost Center NC-020 S... 4

Continue 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: 02:39 PM (EST)

Confirm Clock In 1

Client Name: MICHAEL JORDAN
Service Code: CLS

Clock Out

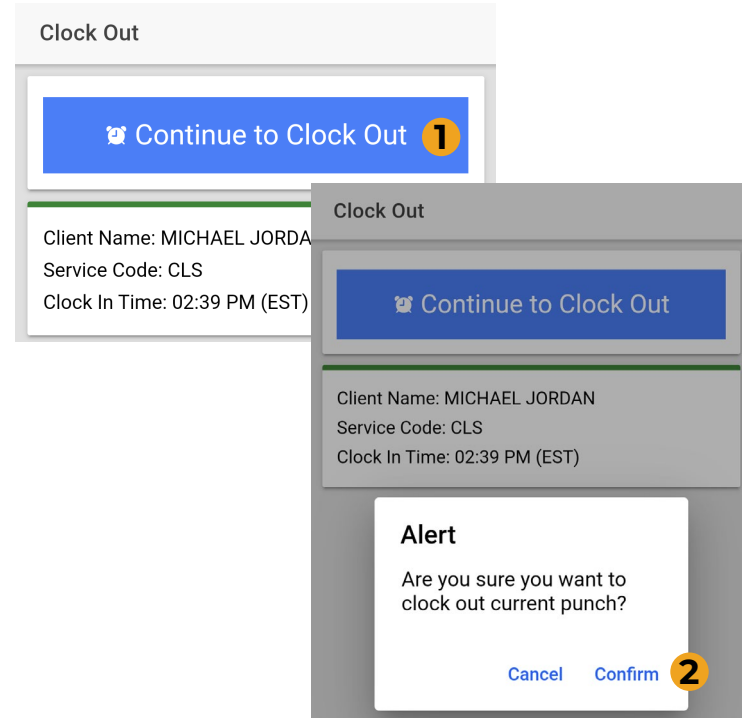
Continue to Clock Out

Client Name: MICHAEL JORDAN
Service Code: CLS
Clock In Time: 02:39 PM (EST) 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

The screenshot displays the 'Clock Out' interface. At the top, it shows 'Clock Out Time: 02:47 PM (EST)'. Below this, the text '**Notes are optional**' is highlighted with a yellow circle containing the number '1'. Underneath is an 'Add Attachment' button. A large blue button labeled 'Confirm Clock Out' is highlighted with a yellow circle containing the number '2'. Below the main interface, a 'Punch Information' section is shown, containing client details: 'Client Name: MICHAEL JORDAN', 'Service Code: CLS', and 'Clock In Time: 02:39 PM (EST)'. A green bar indicates the status is 'Online'. At the bottom, a blue button with a home icon and the text 'Home' is highlighted with a yellow circle containing the number '3'.

Congratulations!
Your shift is complete.

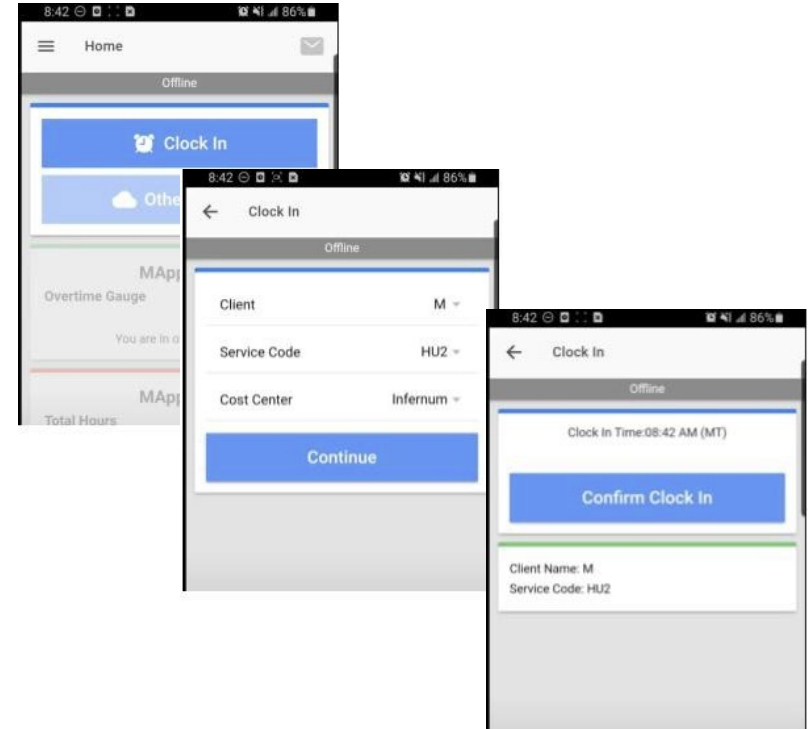
Review Employee Entries

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 the Overtime mobile application interface. At the top, there is a navigation bar with a hamburger menu icon (labeled '1'), the text 'Home', and a notification icon. Below this is a blue 'Clock In' button. The main content area shows the profile for 'JAMES WORTHY' with a back arrow, a date '10/01/2023', and a profile picture. Below the profile is a list of navigation options: Home, Message, Entries (labeled '2'), Search, and Logout. To the right, a secondary window shows a list of entries under the heading 'Entries (7)'. The first entry is for 'Entry ID: 4694' with a status of 'Pending' (labeled '3'). The second entry is for 'Entry ID: 4693' with a status of 'Processed'.

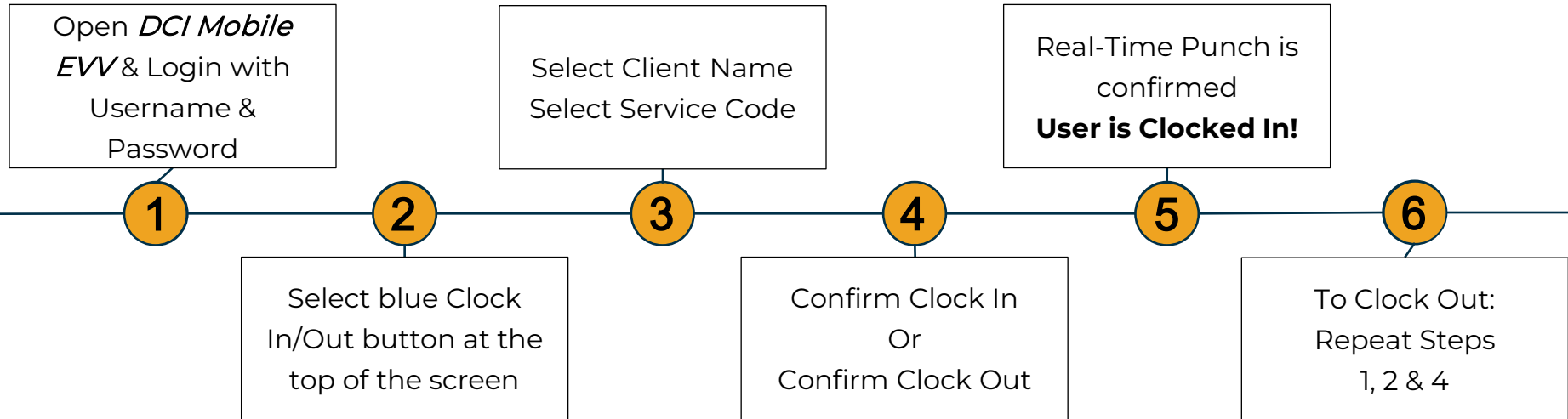
Mobile App Offline

- 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

Alternative Time-Entry method when needed
***Landline required**

Telephone EVV Setup

- **Confirm Client phone number on file w/ Acumen**
 - Contact Acumen Customer Service to begin
- **Client must have a Landline or VOIP phone number**
- **Employees need the of the following info:**
 - Employee last 4 of SSN
 - Employee PIN (MMDD of Birthday)
 - MMDD of Birthday (Same as above)
 - Client Name & Service Code
- **Client PIN is needed for Historical time entry**
 - Client PIN is on Employer GTG Letter
- **Employees should log into the Web Portal to review**



Employee Sign-In

This is the sign-in process to begin using Telephone EVV :

1. Employee calls [\(855\) 807-9595](tel:855-807-9595) to start their shift
2. Enter last 4 of Employee SSN
3. Enter Employee PIN
4. Enter Employee Month/Day of Birth

Real-Time Entry: Clock In

Use these steps to clock in at the beginning of shift:

1. Press #1 for Hourly
2. Confirm Client Name with prompt given
3. Press #1 for Real-Time entry
4. Select Service Code with the prompt given
5. Press #1 to confirm and save punch
6. Recording will read back punch details and disconnect

Congratulations! You are now on the clock.

Real-Time Entry: Clock Out

Use these steps to clock out at the end of the shift:

1. Follow instructions for [Employee Sign-In](#)
2. Recording will announce that there is an open punch
3. Confirm if you want to Close punch
4. Punch will be closed – Employee is Clocked Out
 - Press #2 to disconnect or Press #1 to open new punch

Historical Entries (1/3)

Historical Entries are used for a missed punch or punch correction.

Client or Employer must be present at the end of this process.

1. Follow instructions for [Employee Sign-In](#)
2. Press #1 for Hourly
3. Confirm Client Name with prompt given
4. Select #2 for Historical Punch
5. Select Service Code with the prompts given

Historical Entries (2/3)

Enter Date & Time in proper format

1. Enter Date of Service in MMDDYYYY format
 - Ex: August 1, 2023 = 08012023
2. Enter Clock-In time in HH:MM
3. Select AM (#1) or PM (#2)
4. Enter Clock-Out time in HH:MM
5. Select AM (#1) or PM (#2)
6. Recording will read back Punch Details - Press #1 to Confirm

Historical Entries (3/3)

Client or Employer must be present for this step

1. Initiate Client Validation > Hand the phone to Client/Employer
 - Client/Employer will Press #1 when ready
2. Client/Employer will review punch details
 - Press #1 to Accept or #2 to Reject
3. Client/Employer will validate with Client PIN
 - Punch will be created with EVV
4. Phone will Disconnect and shift will be entered

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
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

acumen.dcisoftware.com

Sign In

Username

Password

Remember me

[Forgot your password?](#)

Sign In

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. On the left is a navigation menu with tabs: DASHBOARD, ENTRIES (marked with a yellow circle '1'), ACCOUNTS, and PROFILE CERTIFICATION. The main content area shows the user 'JAMES WORTHY' for the period '10/01/2023 To 10/07/2023'. Below this is an 'Overtime Gauge' (marked with a yellow circle '2') with a legend: green for '0 To 30', yellow for '30 To 40', and red for '40+'. The gauge shows 'No entry in current week'. To the right is a 'Total Hours' summary (marked with a yellow circle '3') for the same period, listing: Approved: 0.00, Pending Hours: 0.15, Unverified Hours: 0.00 (highlighted in red), and Total Hours: 0.15. A blue 'Add Entry' button is located in the top right corner.

Add New Entry

Add New Entry (Computer/Laptop)

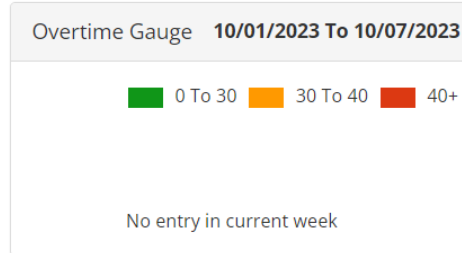
Home / Dashboard



Once logged in

1. Select Add New Entry

JAMES WORTHY ← 10/01/2023 To 10/07/2023 →



Total Hours	10/01/2023 To 10/07/2023
Approved:	0.00
Pending Hours:	0.15
Unverified Hours:	0.00
Total Hours:	0.15

Complete New Entry

1. Enter Client Name & Select
2. Select Service Code
3. Select Service Date
4. Enter Check In and Check Out times
5. Select Portal Signoff
6. Select EVV Location if necessary

Add New Entry

Entry Type:

Employee Name:

Account Type:

Client:

Service Code:

Service Date:

Remaining Balance:

Check In: Check Out:

EVV Method:

Clock In EVV Location:

Clock Out EVV Location:

1

2

3

4

5

6

Complete New Entry (Cont.)

7. Select Reason Code from drop-down list
8. Add Reason Code Note, if required.
 - An * will appear if a note is required
9. Notes are optional
10. Attachments are optional
11. Select Save
12. Select Yes to Submit

The screenshot shows a web form for adding a new punch entry. The form includes the following fields and elements:

- Add Reason Codes:** A dropdown menu with the selected option "Forgot mobile device - 4568".
- Add Reason Code Note:** A text input field containing "Lost my phone".
- Diagnosis Code:** A text input field containing "Diagnostic Code".
- Notes:** A text input field containing "Add Notes for Punch".
- Attachment:** A link labeled "Add Attachment".
- Buttons:** "Cancel" and "Save" buttons.

Numbered callouts (7-12) are placed on the right side of the form to indicate the steps described in the list:

- 7: Points to the "Add Reason Codes" dropdown.
- 8: Points to the "Add Reason Code Note" text field.
- 9: Points to the "Notes" text field.
- 10: Points to the "Add Attachment" link.
- 11: Points to the "Save" button.
- 12: Points to the "Yes" button in the alert dialog.

An alert dialog box is displayed in the foreground, titled "Alert", with the following text: "Are you sure you want to add a new punch for 04:00 hour(s) for PATRICK - TX5678 for Jan 01, 2021?". The dialog has "No" and "Yes" buttons.

Review Entries

From Employee Dashboard

1. Select Entries Tab
 - Select Entry to view details
2. Review Entries
3. Review Punch Details

The screenshot shows the Acumen Employee Dashboard. The 'ENTRIES' tab is selected and highlighted with a yellow circle containing the number 1. Below the navigation menu, there is a breadcrumb trail: Home / Dashboard, Home / Entries / 4695, and Home / Entries / 4695. The main content area displays 'JAMES WORTHY' with a left arrow and the date range '10/01/2023 To 10/07/2023'. Below this is an 'Overtime Gauge' for the same date range, with a legend: 0 To 30 (green), 30 To 40 (orange), and 40+ (red). A table of punch entries is shown below the gauge, with the first entry (Id: 4695) highlighted and circled with a yellow circle containing the number 2. The table has columns for Id, Service Date, Start Time, End Time, Client Name, and Serv. The entry 4695 has a Service Date of Oct 01, 2023, Start Time of 09:30 AM, End Time of 01:00 PM, Client Name of MICHAEL JORDAN, and Serv of CLS. To the right of the table is a 'Punch Details' panel, circled with a yellow circle containing the number 3, which displays the following information: Entry Id: 4695, Machine Details: 68.231.143.50, Service Date: Oct 01, 2023, Check In: 09:30 AM, Check Out: 01:00 PM, Hour(s): 0:03:30, Amount: 3.50 Hours, Pay Rate Name: Standard, Pay Rate: 18.00, Status: Pending, Created By: JAMES WORTHY, Created: Oct 04, 2023, and Input Method Type: Web Portal.

Id	Service Date	Start Time	End Time	Client Name	Serv
4695	Oct 01, 2023	09:30 AM	01:00 PM	MICHAEL JORDAN	CLS
4694	Oct 04, 2023	02:39 PM	02:48 PM	MICHAEL JORDAN	CLS

Punch Details



- Entry Id: 4695
- Machine Details: 68.231.143.50
- Service Date: Oct 01, 2023
- Check In: 09:30 AM
- Check Out: 01:00 PM
- Hour(s): 0:03:30
- Amount: 3.50 Hours
- Pay Rate Name: Standard
- Pay Rate: 18.00
- Status: Pending
- Created By: JAMES WORTHY
- Created: Oct 04, 2023
- Input Method Type: Web Portal

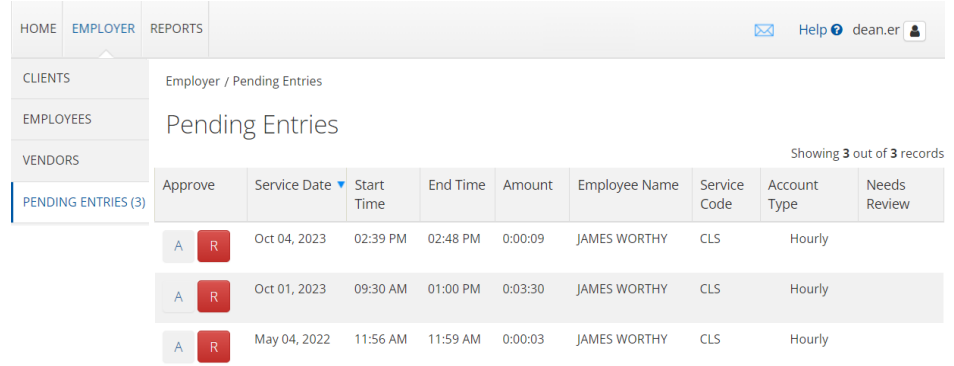
Employer Web Portal







Full Site – Computer or Laptop

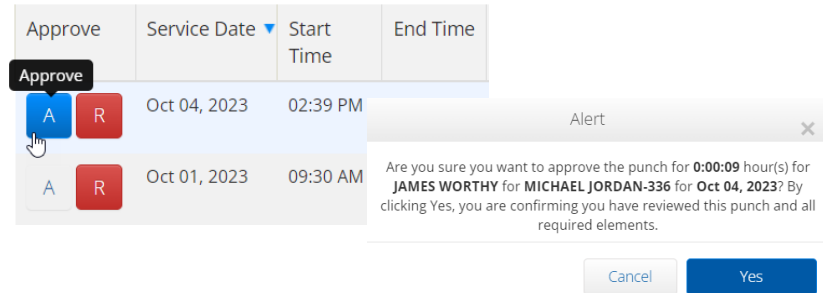
Approve Pending Entries





Landing Page = Pending Entries

- What shows up here?
 - All entries that require approval
- Scroll down to view list of Entries
 - Review and Approve or Reject
 - Click any entry for more detail
- Select   to Approve/Reject
 - Select Yes to submit



Approve	Service Date	Start Time	End Time	Amount	Employee Name	Service Code	Account Type	Needs Review
 	Oct 04, 2023	02:39 PM	02:48 PM	0:00:09	JAMES WORTHY	CLS	Hourly	
 	Oct 01, 2023	09:30 AM	01:00 PM	0:03:30	JAMES WORTHY	CLS	Hourly	
 	May 04, 2022	11:56 AM	11:59 AM	0:00:03	JAMES WORTHY	CLS	Hourly	



Approve	Service Date	Start Time	End Time
 	Oct 04, 2023	02:39 PM	
 	Oct 01, 2023	09:30 AM	

Alert

Are you sure you want to approve the punch for 0:00:09 hour(s) for **JAMES WORTHY** for **MICHAEL JORDAN-336** for **Oct 04, 2023**? By clicking Yes, you are confirming you have reviewed this punch and all required elements.

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

Acumen Powered by DCI

HOME EMPLOYER REPORTS

CLIENTS

EMPLOYEES

VENDORS

PENDING ENTRIES

Employer > Employees

Employees

Employer / Employees / JAMES WORTHY

Employee Details - JAMES WORTHY

Basic Demographics

Address: 310 South Rd
Chapel Hill, NC 27599-4232

Username: james42

Time Zone: EST (UTC-5)

Type: Hourly Non Exempt

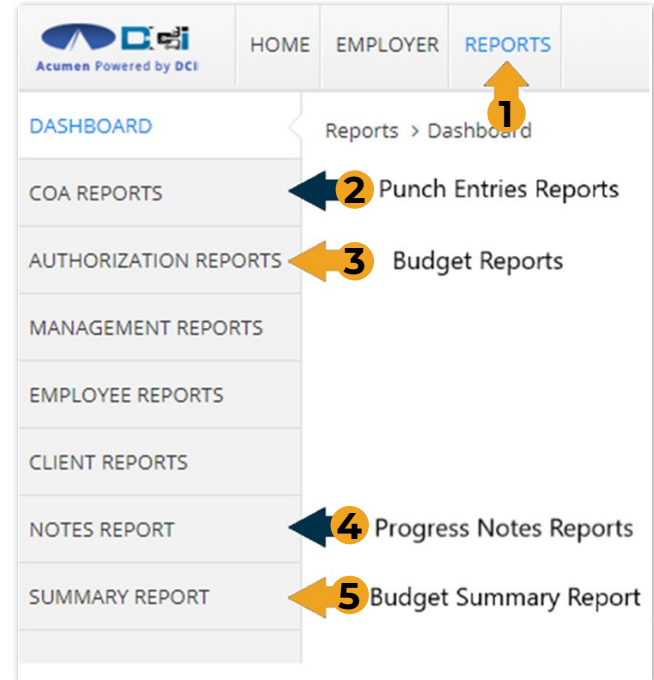
SSN: ###-##-####

Status: Active

Photo:

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. At the top, there is a navigation bar with 'HOME' and 'EMPLOYER' tabs. A search bar for employee names is present, with a 'Search' button and an 'Add Entry' button. Below this, there is a section for 'DEAN SMITH' with a date range selector '10/01/2023 To 10/07/2023'. This section contains an 'Overtime Gauge' and a 'Total Hours' table. The 'Overtime Gauge' shows three categories: 0 To 30 (green), 30 To 40 (orange), and 40+ (red). The 'Total Hours' table lists 'Approved: 0.00', 'Pending Hours: 0.00', 'Unverified Hours: 0.00', and 'Total Hours: 0.00'. Below this is a 'Client Total Hours Per Week' section with a search bar and 'Search' and 'Reset' buttons. At the bottom, there is an 'Authorizations' section with a search bar, a 'Date of Service' dropdown, and 'Search', 'Reset', and 'Display as Time' buttons. Numbered callouts 1 through 6 are placed over the interface to highlight key features: 1 points to the 'HOME' tab, 2 points to the employee search input, 3 points to the date range selector, 4 points to the 'Client Total Hours Per Week' section, 5 points to the 'Authorizations' section, and 6 points to the user profile 'dean.er' in the top right corner.

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

The screenshot displays the DCI user interface. At the top, there are navigation tabs for 'HOME' and 'EMPLOYER'. In the top right corner, there is a user profile section with a mail icon, the text 'Help dean.er', and a user icon. A dropdown menu is open, showing options: 'dean.er', 'Settings' (highlighted with a yellow circle and the number '1'), and 'Logout'. Below this, another dropdown menu is open, showing options: 'CHANGED PASSWORD' (highlighted with a yellow circle and the number '2'), 'CHANGE PIN', 'CHANGE SECURITY QUESTION', 'CHANGE EMAIL', 'VERIFY MOBILE', and 'CHANGE USERNAME'. The main content area shows the 'Change Password' form with three input fields: 'Current Password: *', 'New Password: *', and 'Confirm Password: *'.

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) 811-3099



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



Thank you!

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