DCI Mobile App Guide

Oregon

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 helps keep you compliant with the 21st Century Cures Act

- Our EVV compliant time entry options will keep you compliant with your CLS & PSS requirements

Time Entry Options

- Employees will be entering their time using the DCI Mobile EVV App which meets federal and state requirements. The Mobile App will be used by employees only.

- The Employer profile will be responsible for reviewing time entries in the DCI Portal (acumen.dcisoftware.com) which is used for administrative purposes. Verified EVV Compliant entries can be auto approved and viewed on the portal.

- EVV requires shifts be entered "in real time". Make sure all shifts are in an approved status by the 1 st and 16 th of each month.

- This requirement will begin October 1 st, 2021

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
- 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
- Authorized Reps can also help complete these tasks
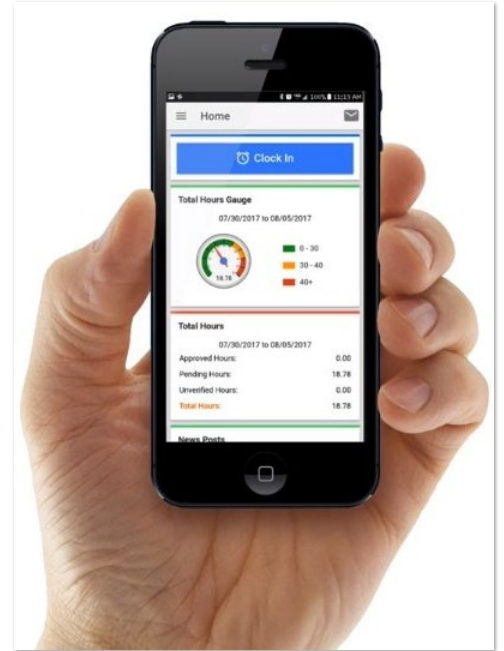
Employee(s)

- 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

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
  - E-Signature from Client

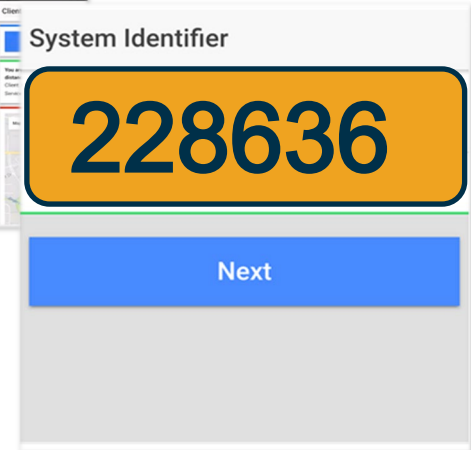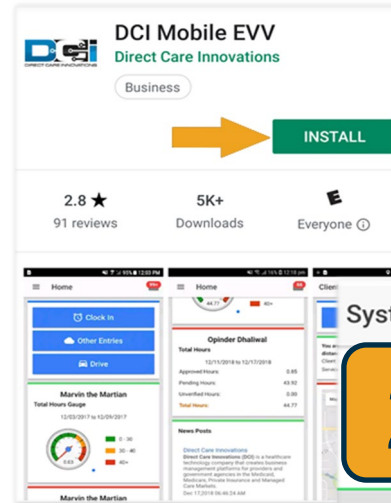# Download DCI Mobile EVV

1. Download the *DCI Mobile EVV* App

 Available on the App Store

 GET IT ON Google Play

2. Set App Permissions

   - Location is Required

   - Media access is optional

3. Enter System Identifier: **228636**
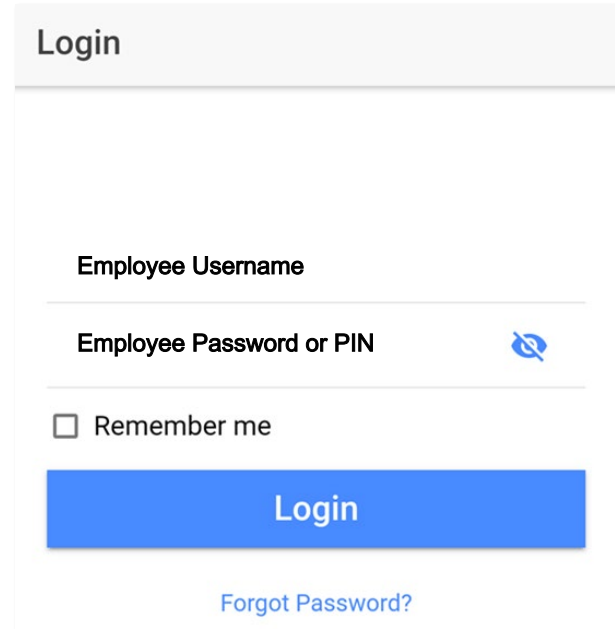
4. Select Next to login

System Identifier

228636

Next

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 personal device

- Utilize Forgot Password link if necessary

  - Requires a valid email on file

- Contact Acumen Agent with 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 a total of the hours worked
     - Not applicable in all states
4. Total Hours Breakdown
   - Shows the current status of hours

1 ≡ Home ✉

2 🕐 Clock In

3 SPONGEBOB
← 08/09/2020 to 08/15/2020 →
Overtime Gauge
No entry in current week

SPONGEBOB
Total Hours
4 08/09/2020 to 08/15/2020
Approved Hours: 0.00
Pending Hours: 0.00
Unverified Hours: 0.00
Total Hours: 0.00

Current Calendar Week (Sun – Sat)

Clock In on Mobile App

1. Tap Blue Clock In Button

2. Select Client Name from   dropdown

3. Select Service Code from dropdown

4. Cost Center is auto -filled

5. Select Continue
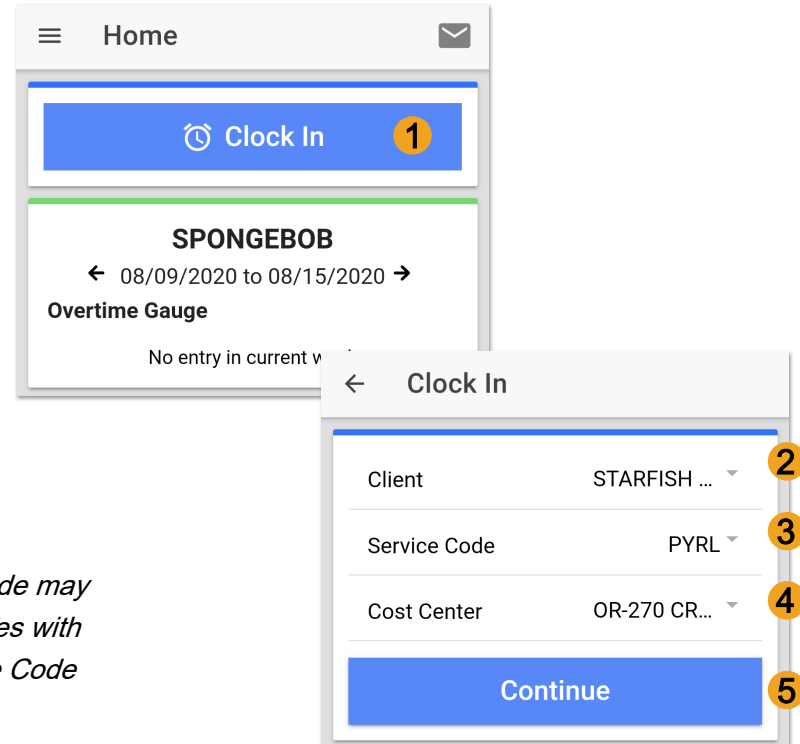
Pro Tip:
Client Name & Service Code may
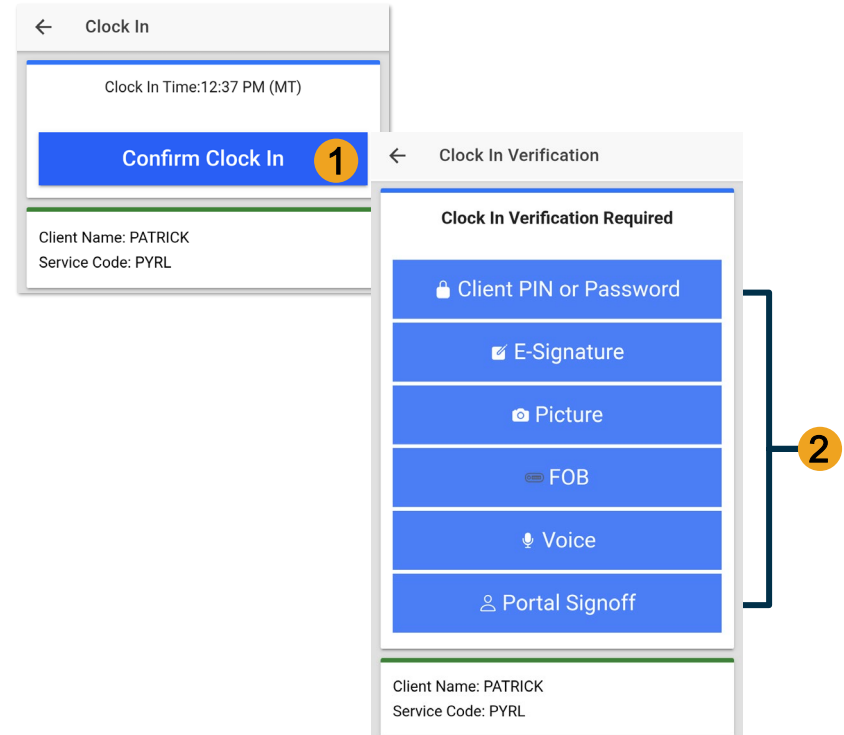*be auto -filled for Employees with*
only one Client or Service Code

Confirm Clock In

1. Select Confirm Clock In

   * *This will Start the time for the shift*

2. Select one EVV Verification

   • PIN/Password entered by Client

   • E-Signature from Client or Employee

   • Client Picture taken by Employee

   • Secure FOB (Not used with Mobile App)

   • Client/Employer Voice Verification

   • Portal Signoff

← Clock In

Clock In Time:12:37 PM (MT)

Confirm Clock In ①

Client Name: PATRICK
Service Code: PYRL

← Clock In Verification

Clock In Verification Required

🔒 Client PIN or Password

✒ E-Signature

📷 Picture

⌨ FOB

🎤 Voice

👤 Portal Signoff

②

Client Name: PATRICK
Service Code: PYRL

EVV: Client PIN or Password

1. Select Client PIN or Password

2. Client will enter the Client PIN or Password

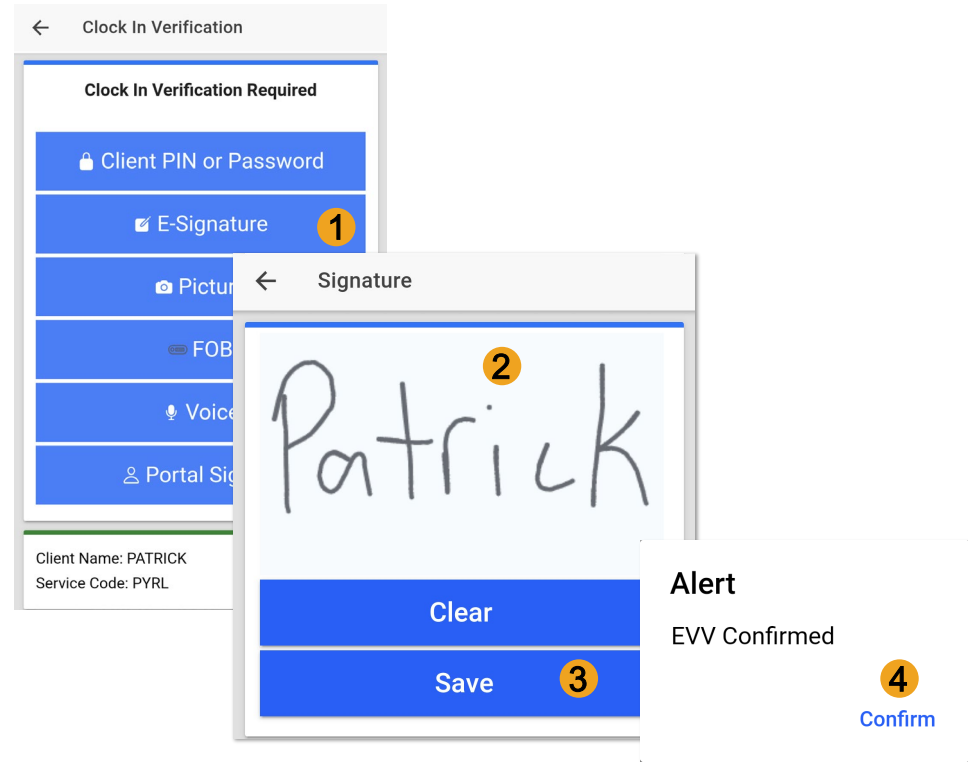3. Select Submit

4. Select Confirm to validate EVV is complete

Setup:
Employer or Client should log into the Client Profile in the Web Portal to set EVV PIN.

EVV: E- Signature

1. Select E-Signature

2. Client or Employee can sign screen with finger or stylus

3. Select Save
   - Select Clear to try again

4. Select Confirm to validate EVV is complete

EVV: Picture

1. Select Picture

2. Employee will take a picture of the Client

3. Select ✓ to Save picture
   - Select ↻ to try again

4. Select Confirm to validate

Setup:
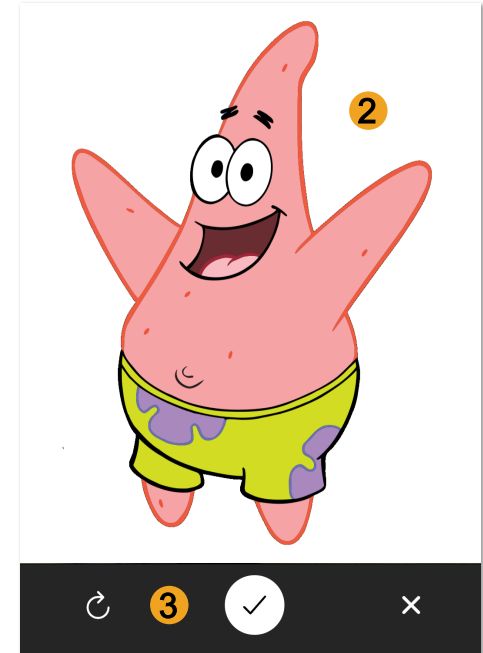*Employer or Client should send picture of client to Customer Service for Facial Recognition setup*

EVV: Voice Recognition

1. Select Voice

2. Select ▶ to record voice

3. Record voice message

4. Select ⏹ to stop recording

5. Select Save to move forward

6. Select Confirm to validate

← Clock In Verification

Clock In Verification Required

🔒 Client PIN or Password

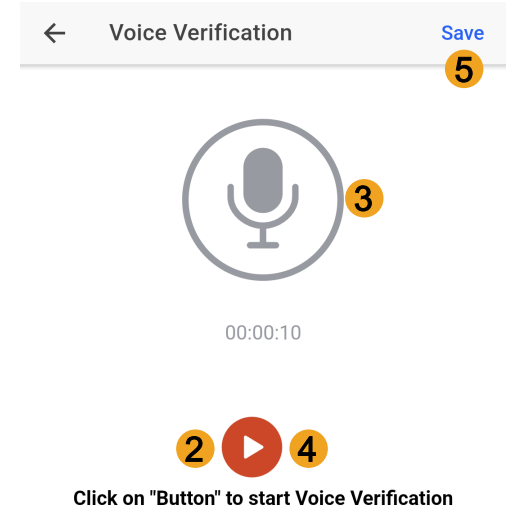☑ E-Signature

📷 Picture

💳 FOB

🎤 Voice **1**

👤 Portal Signoff

Client Name: PATRICK
Servic...

Alert

EVV Confirmed

6

Confirm

← Voice Verification　　Save **5**

🎤 **3**

00:00:10

2 ▶ **4**

Click on "Button" to start Voice Verification
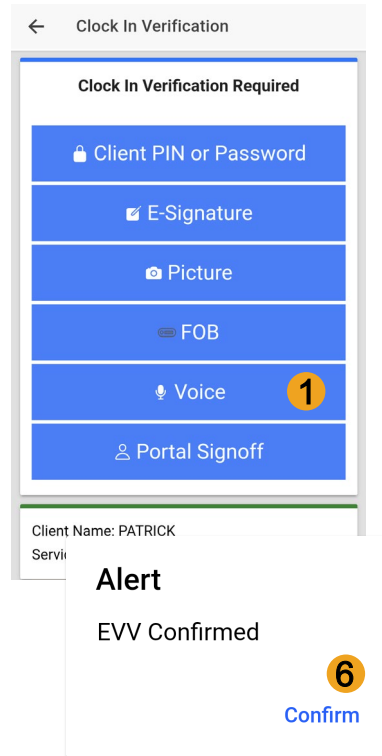
EVV: Portal Signoff

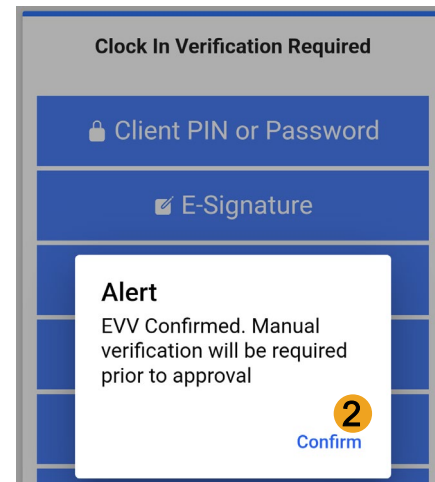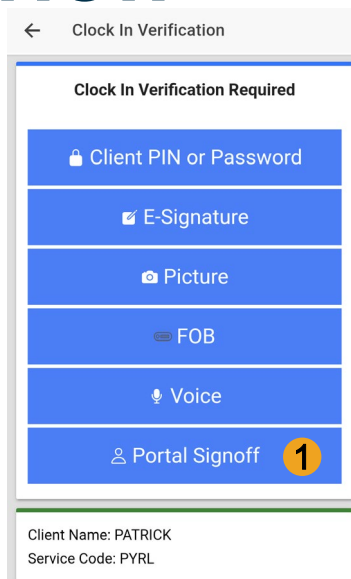1. Select Portal Signoff

2. Select Confirm to validate portal signoff

Reminders :

- Employers must log in to the DCI Portal to manually approve the shift.

- Portal Signoff only available on Clock In

Clock In Verification Complete

After EVV is complete

1. Employee will see "Continue to Clock Out" screen

2. Clock In details will be shown

   1. Client Name & Service Code

   2. Clock In Time & EVV Method

Clock Out ①

⏰ **Continue to Clock Out**

Client Name: PATRICK ②
Service Code: PYRL
Clock In Time: 12:39 PM (MT) verified by Client PIN or Password

Congratulations!
You are now on the clock.

Clock Out on Mobile App

Employee logs into Mobile App

1. Select Continue to Clock Out

2. Select Confirm

Clock Out

🕐 Continue to Clock Out ①

Client Name: PATRICK
Service Code: PYRL
Clock In Time: 12:39 PM (MT) verified by Client PIN or Password

Clock Out

🕐 Continue to Clock Out

Client Name: PATRICK
Service Code: PYRL
Clock In Time: 12:39 PM (MT) verified by Client PIN or Password

Alert

Are you sure you want to clock out current punch?

②

Cancel   Confirm

Electronic Visit Verification (EVV)

EVV is required at Clock In & Out

1. Select one EVV Verification

   - PIN/Password entered by Client

   - E-Signature from Client or Employee

   - Client Picture taken by Employee

   - Secure FOB (Not used with Mobile App)

   - Client/Employer Voice Verification

   - Portal Signoff (Clock In only)

← Clock Out Verification

Clock Out Verification Required

🔒 Client PIN or Password

☑ E-Signature

📷 Picture

▭ FOB

🎤 Voice

👤 Portal Signoff

Client Name: PATRICK
Service Code: PYRL
Clock In Time: 12:46 PM (MT) verified by Client
PIN or Password

Continue to Clock Out

Once EVV is complete

1. Service Notes are Optional

2. Select Confirm Clock Out

3. Review punch details

4. Select Home to return to dashboard

Clock Out

Clock Out Time: 01:19 PM (MT)

Notes are Optional ①

📎 Add Attachment

Confirm Clock Out ②

Client Name: PATRICK
Service Code: PYRL
Clock In Time: 12:39 PM (MT) verified by Client PIN or Password

Punch Information

Client Name: PATRICK ③
Service Code: PYRL
Clock In Time: 12:39 PM (MT) verified by Client PIN or Password
Clock Out Time: 01:19 PM (MT) verified by Signature

🏠 **Home** ④

Review Employee Entries

1. Select Menu on Top Left of Screen

2. Select Entries to view a complete list of submitted time entries

3. Ensure all time entered is accurate

   • Approved entries will be paid

   • Pending is waiting for Approval

   • Unvalidated requires no action
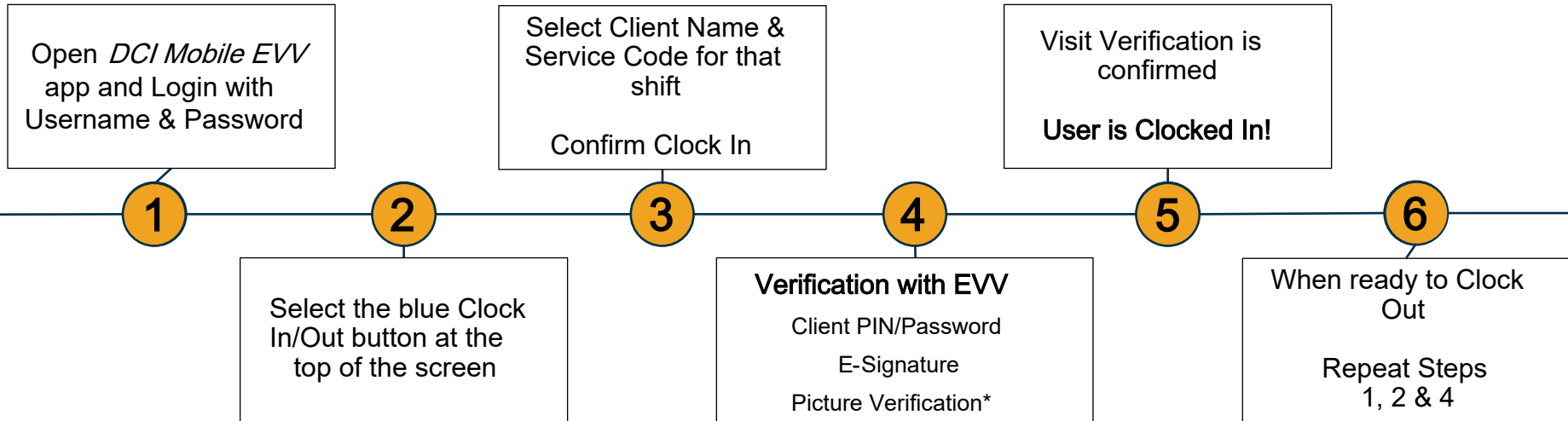
   • Rejected entries will not be paid
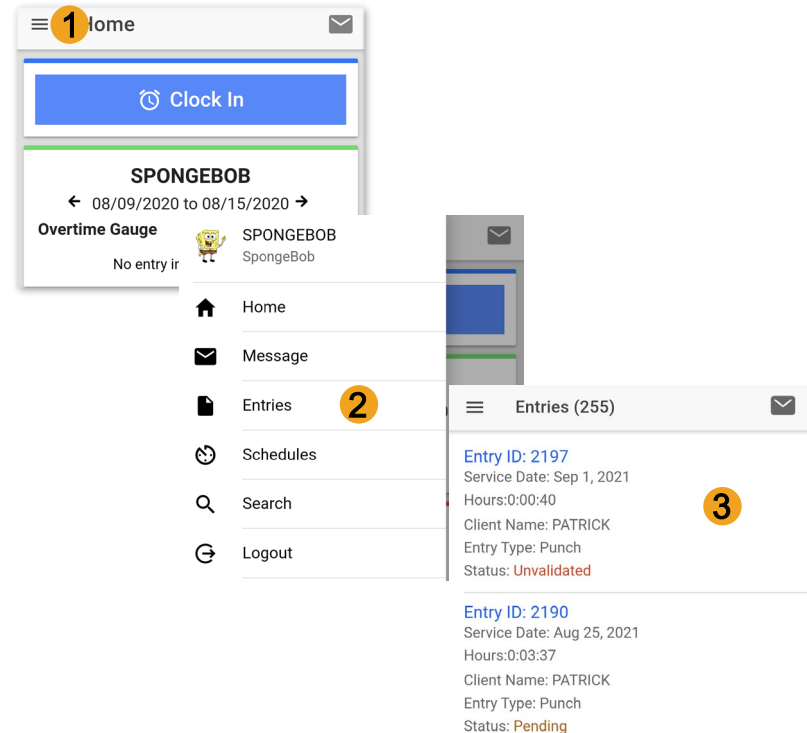
Facial Recognition Setup

- Picture is sent by the Client or Designated Rep

- Client picture is similar to a drivers license photo

    - A headshot on a plain background

- Email Picture to   Customer Service

    - "Facial Recognition Setup" in Subject Line

- Enter Client Name & State in the body of email

- Acumen will notify you once complete

Mobile App Process Timeline

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

1

Open *DCI Mobile EVV* app and Login with Username & Password

2

Select the blue Clock In/Out button at the top of the screen

3

Select Client Name & Service Code for that shift

Confirm Clock In

4

Verification with EVV

Client PIN/Password

E-Signature

Picture Verification*

5

Visit Verification is confirmed

User is Clocked In!

6

When ready to Clock Out

Repeat Steps 1, 2 & 4

*Requires Additional Setup

DCI Tips & Tricks

1. All profiles must have a unique valid email address in DCI

2. Employees should use PIN instead of Password for an easier login experience

3. Users are locked out   after 3 bad attempts

   • Contact Acumen Customer Service for help

4. Only Employees will use the Mobile app

   • Employers use the DCI Web Portal

5. Employees will always enter their own time

   • Employers will Approve or Reject

How to Change PIN

PIN must be changed in DCI Portal

1. Login and select username in top right corner

   • Then select Settings

2. Select Change PIN/Add New PIN

   • Enter Password if necessary

3. Enter new PIN twice

4. Select Change PIN

Pro Tip:
Initial PIN should be last 4 of Client SSN

Where to go for help?

- **Utilize our** <u>DCI Training Materials</u> **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) 211-3738

    <u>acumenfiscalagent.com</u>

Thank you!

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