DCI Time Entry Guide

South Dakota
Family Support 360

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.

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

DCI Mobile App

Most Common Time-Entry Method

Acumen Fiscal Agent
Innovation • Opportunity • Freedom

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**

    - Real-Time Verification required for PCS

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

Download DCI Mobile EVV

1. Download the *DCI Mobile EVV* App

    Available on the App Store   GET IT ON Google Play
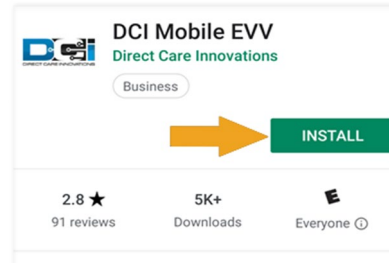
1. Set App Permissions

   - Location is Required

   - Media access is not necessary
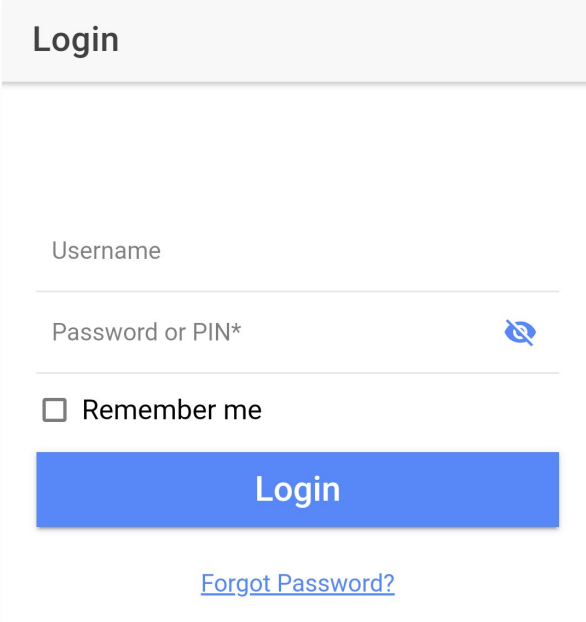
3. Enter System Identifier: **228636**

4. Select Next to login

System Identifier

228636

Next

Acumen Fiscal Agent
Innovation · Opportunity · Freedom
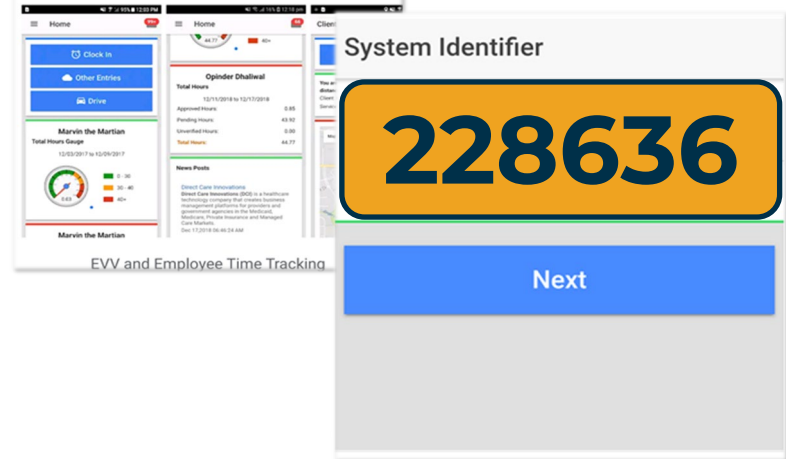
Log into the DCI Mobile App

- 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

Login

Username

Password or PIN*

☐ Remember me

Login

Forgot Password?

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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

Acumen Fiscal Agent
Innovation · Opportunity · Freedom
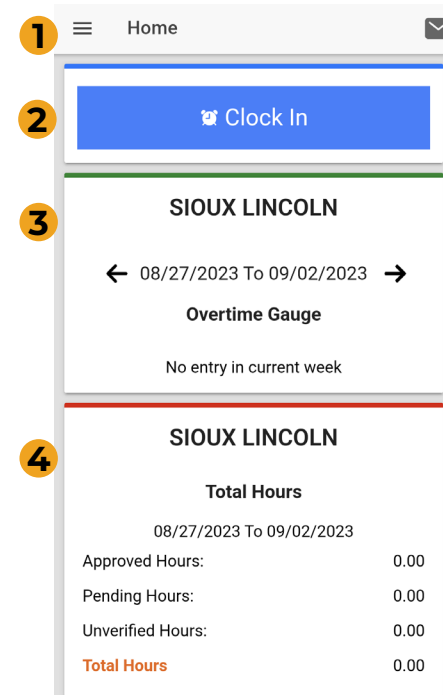
Clock In/Out Process

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 auto-filled

5. Select Continue

⏰ Clock In ①

SIOUX LINCOLN

← 08/27/2023 To 09/02/2023 →

Overtime Gauge

No entry in current week

Client	MATT RU... ▼ ②
Service Code	PCS ▼ ③
Cost Center	SD-010 P... ▼ ④

Continue ⑤

Service Codes	Descriptions
SE	Supported Employment
CC	Companion Care
RSP	Respite Services
PCS	Personal Care Services

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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 Employer

   • Portal Signoff

Note:
Visit Verification only required
for the PCS Service Code

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

Clock In Verification

Clock In Verification Required

🔒 Client PIN or Password

① ✏ E-Signature

👤 Portal Signoff

Client Name: MATT RUSHMORE
Service Code: PCS

Signature

②

Clear

Save ③

Alert

EVV Confirmed

④ Confirm

Proprietary and Confidential: Do Not Distribute

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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.

- The Portal Signoff option is only available during Clock In.
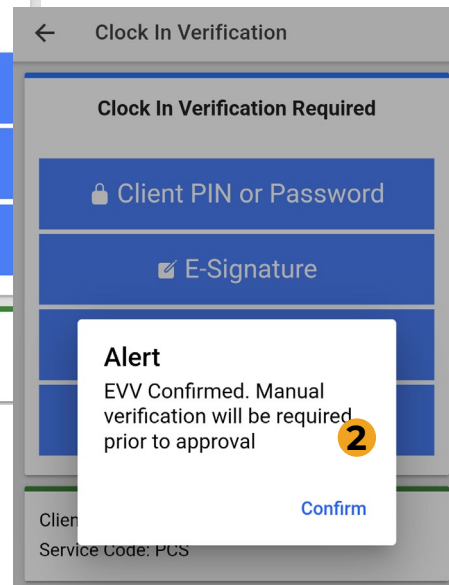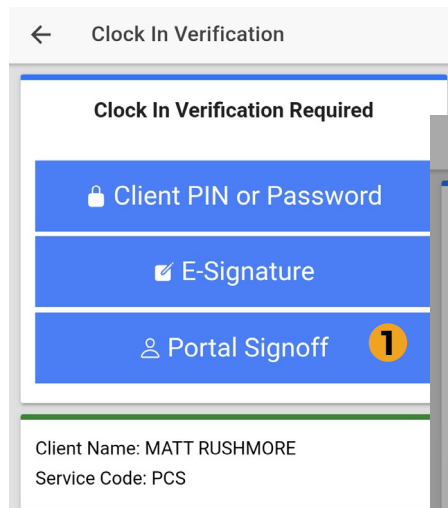
Visit Verification Complete

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
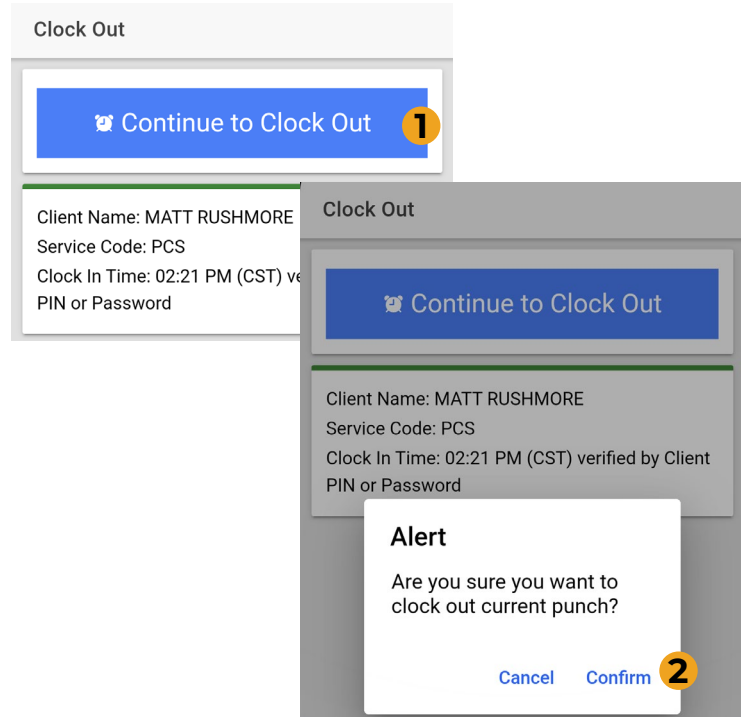
   2. Clock In Time & EVV Method

Clock Out   **1**

⏰ Continue to Clock Out

Client Name: MATT RUSHMORE   **2**
Service Code: PCS
Clock In Time: 02:21 PM (CST) verified by Client PIN or Password

Congratulations!
You are now on the clock.

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

Clock Out on Mobile App

Employee logs into Mobile App

1. Select Continue to Clock Out

2. Alert will ask to cofirm

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

   - Portal Signoff Unavailable

     - If not selected on Clock In

← Clock Out Verification

Clock Out Verification Required

🔒 Client PIN or Password

✎ E-Signature

👤 Portal Signoff

Client Name: MATT RUSHMORE
Service Code: PCS
Clock In Time 1: 03:21 PM (CST) verified by Client PIN or Password

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

Confirm Clock Out

1. Notes are Required
   - Discuss details w/ ER

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.

Clock Out

Clock Out Time: 02:22 PM (CST)

Notes are required ①

📎 Add Attachment

② Confirm Clock Out

Client Name: MATT RUSHMORE
Service Code: PCS
Clock In Time: 02:21 PM (CST) verified by PIN or Password

Punch Information

Client Name: MATT RUSHMORE
Service Code: PCS
Clock In Time : 02:21 PM (CST) verified by Client PIN or Password
Clock Out Time : 02:22 PM (CST) verified by Client PIN or Password ③

🏠 Home

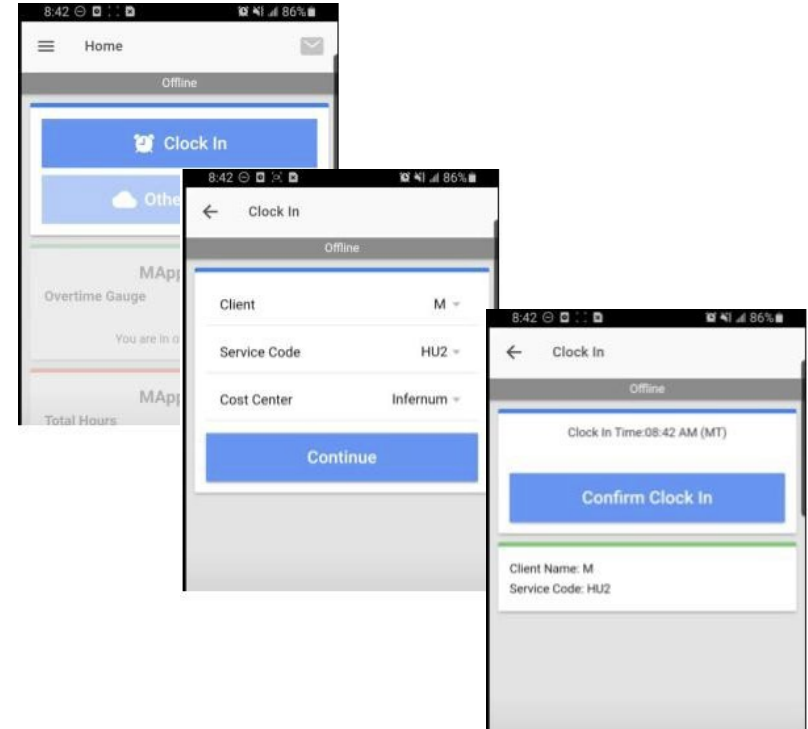Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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

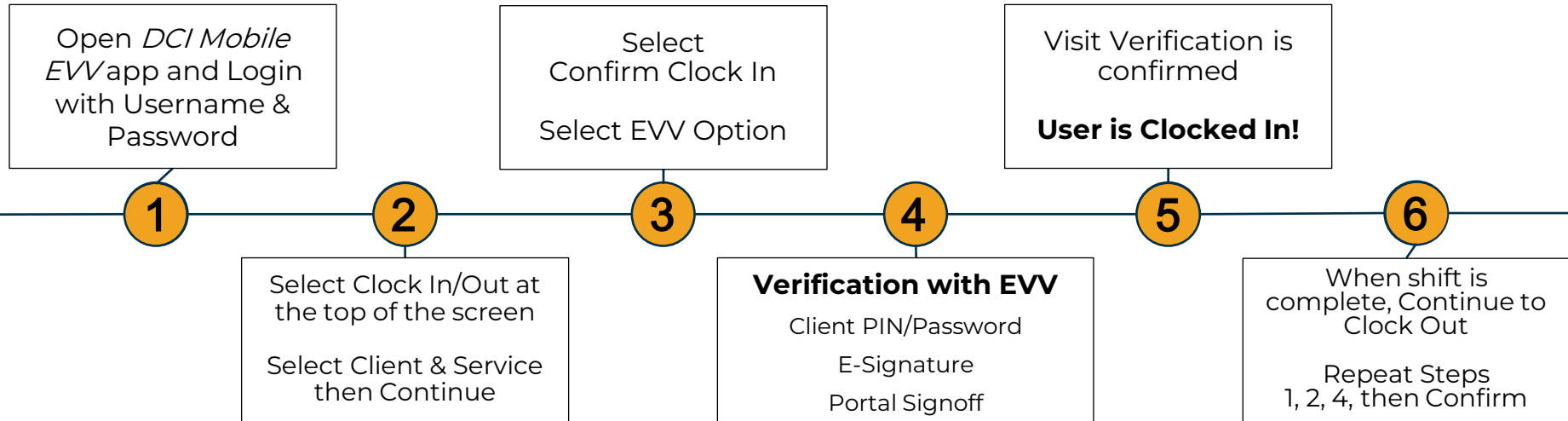   • Employer will approve time as needed
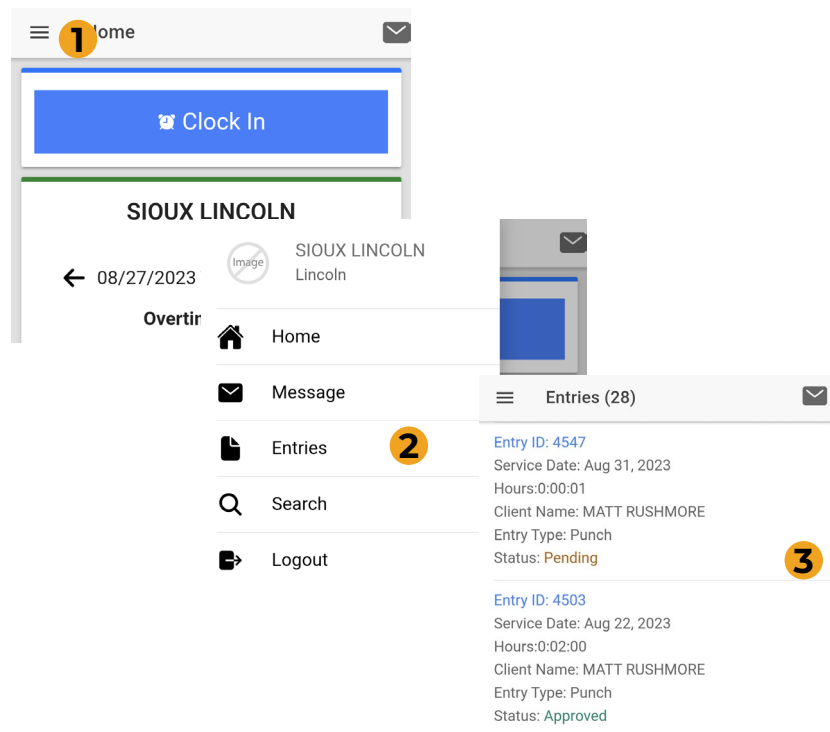
Mobile App Offline

- 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

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

Mobile App Process Timeline

Follow these steps when the Employee is ready to begin their shift.

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

2 — Select Clock In/Out at the top of the screen

Select Client & Service then Continue

3 — Select Confirm Clock In

Select EVV Option

4 — **Verification with EVV**

Client PIN/Password

E-Signature

Portal Signoff

5 — Visit Verification is confirmed

User is Clocked In!

6 — When shift is complete, Continue to Clock Out

Repeat Steps 1, 2, 4, then Confirm

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

Proprietary and Confidential: Do Not Distribute

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 must log into Web Portal to enter notes**

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

Employee Sign-In

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

1. Employee calls (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

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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

Service Codes	Descriptions
SE	Supported Employment
CC	Companion Care
RSP	Respite Services
PCS	Personal Care Services

Congratulations! You are now on the clock.

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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 <u>Employee Sign-In</u>

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

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

Historical Entries

Client or Employer <u>must</u> 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

Proprietary and Confidential: Do Not Distribute

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

DCI Web Portal

Acumen Fiscal Agent
Innovation • Opportunity • Freedom

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

Proprietary and Confidential: Do Not Distribute

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

Employee Web Portal

Full Site – Computer or Laptop

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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*

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

Add New Entry

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

Add New Entry (Computer/Laptop)

Once logged in

1. Select Add New Entry

1 ➡️ Add Entry

SIOUX LINCOLN ⬅️ 08/20/2023 To 08/26/2023 ➡️

Overtime Gauge	08/20/2023 To 08/26/2023

■ 0 To 30   ■ 30 To 40   ■ 40+

SD-010 PIERRE HUGHES

2.14
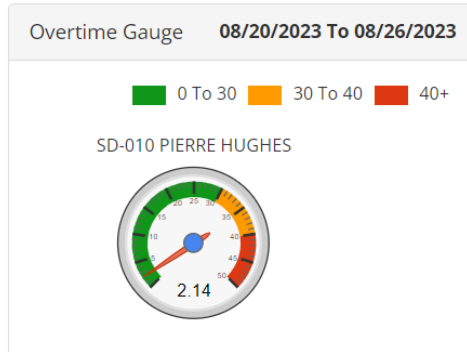
Total Hours	08/20/2023 To 08/26/2023
Approved:	2.14
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	2.14

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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

Proprietary and Confidential: Do Not Distribute

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

Add Reason Codes: * | × Forgot mobile device - 4568 | × **7**

Add Reason Code Note: Lost my phone **8**
*

Diagnosis Code: Diagnostic Code

Notes: Add Notes for Punch **9**

Attachment: Add Attachment **10**

11

Cancel | Save

Alert ×

Are you sure you want to add a new punch for **04:00 hour(s)** for **PATRICK - TX5678** for **Jan 01, 2021**?

No | Yes **12**

Review Entries

From Employee Dashboard

1. Select Entries Tab

2. Review Entries

    •   Select Entry to view details

3. Review Punch Details

Employer Web Portal

Full Site – Computer or Laptop

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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
A R	3596	May 08, 2019	05:00 AM	11:00 AM
⬆ Click Here to Approve Punch				
A R	1448	Feb 08, 2019	08:35 AM	04:45 PM
⬆ Click Here to Reject Punch				

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

How to Use "Employees" Page

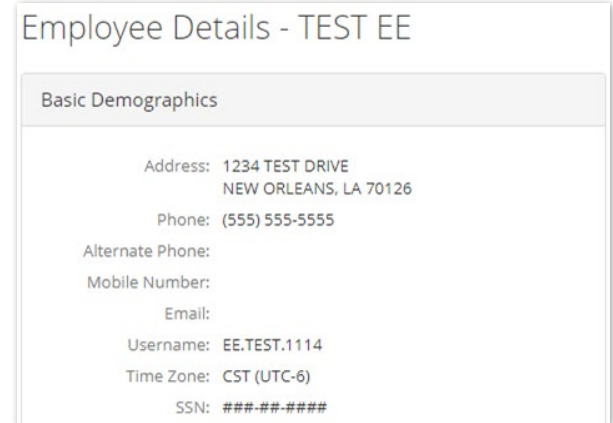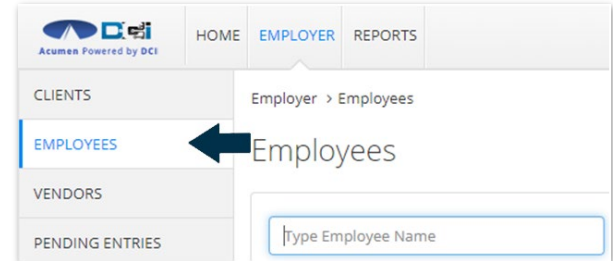1. **Select the "Employees" Tab from the Home Page**

   - 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.

45
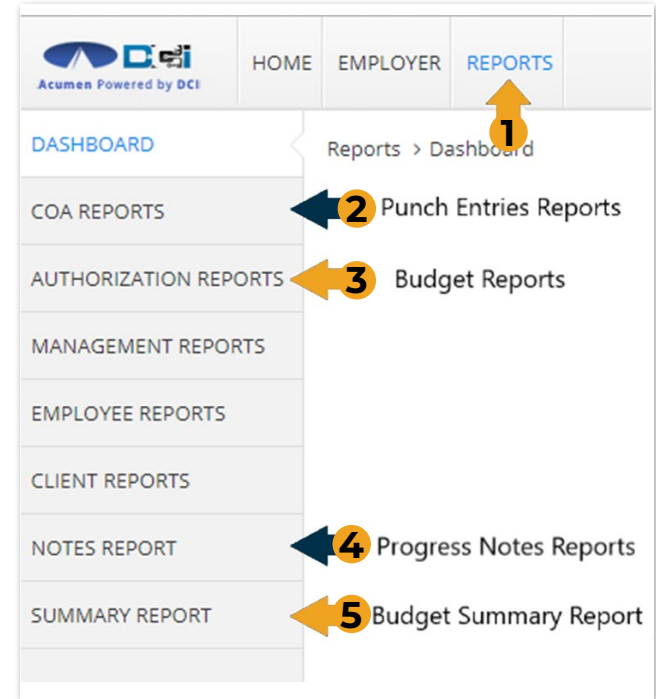
Home Page Basics

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

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

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
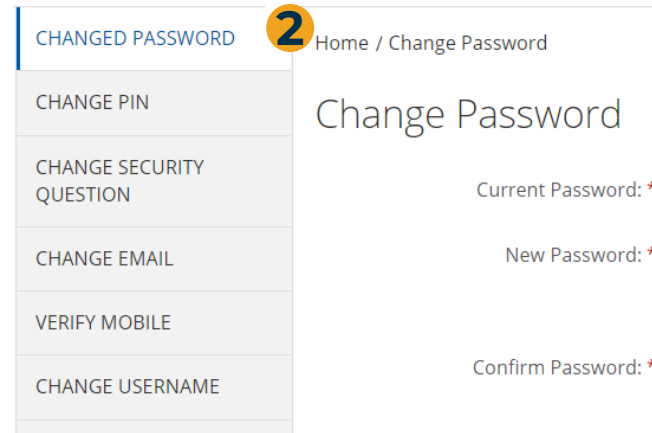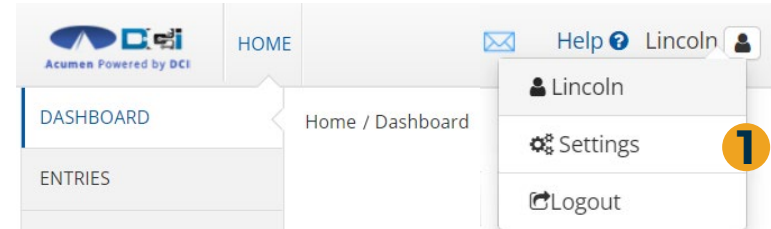
Where to go for help?

- **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: (866) 499-0624

    💻 acumenfiscalagent.com

Acumen Fiscal Agent
Innovation · Opportunity · Freedom

Thank you!

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

Acumen Fiscal Agent
Innovation • Opportunity • Freedom