



# Historical Entries with Reason Codes

# Reason Code Basics

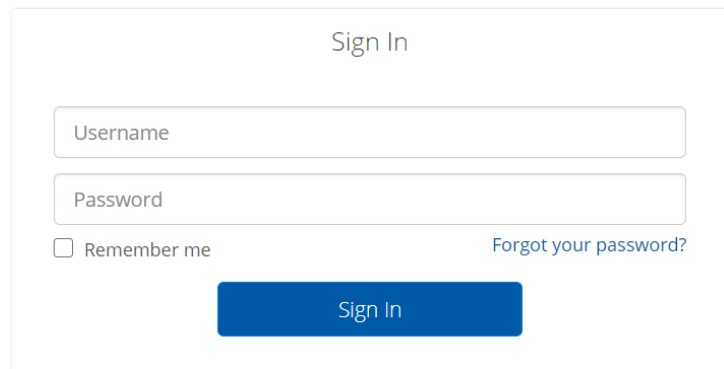
- Reason Codes are required for some programs and services
- If you see an option to select a reason, it's required for you.
- This is the reason you are entering your time in the DCI Web Portal instead of an EVV Compliant method
- The DCI Web Portal should only be used to enter missed punches or for Live-In Exempt Employees
  - Discuss with your Agent for more info on Live-In Exemptions



# The DCI Web Portal

1. Open an Internet Browser on a computer or mobile device
2. Navigate to the DCI Web Portal
3. Enter Employee Username/Password
4. Use Forgot Password link if needed
5. Contact Acumen Agent for help

[acumen.dcisoftware.com](https://acumen.dcisoftware.com)



Sign In

Username

Password

Remember me [Forgot your password?](#)

Sign In

The screenshot shows a sign-in form with a title 'Sign In'. It contains two input fields: 'Username' and 'Password'. Below the password field, there is a checkbox labeled 'Remember me' and a link 'Forgot your password?'. At the bottom of the form is a blue button labeled 'Sign In'.

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# DCI Web Portal

On a Laptop or Desktop Computer

# Add New Entry (Computer/Laptop)

## Once logged in

1. Select Add New Entry

The screenshot shows a user interface for 'SPONGEBOB' with the following elements:

- Top right: Help icon, 'spongebob' user profile.
- Breadcrumbs: Home > Dashboard.
- Navigation: A yellow arrow with the number '1' points to a blue 'Add Entry' button.
- Dashboard Header: SPONGEBOB ← 11/01/2020 to 11/07/2020 →
- Overtime Gauge: 11/01/2020 to 11/07/2020. Legend: 0 to 30 (green), 30 to 40 (yellow), 40+ (red). Text: 'No entry in current week'.
- Total Hours Summary: 11/01/2020 to 11/07/2020.

Approved By:	7.52
Pending Hours:	0.00
<b>Unverified Hours:</b>	<b>0.00</b>
<b>Total Hours:</b>	<b>7.52</b>
- Expiring Certifications Table:

Certification Name	Certification Expiration Date	Link to Certification Course



# 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 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 area containing "Add Notes for Punch".
- Attachment:** A section with a link "Add Attachment".
- Buttons:** "Cancel" and "Save" buttons.

An alert dialog is shown at the bottom, asking for confirmation to add a new punch. The alert text is: "Alert. 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.



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# Mobile Web Portal

On a Smartphone or Tablet

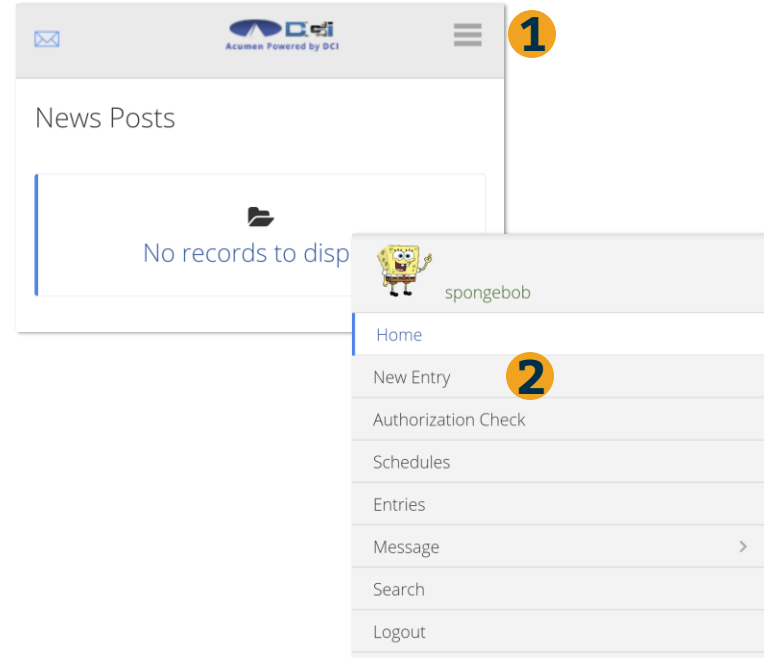


# Add New Entry (Mobile Device)

Once logged in

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 Portal Signoff
7. Select EVV Location if necessary


The screenshot shows a web form titled "Add New Entry" with the following fields and callouts:

- 1:** A bracket groups the first two dropdown menus: "Punch" (set to "Punch") and "Hourly" (set to "Hourly").
- 2:** A text input field containing "PATRICK - TX5678" with a clear (X) button.
- 3:** A dropdown menu set to "PYRL".
- 4:** A date input field set to "01/01/2021" with a calendar icon.
- 5:** Two time input fields: "6:00 AM" and "10:00 AM", each with a clock icon.
- 6:** A dropdown menu set to "Portal Signoff".
- 7:** A bracket groups the last two dropdown menus: "Select Clock In EVV Location" and "Select Clock Out EW Location".



# Add New Entry Wizard (Cont.)

8. Select Reason Code from the drop-down list

9. Select the  to move to the note field

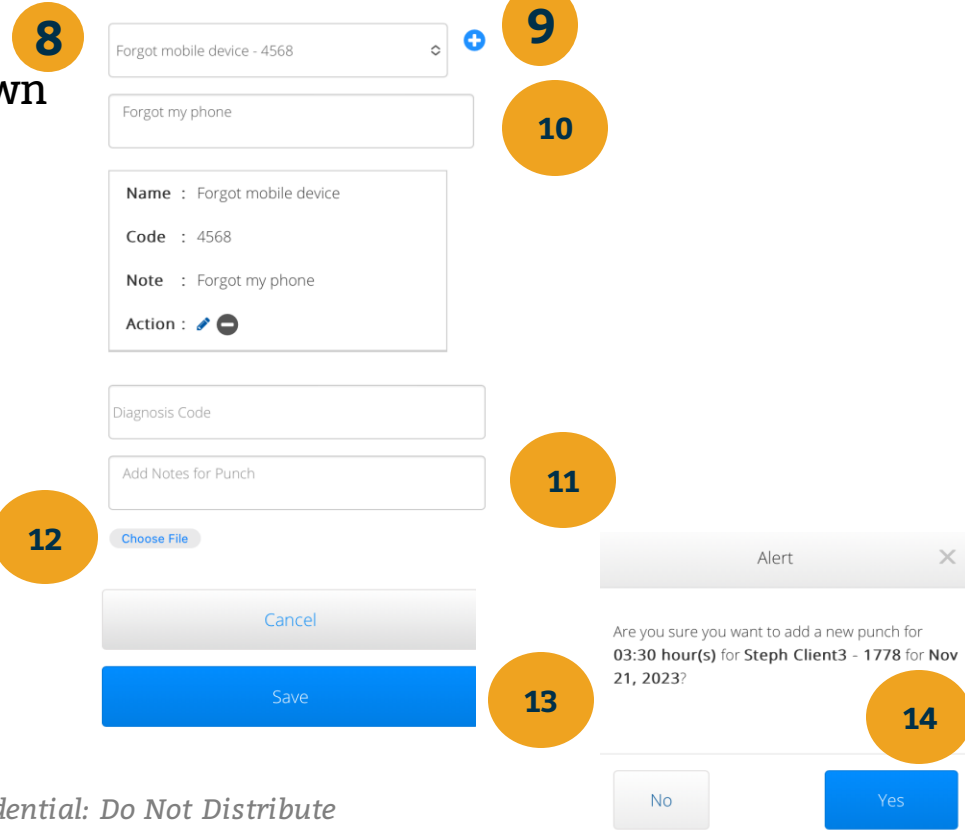
10. Add Reason Code Note, if required



11. Notes are optional

12. Attachments are optional

13. Select Save

14. Select Yes to Submit



The screenshot shows a multi-step wizard interface. Step 8 is a dropdown menu with 'Forgot mobile device - 4568' selected. Step 9 is a plus icon next to the dropdown. Step 10 is a text input field containing 'Forgot my phone'. Step 11 is a summary box showing 'Name : Forgot mobile device', 'Code : 4568', 'Note : Forgot my phone', and 'Action :  '. Step 12 is a 'Choose File' button. Step 13 is a 'Save' button. Step 14 is a confirmation dialog box with the text 'Alert' and 'Are you sure you want to add a new punch for 03:30 hour(s) for Steph Client3 - 1778 for Nov 21, 2023?' and 'Yes'/'No' buttons.



# 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) 211-3738



[acumenfiscalagent.com](http://acumenfiscalagent.com)



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# Thank you!

Visit the **Acumen Help Center** to learn more at:  
[acumenfiscalagent.zendesk.com](https://acumenfiscalagent.zendesk.com)