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 Employers to manage the process

- Faster and easier time entry & payroll processing

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

- As long as your employees use DCI to properly enter and manage time using EVV.

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 person who manages the process
- Some Clients may be their own Employer
- Logs into DCI to approve time and manage budgets
- 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

Multiple Ways to Enter Time

Mobile App

- Preferred Method
- Real Time Entry
- Auto-Approved Time*
- EVV Compliant

Phone EVV

- Alternate Method
- Real Time & Historical
- Auto-Approved Time*
- EVV Compliant

*- Not available in all states

Web Portal

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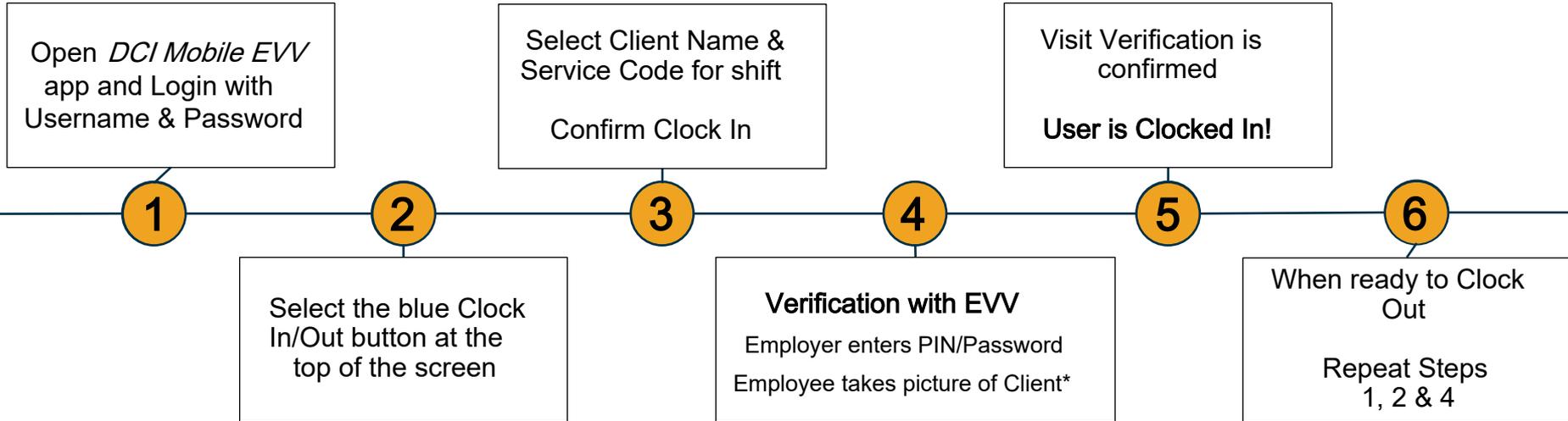- Non-EVV Compliant

DCI Mobile App

Mobile App Basics

- The DCI Mobile App is meant for Real -Time Entry
  - Missed punches are entered in Web Portal

- Employees will Clock In/Out with Mobile App
  - Employers can review time in Web Portal

- 2 Options for Verification with EVV
  - PIN/Password entered by Employer
  - Employee takes picture of Client

- Employers do not need to use the Mobile App
  - All Employer tasks completed the Web Portal

- For more detail view the *Mobile App Guide*

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 shift

Confirm Clock In

4. Verification with EVV

Employer enters PIN/Password

Employee takes picture of Client*

5. Visit Verification is confirmed

User is Clocked In!

6. When ready to Clock Out

Repeat Steps 1, 2 & 4

*Requires Facial Recognition

Facial Recognition Setup

- Picture must be sent by the Client, Employer, Gaurdian or Authorized Rep from their email on file

- Client picture should resemble a drivers license photo

  - A headshot on a plain background (See Example)

- Email Picture to   Acumen Agent or Customer Service

- Enter Client Name & State in the body of the email to prevent confusion with any other clients.

- Acumen will notify Employer once setup is complete

DCI Phone EVV

Phone EVV Basics

- Phone EVV is an alternative option for both Real - Time & Historical time entry

  - Only used by those with limited internet access

- Real-Time Entry is the best Phone EVV option

  - Historical = Entering a full shift after that fact

    - Used only for missed punches and corrections

- Client Phone number must be a Landline or VOIP

  - Landline & VOIP phones meets all EVV Requirements

- For more detail view the *Phone EVV Guide*

Employer Web Portal

Accessing the DCI Web Portal

1. Open up an Internet Browser on a computer or mobile device
   - Google Chrome is preferred

2. Navigate to the DCI Web Portal

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

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				

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)
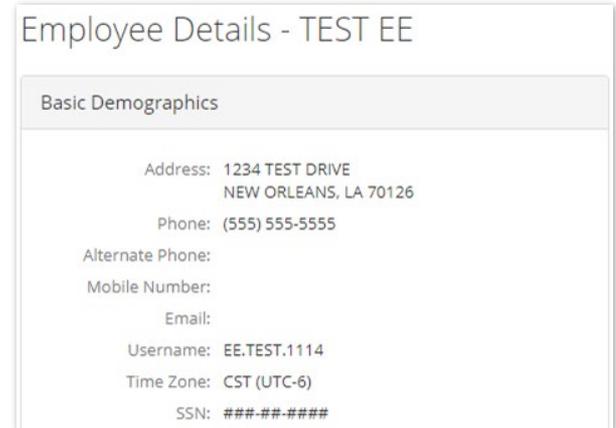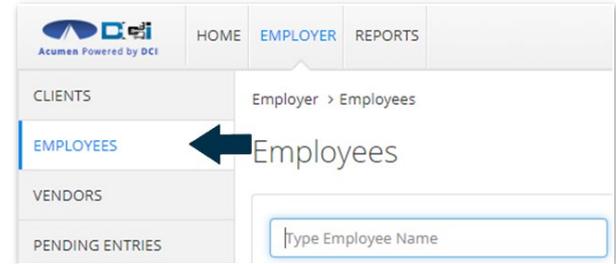
1. Select "Reports" Tab from **Employer Tab**

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.

View **Reports Guide** for more details
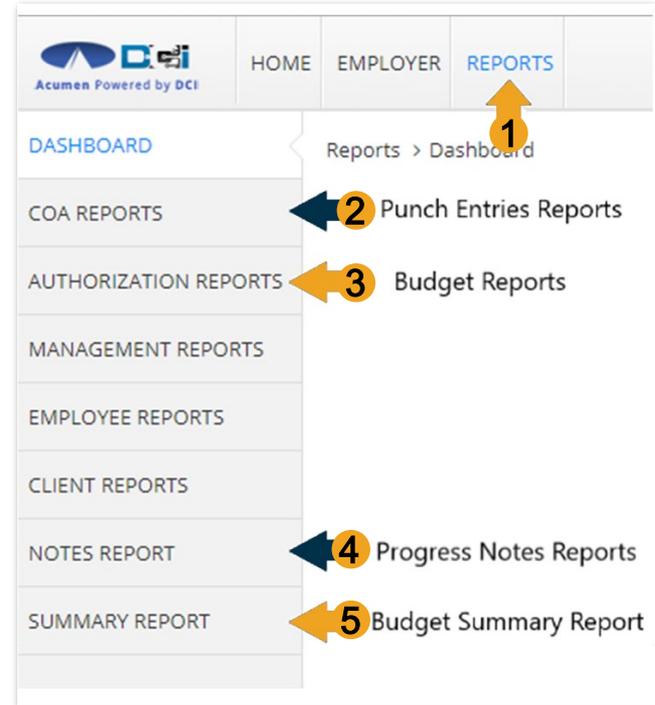
Home Page Basics

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

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: (877) 211-3738

  acumenfiscalagent.com

Thank you!

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