Acumen powered by DCI Software

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.

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 Employers to manage the process
- Faster and easier time entry & payroll processing

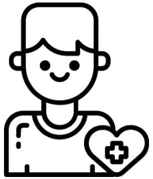
DCI will also helps keep you compliant with the 21st Century Cures Act

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

DIRECT CARE INNOVATIONS

Roles & Responsibilities

Client

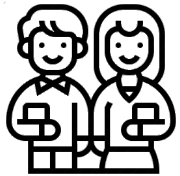


- This is the person who is receiving the care
- Sometimes referred to as participant or individual
- DCI profile is not logged into very often

Employer

- This is the person who manages the process
- Some Clients may be their own Employer
- 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
- Easy Time Approval
- EVV Compliant

Web Portal

- Time Management
- Historical Entries
- Easy Time Approval
- <u>Non-EVV Compliant</u>

DCI Mobile App

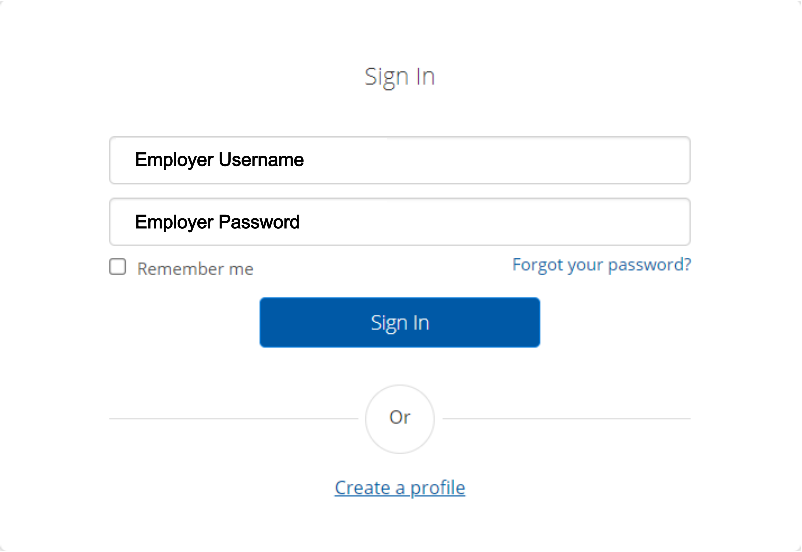
Mobile App Basics

- **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**
  - E-Signature done by Client/Employer
  - Portal Signoff selected by Employee
- **Employers do not need to use the Mobile App**
  - All Employer tasks completed the Web Portal
- **For more detail view the** *UT Training Materials*

Employer Web Portal

Accessing the DCI Web Portal

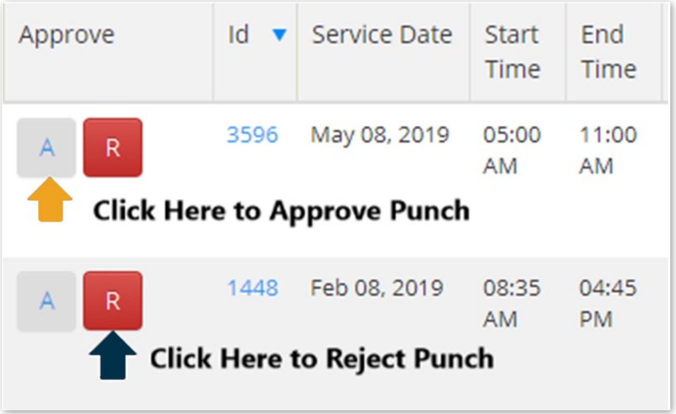
1. Open up an Internet Browser on a computer or mobile device
   - Google Chrome is preferred
2. Navigate to the DCI Web Portal
3. Enter Employer Username and Password
   - Credentials provided by Acumen
4. Utilize Forgot Password link if necessary
5. Contact Acumen Agent with login issues



Approve Pending Entries

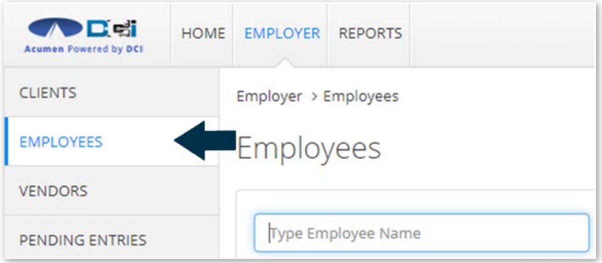
Pending Entries is the landing page

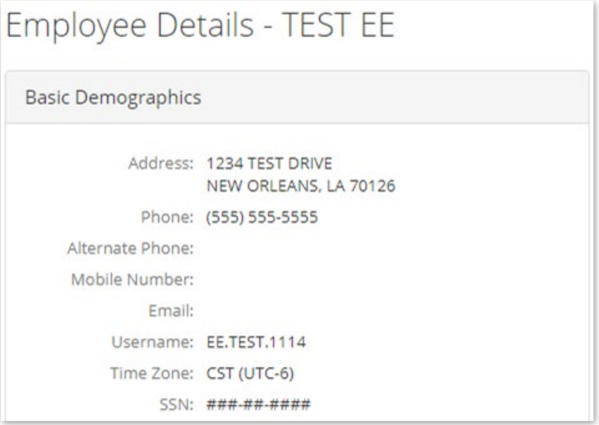
- What shows up here?
  - Any punch that requires approval
- Scroll down to view list of Entries
  - Review each entry and Approve or Reject
  - Click any entry for more detail
- If Rejected, inform Employee to re-enter time correctly via DCI Portal



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

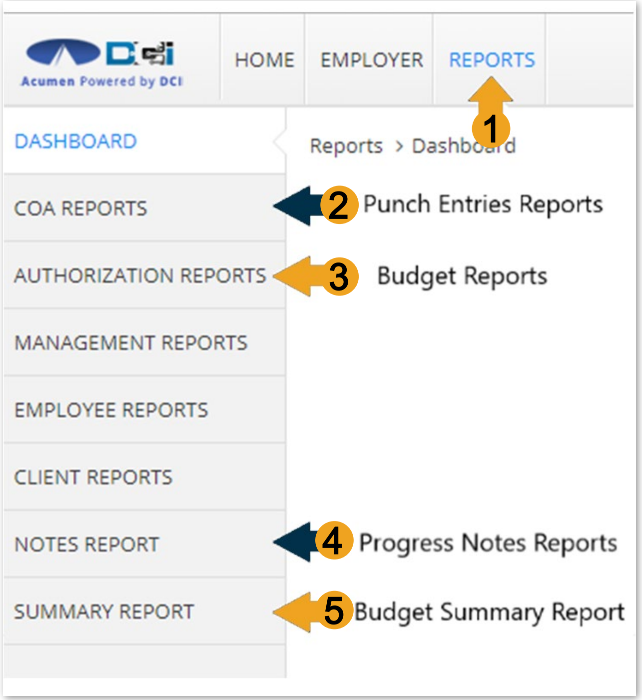




How to Use Reports

(Computer/Laptop)

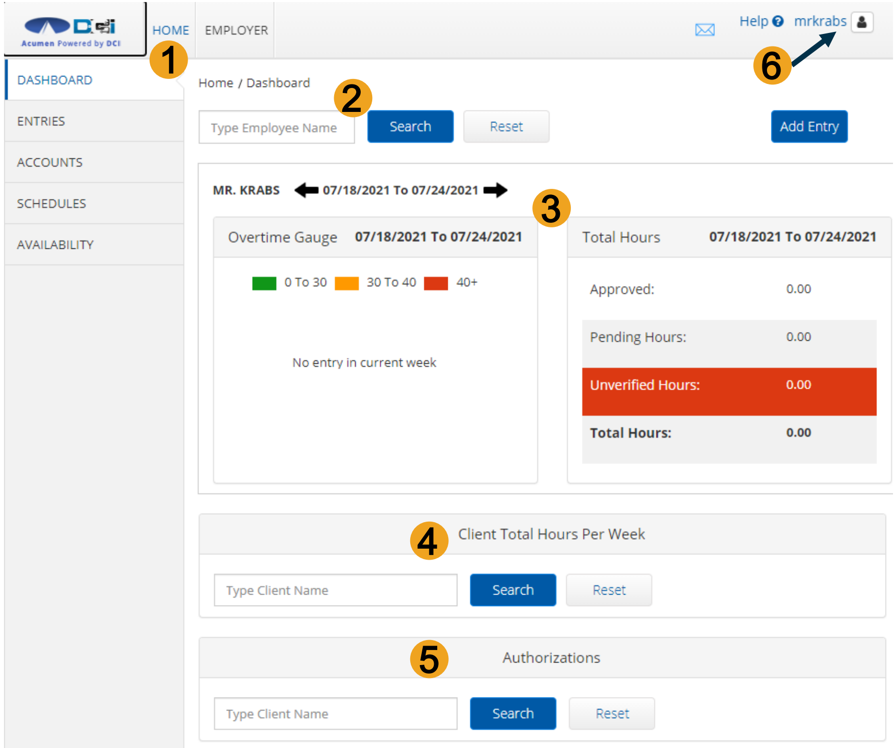
1. Select "Reports" Tab from **Employer Tab**
2. **COA Reports** - This will show you a full list of punches from the selected date range.
3. **Authorization Reports** - Authorization Run Rate Report will show budget usage breakdown.
4. **Note Reports** - Here you can pull any Service Notes entered on 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

DIRECT CARE INNOVATIONS
www.dcisoftware.com