

# **SAIL – Employee Guide**

# **Employee Mobile App**

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# Mobile App Basics

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- The DCI Mobile App is used for real-time entries
- Preferred, EVV-compliant method
- Can be downloaded on a mobile device or tablet
- Use for clocking in & out
- Quick & easy
- View all entries including status & details




# Download DCI Mobile EVV



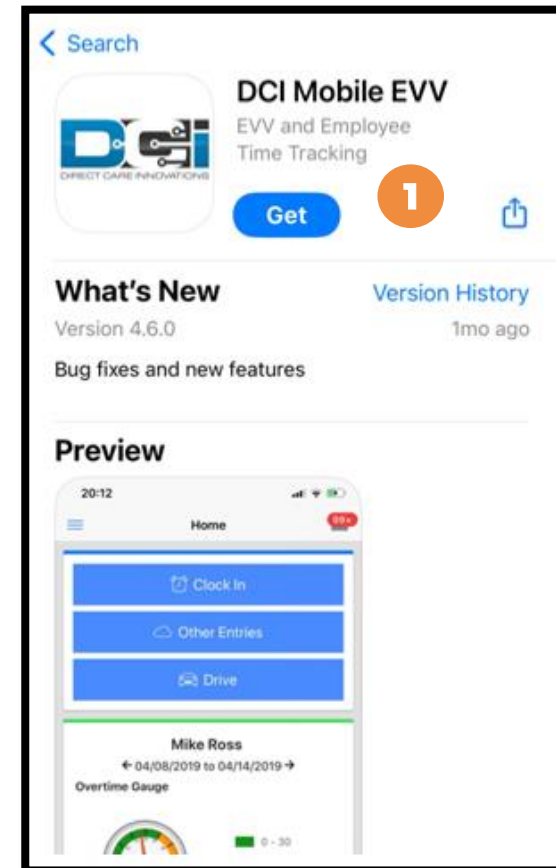
1. [Download](#) the **DCI Mobile EVV** App



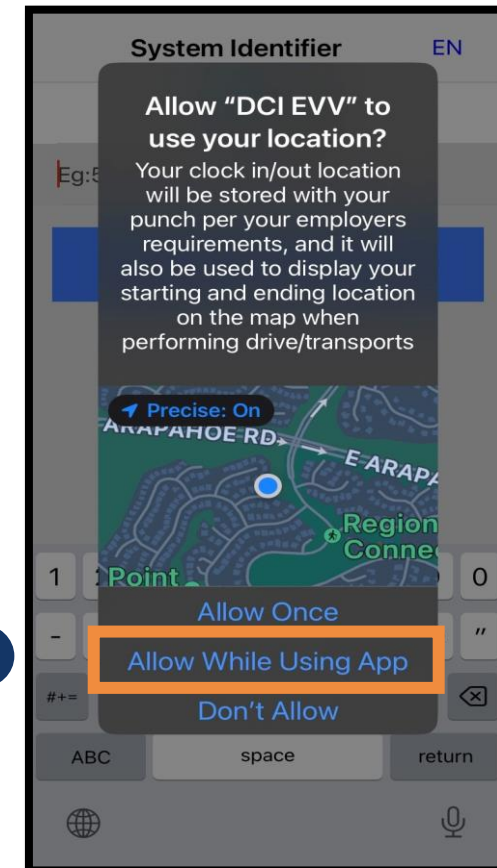
2.  Select **Allow While Using App** only when accessing the app for the first time or after a new download to give the app access to the device's location
  - Location is only captured at clock in & out

## \*Please note!

- There is more than one DCI app available. Please be sure to select the one labeled DCI Mobile EVV.
- Users may need to set app permissions. Media access is not necessary.

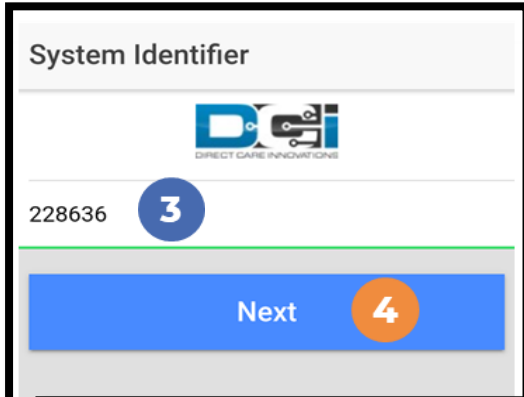


2



# Download DCI Mobile EVV

3. Enter System Identifier: **228636**
4. Click the blue **Next** button to access the login screen
5. Click the language button (**EN**) in the top right corner to change the language in the app
  - Preferred language is only available for employees
  - Choose from seven languages!

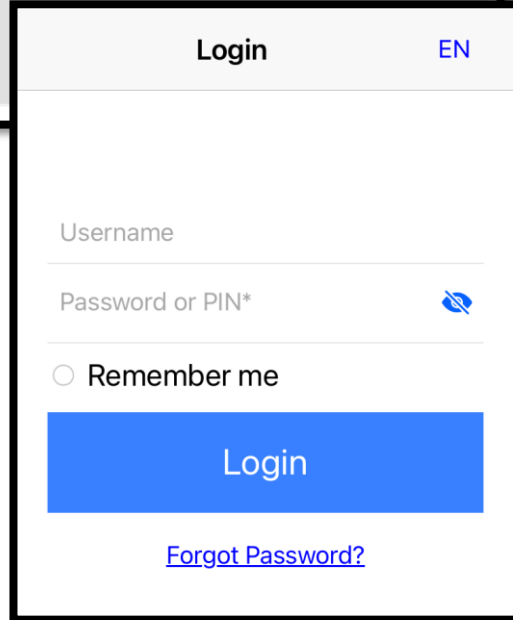


System Identifier

DCI  
DIRECT CARE INNOVATIONS


228636 **3**

Next **4**



Login EN

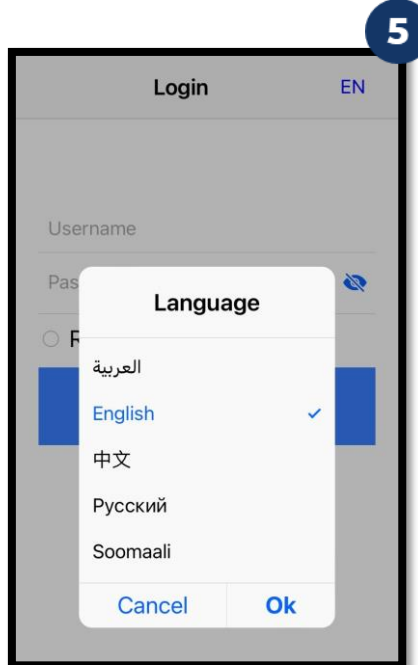
Username

Password or PIN\* 

Remember me

Login

[Forgot Password?](#)



Login EN **5**

Language

العربية

English ✓

中文

Русский

Soomaali

Cancel Ok

# Log into the DCI Mobile App




1. Enter employee credentials
  - ✓ Acumen provided a **username, password, and PIN** on the Good To Go letter
  - ✓ Optionally, select “Remember Me” to save the username
    - \*Please note:** Do not use on a shared device
2. Click the blue **Login** button to access the mobile app
  - ✓ The **Forgot Password** link is available if necessary but requires a valid email address to be on file

**\*Please note:** Contact Acumen with any login issues

A screenshot of the mobile app's login interface. At the top, the word "Login" is displayed in a grey header. Below this, there are two input fields: "Username" and "Password or PIN\*". The "Username" field has an orange circle with the number "1" next to it. The "Password or PIN\*" field has a blue eye icon to its right. Below the input fields is a checkbox labeled "Remember me". At the bottom of the form is a large blue button with the text "Login" and an orange circle with the number "2" next to it. Below the button is a blue link that says "Forgot Password?".

Login

Username 1

Password or PIN\* 

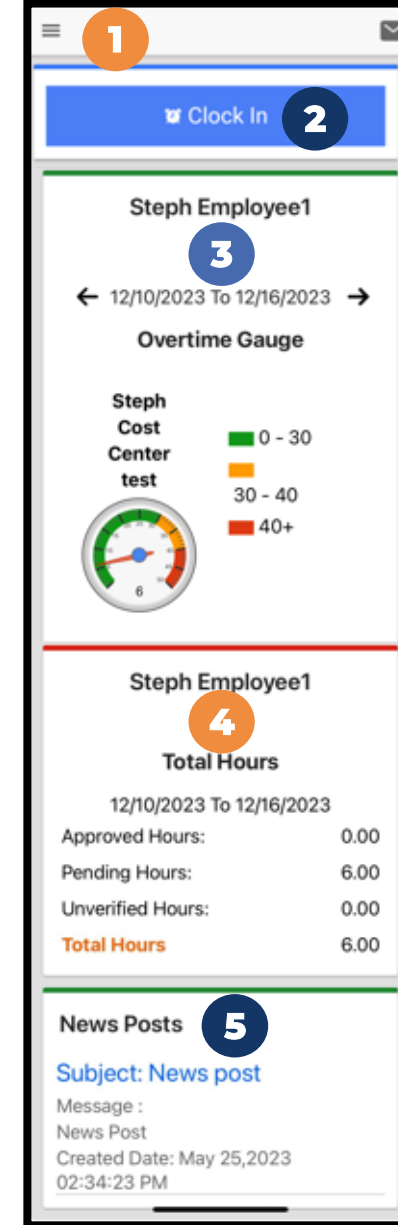
Remember me

Login 2

[Forgot Password?](#)

# Mobile App Home Page

1. Menu Button
  - Use to navigate in the mobile app
  - View all entries including status & details
2. Clock In Button
  - Click to begin the Clock In process
3. Overtime Gauge
  - Shows progress and provides a visual representation of hours worked in a week. Does not indicate overtime eligibility.
4. Total Hours
  - Shows the total hours breakdown by week by approved, pending, and unverified entry status.
5. News Posts
  - Displays important messages



# Mobile App Messaging Module

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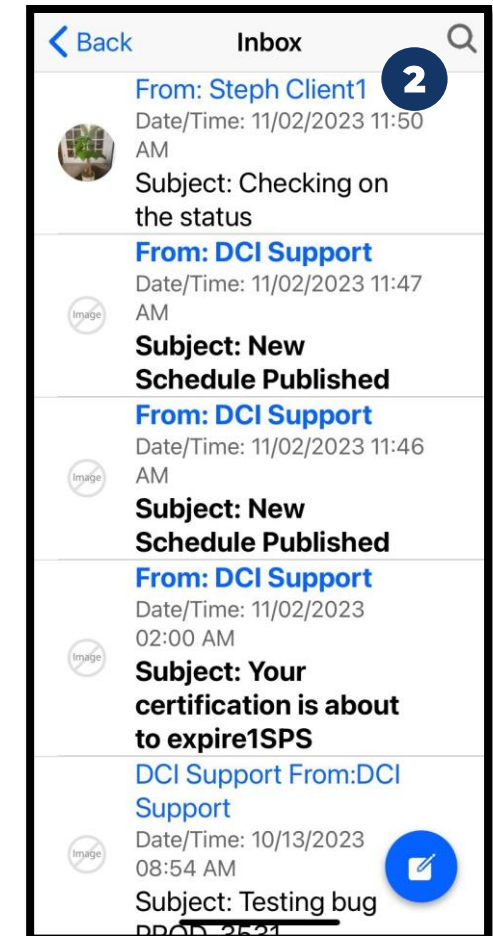
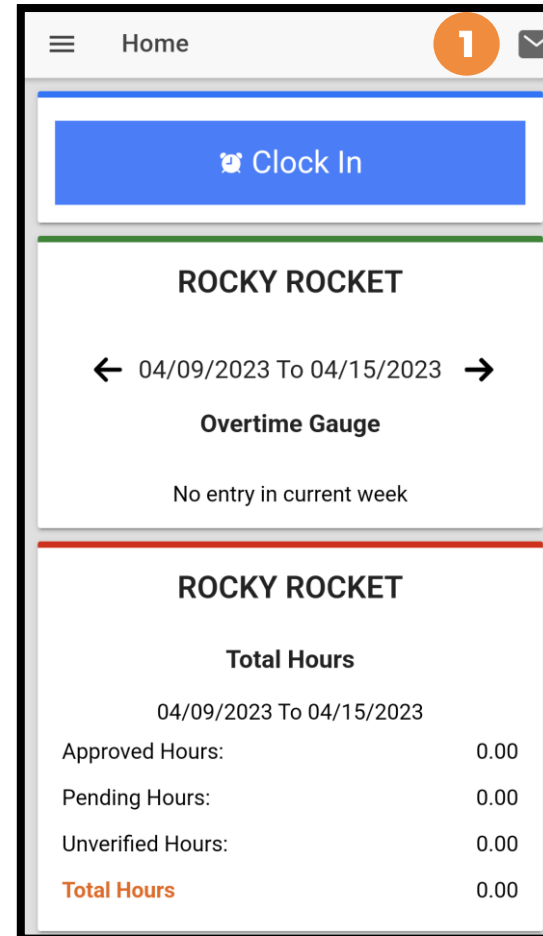
- The DCI messaging module allows users to send and receive secure messages
- Paystubs are sent via secure messaging
  - ❖ **Please note!** Users may receive an error when attempting to view paystubs if the mobile device does not have a pdf viewer installed
  - ✓ Email notifications are sent to the user's personal email address on file and phone number if the mobile number has been verified
    - These notifications provide a link for the user to log in to DCI to view the message securely. They do not include the message itself.





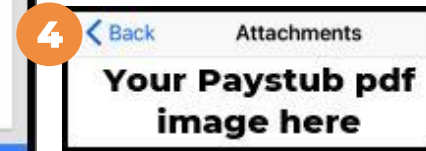
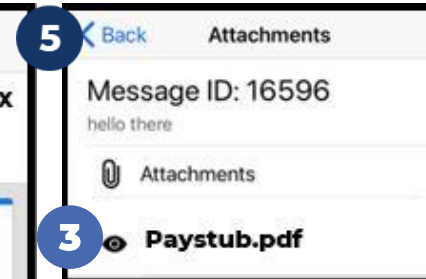
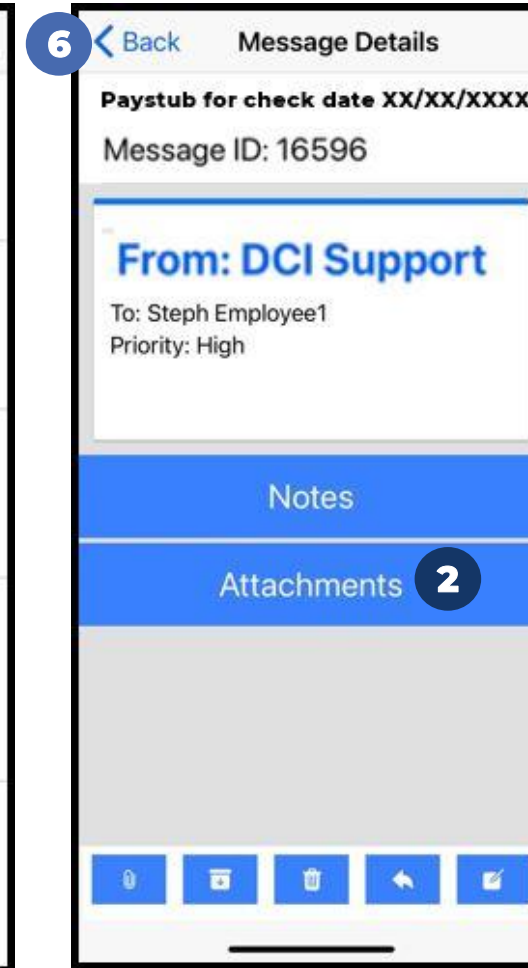
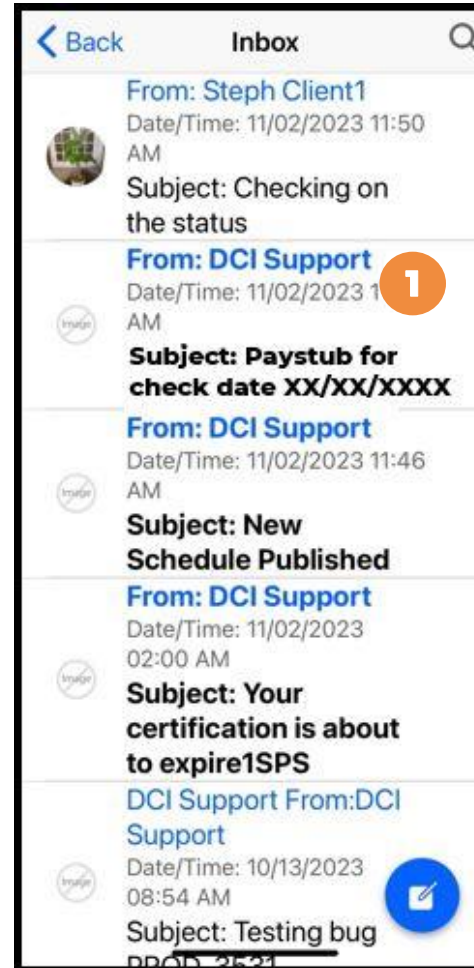
# Mobile App Messaging Module

1. Click the **Mail** icon (envelope) in the top right corner to access the inbox directly
2. Select a message by clicking the **blue link** on the message to view
  - ✓ Dark blue text indicates the message has not been read
  - ✓ Light blue text indicates the message has been read



# View Paystub via Messaging Module

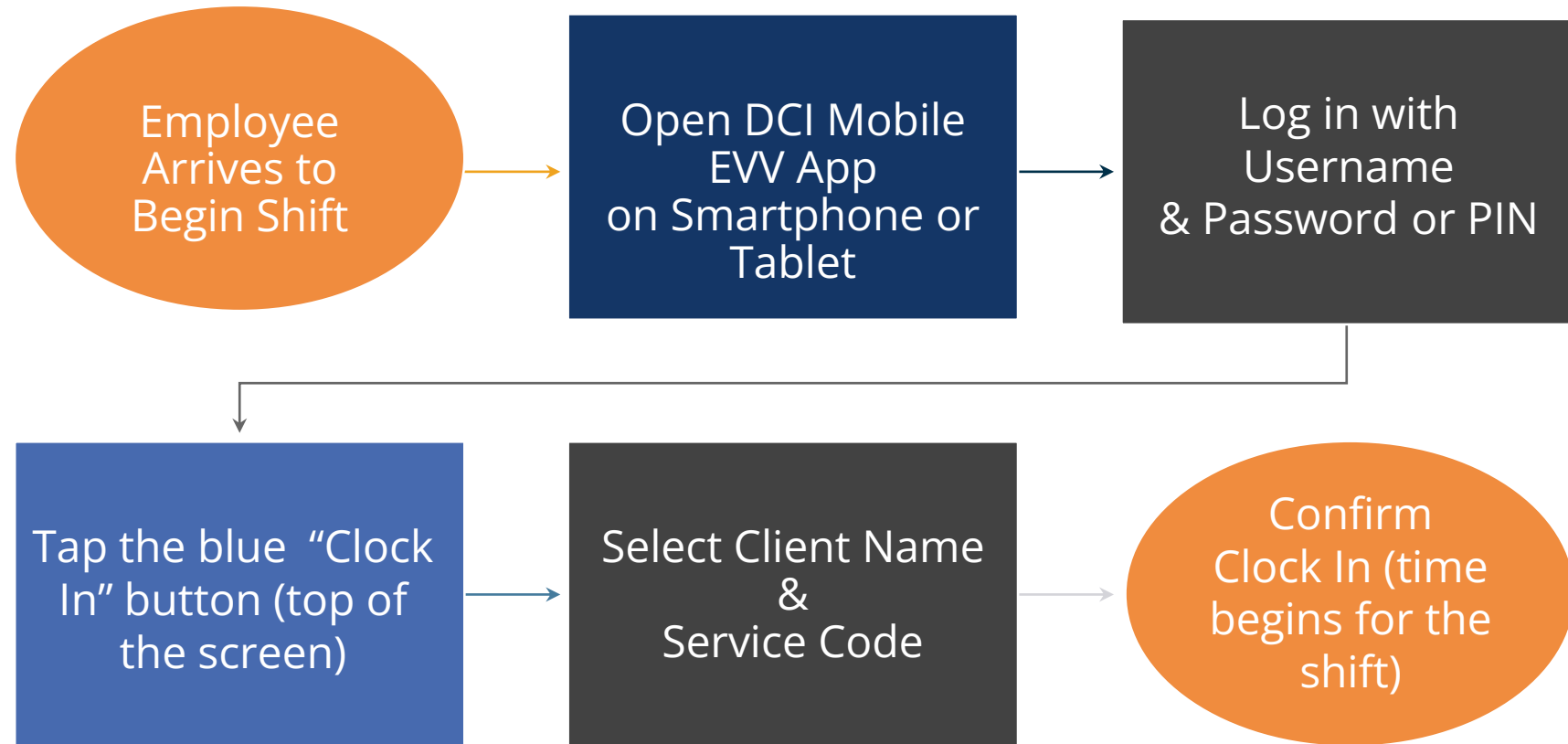
1. Locate the Paystub message in the inbox and click the **blue link** to view it
2. Click the blue **Attachments** button
3. Click the **eye** icon next to the attachment name to view the attachment
4. Click the **< Back** button in the top left corner to return to the list of attachments
5. Click the **<Back** button again to return to the message details
6. Click **<Back** in the top left corner to return to the inbox



# **Employee Clock In/Out Process**

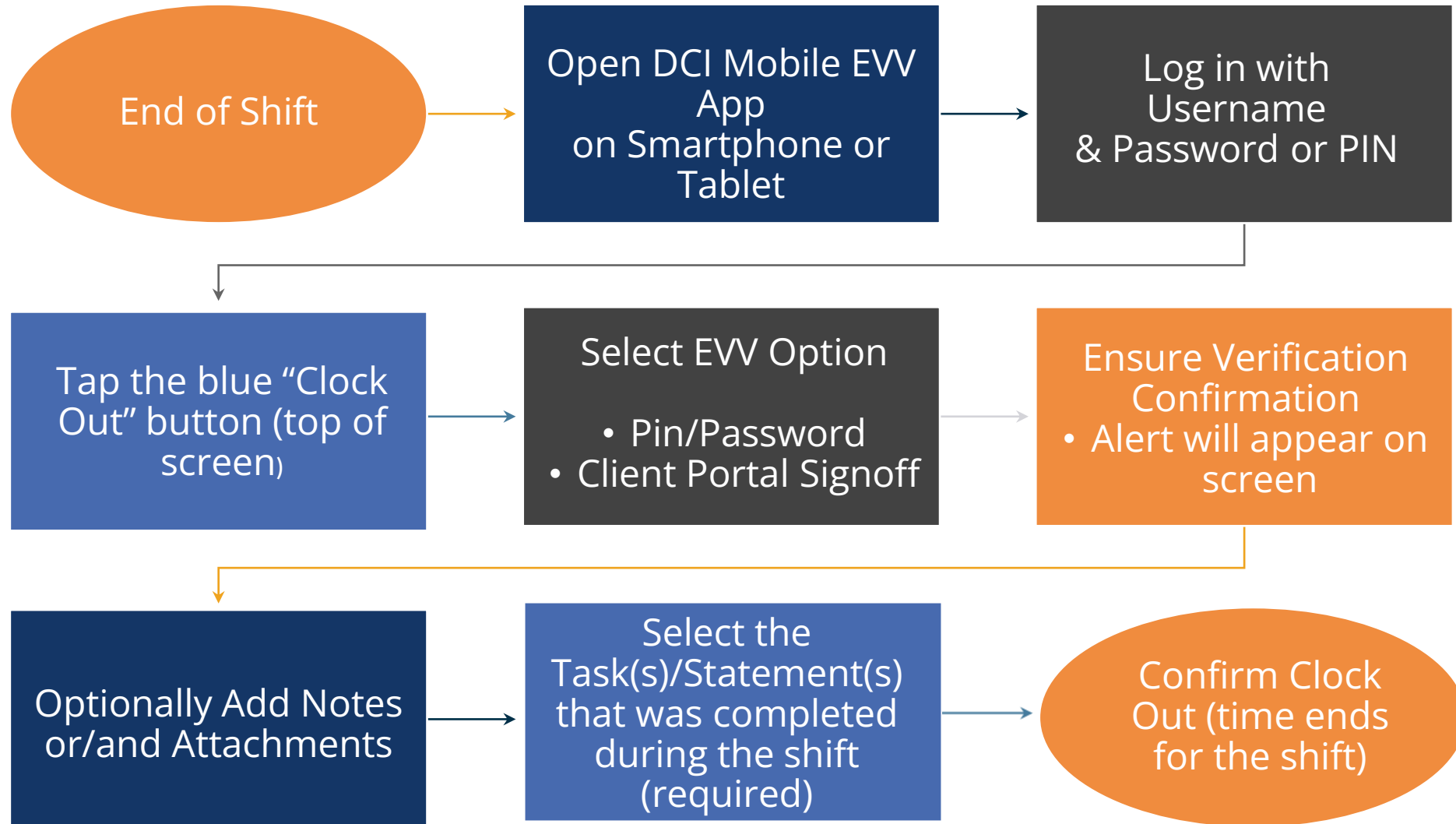
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# Overview Mobile App Clock In



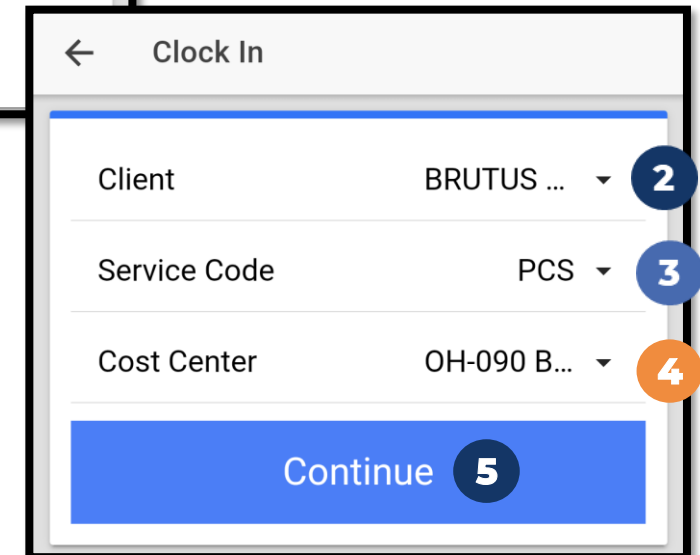
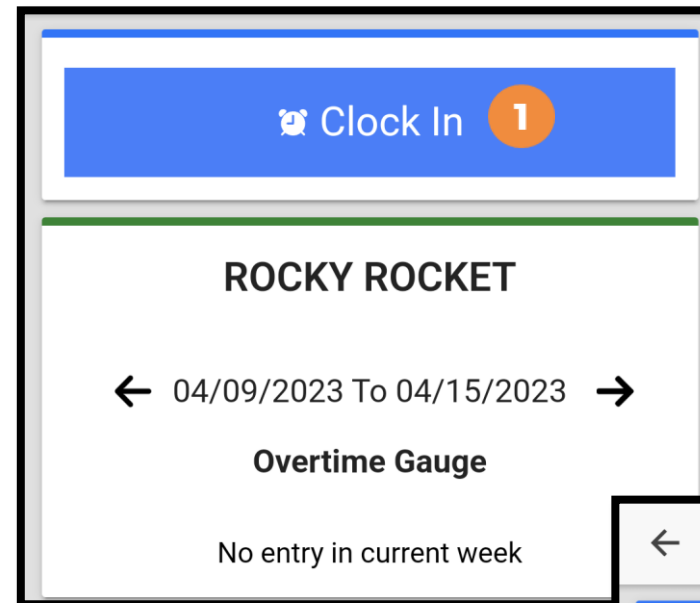


# Overview Mobile App Clock Out



# Clock In on Mobile App

1. Click the blue **Clock In** Button
2. Select the Client's Name
  - Auto-fills for a single client
3. Select the Service Code
  - Auto-fills for a single service
4. Cost Center is always auto-filled
5. Click the blue **Continue** button



# Clock In on Mobile App (cont.)

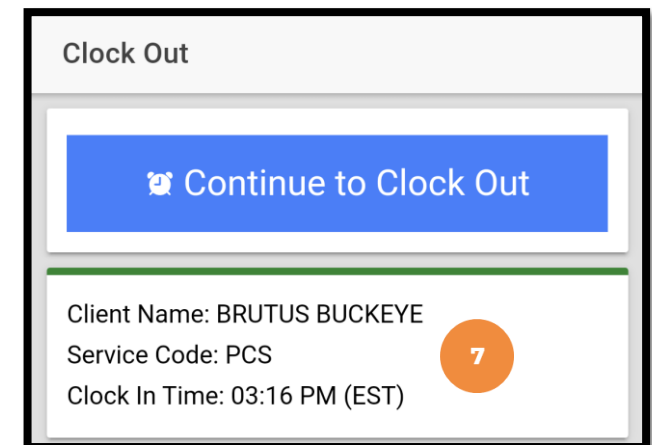
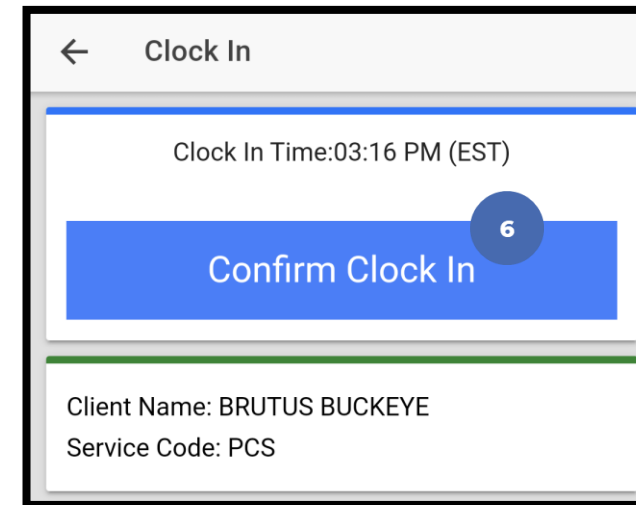
## 6. Select Confirm Clock In

\* *This will start the time for the shift*

## 7. Clock In Details Summary

- Clock in is successful when the blue **Continue to Clock Out** button displays
- Clock in details display in summary form

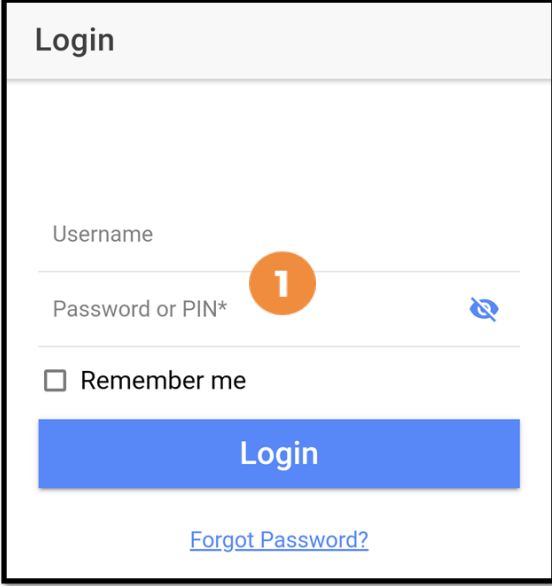
**\*Please note:** Users do not need to stay logged into the mobile app during their shift and cannot take any other action until clocked out.



# Clock Out - EVV Option #1

## Client PIN or Password

1. At the end of the shift, log in to the mobile app.
2. Click the blue **Continue to Clock Out** button
3. Select **Confirm** to proceed with clocking out



Login

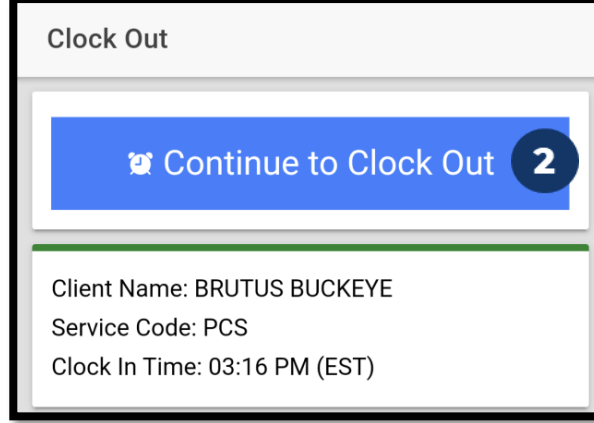
Username

Password or PIN\* **1**

Remember me

Login

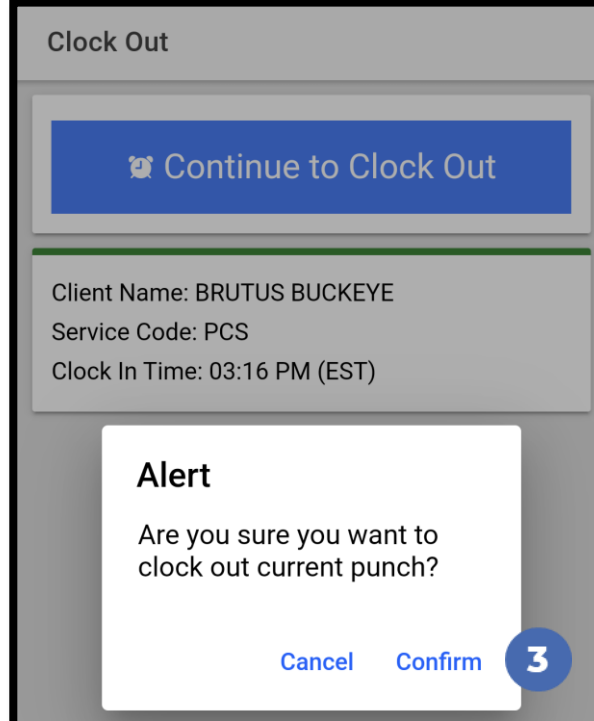
[Forgot Password?](#)



Clock Out

**Continue to Clock Out** **2**

Client Name: BRUTUS BUCKEYE  
Service Code: PCS  
Clock In Time: 03:16 PM (EST)



Clock Out

**Continue to Clock Out**

Client Name: BRUTUS BUCKEYE  
Service Code: PCS  
Clock In Time: 03:16 PM (EST)

**Alert**

Are you sure you want to clock out current punch?

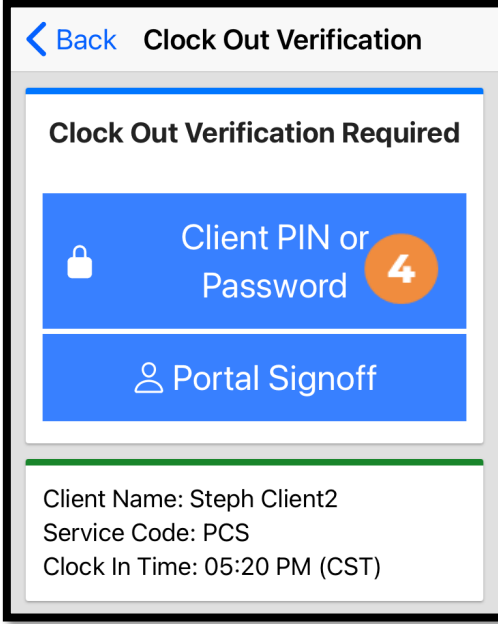
Cancel **Confirm** **3**



# Clock Out - EVV Option #1 (cont.)

## Client PIN or Password

4. Select the clock out verification type:
  - ✓ Client PIN or Password
5. Hand the mobile device to the client or employer, who enters the Client PIN or Password (client PIN or password issued on the Employer Good to Go/Welcome letter).
6. The client or employer clicks the blue **Submit** button when ready
7. The client or employer clicks **Confirm** to validate the PIN or password and hands the mobile device back to the employee



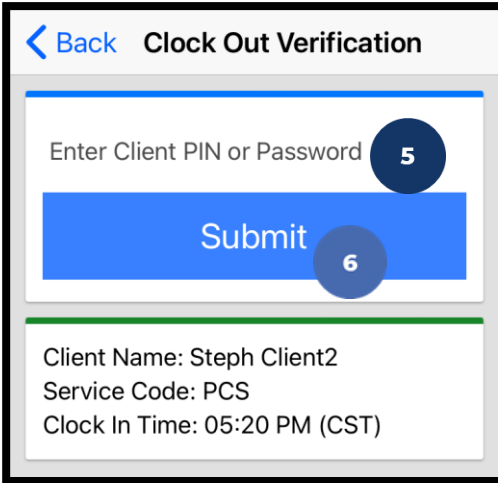
← Back Clock Out Verification

Clock Out Verification Required

Client PIN or Password 4

Portal Signoff

Client Name: Steph Client2  
Service Code: PCS  
Clock In Time: 05:20 PM (CST)

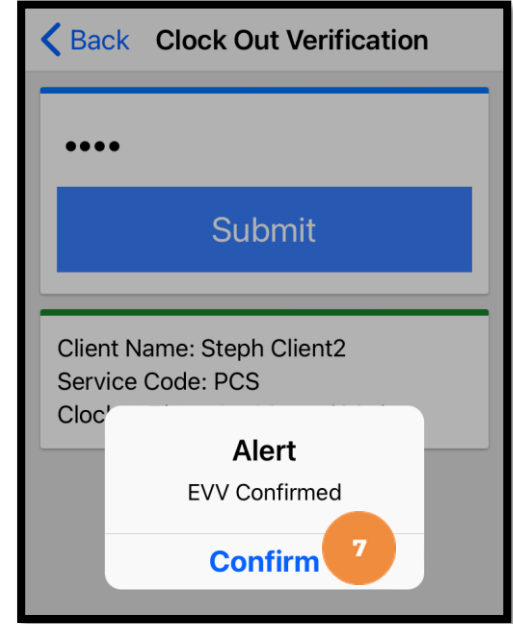


← Back Clock Out Verification

Enter Client PIN or Password 5

Submit 6

Client Name: Steph Client2  
Service Code: PCS  
Clock In Time: 05:20 PM (CST)



← Back Clock Out Verification

Submit

Client Name: Steph Client2  
Service Code: PCS  
Clock In Time: 05:20 PM (CST)

**Alert**  
EVV Confirmed

Confirm 7

# Clock Out – EVV Option #1 (cont.)



The employee:

8. Enters any notes for the punch (optional)
9. Adds an attachment for the punch (optional)
10. Selects the task(s)/statement(s) that was completed during the shift
  - ✓ Tasks/statements are a quick way to document the duties completed with/for the participant
  - ✓ The entry cannot be saved without a selection
11. Clicks the blue **Confirm Clock Out** button when ready
  - ✓ *This will stop the time for the shift*
12. Punch Confirmation
  - Punch details are shown
  - Click the blue **Home** button when ready

### Clock Out

Clock Out Time: 05:23 PM (CST)

Add Notes **8**

Add Attachment **9**

Personal hygiene

Cleaning **10**

Grocery shopping

**Confirm Clock Out** **11**

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Client Name: Steph Client2  
Service Code: PCS

### Punch Information

Client Name: Steph Client2  
Service Code: PCS  
Clock Out Time : 05:22 PM (CST)  
verified by Client PIN or Password

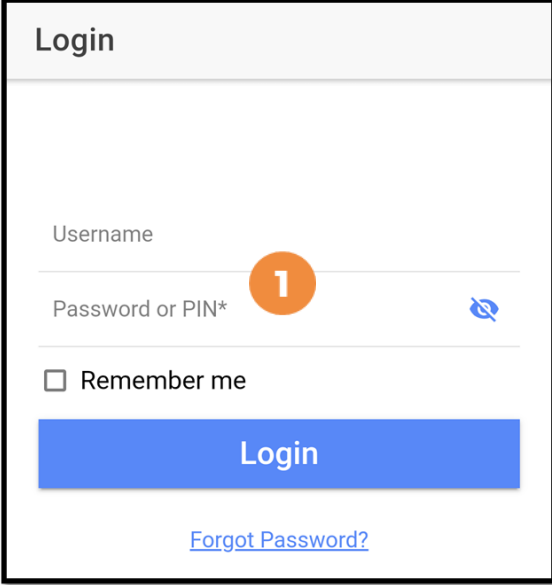
**Home** **12**

**Congratulations!**  
The shift is complete.

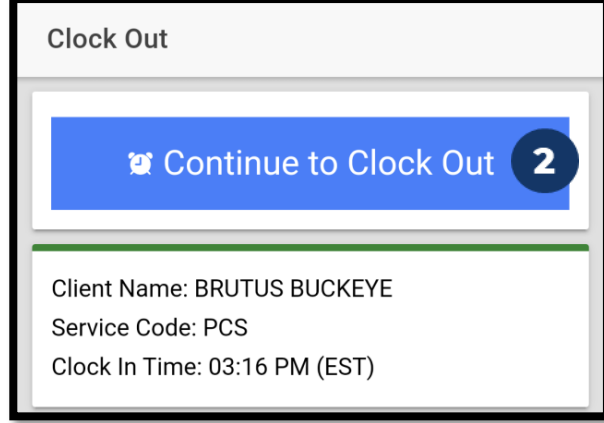
# Clock Out – EVV Option #2

## Portal Signoff

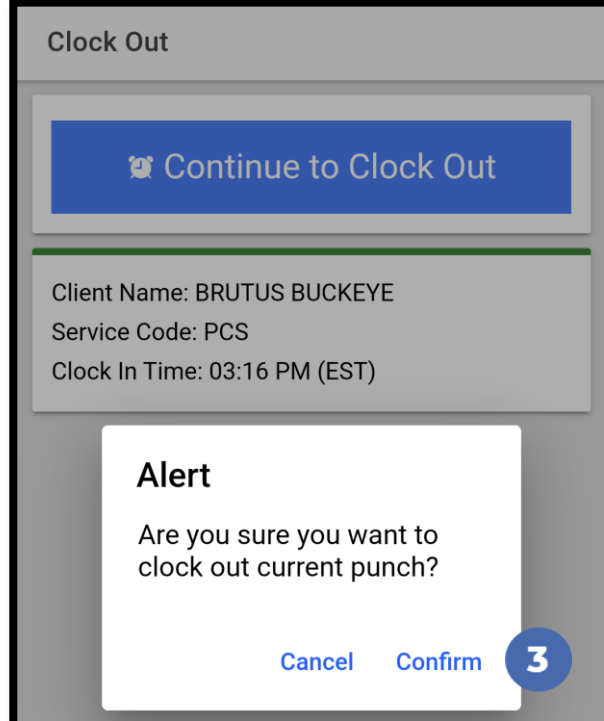
1. At the end of the shift, log in to the mobile app.
2. Click the blue **Continue to Clock Out** button
3. Select **Confirm** to proceed with clocking out



The screenshot shows the 'Login' screen of the mobile app. It features a 'Username' field, a 'Password or PIN\*' field with a blue eye icon for toggling visibility, and a 'Remember me' checkbox. A blue 'Login' button is at the bottom, with a 'Forgot Password?' link below it. A red circle with the number '1' is overlaid on the password field.



The screenshot shows the 'Clock Out' screen. At the top, it says 'Clock Out'. Below that is a blue button with a clock icon and the text 'Continue to Clock Out', with a red circle containing the number '2' next to it. Underneath, the screen displays the following information: 'Client Name: BRUTUS BUCKEYE', 'Service Code: PCS', and 'Clock In Time: 03:16 PM (EST)'.

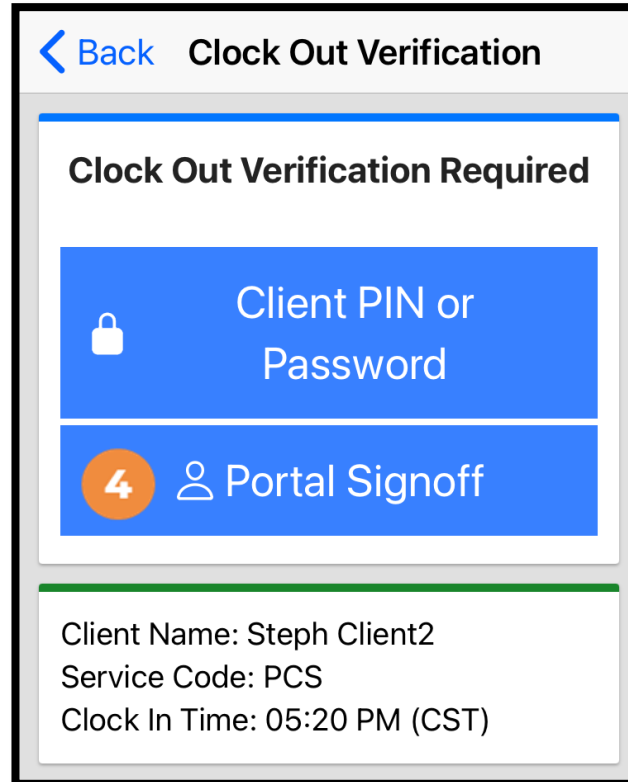


The screenshot shows the 'Clock Out' screen with an alert dialog box. The 'Clock Out' screen information is visible in the background: 'Client Name: BRUTUS BUCKEYE', 'Service Code: PCS', and 'Clock In Time: 03:16 PM (EST)'. The alert dialog box is titled 'Alert' and contains the text 'Are you sure you want to clock out current punch?'. At the bottom of the alert, there are two buttons: 'Cancel' and 'Confirm', with a red circle containing the number '3' next to the 'Confirm' button.

# Clock Out - EVV Option #2 (cont.)

## Portal Signoff

4. Select the clock out verification type:
  - ✓ Second Option: Portal Signoff
5. An alert will appear stating that EVV is confirmed, but manual verification will be required prior to approval. Click **Confirm**.



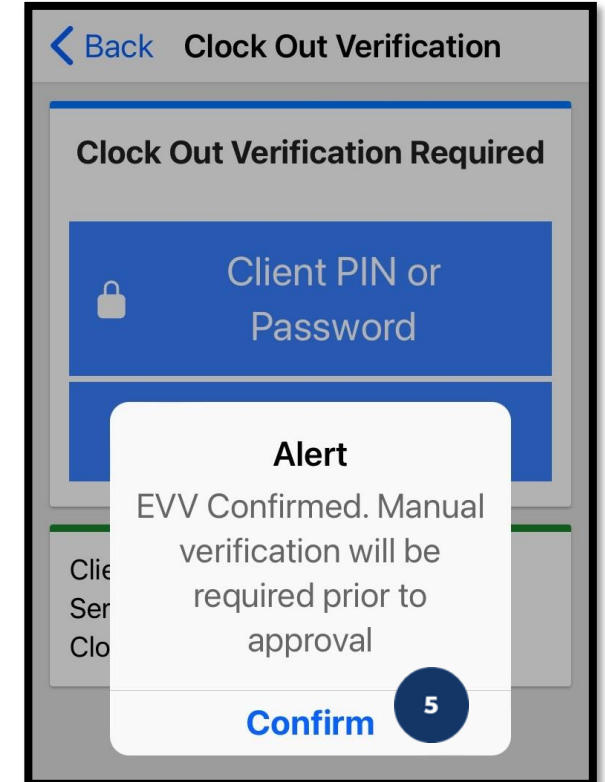
Back Clock Out Verification

Clock Out Verification Required

Client PIN or Password

4 Portal Signoff

Client Name: Steph Client2  
Service Code: PCS  
Clock In Time: 05:20 PM (CST)



Back Clock Out Verification

Clock Out Verification Required

Client PIN or Password

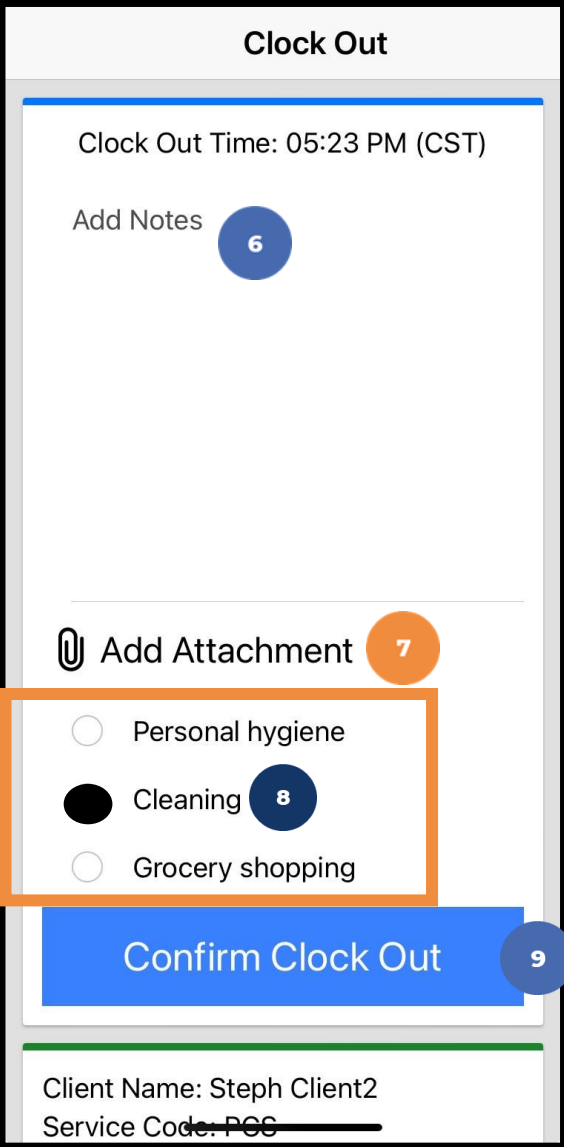
**Alert**  
EVV Confirmed. Manual verification will be required prior to approval

Confirm 5

# Clock Out – EVV Option #2 (cont.)

The employee:


6. Enters any notes for the punch (optional)
7. Adds an attachment for the punch (optional)
8. Selects the task(s)/statement(s) that was completed during the shift
  - ✓ Tasks/statements are a quick way to document the duties completed with/for the participant
  - ✓ The entry cannot be saved without a selection
9. Clicks the blue **Confirm Clock Out** button when ready
  - ✓ *This will stop the time for the shift*
10. Punch Confirmation
  - ✓ Punch details are shown
  - ✓ Click the blue **Home** button when ready



**Clock Out**

Clock Out Time: 05:23 PM (CST)

Add Notes **6**

 Add Attachment **7**

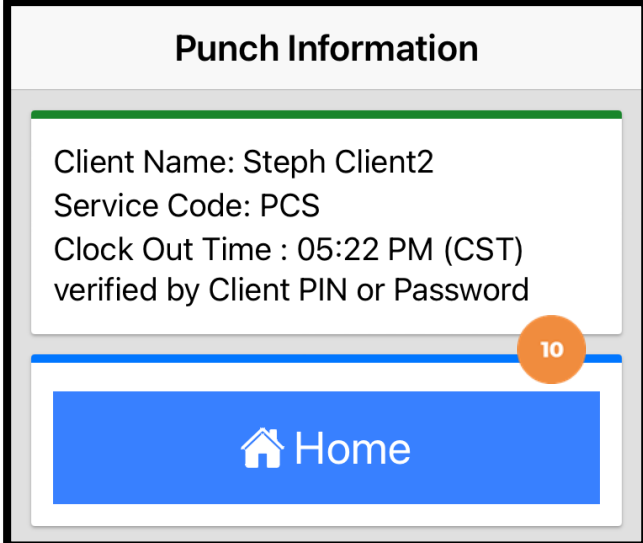
Personal hygiene

Cleaning **8**

Grocery shopping

**Confirm Clock Out** **9**

Client Name: Steph Client2  
Service Code: PCS



**Punch Information**

Client Name: Steph Client2  
Service Code: PCS  
Clock Out Time : 05:22 PM (CST)  
verified by Client PIN or Password

**Home** **10**

**Congratulations!**  
The shift is complete.

# Mobile App - Client Attestation



- The two client attestation (EVV) options are a way for the client to verify that they received service
  - ✓ Choose only one option
- Client attestation is an extra layer of protection against potential fraud because the client is “signing off” on the punch in real time

**\*Please note:** The employer must still review and approve all punches in their Pending Entries tab.  
Client attestation does not approve the punch.

A screenshot of a mobile application interface titled "Clock Out Verification". At the top left is a blue back arrow icon and the text "Back". To the right of the back arrow is the title "Clock Out Verification". Below the title is a white box with a blue border containing the text "Clock Out Verification Required". Underneath this are two blue buttons: the top one has a white padlock icon and the text "Client PIN or Password", and the bottom one has a white person icon and the text "Portal Signoff". Below the white box is a white box with a green border containing the text "Client Name: Steph Client2", "Service Code: PCS", and "Clock In Time: 05:20 PM (CST)".

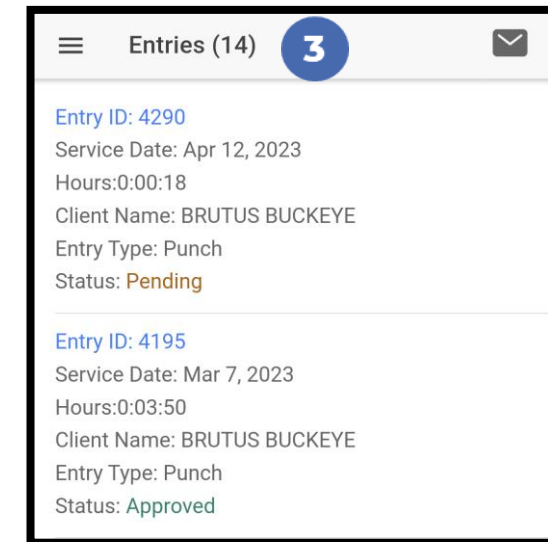
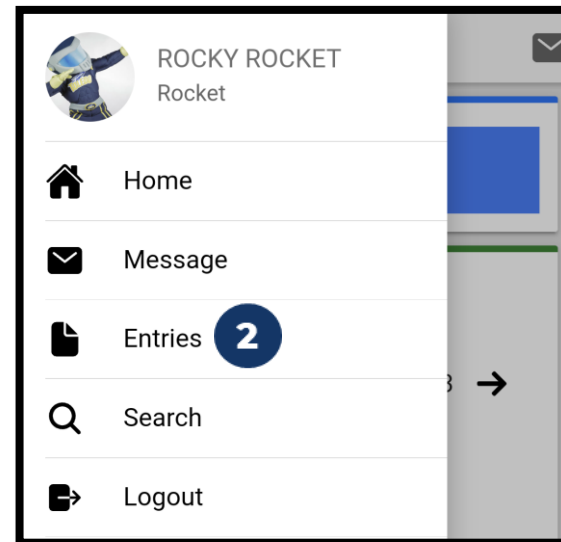
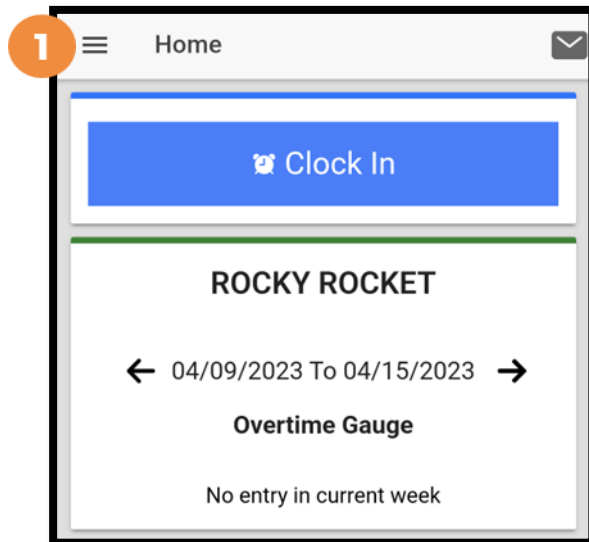
# Mobile App Offline Mode



- Offline mode allows the employee to use the mobile app on a **registered device** when the device is not connected to the internet or loses connection while the app is in use
  - ✓ **Please note:** A device is registered automatically the first time the user logs into the mobile app while connected to a cellular network or internet
  - ✓ A user can only have one registered device
- Useful when there is limited or no cellular or WIFI connection at the service location
- Limits users to only clock in and clock out
- Offline mode status is indicated by a **red "Offline" bar** at the top of the dashboard
- Punches made in offline mode are saved in the mobile app as offline punches, will automatically upload when the user connects to a cellular or wireless network, and will be listed under Entries.

# Review Entries

1. Click the **Menu** in the top left corner of the screen
2. Select **Entries** on the submenu
3. View the complete list of entries
  - Verify that all time is submitted
  - The employer approves the time as needed





# **Employee Web Portal**

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# Web Portal Basics

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- The employer (ER)/designated representative (DR) reviews and manages time
- Employees correct punches and/or enter historical time
- Users may update profile settings

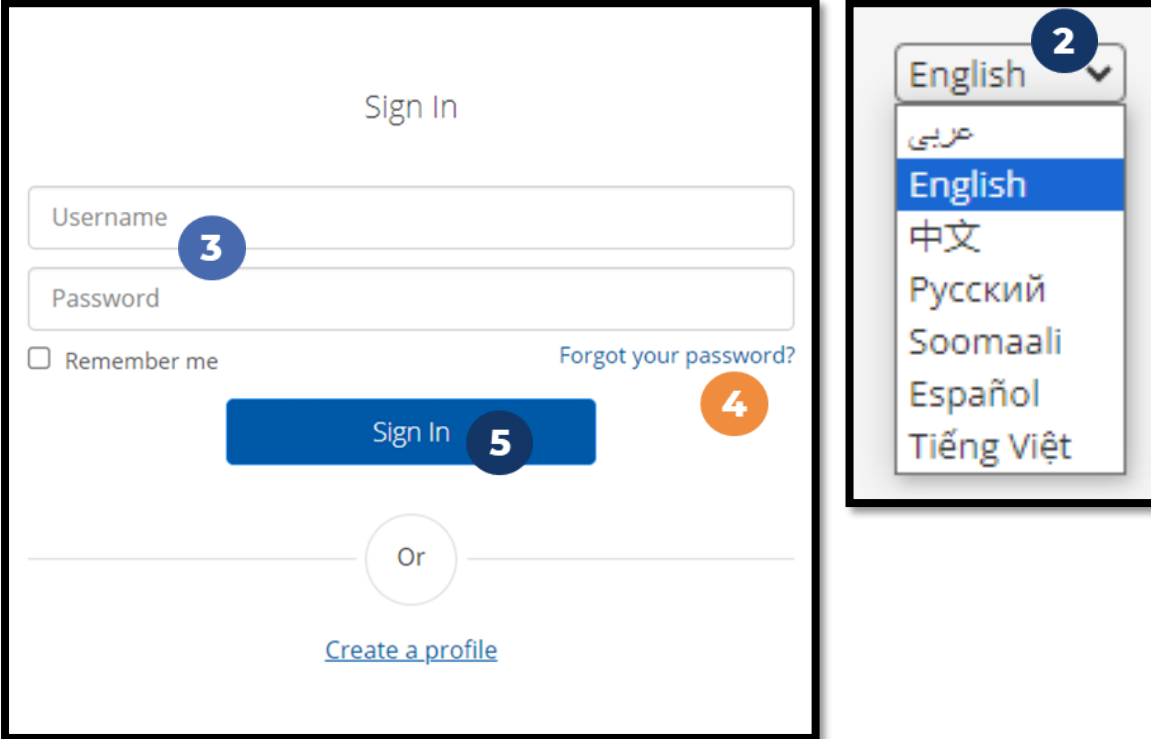


# Accessing the DCI Web Portal

1. Open an internet browser on a computer or mobile device (Google Chrome is preferred) and navigate to the [DCI Web Portal](#)
2. Use the language drop-down in the top right corner to select the preferred language
  - The page will now display in the new language each time you log in
  - This feature is only available for employees
3. Enter **username** and **password** (not Pin)
  - Credentials provided by Acumen
4. Utilize the “Forgot your password?” link if needed
5. Click the blue **Sign In** button

**\*Please note:** Contact Acumen with login issues

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



The screenshot shows the sign-in page for the DCI Web Portal. It features a 'Sign In' heading, a 'Username' field (callout 3), a 'Password' field (callout 3), a 'Remember me' checkbox, and a 'Forgot your password?' link (callout 4). A blue 'Sign In' button (callout 5) is prominently displayed. Below the button is an 'Or' separator and a 'Create a profile' link. On the right side, a language drop-down menu (callout 2) is open, showing options: English (selected), العربية, 中文, Русский, Soomaali, Español, and Tiếng Việt.

# Profile Settings

**\*Please note!** Profile settings are only available on the full site

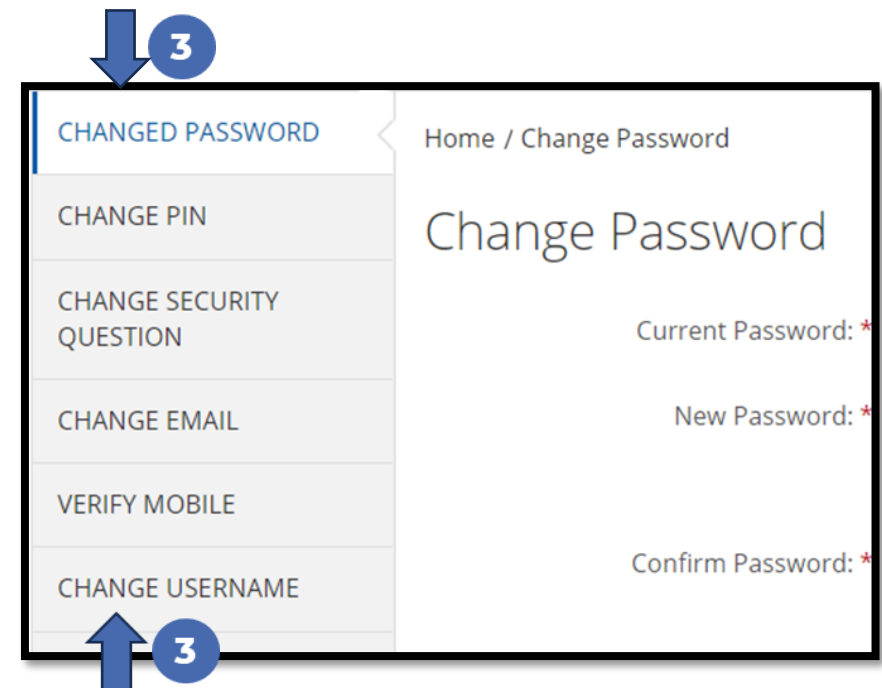
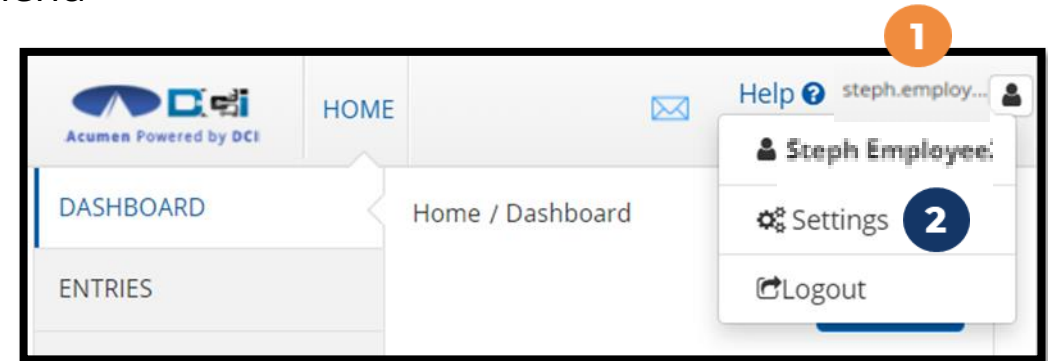


1. Click the **username** in the top right corner of the main menu

2. Click **Settings**

3. Select a submenu tab to update:

- Change Password – Used for login
- Change PIN – A number that can be used instead of a password when logging into the mobile app. *Required for employees if using Phone EVV.*
- Change Security Question
- Change Email – A valid and correct email address is required for password recovery
- Verify Mobile
- Change Username – Used for login



# Add / Change PIN

**\*Please Note!** The PIN can only be added or changed in the web portal

1. Log in to the DCI web portal
2. Click the username in the top right corner of the main menu
3. Click **Settings** from the drop-down menu
4. Select **Change PIN** or **Add New PIN**
  - ✓ Add New PIN after a reset
  - ✓ Change PIN anytime
5. Enter password
6. Click the blue **Verify** button



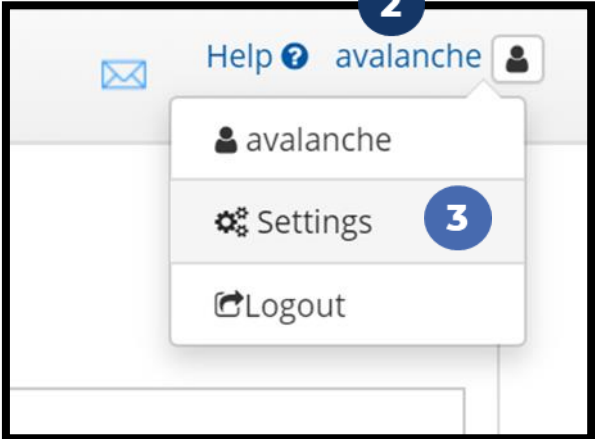
Sign In

Username **1**

Password **1**

Remember me [Forgot your password?](#)

Sign In

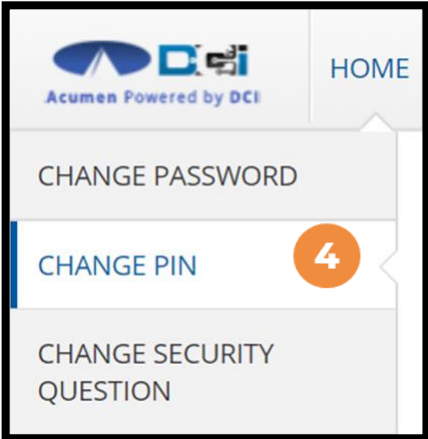


Help ? avalanche **2**

avalanche

Settings **3**

Logout



HOME

CHANGE PASSWORD

CHANGE PIN **4**

CHANGE SECURITY QUESTION



Password: \* Please enter password **5**

Cancel **6** Verify

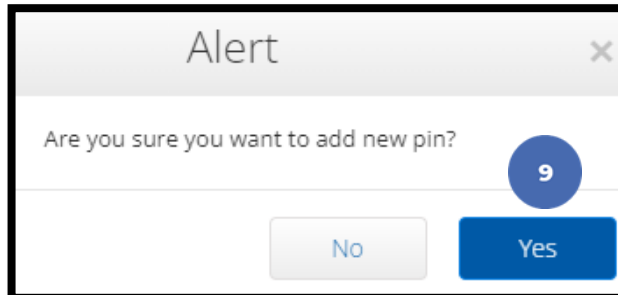
# Add / Change PIN (cont.)

7. Complete the New Pin field and retype the pin in the Confirm Pin field
8. Click the blue **Change Pin** button
9. Select **Yes** to confirm the pin change
10. A green bar stating “Pin Changed Successfully!” appears



The screenshot shows a form with two input fields. The first field is labeled "New Pin: \*" and contains the placeholder text "Please enter New Pin". The second field is labeled "Confirm Pin: \*" and contains the placeholder text "Please Confirm Pin". Below the fields are two buttons: a grey "Cancel" button and a blue "Change Pin" button. An orange circle with the number 7 is positioned over the "New Pin" field, and a blue circle with the number 8 is positioned over the "Change Pin" button.

**\*Please Note!** The PIN can only be added or changed in the web portal



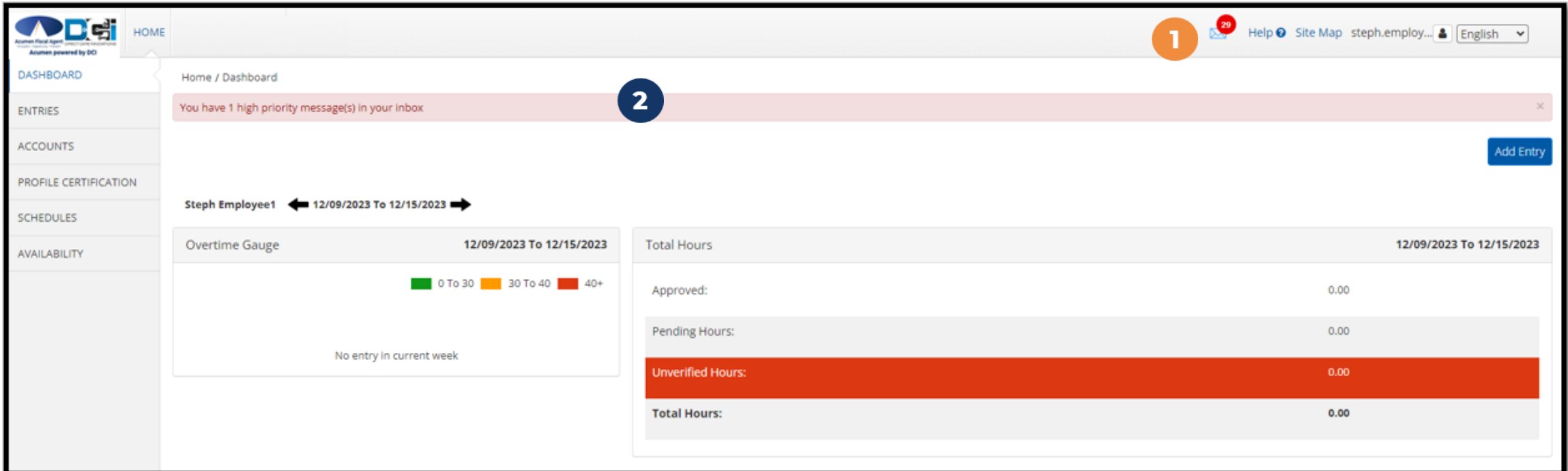
The screenshot shows a dialog box titled "Alert" with a close button (X) in the top right corner. The main text of the dialog is "Are you sure you want to add new pin?". Below the text are two buttons: a grey "No" button and a blue "Yes" button. A blue circle with the number 9 is positioned over the "Yes" button.



The screenshot shows a green horizontal bar with the text "Pin Changed Successfully!". A blue circle with the number 10 is positioned at the end of the bar.

# Web Portal Messaging Module

1. Click the **Mail** icon (envelope) in the top right corner of the main menu to access the inbox
2. Alternatively, if the red **high priority message banner** displays, click it to access the inbox.



The screenshot shows the Acumen Fiscal Agent web portal dashboard. The top navigation bar includes the logo, a 'HOME' link, a notification bell icon with a red bubble containing the number '1', and user information for 'steph.employ...'. A sidebar on the left contains navigation links for DASHBOARD, ENTRIES, ACCOUNTS, PROFILE CERTIFICATION, SCHEDULES, and AVAILABILITY. The main content area displays a pink banner with a blue circle containing the number '2' and the text 'You have 1 high priority message(s) in your inbox'. Below the banner, the user is identified as 'Steph Employee1' for the period '12/09/2023 To 12/15/2023'. An 'Overtime Gauge' shows 'No entry in current week' with a legend for 0 To 30 (green), 30 To 40 (yellow), and 40+ (red). A 'Total Hours' table is also visible.

Total Hours	12/09/2023 To 12/15/2023
Approved:	0.00
Pending Hours:	0.00
Unverified Hours:	0.00
<b>Total Hours:</b>	<b>0.00</b>

# Web Portal Messaging Module







Select a message to view by clicking anywhere on the line

- ✓ Bold text indicates the message has not been read
- ✓ Light text indicates the message has been read
- ✓ A yellow star indicates a high priority message
- ✓ A paperclip indicates an attachment



Archive Delete Export

Showing 30 out of 72 records

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>	★		DCI Support	<b>Paystub for check date XX/XX/XXXX</b>	11/02/2023 02:00 AM	
<input type="checkbox"/>	★		Kristen Ziegler	hello there	12/08/2023 05:19 PM	
<input type="checkbox"/>	★		Steph Client1	Checking on the status	11/02/2023 11:50 AM	
<input type="checkbox"/>	★		DCI Support	Punch Rejected	10/12/2023 08:33 AM	






# View Paystub via Messaging Module

1. Locate the Paystub message in the inbox and click anywhere on the line to view it
2. Click the **Attachments** tab
3. Click the **eye** icon in the download column to view the paystub or the **download** icon to download it

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>	★		DCI Support	Paystub for check date XX/XX/XXXX	07:13 PM	 

Notes **Attachments** 2

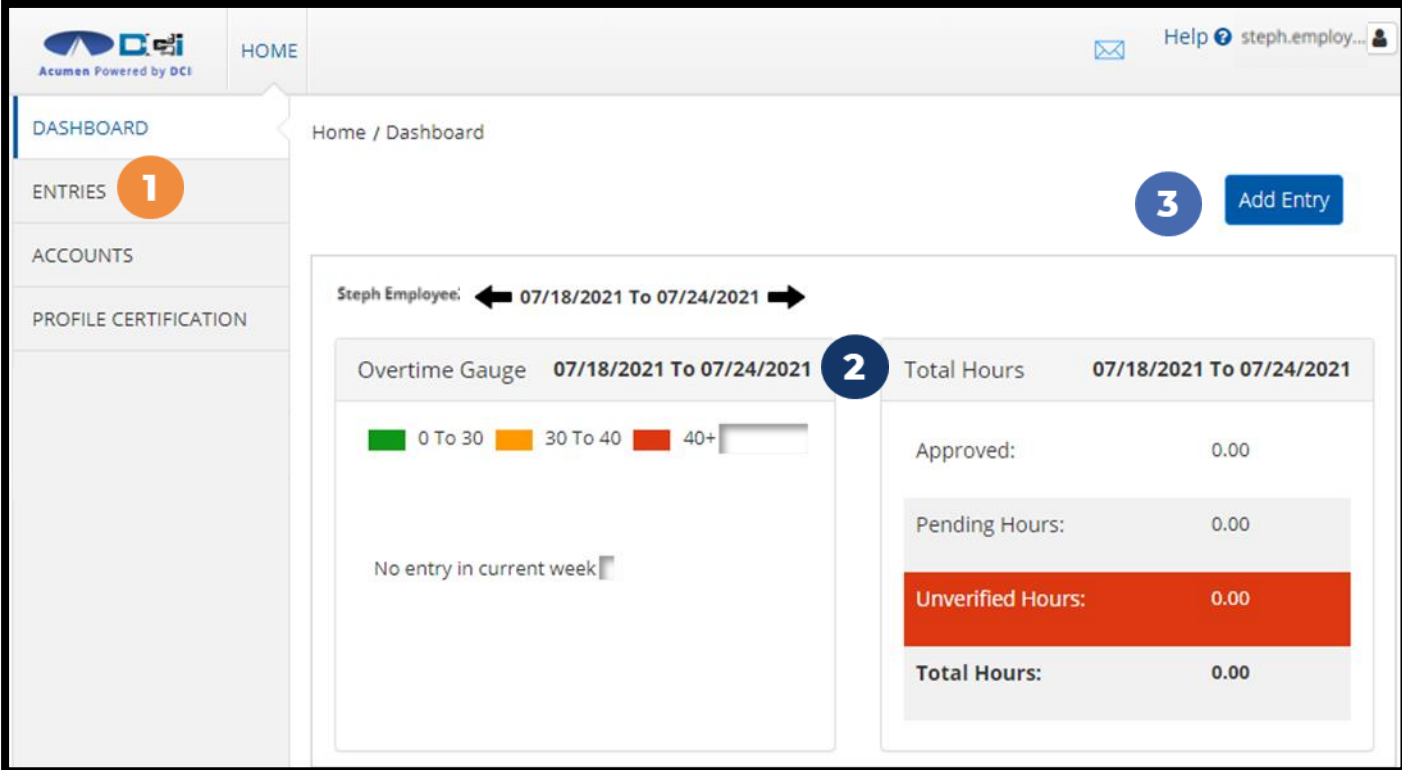
<input type="checkbox"/>	Date	File Name	File Type	File Size	Added By	Download	Status
<input type="checkbox"/>	Dec 08, 2023	Paystub.pdf		2554.02 KB	Kristen Ziegler	 	Active

3

# Home Tab Details - Employee

The Dashboard is the landing page

1. Select the **Entries** tab to view a complete list of submitted time entries
2. Overtime Gauge & Total Hours for the current calendar week
3. Click **Add Entry** to enter a historical time punch



The screenshot shows the dashboard interface for an employee named Steph. The left sidebar contains navigation tabs: DASHBOARD, ENTRIES (highlighted with a red circle '1'), ACCOUNTS, and PROFILE CERTIFICATION. The main content area displays the following information:

- Header: HOME, Help, and user profile (steph.employ...)
- Breadcrumb: Home / Dashboard
- Buttons: Add Entry (highlighted with a red circle '3')
- Employee Selection: Steph Employee: 07/18/2021 To 07/24/2021
- Overtime Gauge: 07/18/2021 To 07/24/2021 (highlighted with a red circle '2'). Legend: 0 To 30 (green), 30 To 40 (orange), 40+ (red). Status: No entry in current week.
- Total Hours Summary Table:

Total Hours	07/18/2021 To 07/24/2021
Approved:	0.00
Pending Hours:	0.00
<b>Unverified Hours:</b>	<b>0.00</b>
<b>Total Hours:</b>	<b>0.00</b>

# Add New Entry

1. Log in to the [DCI Web Portal](#) using Chrome, Safari, Edge, or Firefox browser.
  - ✓ Chrome is preferred
2. Click the blue **Add Entry** button

**\*Please note!** Web Portal (historical) entries are used for a missed punch or punch correction. The goal should always be to enter punches in real time (Mobile App) to maintain EVV compliance.

acumen.dcisoftware.com

A screenshot of the "Sign In" form. It includes fields for "Username" and "Password", a "Remember me" checkbox, a "Forgot your password?" link, and a blue "Sign In" button. A red circle with the number "1" is placed over the Username field.A screenshot of the DCI Web Portal dashboard for a user named "Steph Employee". The dashboard shows a navigation bar with "Home > Dashboard" and a "Help" icon. A blue "Add Entry" button is highlighted with a red circle and the number "2". Below the navigation bar, there is a section for "Steph Employee" with a date range of "11/01/2020 to 11/07/2020". This section contains two main cards: "Overtime Gauge" and "Total Hours". The "Overtime Gauge" card shows a legend with three categories: "0 to 30" (green), "30 to 40" (yellow), and "40+" (red). Below the legend, it states "No entry in current week". The "Total Hours" card shows a table of statistics for the period "11/01/2020 to 11/07/2020".

Category	Value
Approved By:	7.52
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	7.52

At the bottom of the dashboard, there is a section titled "Expiring Certifications" with a table containing columns for "Certification Name", "Certification Expiration Date", and "Link to Certification Course".

# Add New Entry (cont.)

3. Type a minimum of three characters to generate results and select the Client's name from the list
4. Select the Service Code from the drop-down
5. Select the Service Date
6. Enter the Check In (start) and Check Out (end) times
7. Select Portal Signoff as the EVV Method

### Add New Entry

Entry Type: \* Punch

Employee Name: Steph Employee2

Account Type: \* Hourly

Client: \* Steph Client2 - 10 **3**

Service Code: \* PCS **4**

Service Date: \* 12/12/2023 **5**

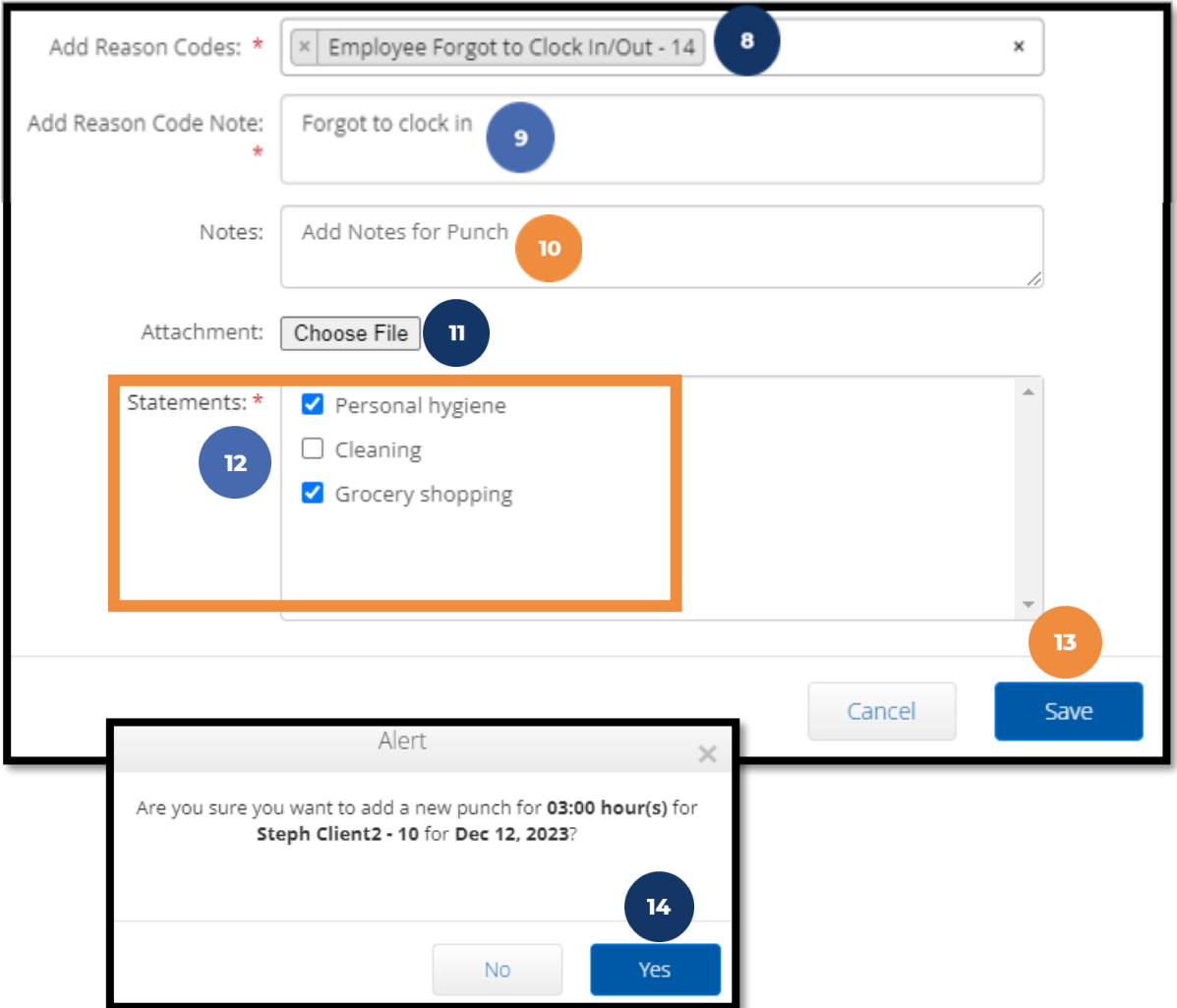
Check In: \* 5:00 AM **6** Check Out: \* 8:00 AM **6**

EVV Method: \* Portal Signoff **7**

Check Out Date: 12/12/2023

# Add New Entry (cont.)

8. Select a Reason Code from the drop-down list
9. Add a Reason Code Note
10. Enter Notes for the punch (optional)
11. Click the **Choose File** button to select and upload Attachments (optional)
12. Select the task(s)/statement(s) that was completed during the shift
  - ✓Tasks/statements are a quick way to document the duties completed with/for the participant
  - ✓The entry cannot be saved without a selection
13. Click **Save**
14. Click **Yes** to submit



The screenshot shows the 'Add New Entry' form with the following elements and callouts:

- 8**: Reason Code dropdown menu showing 'Employee Forgot to Clock In/Out - 14'.
- 9**: Reason Code Note text box containing 'Forgot to clock in'.
- 10**: Notes text box containing 'Add Notes for Punch'.
- 11**: 'Choose File' button for attachments.
- 12**: 'Statements' section with a list of tasks: 'Personal hygiene' (checked), 'Cleaning' (unchecked), and 'Grocery shopping' (checked). This section is highlighted with an orange border.
- 13**: 'Save' button at the bottom right of the form.
- 14**: 'Yes' button in the 'Alert' dialog box.

The 'Alert' dialog box contains the following text: 'Alert', 'Are you sure you want to add a new punch for 03:00 hour(s) for Steph Client2 - 10 for Dec 12, 2023?', and 'Yes' and 'No' buttons.

# Edit Entry

**\*Please note!** Only entries in a Pending status can be edited by the employee. Contact Acumen for assistance if in any other status.



1. Log in to the [DCI Web Portal](#)
2. Click **Entries** on the submenu
3. Click anywhere on the line of the punch entry to be edited
4. Click the **Actions** button in the top right corner
5. Select **Edit Entry** from the drop-down menu

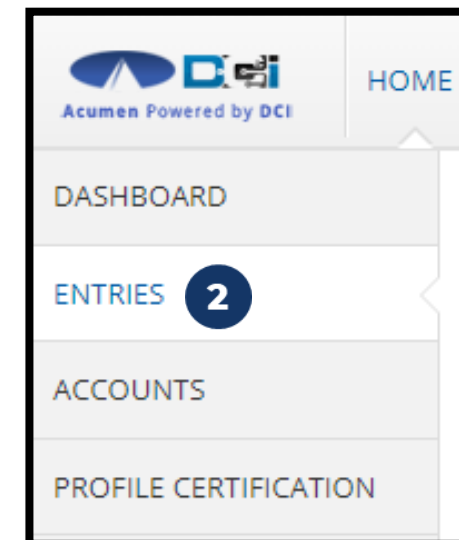
Sign In

Username

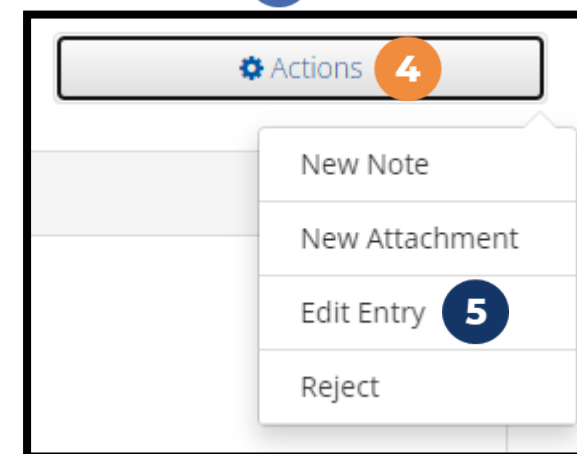
Password **1**

Remember me [Forgot your password?](#)

Sign In



Id	Service Date	Start Time	End Time	Type	Account Type	Ref.	Client Name	Service Code	Amount	Unit Type	Status
<a href="#">92926243</a>	Dec 02, 2023	10:30 AM	02:30 PM	Punch	Hourly		<a href="#">Steph_Client1</a>	Steph Hourly	0:04:00	Hourly	Pending





# Edit Entry (cont.)

**\*Please note!** Only entries in a Pending status can be edited by the employee

6. Complete the necessary changes in the Edit Entry form wizard
7. Select a Reason Code from the drop-down list
8. Add Reason Code Note
9. Click **Save**
10. Click **Yes** to confirm the changes

The edited entry moves into a Rejected status, and a new (corrected) entry in Pending status is created.

6

7

8

9

10

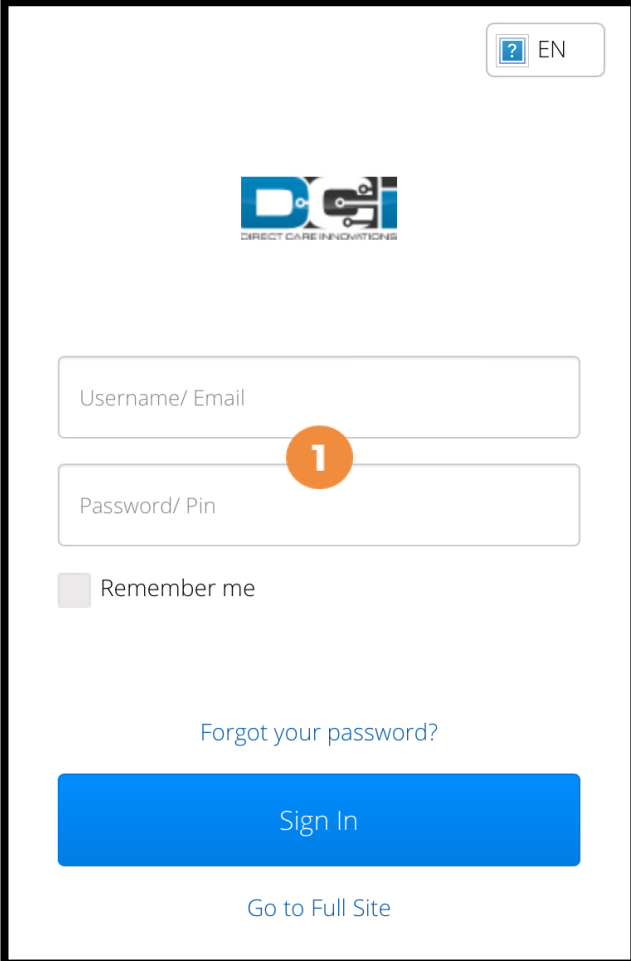
# **Employee Mobile Web Portal**

---

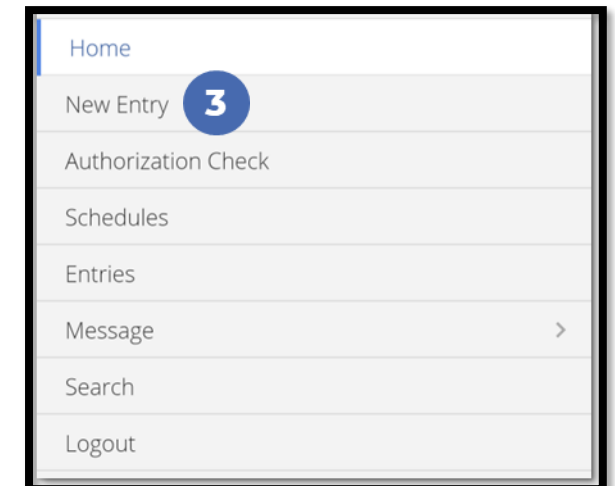
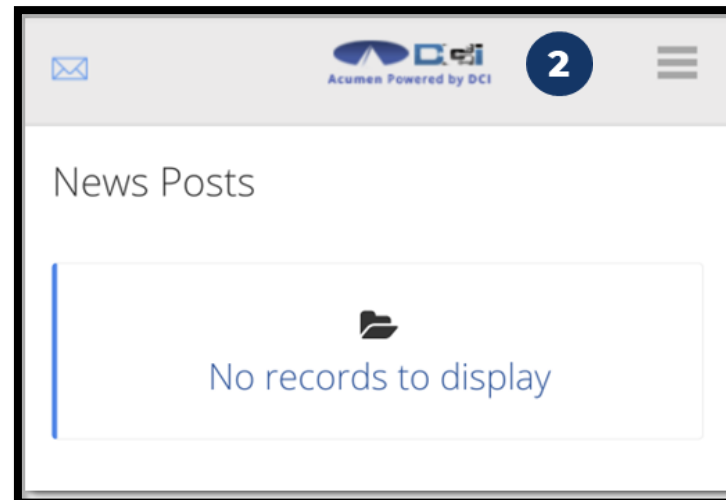
**Accessed via smartphone or tablet**



# Add New Entry - Mobile Web

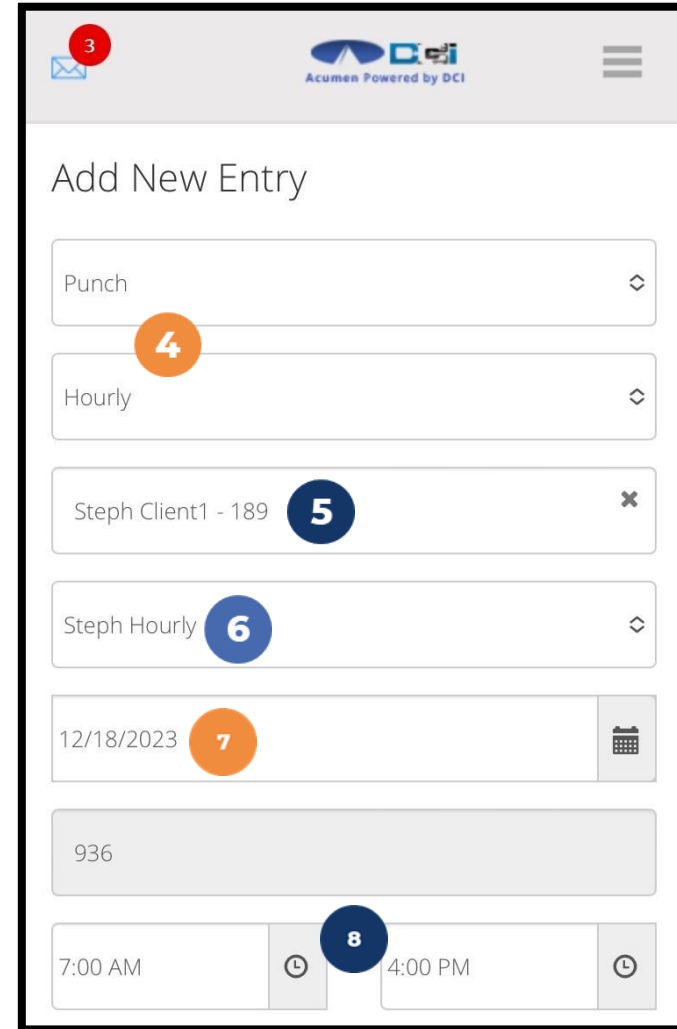


1. Log in to the DCI Web Portal on a mobile device using Chrome, Safari, Edge, or Firefox browser.
  - ✓ Chrome is preferred
  - ✓ Enter Username or Email and Password or Pin
2. Click the **Menu** in the top right corner of the screen
3. Select the **New Entry** tab from the submenu



# Add New Entry - Mobile Web (cont.)

4. The first two fields are prefilled
5. Type a minimum of three characters to generate results and select the Client's name from the list
6. Select the Service Code from the drop-down
7. Select the Service Date
8. Enter the Check In (start) and Check Out (end) times



3

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### Add New Entry

Punch 4

Hourly

Steph Client1 - 189 5

Steph Hourly 6

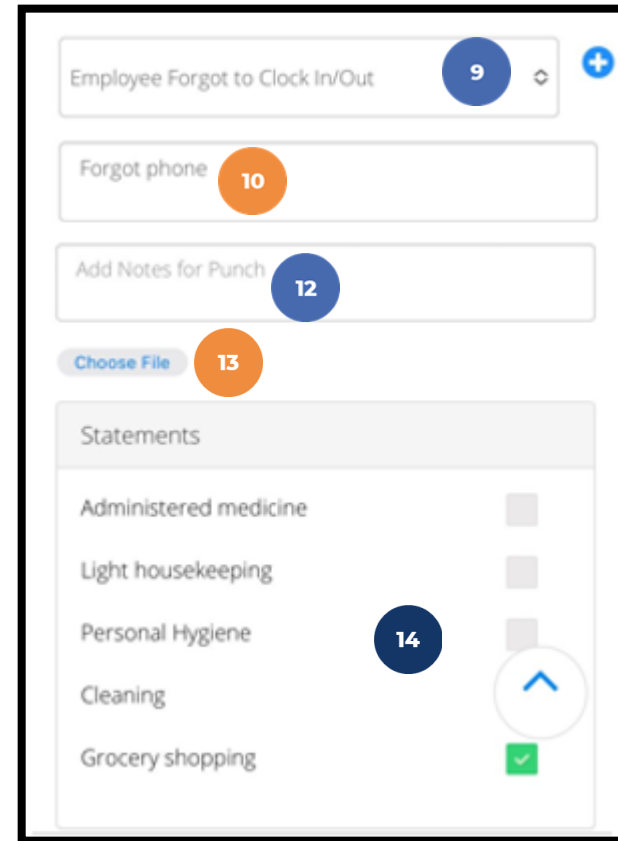
12/18/2023 7

936

7:00 AM 8 4:00 PM

# Add New Entry - Mobile Web (cont.)

9. Select a Reason Code from the drop-down list
10. Add a Reason Code Note
11. Click the blue **plus sign (+)** to populate the reason code details
12. Enter Notes for the punch (optional)
13. Click the **Choose File** button to select and upload Attachments (optional)
14. Selects the task(s)/statement(s) that was completed during the shift
  - ✓Tasks/statements are a quick way to document the duties completed with/for the participant
  - ✓The entry cannot be saved without a selection



Employee Forgot to Clock In/Out 9 +

Forgot phone 10

Add Notes for Punch 12

Choose File 13

Statements

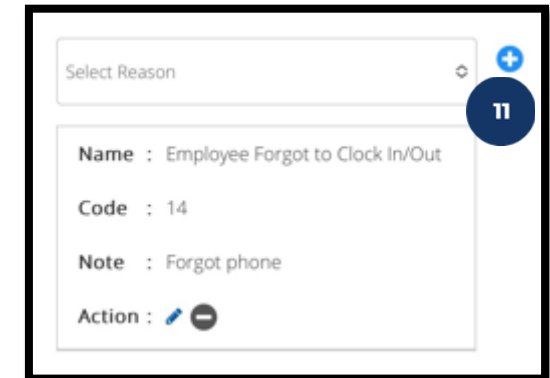
Administered medicine

Light housekeeping

Personal Hygiene 14

Cleaning

Grocery shopping



Select Reason + 11

Name : Employee Forgot to Clock In/Out

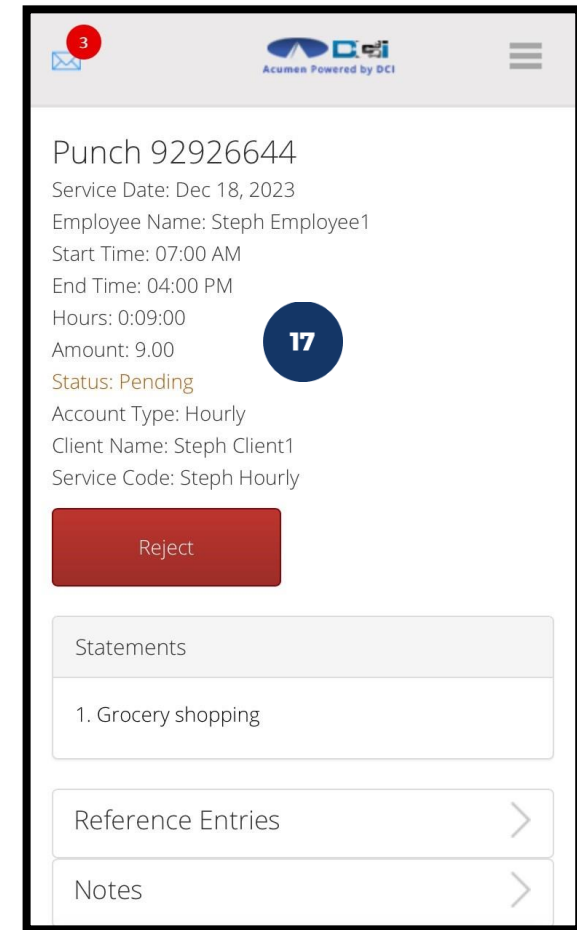
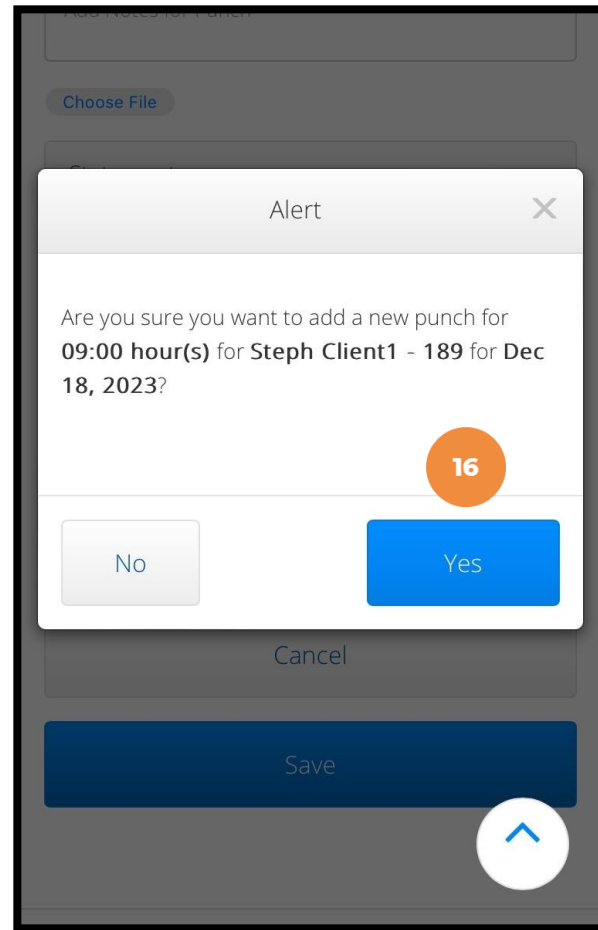
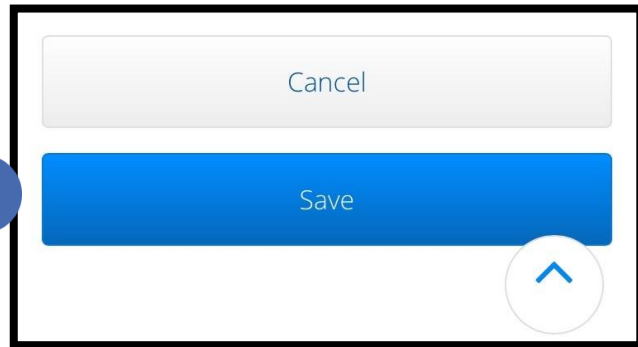
Code : 14

Note : Forgot phone

Action : + -

# Add New Entry - Mobile Web (cont.)

15. Click Save
16. Click Yes to submit
17. The punch has been submitted



# **Phone IVR (Interactive Voice Response)**

**\*Option when access to a mobile device  
or computer is limited**

# Phone EVV Basics



- Employer - Confirm the landline or VoIP phone number on file with Acumen is for the client
  - ✓ The VoIP number must be tied to the client's home address
  - ✓ Employees must call from a recognized number only
  - \***Please note!** If calling from a number not associated with the client, you will receive an error message.
- Employee - Will be asked to validate the following information:
  - ✓ Last four digits of their social security number
  - ✓ PIN
  - ✓ MMDD of their birthday
  - ✓ Client Name & Service Code for the shift
- Client or designated representative (DR) – Need client PIN for historical (non-EVV-compliant) phone entries
  - ✓ Client PIN is on the Employer Good To Go letter



# Clock In: Real Time Entry

---

1. Sign in:
  - ✓ Call (855) 807-9595 from the client's landline or VoIP to start the shift
  - ✓ Enter the last four digits of the social security number
  - ✓ Enter PIN
  - ✓ Enter month/day of birth (MMDD)
2. Press #1 for hourly
3. Confirm the client's name with the prompt given
4. Press #1 for real time entry
5. Select the service code with the prompts given
6. Press #1 to confirm and save the punch
7. The recording will read back the punch details and then disconnect



# Clock Out: Real Time Entry

---

1. Sign in:
  - ✓ Call (855) 807-9595 from the client's landline or VoIP to end the shift
  - ✓ Enter the last four digits of the social security number
  - ✓ Enter PIN
  - ✓ Enter month/day of birth (MMDD)
2. The system will read each task/statement. **Select 1** if the task was completed or **2** if the task was not completed (e.g., Personal hygiene, press 1 for yes and 2 for no). Select at least one statement/task or the call will disconnect, and the process must be restarted.
3. Recording announces that there is an open punch
4. When prompted press #1 to confirm closing the punch
5. The punch is now closed, and the employee is clocked out
6. Press #2 to disconnect or Press #1 to open a new punch





# Historical Entry

**\*Please note!** Historical entries are used for a missed punch or punch correction. The goal should always be to enter punches in real time to maintain EVV compliance.

*The client or employer must be present at the end of this process.*

1. Sign in:
  - ✓ Call (855) 807-9595 from the client's landline or VoIP to enter the shift
  - ✓ Enter the last four digits of the social security number
  - ✓ Enter PIN
  - ✓ Enter month/day of birth (MMDD)
2. Press #1 for hourly
3. Confirm the client's name with the prompt given
4. Select #2 for historical entry
5. Select the service code with the prompts given



# Historical Entry (cont.)

---

6. Enter the date of service in MMDDYYYY format (i.e., December 28, 2023 = 12282023)
7. Enter the clock-in time in HH:MM (i.e., 0830)
8. Select #1 for AM or #2 for PM
9. Enter the clock-out time in HH:MM (i.e., 0530)
10. Select #1 for AM or #2 for PM
11. The system will read each task/statement. **Select 1** if the task was completed or **2** if the task was not completed (e.g., Personal hygiene, press 1 for yes and 2 for no). Select at least one statement/task or the call will disconnect, and the process must be restarted.
12. The recording will read back the punch details
13. Press #1 to confirm



# Historical Entry (cont.)

---

**\*Please Note!** The client or employer must be present for the following final steps:

14. Hand the phone to the client/employer who presses #1 when ready
15. The client/employer reviews the punch details and presses #1 to accept or #2 to reject the entry
16. The client/employer will validate the call using their PIN
17. The punch is created
18. The phone disconnects and the shift is recorded



# Troubleshooting

- Is the employee having trouble signing in?
  - ✓ PIN not working? Update under profile settings
  - ✓ Employee can call Acumen to confirm their date of birth & last four digits of their social security number on their profile
- Is the employee having trouble clocking in?
  - ✓ Only call from the client's landline or VoIP
    - Call Acumen at (866) 859-0027 to confirm the client's number
- Is the employee having trouble adding historical entries?
  - ✓ Enter the date & time in the correct format (MM/DD/YYYY & HH:MM)
  - ✓ Do not overlap with other employee's shifts
- Is the client having trouble validating the entry?
  - ✓ Employer calls Acumen to reset their client PIN



# Paper Timesheets

**\*Available for a limited time during transition.  
End date for usage to be communicated.**

# SAIL Paper Timesheets



- Should only be used temporarily due to EVV requirements & will only be offered for a limited time
  - ✓ Using DCI mobile app is the best practice
- Please note:
  - ✓ Accurate, legible, black ink is preferred, and all entries should be made within the boxes.
  - ✓ Submit on time (see payment schedule)
  - ✓ The **Payroll-SAIL@acumen2.net** email is for timesheet submittal only
  - ✓ Submit the timesheet only once with a distinct subject line
  - ✓ Attach a clear, high-quality attachment. Best practice is a PDF, instead of images in the body of the email, or links that Acumen cannot access for security reasons.
  - ✓ If you work multiple shifts per day, please include each shift on its own line.
  - ✓ Do not submit your time in multiple formats. For example, if you already submitted the time entry (shift) in the mobile app do not also submit the time entry (shift) on a timesheet.
  - ✓ Only include the dates and times worked
  - ✓ Please do not put notes about your shifts or time not worked in the margins or at the top of the timesheet UNLESS you are noting a correction to a previously submitted timesheet
  - ✓ For corrections to a previously submitted timesheet, write CORRECTED at the top and only resend those entries that need to be corrected – do not resend your corrected timesheet with shifts that have already been sent accurately.
- Must be **submitted and approved** within **30 days of the date of service**.
  - ❖ **After 30 days the approval will be prohibited as it will violate the timely filing business rule**

# SAIL - Complete Timesheet



Acumen Fiscal Agent  
Innovation • Opportunity • Freedom

1. Enter Employee (provider) name & ID
2. Enter Participant (client) name & ID
3. Select one Service based on the waiver

**\*Please note:** Enter your ID#, leaving the remaining boxes blank, i.e., if your ID # is only 4 digits, fill in the first 4 boxes, leaving the last 2 boxes blank. Please opt the characters AL.

SERVICE			
P	C	S	PCS - Personal Care
S	F		SF - Savings Fund

4. Enter Service Date (MM/DD/YYYY)
5. Enter Check In Time & Check Out Time
  - ✓ Select AM or PM for both
6. Employee (provider) Signature & Date
7. Employer (participant/representative) Signature & Date
8. Submit:

**\*Please note:** SF Saving Fund balances will not be available until late January/early February

- ✓ Fax: (866) 496-4575
- ✓ Email: [Payroll-SAIL@acumen2.net](mailto:Payroll-SAIL@acumen2.net)

**\*Please note:** You may submit a secondary timesheet for the same payment period if your entries exceed the lines provided on the primary timesheet

The form is titled "State of Alabama Independent Living Service (SAIL) Program" and includes contact information for Acumen Fiscal Agent. It features a grid for recording service dates and times. The grid has columns for "SERVICE DATE" (MM/DD/YYYY), "CHECK IN TIME", "CHECK OUT TIME", and "SERVICE". The "CHECK IN TIME" and "CHECK OUT TIME" columns include radio buttons for "AM" and "PM".

Numbered callouts on the form indicate the following steps:

1. Employee (FIRST NAME) and Employee (LAST NAME)
2. Participant (FIRST NAME) and Participant (LAST NAME)
3. Employee Worker ID and Participant ID
4. Service Date (MM/DD/YYYY)
5. Check In Time and Check Out Time
6. Employee Signature and Date
7. Employer Signature and Date
8. Submit



# Payroll Schedule & Deadlines



# SAIL Payment Schedule



## Alabama Personal Choices Program - SAIL Payment Schedule – December 2023 to June 2024

To ensure that your employees are always paid on time, please ensure your employee's time is entered and approved online by the due date, *even if it falls on a weekend or holiday*. These dates are strictly enforced. Any time that is approved after the due date or payment requests received after that date will be processed for the following payment period. Be sure to have all hours entered and approved by the "Employee Pay/Goods & Services Requests due NO Later Than" date (see next slide). To access the DCI Employer and Employee Portal, go to: <http://acumen.dcisoftware.com>

- \*Please note!** All entries must be entered and approved within 30 days of the date of service.
- ❖ After 30 days the approval will be prohibited as it will violate the timely filing business rule

If you prefer, you may fax your submissions to (866) 496-4575. Acumen's fax machines can receive faxes 24 hours a day, 7 days a week. Please be sure to get verification from the fax machine that your fax was successfully sent. If you have any questions or concerns, contact one of our agents, or our Customer Call Center at (866) 859-0026.



# SAIL Payment Schedule

- Time must be entered and approved two days after the payment period end date by 11:59 PM CST
- Pay dates are the 15<sup>th</sup> and the last day of the month unless it falls on the weekend or a holiday

<i>Payment Period Start Date</i>	<i>Payment Period End Date</i>	<i>Employee Pay/Goods &amp; Service Requests Due NO Later Than</i>	<i>Direct Deposit/Check Date</i>
12/16/2023	12/31/2023	Tues, 01/02/24	Fri, 01/12/24
1/1/2024	1/15/2024	Wed, 01/17/24	Wed, 01/31/24
1/16/2024	1/31/2024	Fri, 02/02/24	Thurs, 02/15/24
2/1/2024	2/15/2024	Sat, 02/17/24	Thurs, 02/29/24
2/16/2024	2/29/2024	Sat, 03/02/24	Fri, 03/15/24
3/1/2024	3/15/2024	Sun, 03/17/24	Thurs, 03/28/24
3/16/2024	3/31/2024	Tues, 04/02/24	Mon, 04/15/24
4/1/2024	4/15/2024	Wed, 04/17/24	Tues, 04/30/24
4/16/2024	4/30/2024	Thurs, 05/02/24	Wed, 05/15/24
5/1/2024	5/15/2024	Fri, 05/17/24	Fri, 05/31/24
5/16/2024	5/31/2024	Sun, 06/02/24	Fri, 06/14/24
6/1/2024	6/15/2024	Mon, 06/17/24	Fri, 06/28/24
6/16/2024	6/30/2024	Tues, 07/02/24	Mon, 07/15/24

“Payment Period Start/End Date” is the first/last day of service pay period (days worked).

“Direct Deposit/ Check Date” shows the date that payment will be issued. For those payees that have selected direct deposit or pay card this is also the date that funds will be available in their accounts.

“Employee and Vendor Requests Due NO Later Than” is the last date that your time sheets or payment requests can be received, or that your DCI approvals can be entered, for the pay period.

**\*Please note:** Employees should review withholdings on their paystub and if changes are needed, complete the W4 (for federal taxes) and an A4 (for state taxes) located on our website: [www.acumenfiscalagent.com/state/alabama](http://www.acumenfiscalagent.com/state/alabama). Return the forms to [enrollment@acumen2.net](mailto:enrollment@acumen2.net).

# 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) 859-0026



<https://acumenfiscalagent.com/state/alabama/>



Enrollment: [enrollment@acumen2.net](mailto:enrollment@acumen2.net)

Payment or other questions:

Please complete the [Contact Us](#) form



**Questions?**

**Thank you!**

**Visit the Acumen Help Center  
to learn more at:**

**[acumenfiscalagent.zendesk.com](https://acumenfiscalagent.zendesk.com)**