



**Acumen powered by DCI Software**

# Monthly Summary Report

MO SDS

# Monthly Summary Report

- Individuals or Designated Representatives are required to submit Monthly Summary Reports within the DCI Portal by the 15<sup>th</sup> of each month
- Must include descriptive words that give a clear picture of the services provided within the ISP and the overall status of the individual
- Be sure to include any unusual events, accomplishments, positive progress towards goals and things the individual may need additional help with
- Summary must also document that you are monitoring your budget and staying within the allocation for the year.
  - Use [Authorization Widget](#) for Budget Balance
  - Use [Spending Summary](#) for Budget Summary

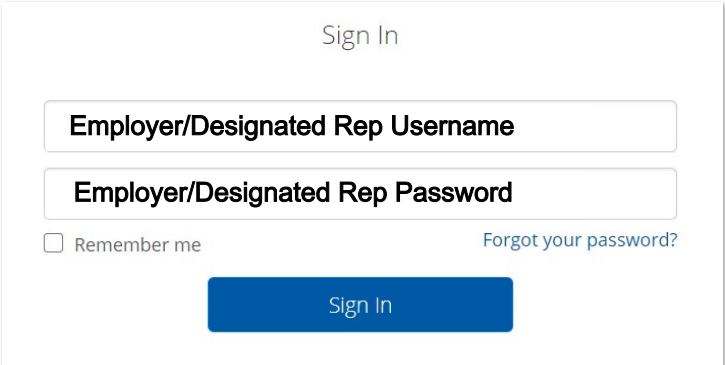
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# How to Submit Monthly Summary

# Access the DCI Portal

1. Open an Internet Browser
2. Navigate to the DCI Web Portal
  - Click “Go to Full Site” on mobile
3. Enter ER/ DR Username/ Password
4. Use Forgot Password link if needed
5. Contact Acumen Agent for help

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



Sign In

Employer/Designated Rep Username

Employer/Designated Rep Password

Remember me [Forgot your password?](#)

Sign In

# Find Client Details Page

Once ER/DR is logged into DCI

1. Click “Clients” Tab on left
2. Select Client name below

Acumen Powered by DCI

HOME EMPLOYER REPORTS Help andy.reid

CLIENTS 1 Employer > Clients

EMPLOYEES

VENDORS

PENDING ENTRIES (1)

Clients

Type Client Name Select Status

Select Funding Source

Reset Search

Export

Showing 1 out of 1 record

Name	Status
MAHOMES PATRICK	Active

2

# Add New Note


## Once on Client Details Page

1. Click “Actions” on top right
2. Select “New Note” on top

Employer > Clients > MAHOMES PATRICK

## Client Details - MAHOMES PATRICK

Basic Demographics

Client Id: MO15  
Address: 1 Arrowhead Dr  
Kansas City, MO 64129-0000  
GNIS: 29-095-748198  
Region:  
Phone: (888) 888-8888  
Alternate Phone:  
Mobile Number:  
Email:  
Date of Birth: Sep 17, 1995  
Photo: 

Other Details

Cost Center: ACUMEN FISC  
Guardian:  
Medicaid No:  
Insurance Group No:  
Insurance Plan No:  
Insurance Payer No:  
Received Date:  
Packet Mailed:  
Username: patrick.mahomes  
Authentication Status: Active  
Email confirm: Yes  
Photo Set: Yes  
Signature Set: No  
Enable Caregiver Rating Emails: No  
Enable Vendor Payment: No  
Enable Employer Reimbursement: No

1 Actions

2 New Note

- New Attachment
- New Entry
- New EVW Location
- New Vendor Payment Entry
- New Reimbursement Entry

# Enter Monthly Summary

## Once New Note box is open

1. Note Type = “Custom”
2. Note Sub Type = “ER or DR Monthly Summary”
3. Enter Month & Year in Subject
4. Type Monthly Summary
5. Select Month & Year
6. Click Save > Yes

The screenshot shows a 'New Note' form with the following fields and callouts:

- 1** Note Type: \* Custom
- 2** Note Sub Type: \* ER or DR Monthly Summary
- 3** Subject: \* April 2021 Monthly Summary
- 4** Body: \* Outcome 1 Goal 1: Patrick will choose an activity in the community at least one time per week and work on socialization skills. Patrick chose a different activity each week this month (ice skating, the local park, a church service, and a friend's softball game). The staff was able to prompt Patrick to talk to others attending the activities, as appropriate.
- 5** Month: Select Month
- 5** Year: 2021
- 6** Save

Buttons: Cancel, Save

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# How to View Monthly Summary



# Find Client Details Page

Once ER/DR is logged into DCI

1. Click “Clients” Tab on left
2. Select Client name below

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HOME EMPLOYER REPORTS Help andy.reid

CLIENTS 1 Employer > Clients

EMPLOYEES

VENDORS

PENDING ENTRIES (1)

Clients

Type Client Name Select Status

Select Funding Source

Reset Search

Export

Showing 1 out of 1 record

Name	Status
MAHOMES PATRICK	Active

2

# View Client Notes

## Once on Client Details Page

1. Scroll down to view tabs
2. Select “Note” tab
3. Scroll down to view notes

Employer > Clients > MAHOMES PATRICK

## Client Details - MAHOMES PATRICK

⚙️ Actions

### Basic Demographics

Client Id: MO15  
Address: 1 Arrowhead Dr  
Kansas City, MO 64129-0000

### Other Details

Cost Center: ACUMEN FISCAL AGENT  
Guardian:  
Medicaid No:

1 ↓ Scroll Down ↓

Entries

Accounts

Certifications

EWV Locations

Notes

Attachments

Events

Custom Fields

History

From (MM/DD/YYYY)

To (MM/DD/YYYY)

Select Type

Select Sub Type

Reset

Search

📄 Export

## Notes

Showing 5 out of 5 records

Date	Type	Sub Type	Subject	Body	Added by
Apr 14, 2021	Custom	ER or DR Monthly Summary	April Monthly Summary	Outcome 1 Goal 1: Patrick will choose an activity in the community at least one time per week and work on socialization skills. Patrick chose a different activity each week this month (ice skating, the local park, a church service, and a friend's softball game). The	REID ANDY

3

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# How to View Budgets with Authorization Widget

# View Authorization Widget

## Once ER is logged into DCI

1. Click “Home” Tab on left
2. Scroll to Authorizations
3. Type Client Name > Select
4. Click Search
5. View Budget Details

The screenshot shows the DCI system interface. The top navigation bar includes 'HOME' and 'EMPLOYER' tabs. The left sidebar has a 'DASHBOARD' tab highlighted with a yellow circle '1'. Below the sidebar, there are search and filter options for 'Type Employee Name' with 'Search' and 'Reset' buttons, and an 'Add Entry' button. The main content area displays the 'REID ANDY' dashboard for the period '04/11/2021 to 04/17/2021'. It features an 'Overtime Gauge' showing 'No entry in current week' and a 'Total Hours' summary table. The 'Total Hours' table has a red background for 'Unverified Hours'.

Total Hours		04/11/2021 to 04/17/2021	
Approved By:			0.00
Pending Hours:			0.00
Unverified Hours:			0.00
<b>Total Hours:</b>			<b>0.00</b>

Below this, the 'Authorizations' section is highlighted with a yellow circle '2'. It contains a search input field with 'pat' entered, a 'Search' button with a yellow circle '4', and a 'Reset' button. Below the search, the client name 'MAHOMES PATRICK - MO15' is displayed. The authorization details for 'MAHOMES PATRICK' are shown in a table:

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorizations Holds	Current Available Balance
PA	04/01/2020	04/30/2021	10000.00	10000.00	4238.42	5761.58

The table is highlighted with a yellow circle '5'.

# Understanding Budget Details

1. Client name on Authorization
2. Type of service being provided
3. Budget period start/end dates
4. Budget balances (Initial/Current)\_
5. Entries ready for Payroll
6. Amount of budget available to use

Authorizations

MAHOMES PATRICK - MO15

1 Authorization for Client: MAHOMES PATRICK

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorizations Holds	Current Available Balance
CS	04/01/2020	05/31/2021	5000.00	5000.00	547.93	4452.07
PA	04/01/2020	04/30/2021	10000.00	10000.00	4238.42	5761.58

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# How to View Budgets with Spending Summary

# View Spending Summary

Once ER/DR is logged into DCI

1. Click “Reports” Tab on top
2. Select Summary Report
3. Type Client Name > Select
4. Click Search
5. View Spending Summary

The screenshot shows the DCI web application interface. At the top, there are navigation tabs: HOME, EMPLOYER, and REPORTS. The REPORTS tab is selected and highlighted with a yellow circle containing the number 1. Below the navigation tabs is a sidebar menu with options: DASHBOARD, COA REPORTS, AUTHORIZATION REPORTS, MANAGEMENT REPORTS, PROFILE REPORTS, NOTES REPORT, and SUMMARY REPORT. The SUMMARY REPORT option is selected and highlighted with a yellow circle containing the number 2. The main content area shows the breadcrumb path: Reports > Dashboard. Below this, the page title is "Dashboard" and "Reports - Summary Report". There are two date input fields: "Service Start Date (MM/DD/YYYY)" and "Service End Date (MM/DD/YYYY)". To the right of these fields is a search input field containing "MAHOMES PATRICK - 131", which is highlighted with a yellow circle containing the number 3. Below the search input is a "Type Service Code" field and a checkbox for "Ended Authorizations". At the bottom right of the search area are "Reset" and "Search" buttons. The "Search" button is highlighted with a yellow circle containing the number 4. Below the search area is a "Download To PDF" button. The main content area displays "Spending Summary as of: 04/15/2021". Below this, there is a box containing client information: "Client Name: MAHOMES PATRICK", "Participant Number: MO15", "Case Manager: KC Case", and "Phone: (999) 999-9999". This box is highlighted with a yellow circle containing the number 5.

# Spending Summary Report

Spending Summary as of: 04/15/2021

## Once report is open

1. Client Details
2. Authorization Details
3. Budget Period Time Elapsed
4. Remaining Budget Balance
5. Additional Service Codes will be listed below

*Scroll down for a list of Entries*

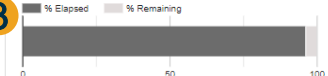
Client Name: MAHOMES PATRICK

Participant Number MO15      Case Manager KC Case

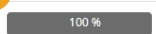
Phone: (999) 999-9999 1

### MO SDS

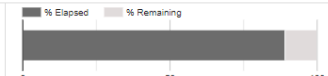
2

Auth	Start 04/01/2020	End 04/30/2021	% Time Elapsed 96	<span style="float: right; border: 1px solid orange; border-radius: 50%; padding: 2px 5px;">3</span> 
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**Dollars (Dollar Based Programs)**

Authorization Name	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
PA	\$10000.00	\$0.00	\$4238.42	\$10000.00 <span style="float: right; border: 1px solid orange; border-radius: 50%; padding: 2px 5px;">4</span>	 100 %

5

Auth	Start 04/01/2020	End 05/31/2021	% Time Elapsed 89	
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**Dollars (Dollar Based Programs)**

Authorization Name	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
CS	\$5000.00	\$0.00	\$547.93	\$5000.00	 100 %



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# Monthly Summary Recap

# Monthly Summary Recap

- Monthly Summary Reports are due by the 15<sup>th</sup> of each month
- Clearly explain the individual's overall status and progress
- Include any unusual events, needs, and positive progress
- Must include a Budget Summary to show proper use
- All documentation should be clear, concise and up to date
- View the [MO SDS Guide to Documentation](#) for more details

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# Thank you!

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