Acumen powered by DCI Software

Monthly Summary Report

MO SDS

Monthly Summary Report

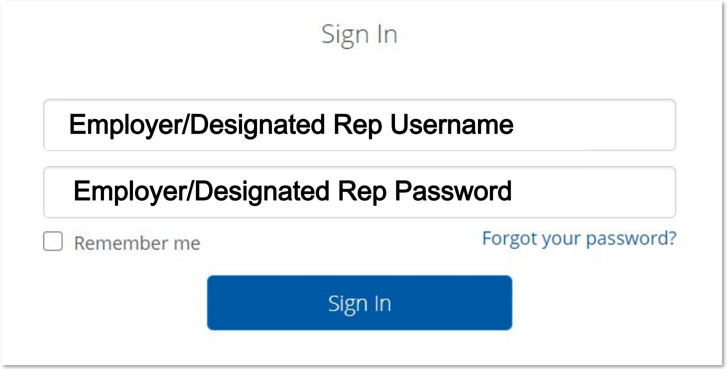
- Individuals or Designated Representatives are required to submit Monthly Summary Reports within the DCI Portal by the 15th of each month
- Must include descriptive words that give a clear picture of the services provided within the ISP and the overall status of the individual
- Be sure to include any 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

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

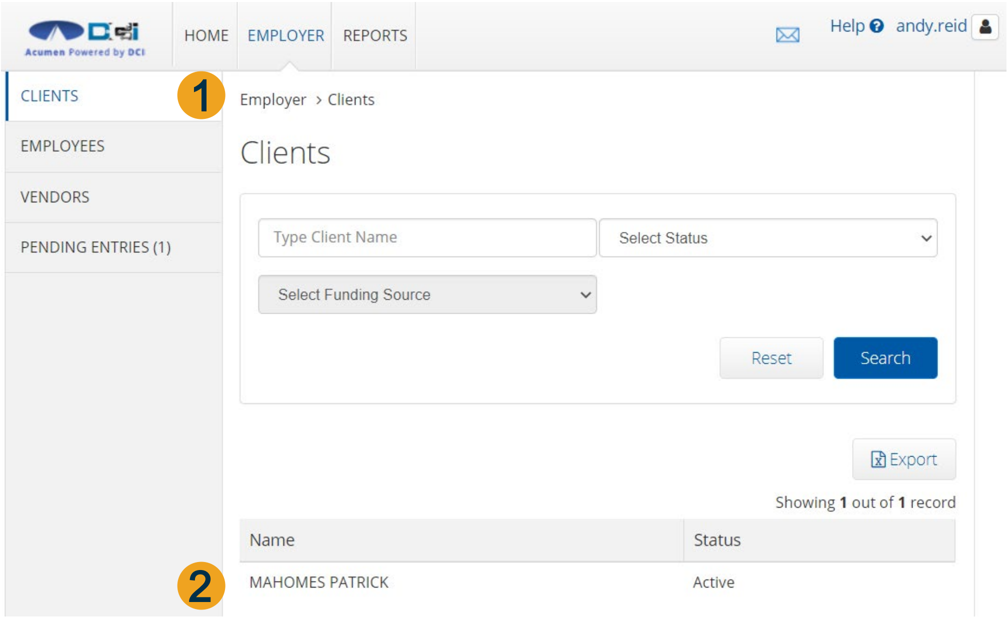


Find Client Details Page

<u>Once ER/DR is logged into DCI</u>

1. Click “Clients” Tab on left

2. Select Client name below

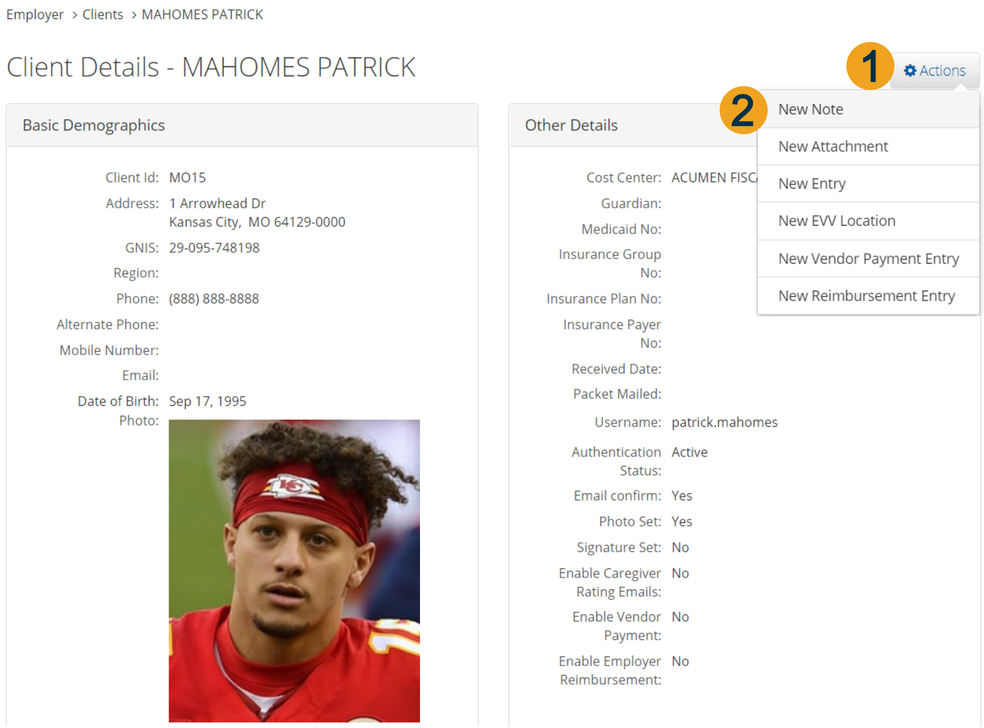


Add New Note

<u>Once on Client Details Page</u>

1. Click "Actions" on top right

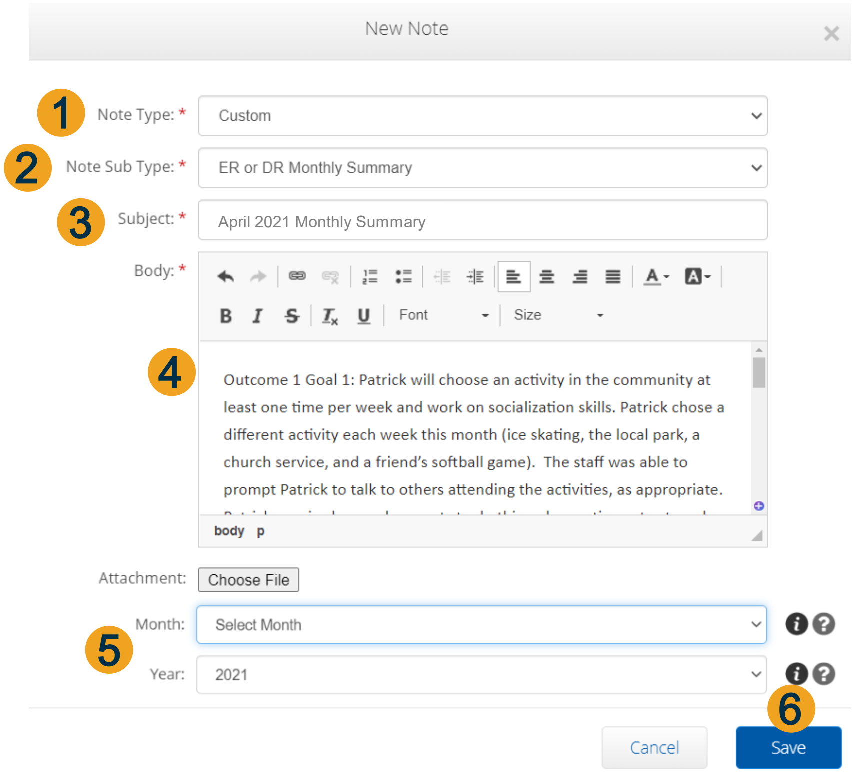
2. Select "New Note" on top



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



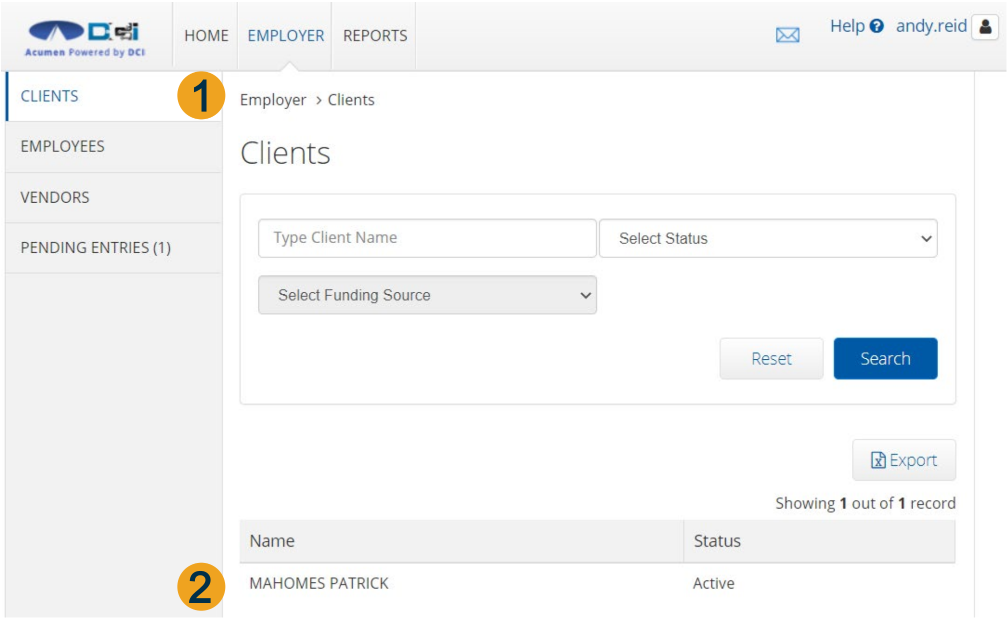
How to View Monthly Summary

Find Client Details Page

<u>Once ER/DR is logged into DCI</u>

1. Click "Clients" Tab on left

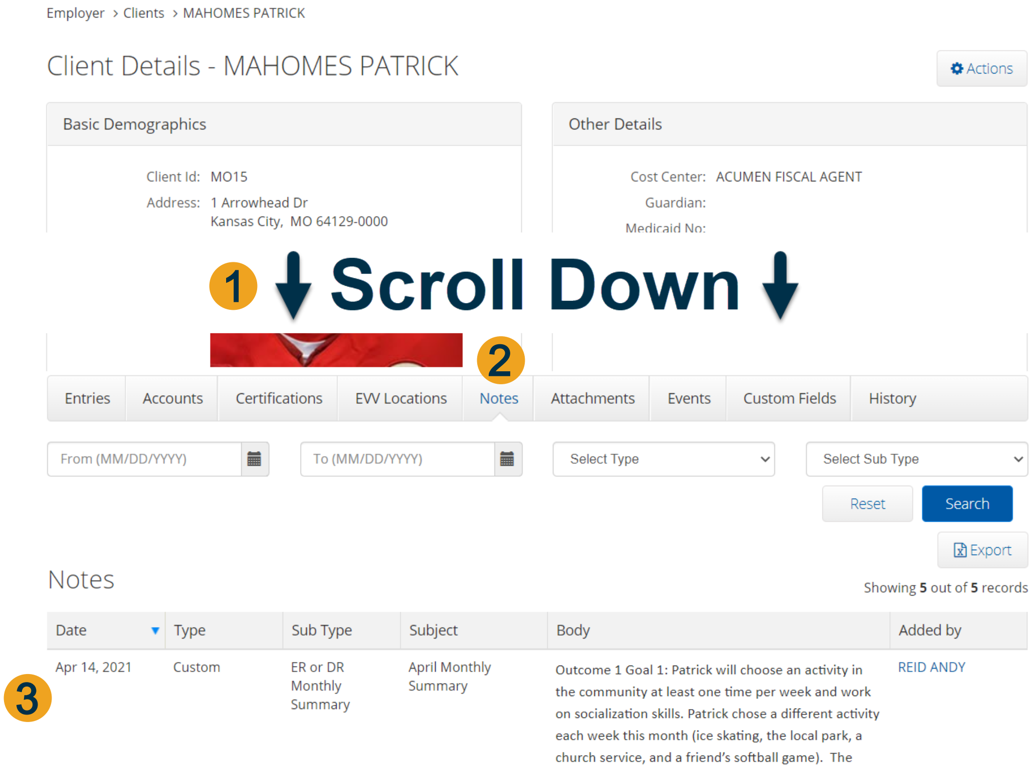
2. Select Client name below



View Client Notes

<u>Once on Client Details Page</u>

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

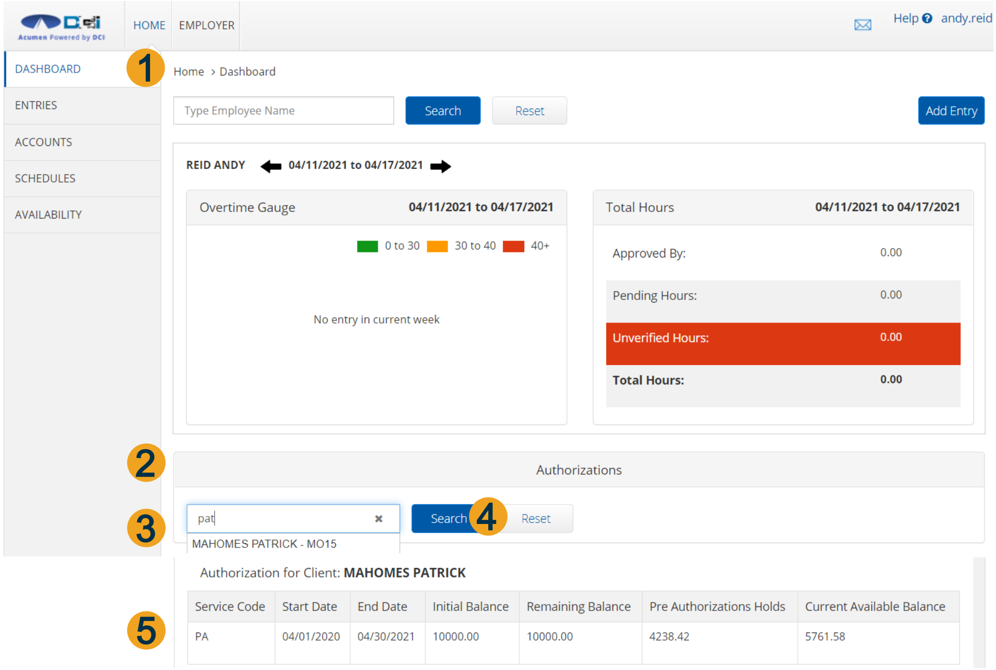


How to View Budgets with Authorization Widget

View Authorization Widget

<u>Once ER is logged into DCI</u>

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



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 ✖ Search Reset

1 Authorization for Client: **MAHOMES PATRICK**

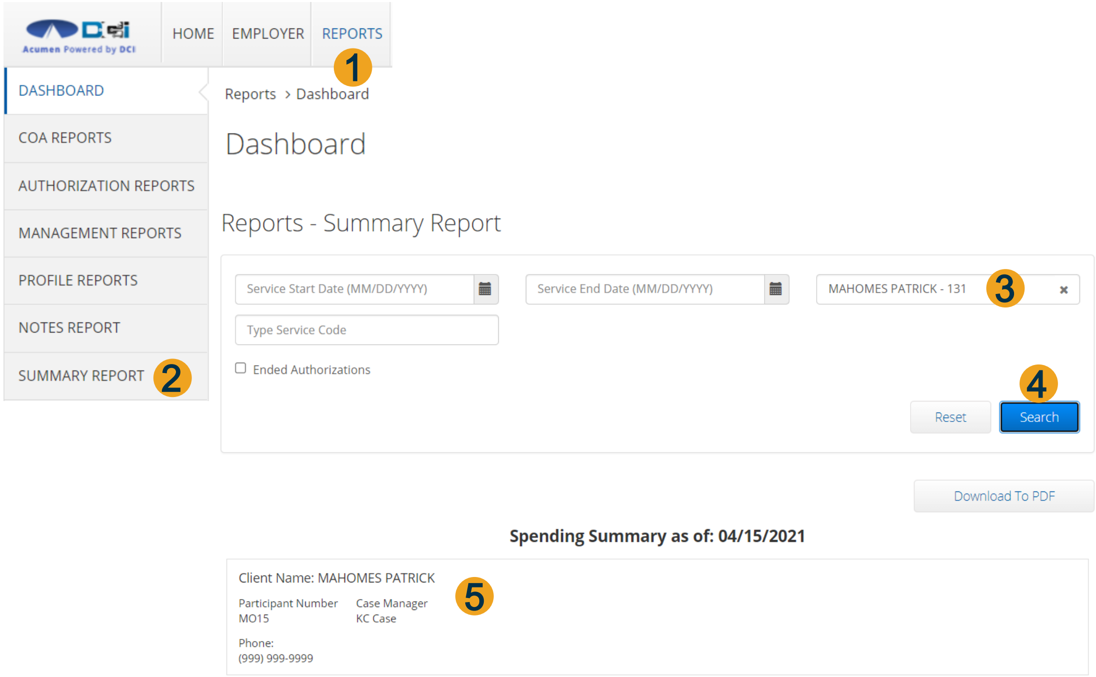
Service Code (2)	Start Date	End Date (3)	Initial Balance	Remaining Balance (4)	Pre Authorizations Holds (5)	Current Available Balance (6)
CS	04/01/2020	05/31/2021	5000.00	5000.00	547.93	4452.07
PA	04/01/2020	04/30/2021	10000.00	10000.00	4238.42	5761.58

How to View Budgets with Spending Summary

View Spending Summary

<u>Once ER/DR is logged into DCI</u>

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



Spending Summary Report

<u>Once report is open</u>

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

Spending Summary as of: 04/15/2021

Client Name: MAHOMES PATRICK

Participant Number: MO15
Case Manager: KC Case

Phone: (999) 999-9999

1

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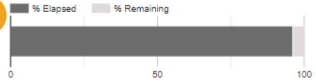
2

Auth	Start	End	% Time Elapsed
	04/01/2020	04/30/2021	96

3



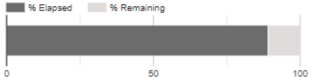
Dollars (Dollar Based Programs)

Authorization Name	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
PA	$10000.00	$0.00	$4238.42	$10000.00	100 %

4

5

Auth	Start	End	% Time Elapsed
	04/01/2020	05/31/2021	89



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 %

Monthly Summary Recap

DIRECT CARE INNOVATIONS
www.dcisoftware.com

Monthly Summary Recap

- Monthly Summary Reports are due by the 15th 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

Thank you!

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