

SAIL

Time Entry

Training for

Employers &

Employees

Welcome to Acumen!
Thank you for joining the Acumen Family!




Acumen powered by DCI

Helping create a positive, long-lasting
impact on people's lives.

Agenda



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	Overview + Mobile App Download & Login
	Employee – Mobile App Entry & EVV/Client Attestation
	Employer – Mobile App – Manage Entries
	Employee – Web Portal Historical Entry & Edit Entries
	Employer – Web Portal – Manage Entries
	Troubleshooting
	Phone EVV (IVR) – Real time & Historical Entries

New Quick Resources

- Short step-by-step resource documents have been added to the [Alabama SAIL Self Direction – Training Materials](#) page providing instructions for the punch entry and approval process.
- **Employee Specific Resources:**
 - ✓ SAIL – Employee Mobile App Entries
 - ✓ SAIL – Employee Web Portal Entries
- **Employer Specific Resources:**
 - ✓ Employer Manage Entries
 - ✓ Employer Manage Budgets
- **Shared Resources:**
 - ✓ Download the DCI Mobile EVV App & Log In
 - ✓ Logging into the Web Portal or the Mobile App
 - ✓ Phone EVV IVR Real Time & Historical Entries
 - ✓ Business Rule Alerts – Quick Reference



What is EVV?

- The 21st Century Cures Act, signed into law December 13th, 2016, by President Obama, requires state agencies to use a system of **electronic visit verification (EVV)** for all Medicaid personal care services (PCS) and home health care services (HHCS) that require an in-home visit by a provider.
- EVV uses electronic devices to verify a provider's visit
- The following data is collected for each visit:
 - ✓ The date of the service
 - ✓ The location of the service delivery
 - ✓ The time the service begins and ends
 - ✓ The individual receiving the service
 - ✓ The individual providing the service
 - ✓ The type of service performed



Why DCI & EVV (Electronic Visit Verification)?

- DCI increases compliance with the 21st Century Cures Act by capturing real-time punch entries at Clock In/Out at the Start/End of the shift



Ensure Time Entries are Submitted & Approved Electronically by Due Date



IMPORTANT

- All time entries must be submitted via **Mobile App** or **Phone EVV (IVR)**. Entries that occurred during a service interruption can be entered via the Web Portal.
- The last pay period when paper timesheets will be accepted is August 1-15, 2024.
- Time must be entered and approved online by the due date, *even if it falls on a weekend or holiday*.
 - ❖ Time entries approved *after* the due date will be processed on the following pay period's pay date
 - ❖ Please reference the AL SAIL [Pay Schedule](#) for due dates
- 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

Ways to Enter Time

Only use one per shift (each clock in/out)

Mobile App



- ***Preferred Method**
- Real Time Entry – EVV compliant
- Quick & Easy
- [Mobile App Guide](#)

OR

Phone EVV



- Landline
- Real Time Entry – EVV compliant
- Historical Entry – Non-EVV compliant
- Option when access to a mobile device or computer is limited

OR

Web Portal



- Only used for service interruptions
- Time Management
- [Historical Entry](#) & Corrections – Non-EVV compliant
- Manual Time Approval
- [Profile Settings](#)
- ***Includes Mobile Web Portal** – Mobile-friendly web portal version accessed via smartphone or tablet

DCI Requirements

Devices & Operating Systems (OS)

Apple

- OS: iOS version 14.0 or later
 - Devices:
 - ✓ iPhone 6s or 6s Plus or later device
 - ✓ iPhone SE
 - ✓ iPod touch (7th generation)

Android

- OS: Android version 8.0 or later
 - Devices:
 - ✓ 4.6" screen or larger
 - ✓ Due to the wide range of Android devices, we are unable to provide a device list.



Web Browsers

- ✓ Google Chrome (DCI Preferred)
- ✓ Firefox
- ✓ Edge
- ✓ Safari

DCI Mobile App

***Preferred Time Entry Method**



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Mobile App Basics

- 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

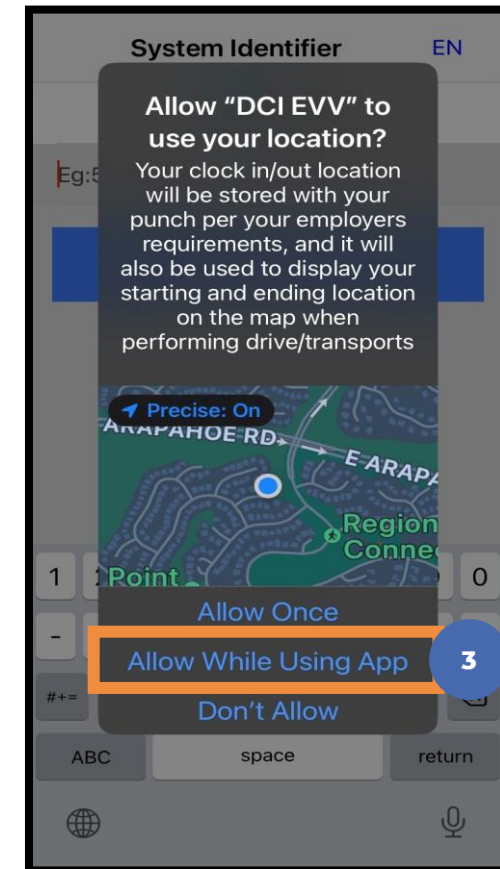
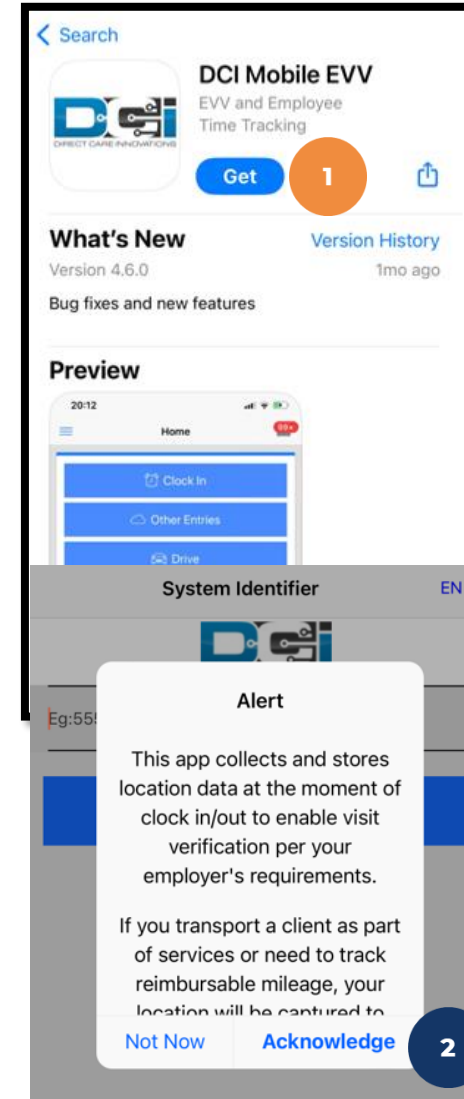
1. [Download](#) the **DCI Mobile EVV** App



2. Select Acknowledge on the Alert
 - The alert states the app collects and stores location data at clock in and clock out, if you transport a client as part of services and/or need to track reimbursable mileage
3. 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

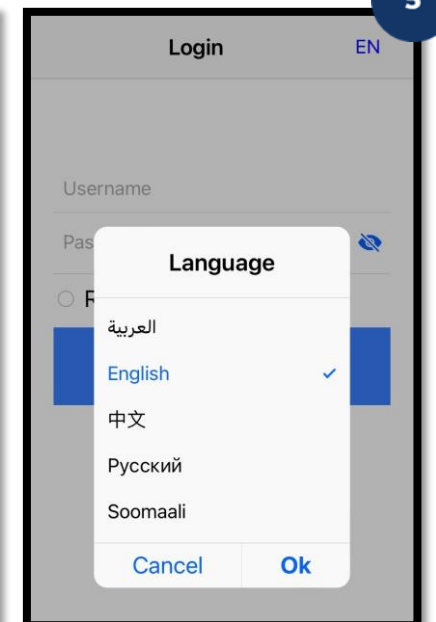
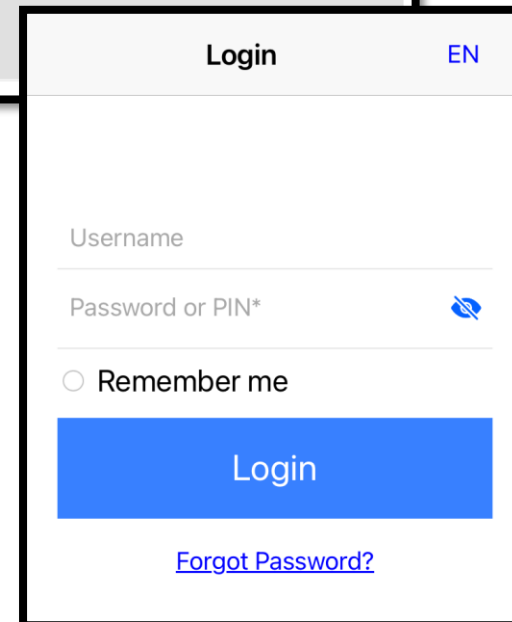
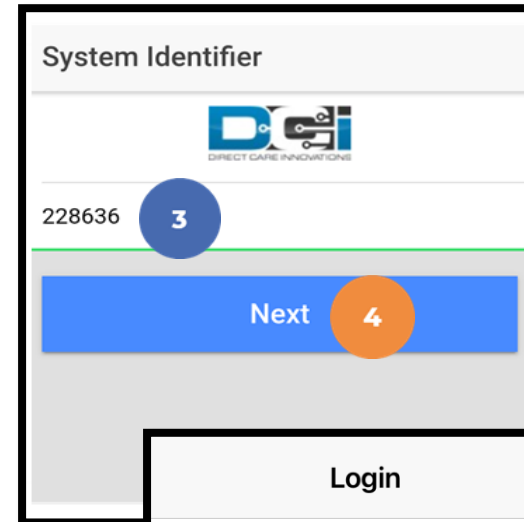
*Please note!

- 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.



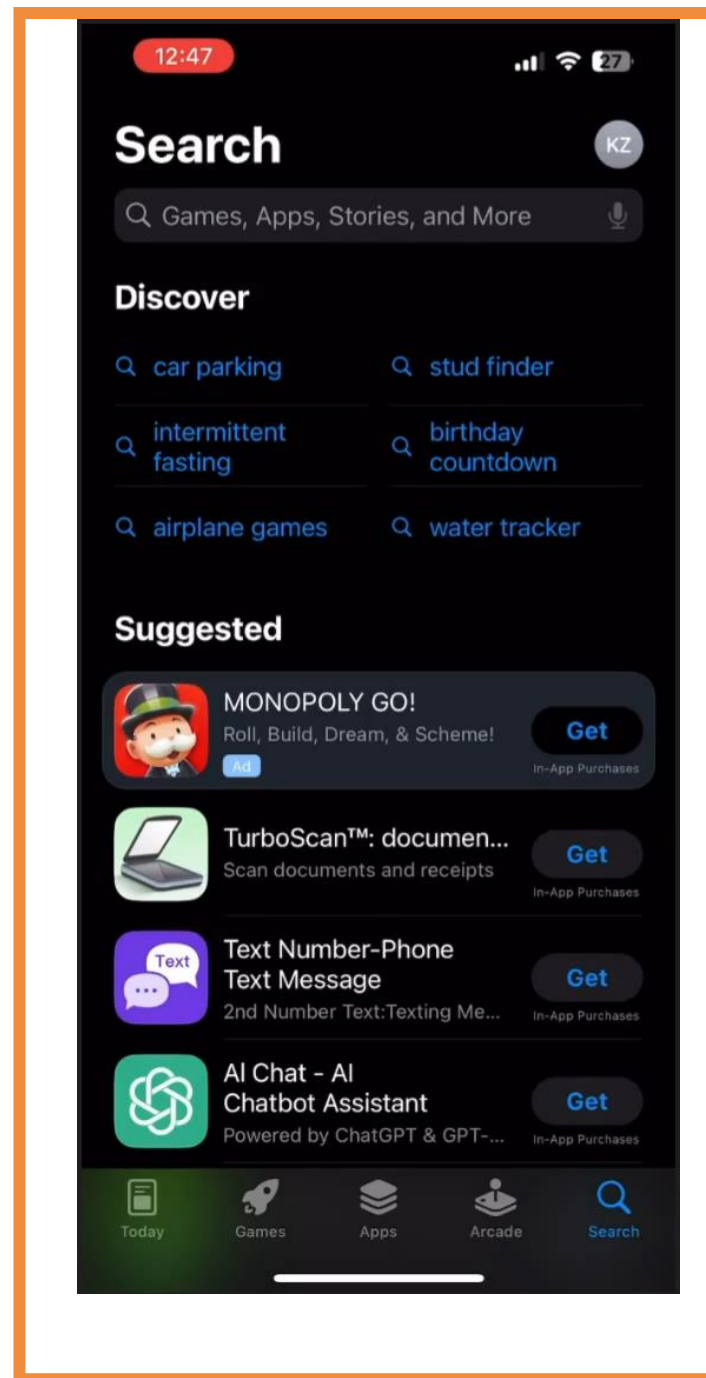
Download DCI Mobile EVV

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!



Mobile App Video

Download the DCI Mobile EVV App



Log into the DCI Mobile App



1. Enter employee credentials
 - ✓ Acumen provided a **username, password, and PIN** on the Good To Go/Welcome 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 screen. At the top is a header with the word "Login". Below it are two input fields: "Username" and "Password or PIN*", with a callout "1" pointing to the password field. A "Remember me" checkbox is located below the password field. A large blue "Login" button with a callout "2" is positioned below the checkbox. At the bottom of the screen is a blue link that says "Forgot Password?".

Username

Password or PIN*

Remember me

Login

[Forgot Password?](#)

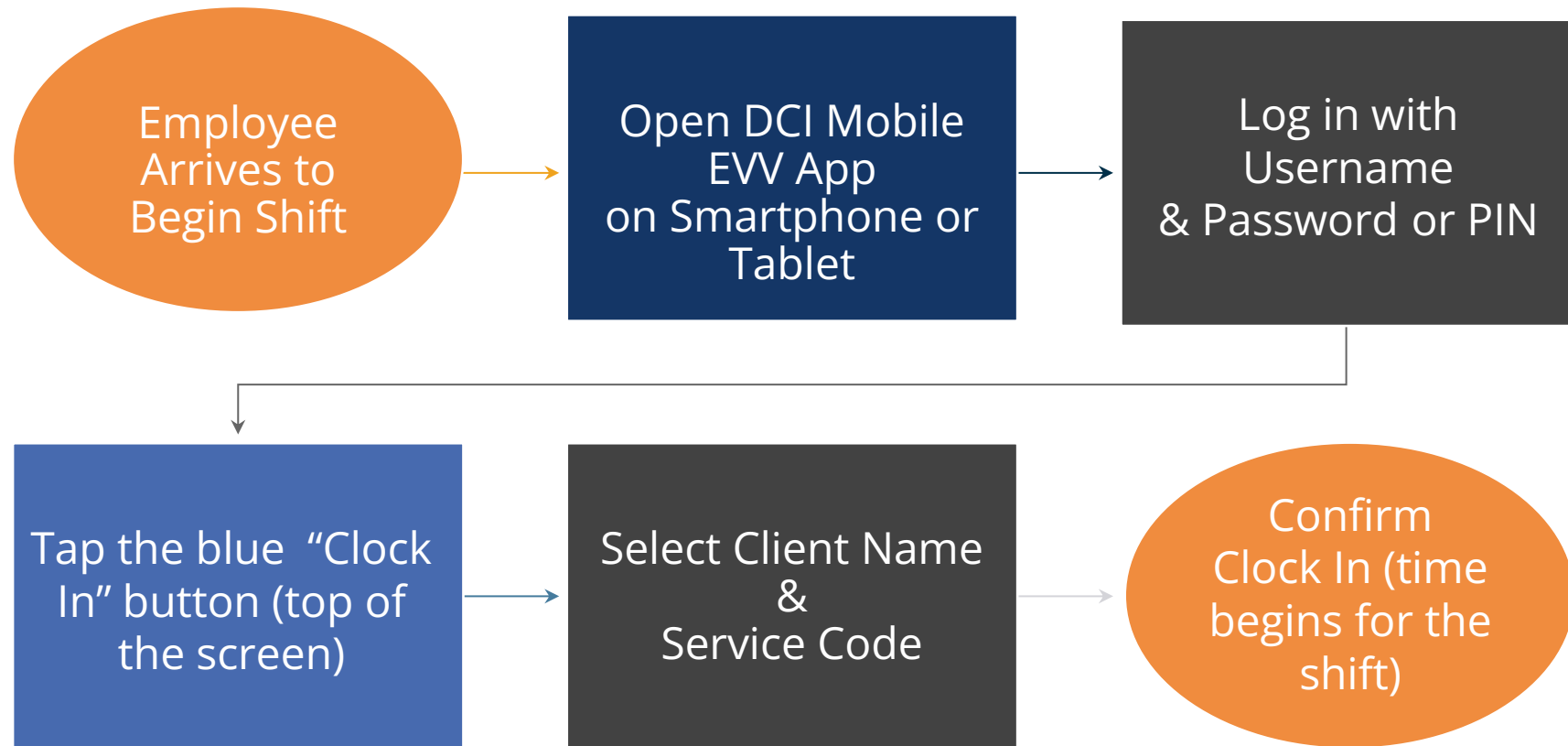
Employee Mobile App

Employee Clock In/Out Process



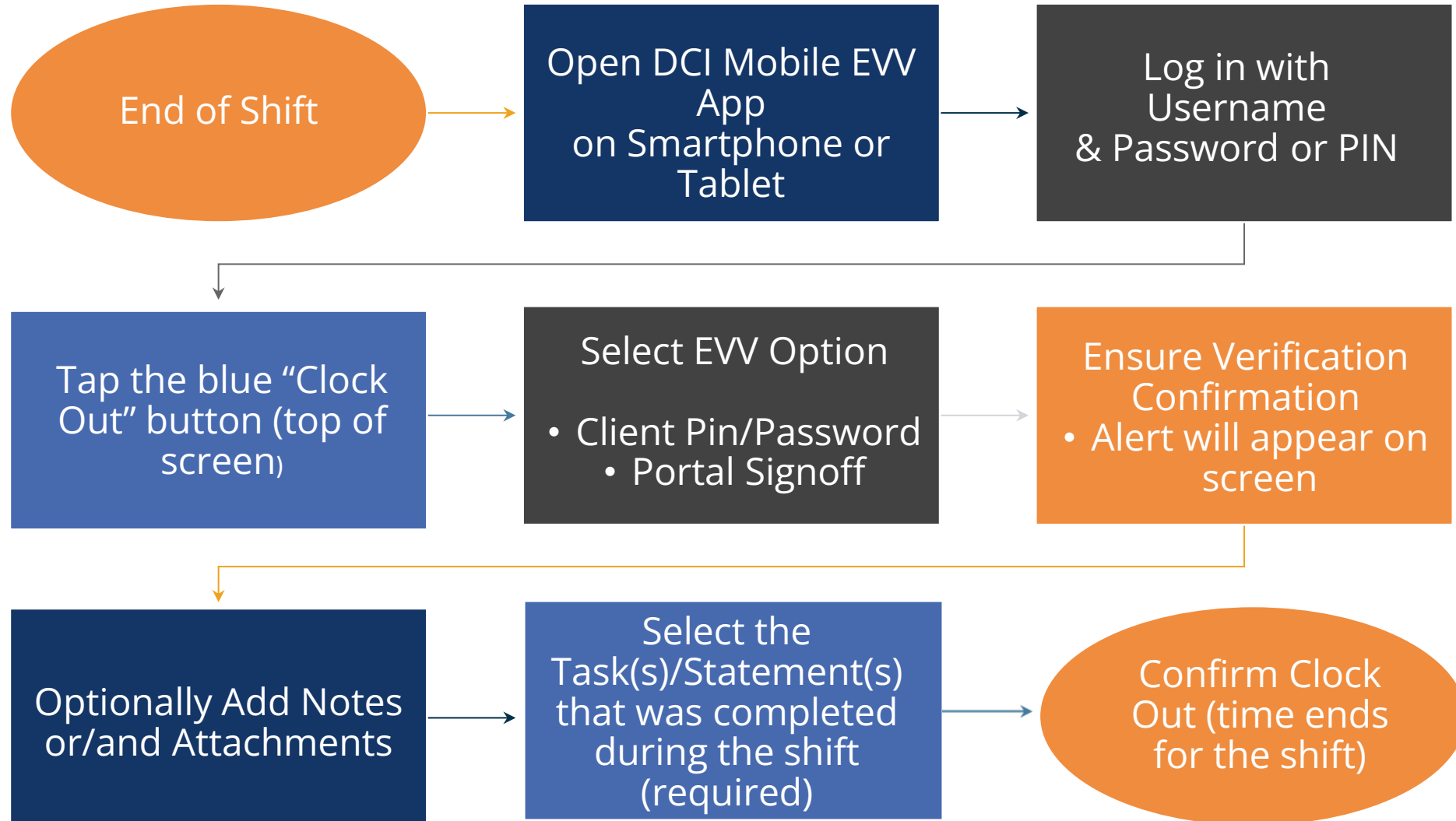
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Overview Mobile App Clock In





Overview Mobile App Clock Out

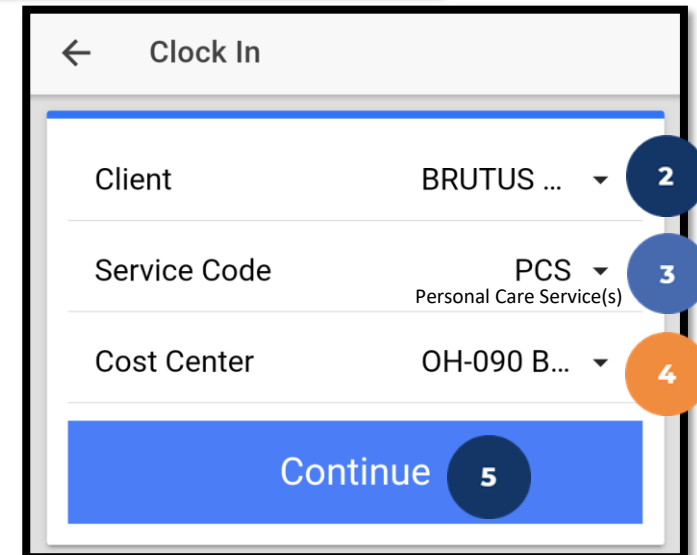
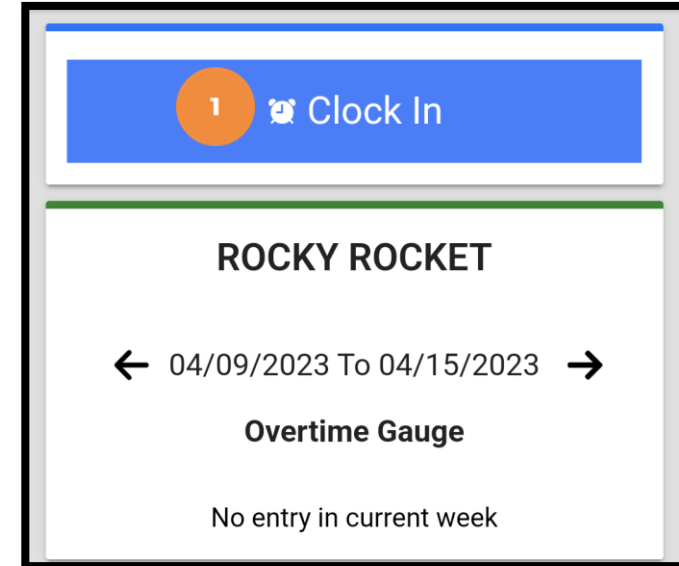


Service Codes (Budgets)

- The Employer is responsible for managing the service code (budgets) for both the Personal Choices Services (PCS) and the Savings Fund (SF)
- Acumen **will not automatically deduct** from the Savings Fund (SF) service code (budget) if the Personal Choices Services (PCS) service code (budget) is exhausted
- Employees will have the two service codes, Personal Choices Services (PCS) and the Savings Fund (SF) to choose from at the time of clock in or when creating an entry.
- The Employee should default to using the Personal Choices Services (PCS) service code at the time of clock in or when creating an entry
- The Employee should only use the Savings Fund (SF) service code (budget) at the direction of the Employer

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 PCS (Personal Care Services) Service Code
 - If the participant's monthly max has been reached and the employer has directed you to do so, select the SF Saving Fund Service Code from the drop-down.
4. Cost Center is always auto-filled
5. Click the blue **Continue** button



Clock In on Mobile App (cont.)

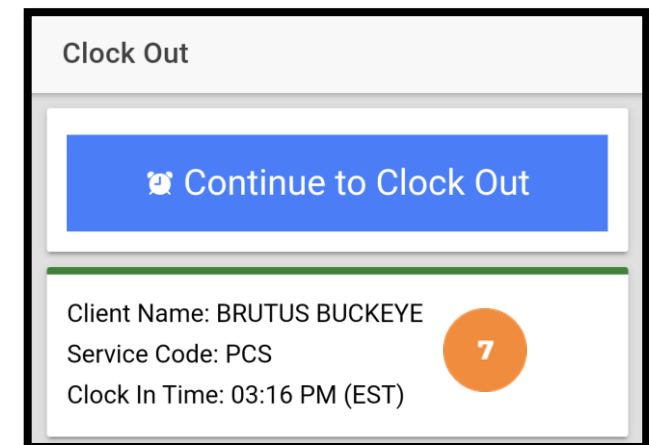
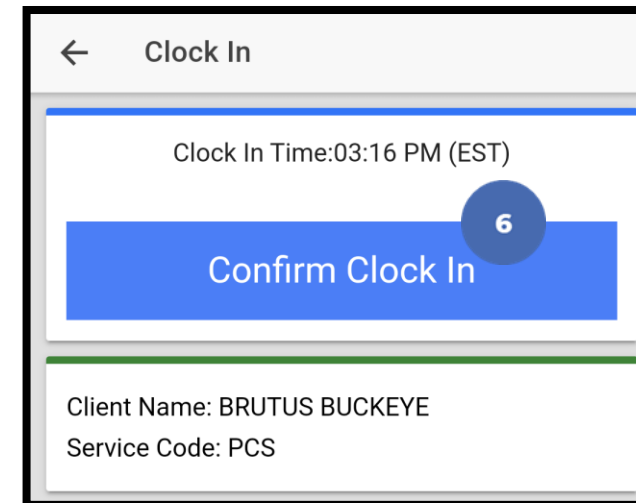
6. Select Confirm Clock In

* *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.



Mobile App – EVV Options (Client/Employer Attestation)



- There are two EVV (client attestation) options that allow the client to verify that they received service
 - ✓ Choose only one option per shift (each clock out)
- Client attestation is an extra layer of protection against potential fraud because the client/employer is “signing off” on the punch in real time

***Please note:** The employer must still review and may need to approve punch entries in their Pending Entries tab each pay period.

A screenshot of a mobile application interface. At the top, there is a navigation bar with a blue back arrow and the text "Back Clock Out Verification". Below this is a white box with a blue border containing the heading "Clock Out Verification Required". Underneath the heading 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)".

< Back Clock Out Verification

Clock Out Verification Required

Client PIN or Password

Portal Signoff

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



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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*

Remember me

Login

[Forgot Password?](#)

Clock Out

Continue to Clock Out

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

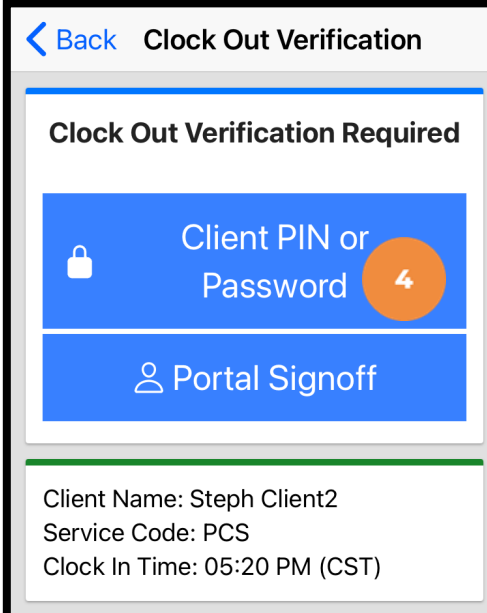
Are you sure you want to clock out current punch?

Cancel Confirm

Clock Out - EVV Option #1 (cont.)

Client PIN or Password

- Select the clock out verification type:
 - ✓ Client PIN or Password
- 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).
- The client or employer clicks the blue **Submit** button when ready
- The client or employer clicks **Confirm** to validate the PIN or password and hands the mobile device back to the employee



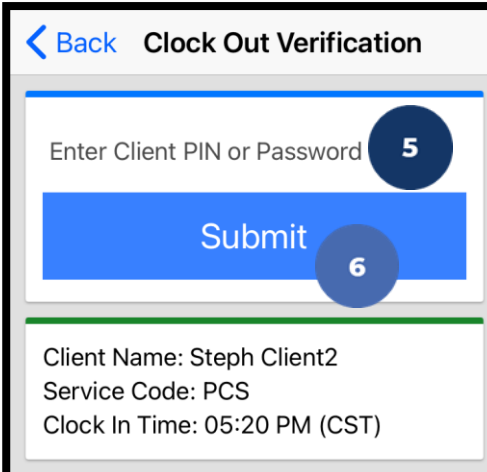
← Back Clock Out Verification

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)

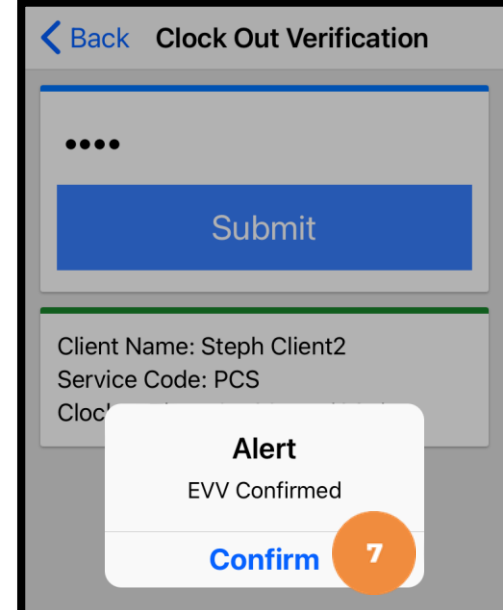


← Back Clock Out Verification

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**

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.

Mobile App Video

**Clock in and
Out Using
Client PIN or
Password
Option**

|Login|

Username*

Password or PIN* 

Remember me

Login

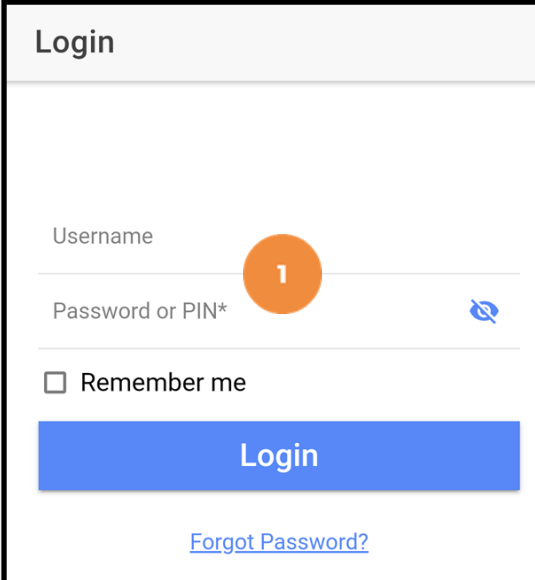
[Forgot Password?](#)

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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



Login

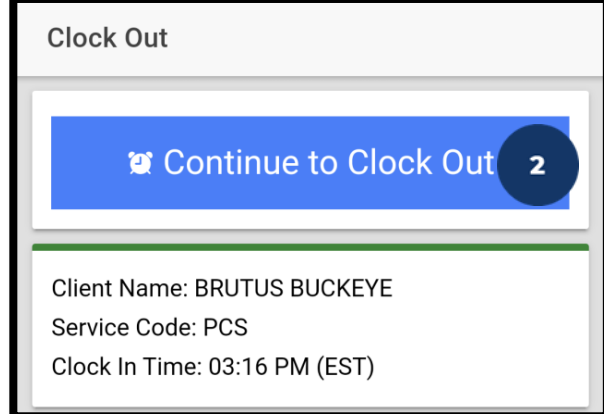
Username

Password or PIN* 1

Remember me

Login

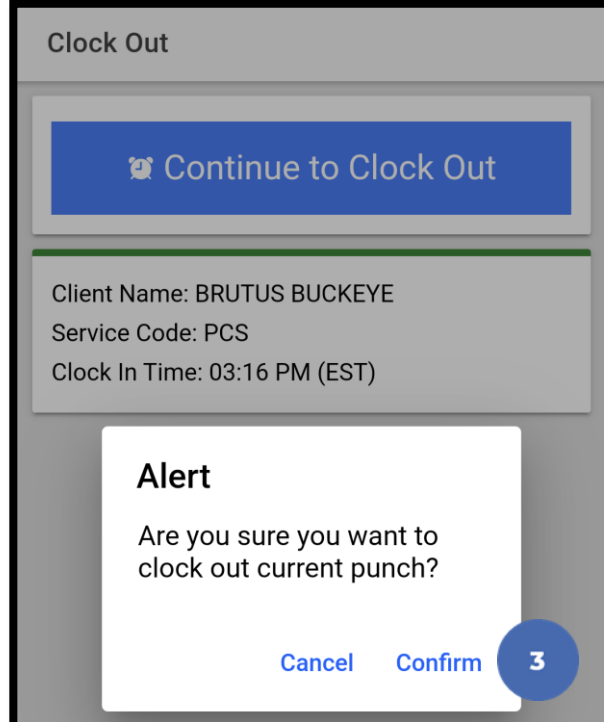
[Forgot Password?](#)



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

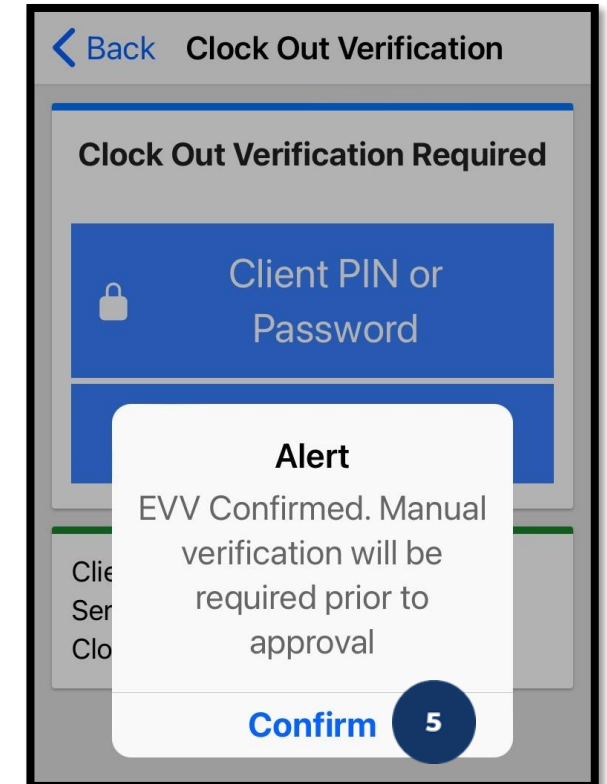
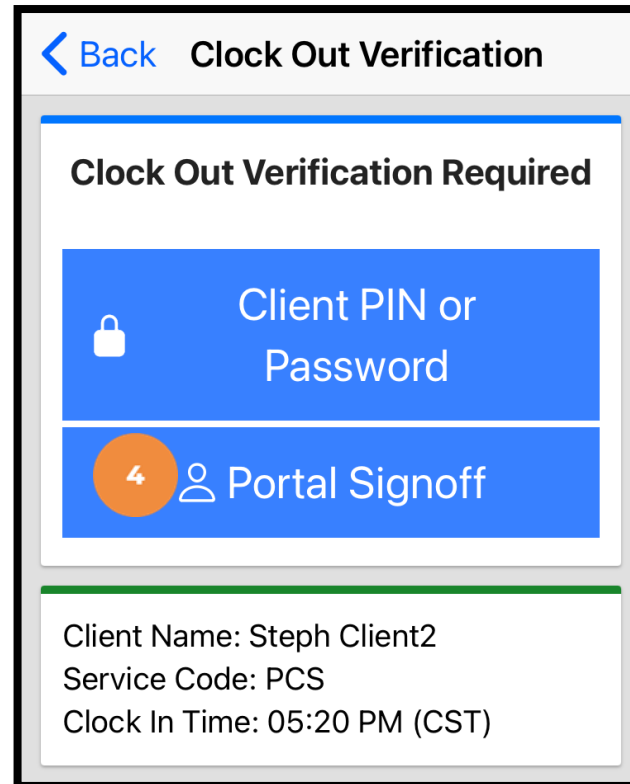
Are you sure you want to clock out current punch?

[Cancel](#) [Confirm](#) 3

Clock Out - EVV Option #2 (cont.)

Portal Signoff

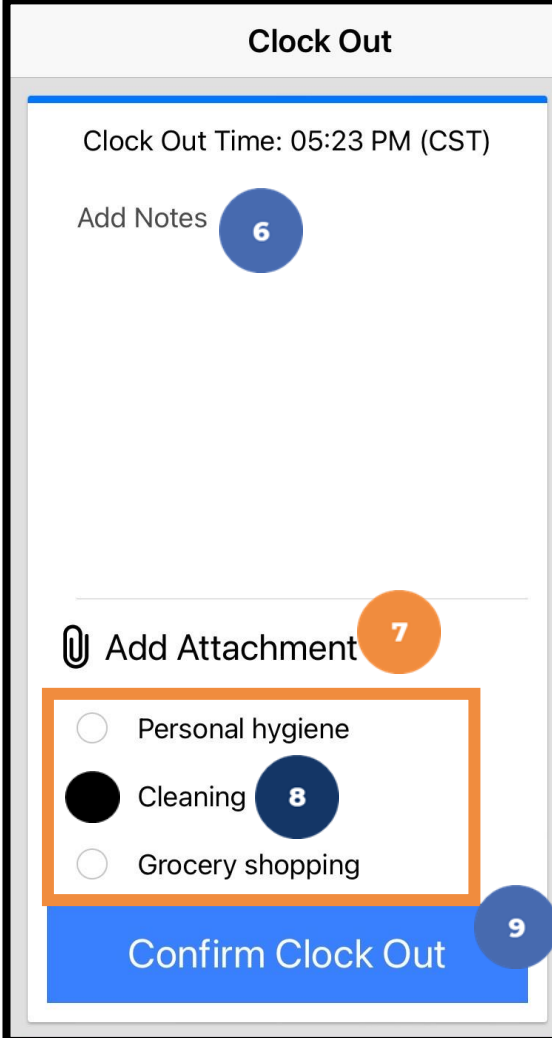
4. Select the clock out verification type:
 - ✓ Second Option: Portal Signoff
5. An alert will appear stating that EVV is confirmed, but manual verification will be required prior to approval. Click **Confirm**.



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

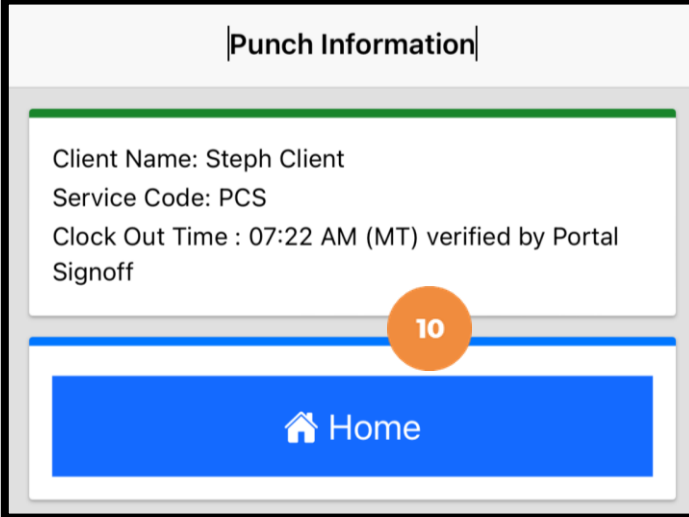
Clock Out Time: 05:23 PM (CST)

Add Notes **6**

 Add Attachment **7**

- Personal hygiene
- Cleaning **8**
- Grocery shopping


Confirm Clock Out **9**



Punch Information

Client Name: Steph Client
Service Code: PCS
Clock Out Time : 07:22 AM (MT) verified by Portal Signoff

10

 Home


Congratulations!
The shift is complete.

Mobile App Video

Clock in and Out Using Portal Signoff Option

Login

Username*

Password or PIN* 

Remember me

Login

[Forgot Password?](#)

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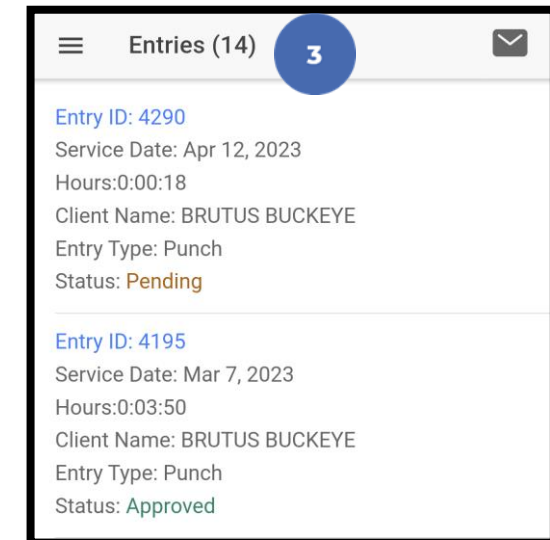
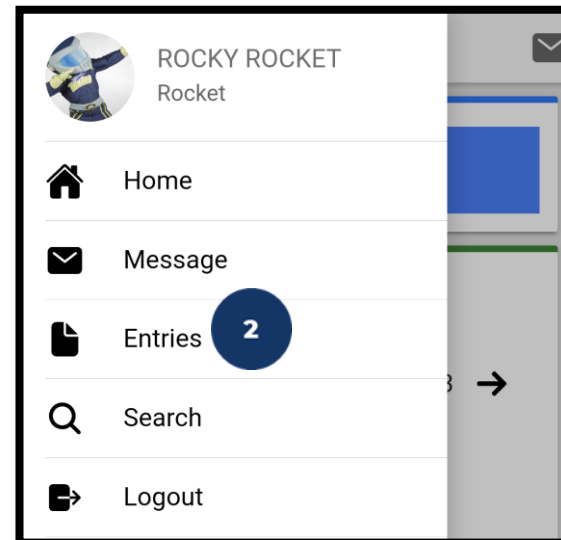
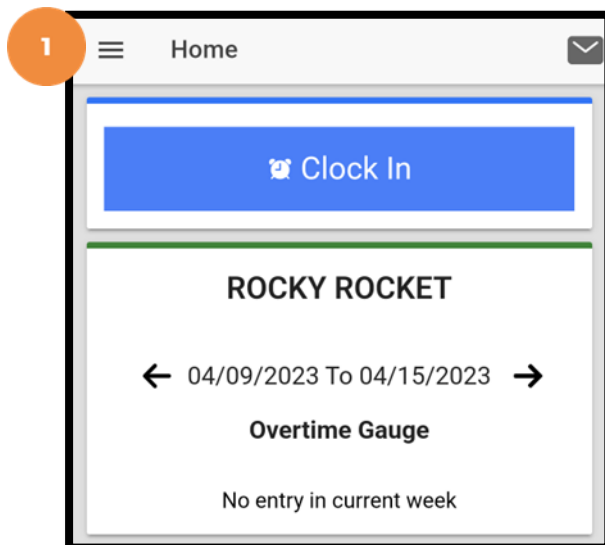
Mobile App Offline Mode



- 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

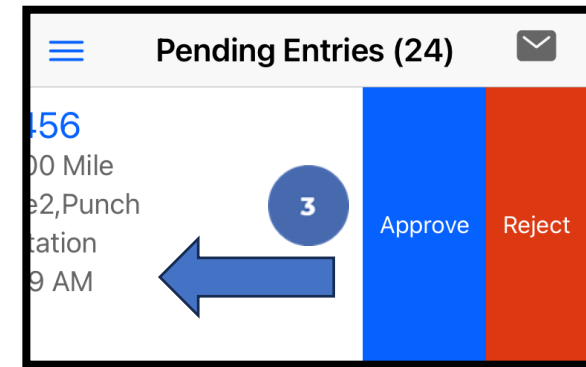
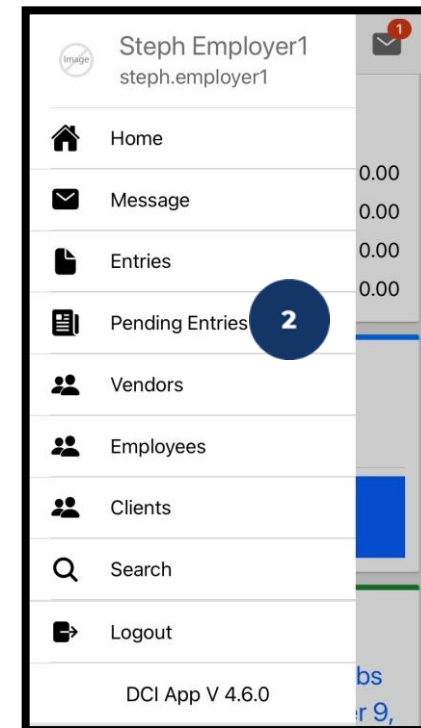
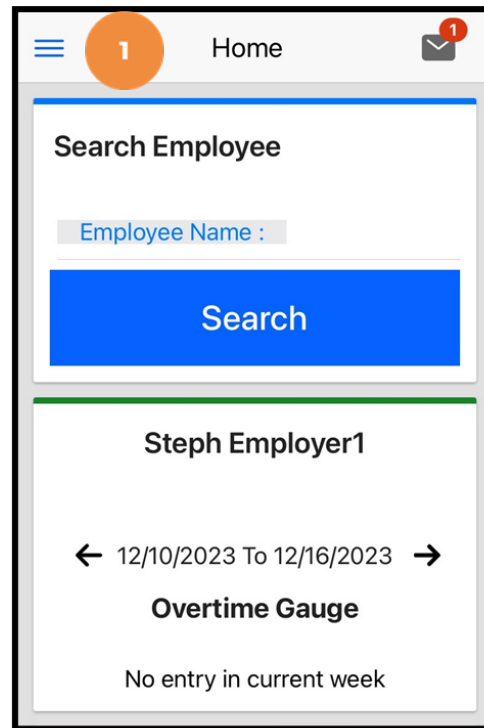
1. Click the **Menu** in the top left corner of the screen
2. Select **Entries** on the submenu
3. View the complete list of entries
 - Verify that all time is submitted
 - The employer approves the time as needed



Employer Mobile App

Review & Approve Entries

1. Click the **Menu** in the top left corner of the screen
2. Select **Pending Entries** on the submenu
3. **Swipe left** on the punch to select either the blue **Approve** button or the red **Reject** button



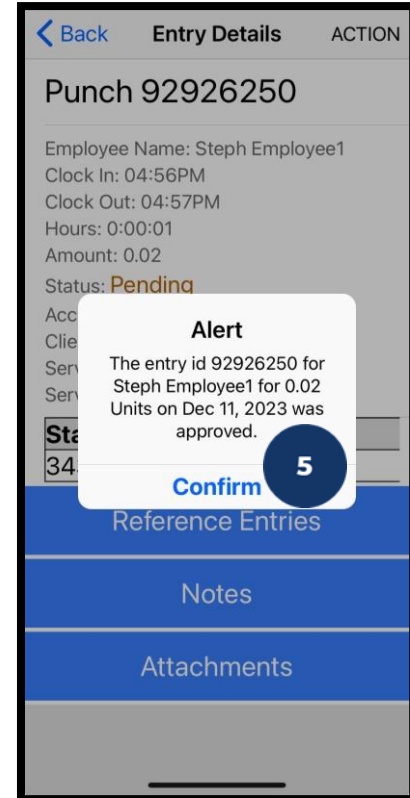
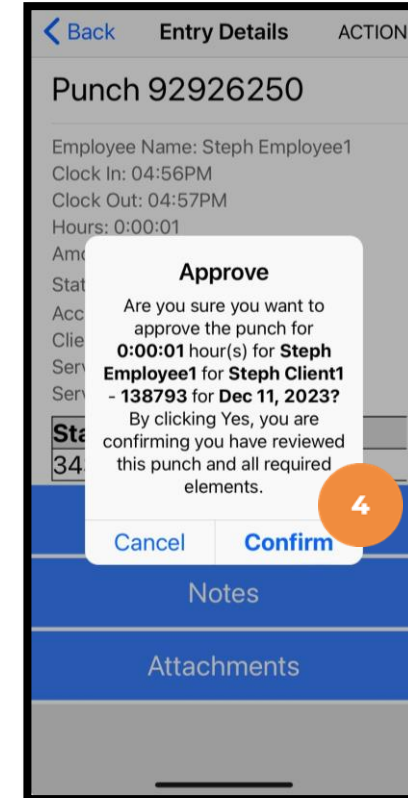
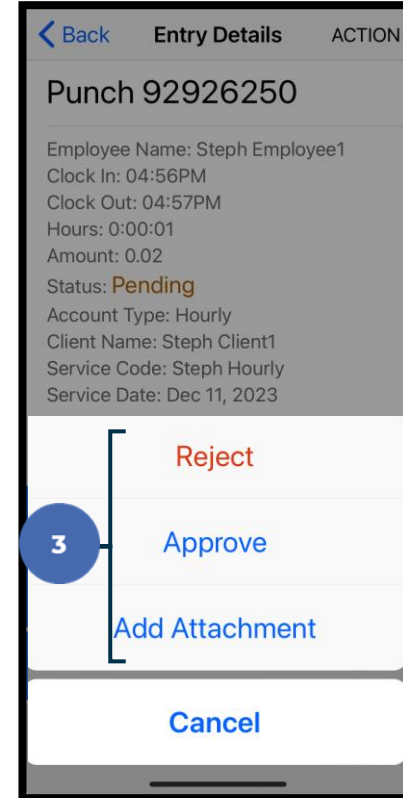
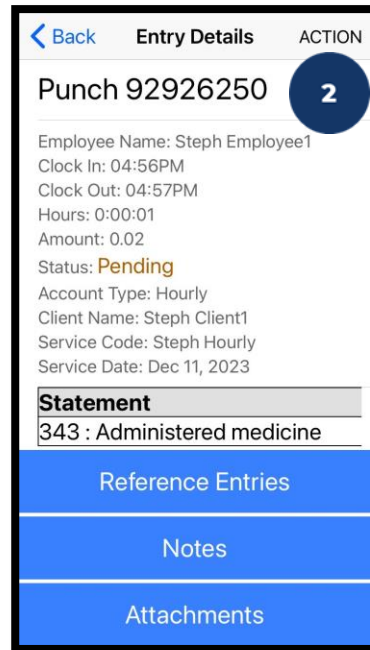
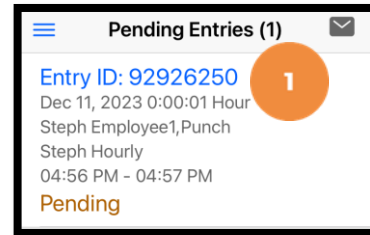
Review & Approve Entries (cont.)



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1. Alternatively, click the blue entry ID hyperlink to open the entry details and take action
2. Click ACTION in the top right corner
3. Select Reject, Approve, or Add Attachment.
4. On the pop-up alert window, view the punch details and Click Confirm to initiate the confirmation process.
5. On the pop-up alert window, click Confirm again to complete the confirmation process.



*Please note:

If the action taken was to approve the entry, the status changes to Approved and the entry will be processed for payment.

*Entries must be 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

Mobile App Video

Employer Reviews & Approves Entries

|Login| EN

Username*

Password or PIN* 

Remember me

Login

[Forgot Password?](#)

DCI Web Portal

Proprietary: For Acumen and Customer Use Only



Navigation

**Full Site – Most compatible when
accessed via desktop or laptop**

Web Portal Basics

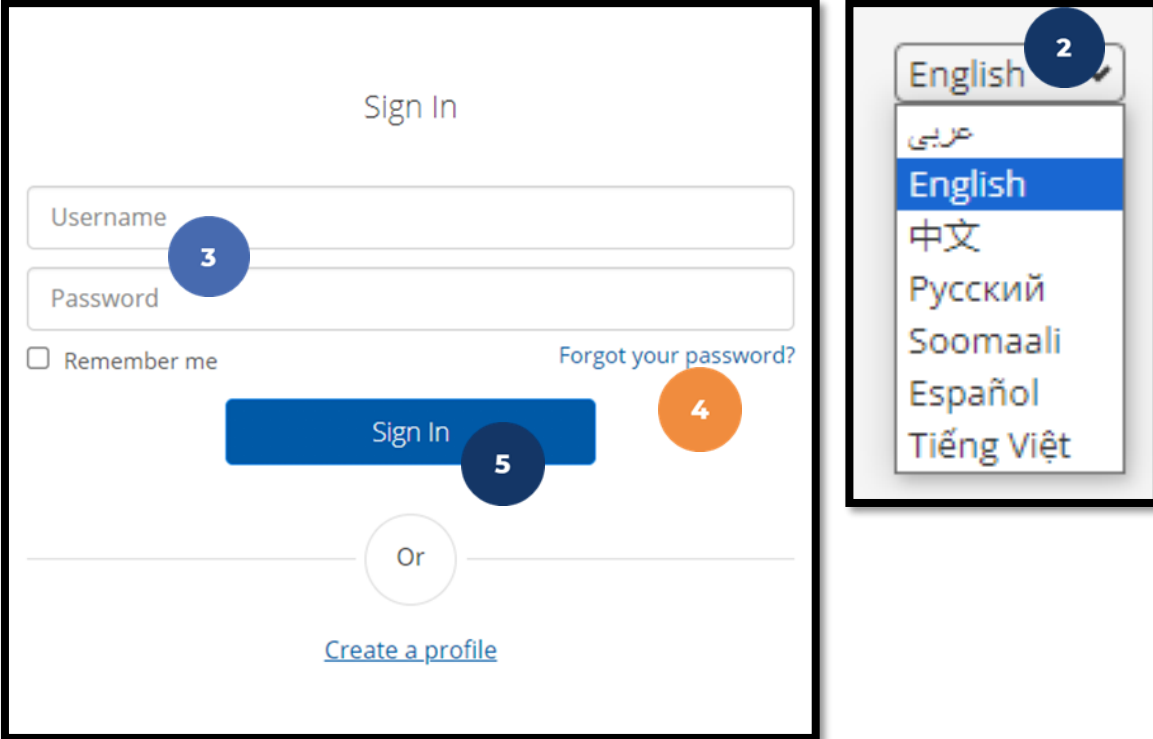
- The employer (ER)/designated representative (DR) reviews and manages time
- Employees correct punches and/or enter historical time
- Users may update profile settings



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**
 - Credentials provided by Acumen
4. Utilize the “Forgot your password?” link if needed
5. Click the blue **Sign In** button

1 acumen.dcisoftware.com



Sign In

English 2

عربي

English

中文

Русский

Soomaali

Español

Tiếng Việt

Username 3

Password

Remember me

Forgot your password? 4

Sign In 5

Or

[Create a profile](#)

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

Profile Settings

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

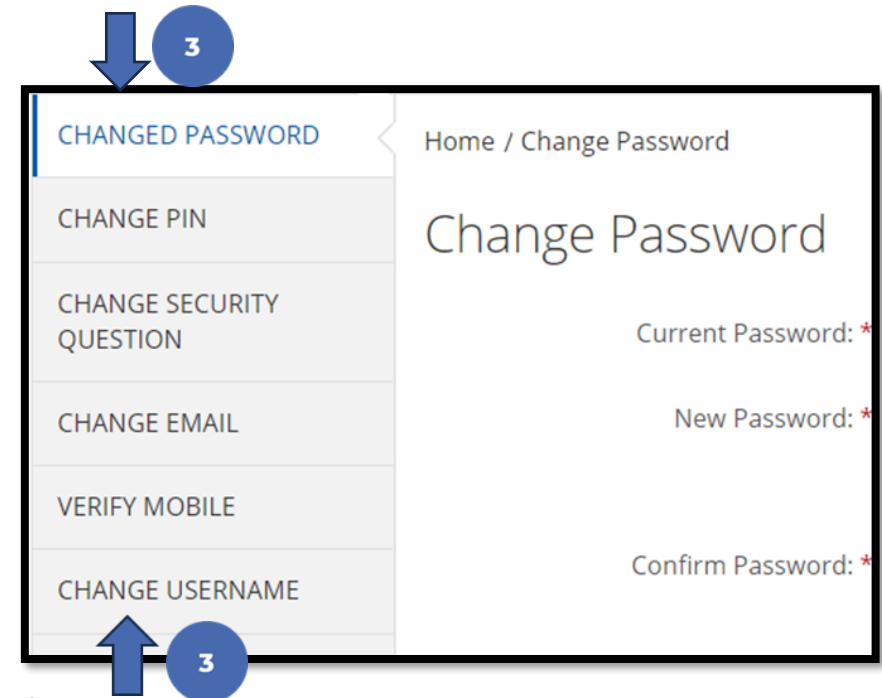
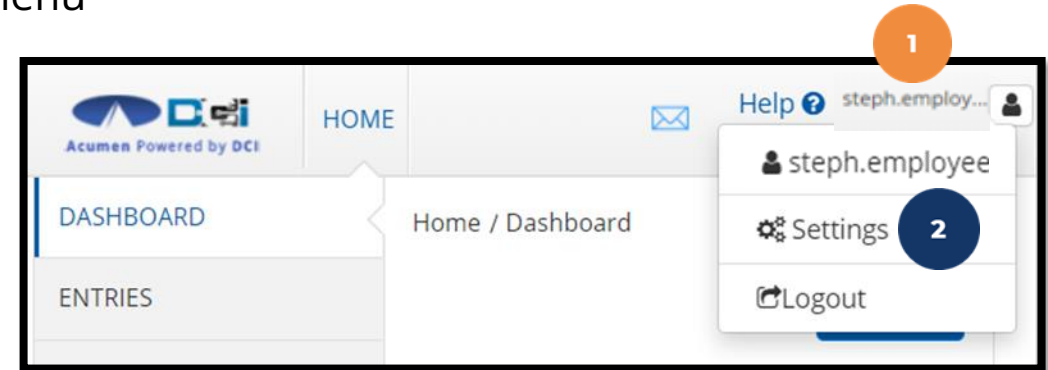


1. Click the **username** in the top right corner of the main menu

2. Click **Settings**

3. Select a submenu tab to update:

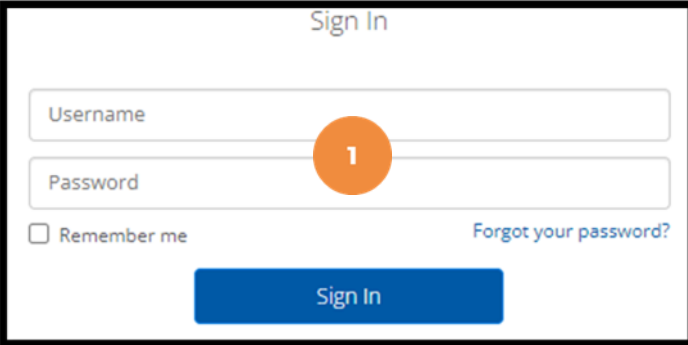
- Change Password – Used for login
- Change PIN – A number that can be used instead of a password when logging into the mobile app. *Required for employees if using Phone EVV.*
- Change Security Question
- Change Email – A valid and correct email address is required for password recovery
- Verify Mobile
- 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
 - ✓ Add New PIN after a reset
 - ✓ Change PIN anytime
5. Enter password
6. Click the blue **Verify** button



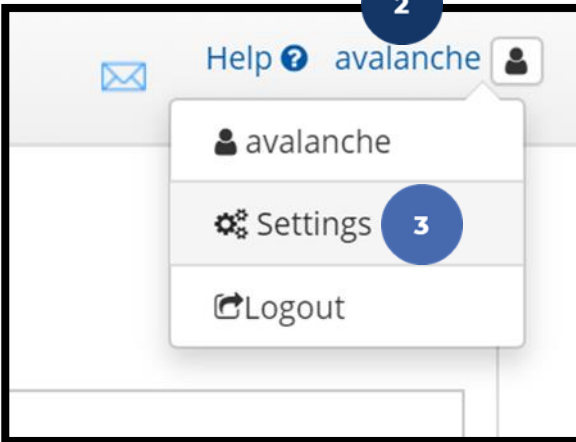
Sign In

Username **1**

Password

Remember me [Forgot your password?](#)

Sign In

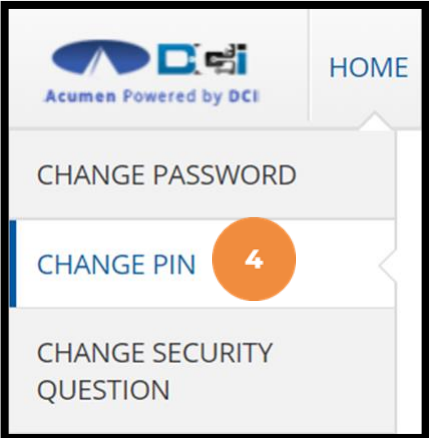


Help ? avalanche **2**

avalanche

Settings **3**

Logout



HOME

CHANGE PASSWORD

CHANGE PIN **4**

CHANGE SECURITY QUESTION



Password: * Please enter password **5**

Cancel Verify **6**

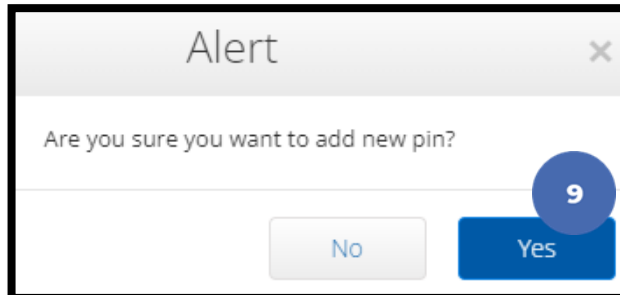
Add / Change PIN (cont.)

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: "New Pin: *" and "Confirm Pin: *". Both fields contain the placeholder text "Please enter New Pin" and "Please Confirm Pin" respectively. A blue circle with the number "7" is positioned over the "Confirm Pin" field. To the right of the fields are two buttons: a grey "Cancel" button and a blue "Change Pin" button. 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

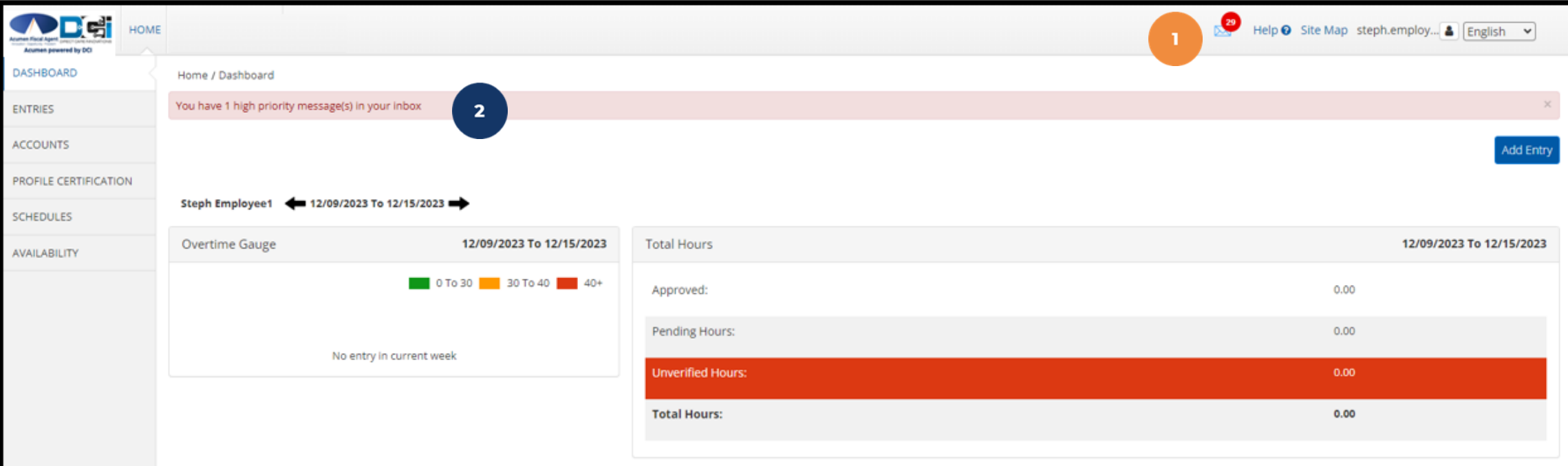


The screenshot shows a dialog box titled "Alert" with a close button (X) in the top right corner. The text inside the dialog reads "Are you sure you want to add new pin?". At the bottom of the dialog are two buttons: a grey "No" button and a blue "Yes" button. A blue circle with the number "9" is positioned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



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. In the top right corner, there is a mail icon with a red notification bubble containing the number '1'. Below the navigation bar, a red banner displays the message: "You have 1 high priority message(s) in your inbox". A blue circle with the number '2' is placed over this banner. The main content area shows the user's name "Steph Employee1" and the date range "12/09/2023 To 12/15/2023". There is an "Add Entry" button in the top right. Below this, there is an "Overtime Gauge" section with a legend: 0 To 30 (green), 30 To 40 (yellow), and 40+ (red). The gauge shows "No entry in current week". To the right, there is a "Total Hours" table for the period "12/09/2023 To 12/15/2023".

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

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	Paystub for check date XX/XX/XXXX	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 Paystubs/Statements via Messaging Module



1. Locate the Paystub/Statement 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/statement 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

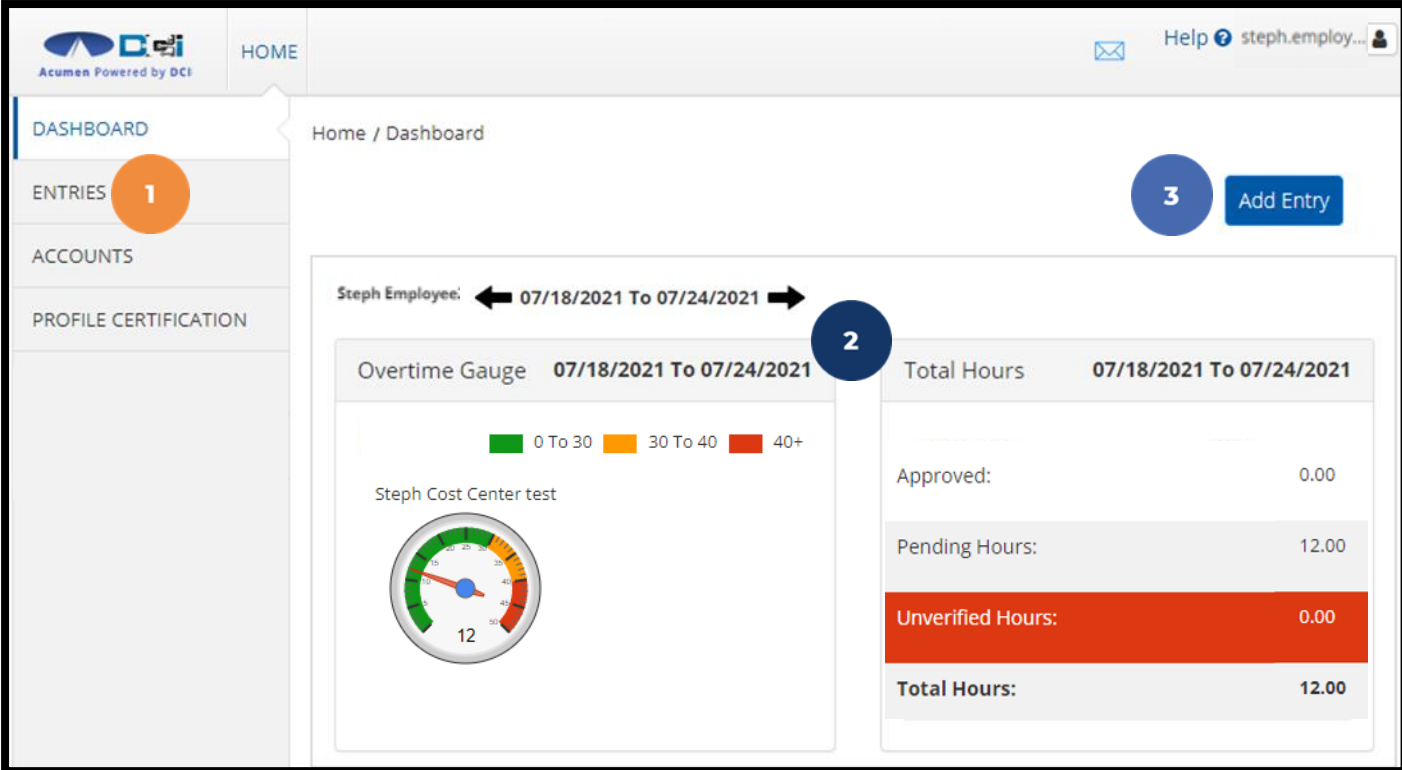
Employee Web Portal

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

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



Acumen Powered by DCI

HOME

Help steph.employ...

DASHBOARD Home / Dashboard

ENTRIES 1

ACCOUNTS

PROFILE CERTIFICATION

3 Add Entry

Steph Employee: 07/18/2021 To 07/24/2021

Overtime Gauge 07/18/2021 To 07/24/2021

0 To 30 30 To 40 40+

Steph Cost Center test

12

Total Hours 07/18/2021 To 07/24/2021

Approved:	0.00
Pending Hours:	12.00
Unverified Hours:	0.00
Total Hours:	12.00



Acumen Fiscal Agent
Innovation • Opportunity • Freedom

Add New Entry

1. Log in to the [DCI Web Portal](#)
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.

Sign In

Username

Password

Remember me [Forgot your password?](#)

Sign In

Home > Dashboard

Help steph.employ...

Steph Employee 11/01/2020 to 11/07/2020

Overtime Gauge 11/01/2020 to 11/07/2020

0 to 30 30 to 40 40+

No entry in current week

Total Hours 11/01/2020 to 11/07/2020

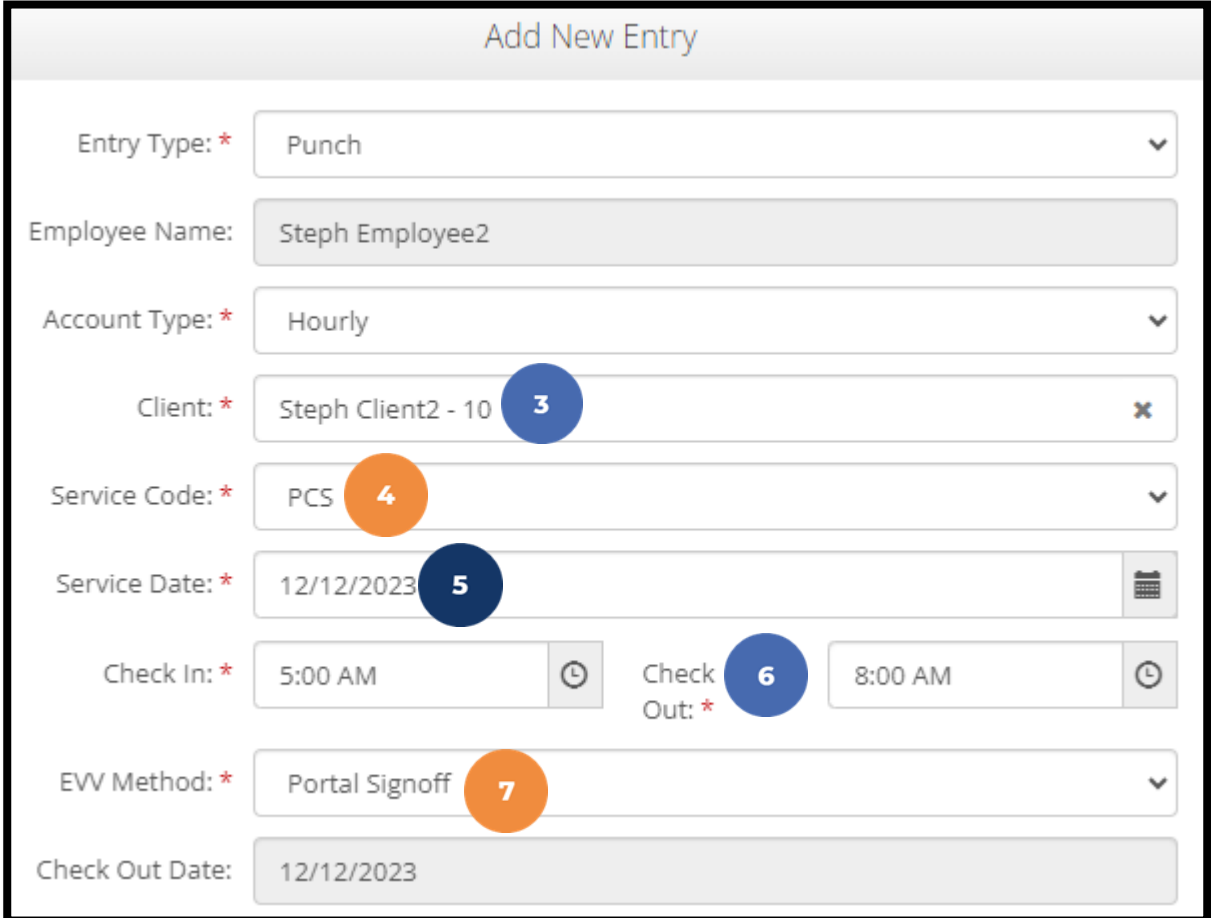
Approved By:	7.52
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	7.52

Expiring Certifications

Certification Name	Certification Expiration Date	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 PCS (Personal Care Services) Service Code
 - If the participant's monthly max has been reached and the employer has directed you to do so, select the SF Saving Fund 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

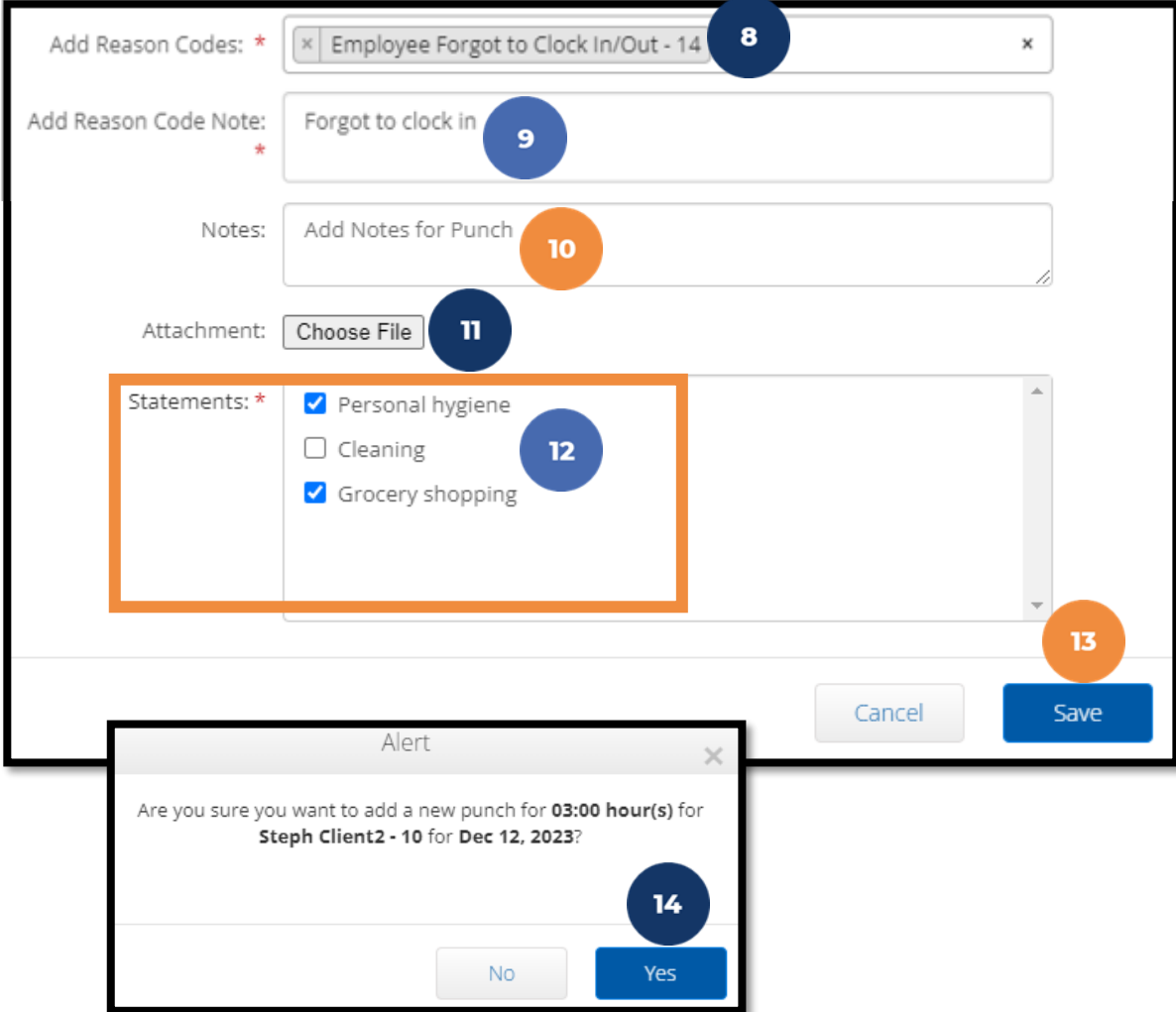


The screenshot shows the 'Add New Entry' form with the following fields and values:

- Entry Type: * Punch
- Employee Name: Steph Employee2
- Account Type: * Hourly
- Client: * Steph Client2 - 10 (Callout 3)
- Service Code: * PCS (Callout 4)
- Service Date: * 12/12/2023 (Callout 5)
- Check In: * 5:00 AM (Callout 6)
- Check Out: * 8:00 AM (Callout 6)
- EVV Method: * Portal Signoff (Callout 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

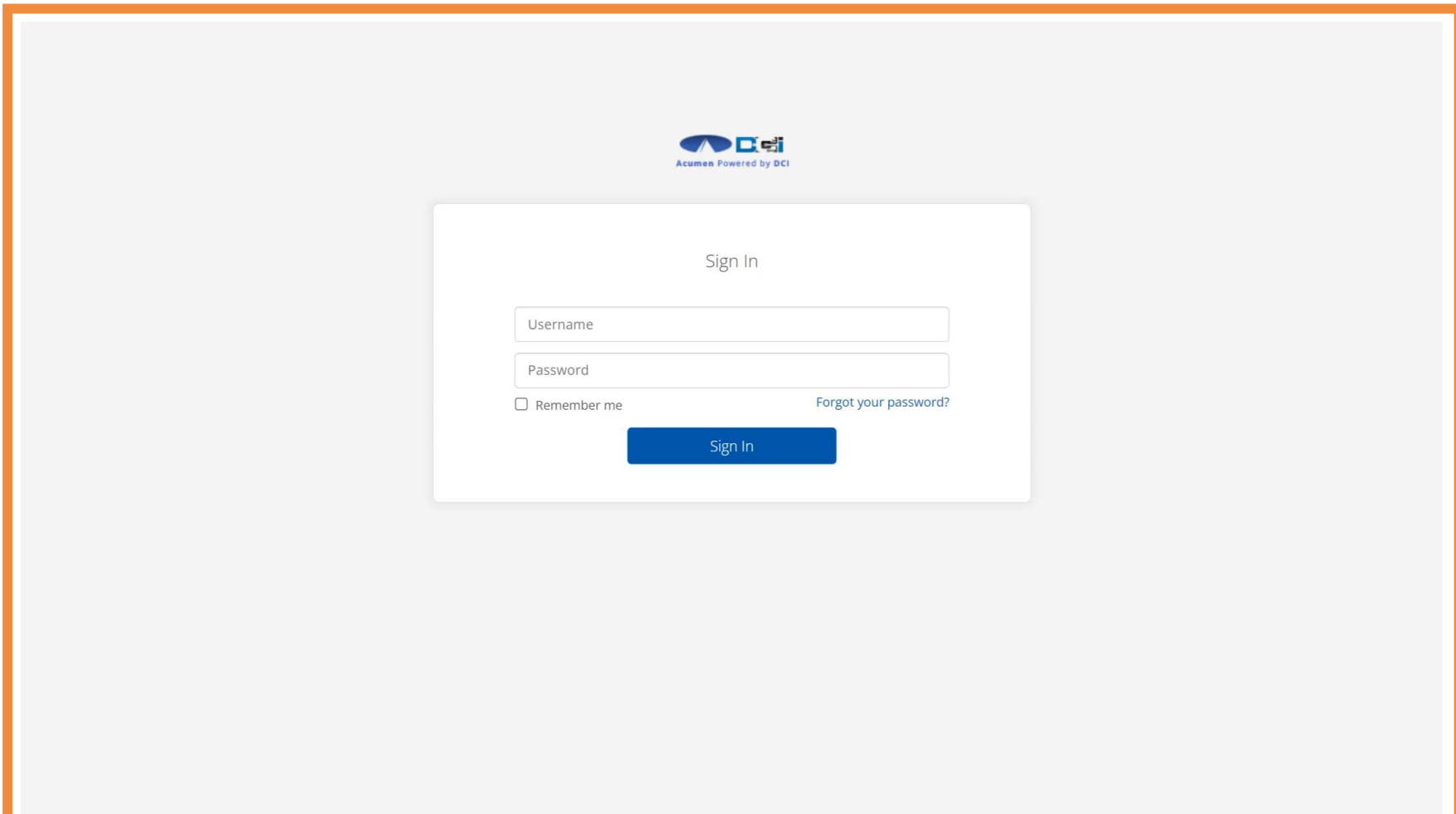


The screenshot shows the 'Add New Entry' form with the following elements:

- Add Reason Codes:** A dropdown menu with 'Employee Forgot to Clock In/Out - 14' selected.
- Add Reason Code Note:** A text box containing 'Forgot to clock in'.
- Notes:** A text box containing 'Add Notes for Punch'.
- Attachment:** A 'Choose File' button.
- Statements:** A list of tasks with checkboxes: 'Personal hygiene' (checked), 'Cleaning' (unchecked), and 'Grocery shopping' (checked).
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.
- Alert:** A dialog box asking 'Are you sure you want to add a new punch for 03:00 hour(s) for Steph Client2 - 10 for Dec 12, 2023?' with 'No' and 'Yes' buttons.

Web Portal Video

Employee Adds (Historical) Entry



Proprietary: For Acumen and Customer Use Only



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

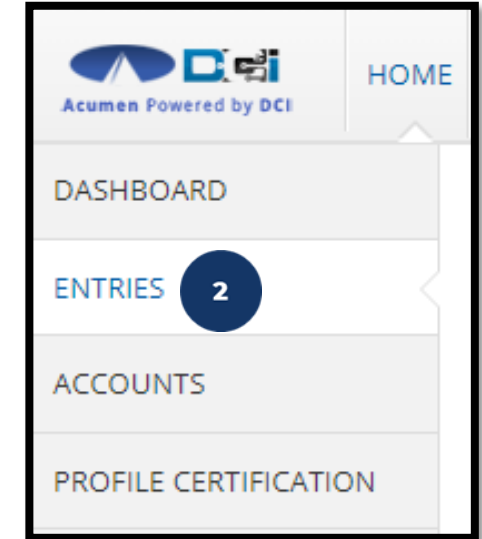
Sign In

Username

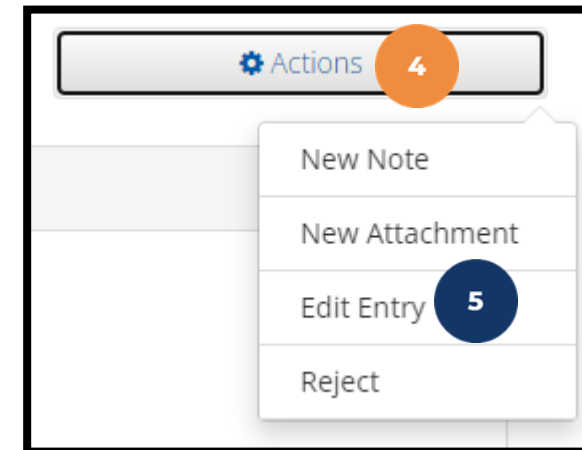
Password

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
92926243	Dec 02, 2023	10:30 AM	02:30 PM	Punch	Hourly		Steph_Client1	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.

The screenshot shows the 'Edit Entry' form with the following fields and callouts:

- 6**: Title of the form.
- Entry Type: * Punch
- Employee Name: Steph Employee2 - 12
- Account Type: * Hourly
- Client: * Steph Client2 - 138795
- Service Code: * PCS
- Select Date: * 12/12/2023
- Check In: * 5:00 AM
- Check Out: * 8:30 AM
- Check Out Date: 12/12/2023
- EVV Method: * Portal Signoff
- Add Reason Codes: * Employee Forgot to Clock In/Out **7**
- Add Reason Code Note: * Updating check out time **8**
- Notes: Add Notes for Punch
- Attachment: Choose File
- Statements: Personal hygiene, Cleaning, Grocery shopping
- 9**: Save button

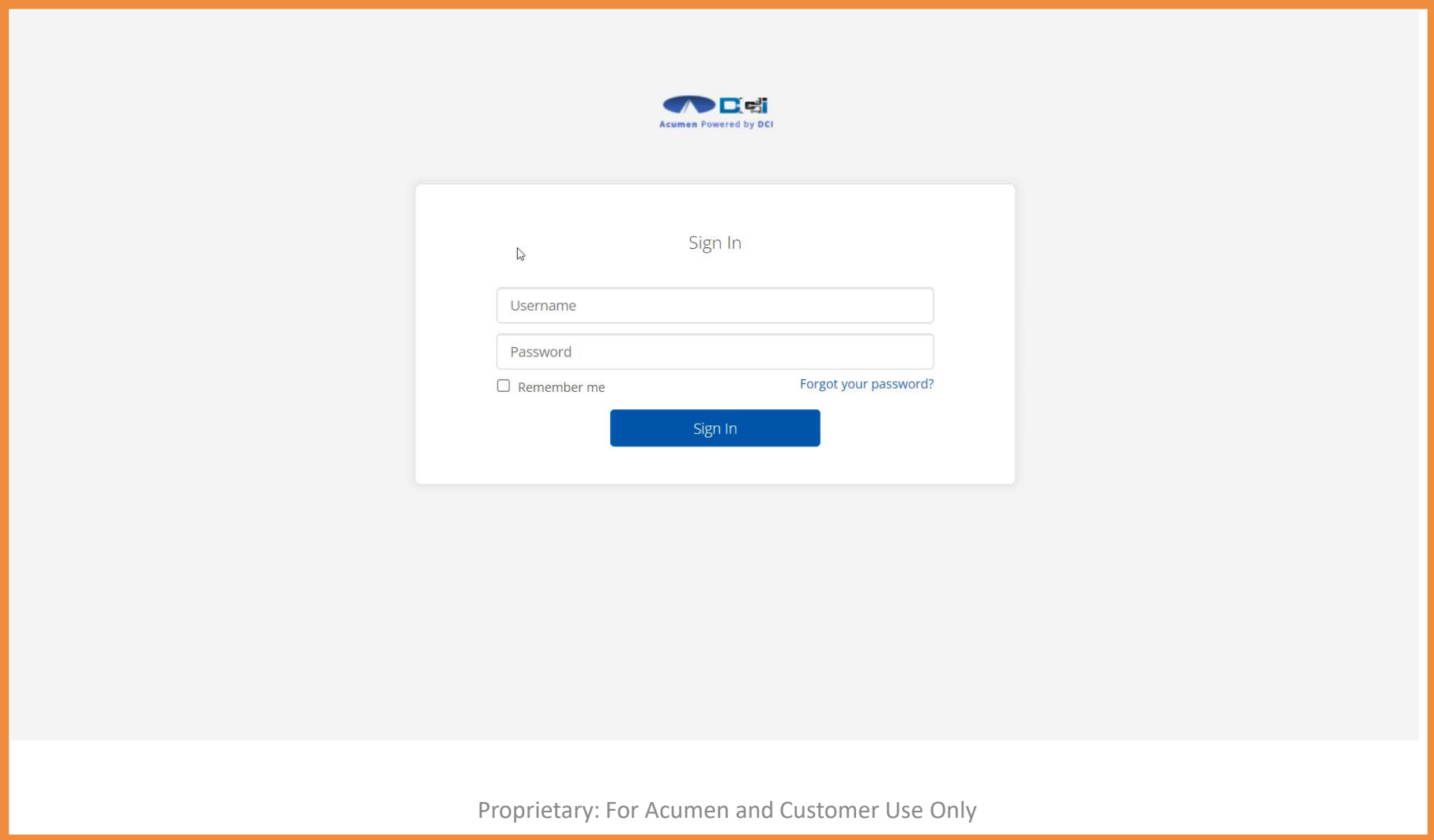
The screenshot shows an 'Alert' dialog box with the following text and callout:

Are you sure you want to cancel the existing punch for 0:03:00 hour(s) for Dec 12, 2023 and add a new punch for 03:30 hour(s) for Steph Employee2 for Steph Client2-138795 for Dec 12, 2023?

10: Yes button

Web Portal Video

Employee Edits (Historical) Entry



The screenshot shows a web portal sign-in page. At the top center is the logo for Acumen Powered by DCI. Below the logo is a white sign-in form with the title "Sign In". The form contains two input fields: "Username" and "Password". Below the "Password" field is a checkbox labeled "Remember me" and a link labeled "Forgot your password?". At the bottom of the form is a blue button labeled "Sign In".

Proprietary: For Acumen and Customer Use Only

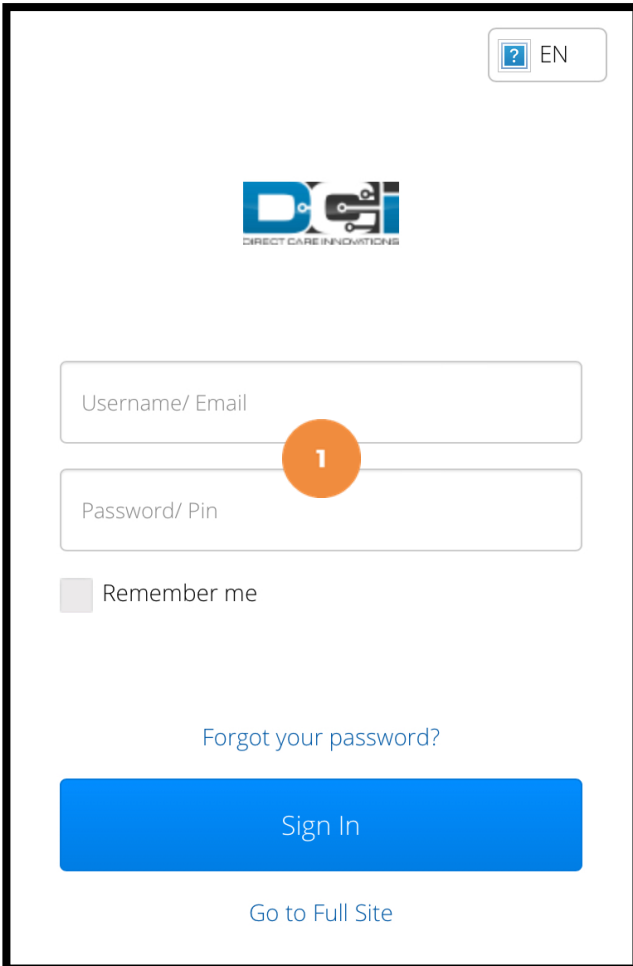


Employee Mobile Web Portal

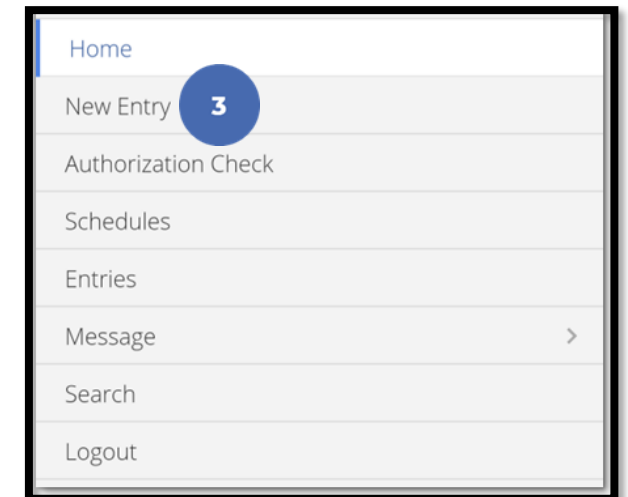
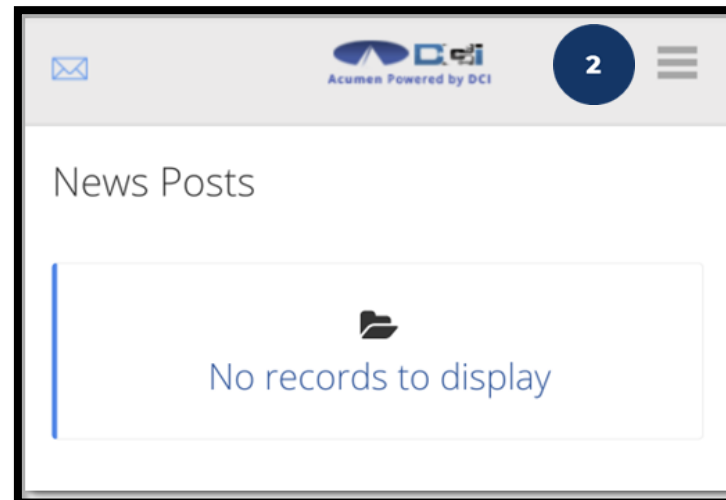
Accessed via smartphone or tablet

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

Add New Entry - Mobile Device

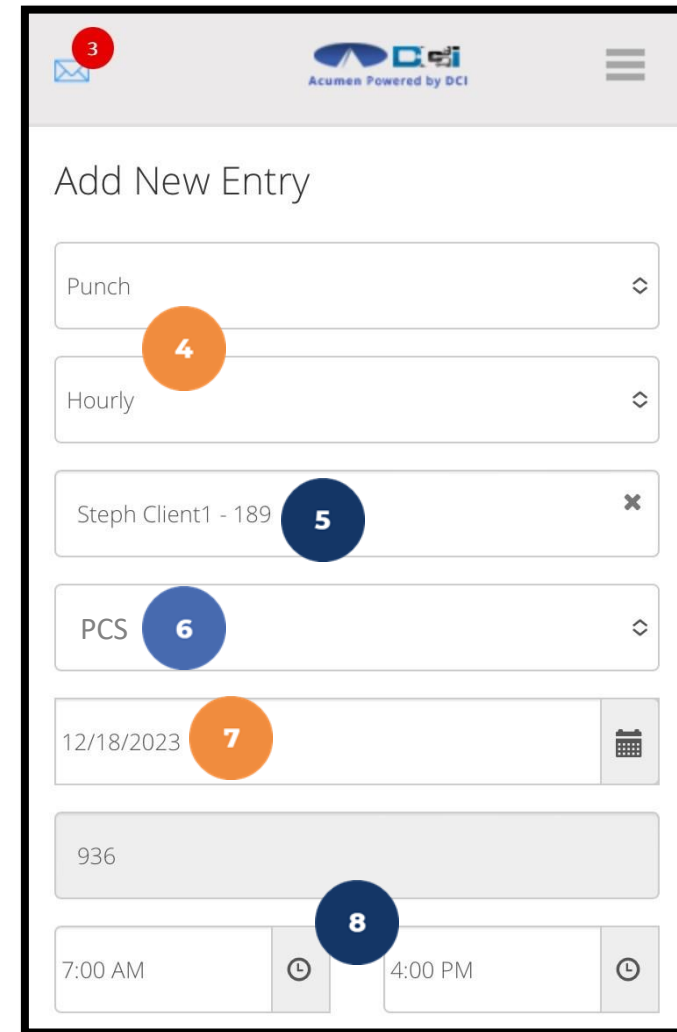


1. Log in to the DCI Web Portal on a mobile device
2. Click the **Menu** in the top right corner of the screen
3. Select the **New Entry** tab from the submenu



Add New Entry - Mobile Device (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 PCS (Personal Care Services) Service Code
 - If the participant's monthly max has been reached and the employer has directed you to do so, select the SF Saving Fund Service Code from the drop-down.
7. Select the Service Date
8. Enter the Check In (start) and Check Out (end) times

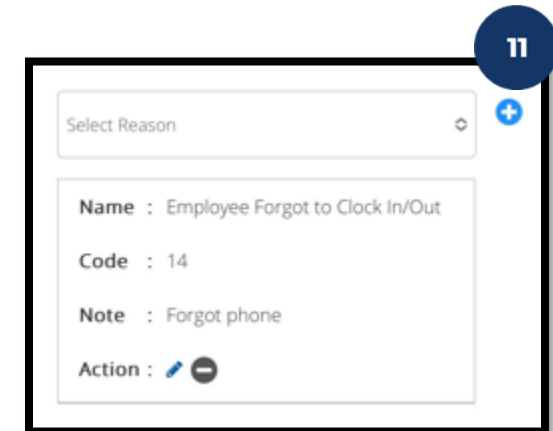
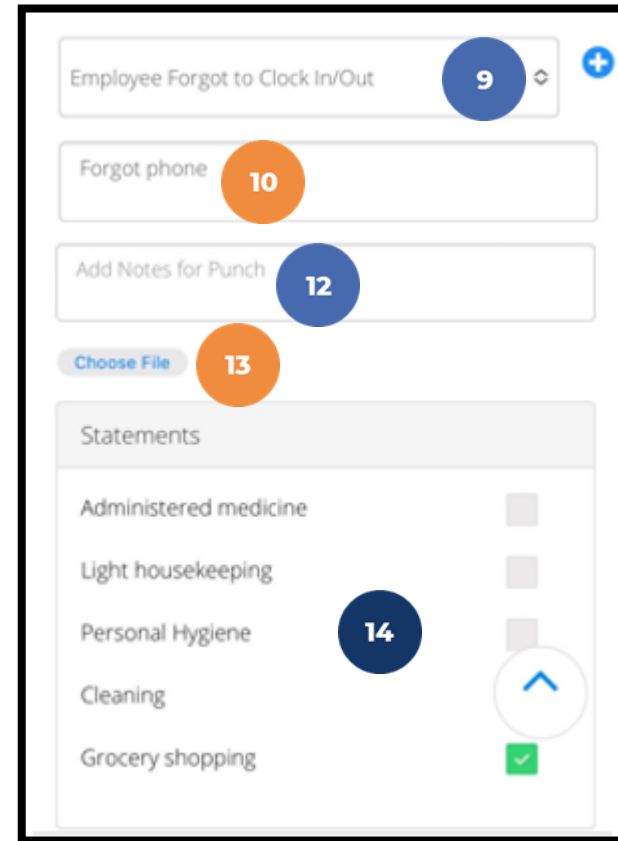


The screenshot shows the 'Add New Entry' form in a mobile application. The form is titled 'Add New Entry' and is part of the 'Acumen Powered by DCI' app. The form contains several fields with numbered callouts:

- 3: A red circle with the number 3 is positioned above the top navigation bar.
- 4: An orange circle with the number 4 is positioned over the 'Punch' dropdown menu.
- 5: A blue circle with the number 5 is positioned over the client selection dropdown menu, which shows 'Steph Client1 - 189'.
- 6: A blue circle with the number 6 is positioned over the 'PCS' dropdown menu.
- 7: An orange circle with the number 7 is positioned over the date selection field, which shows '12/18/2023'.
- 8: A blue circle with the number 8 is positioned over the time selection fields, which show '7:00 AM' and '4:00 PM'.

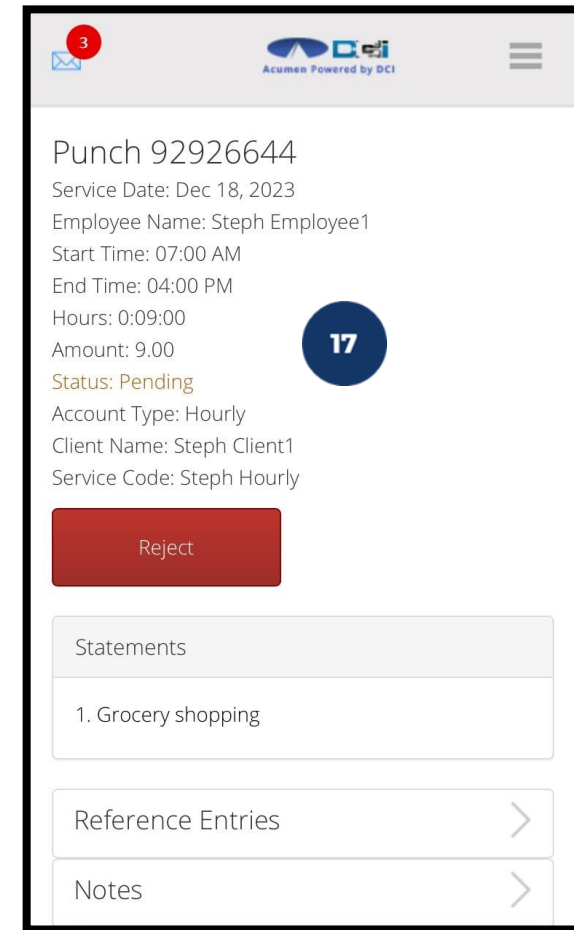
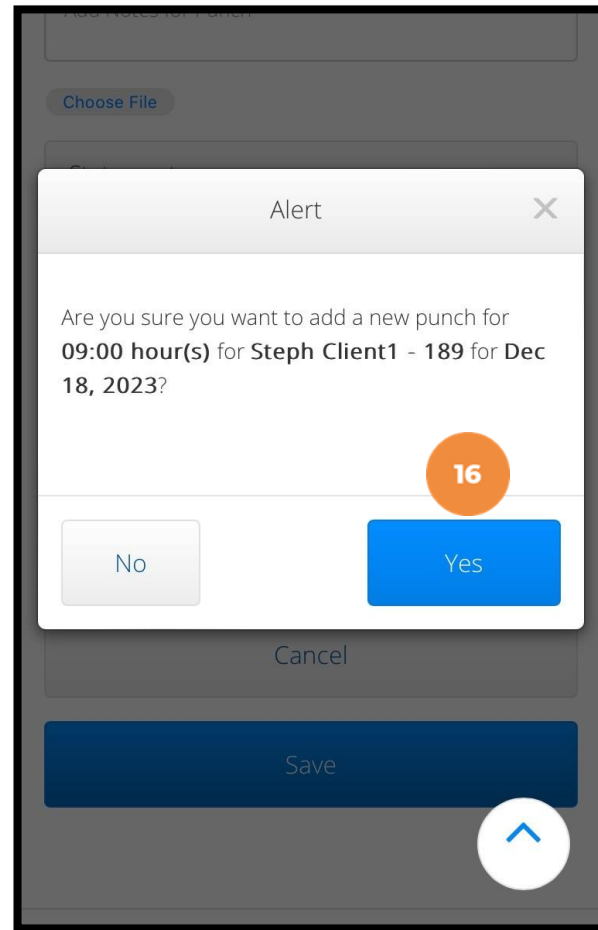
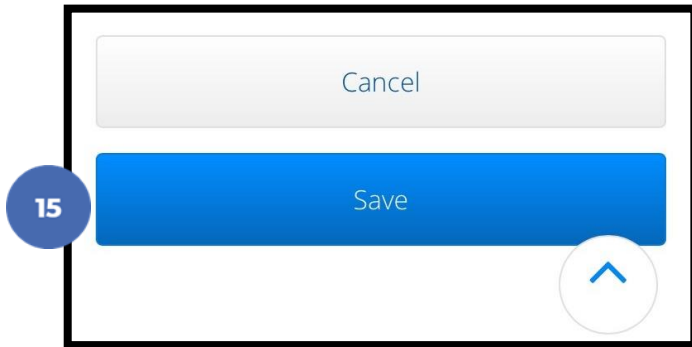
Add New Entry - Mobile Device (cont.)

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. 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



Add New Entry - Mobile Device (cont.)

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



Employer Web Portal

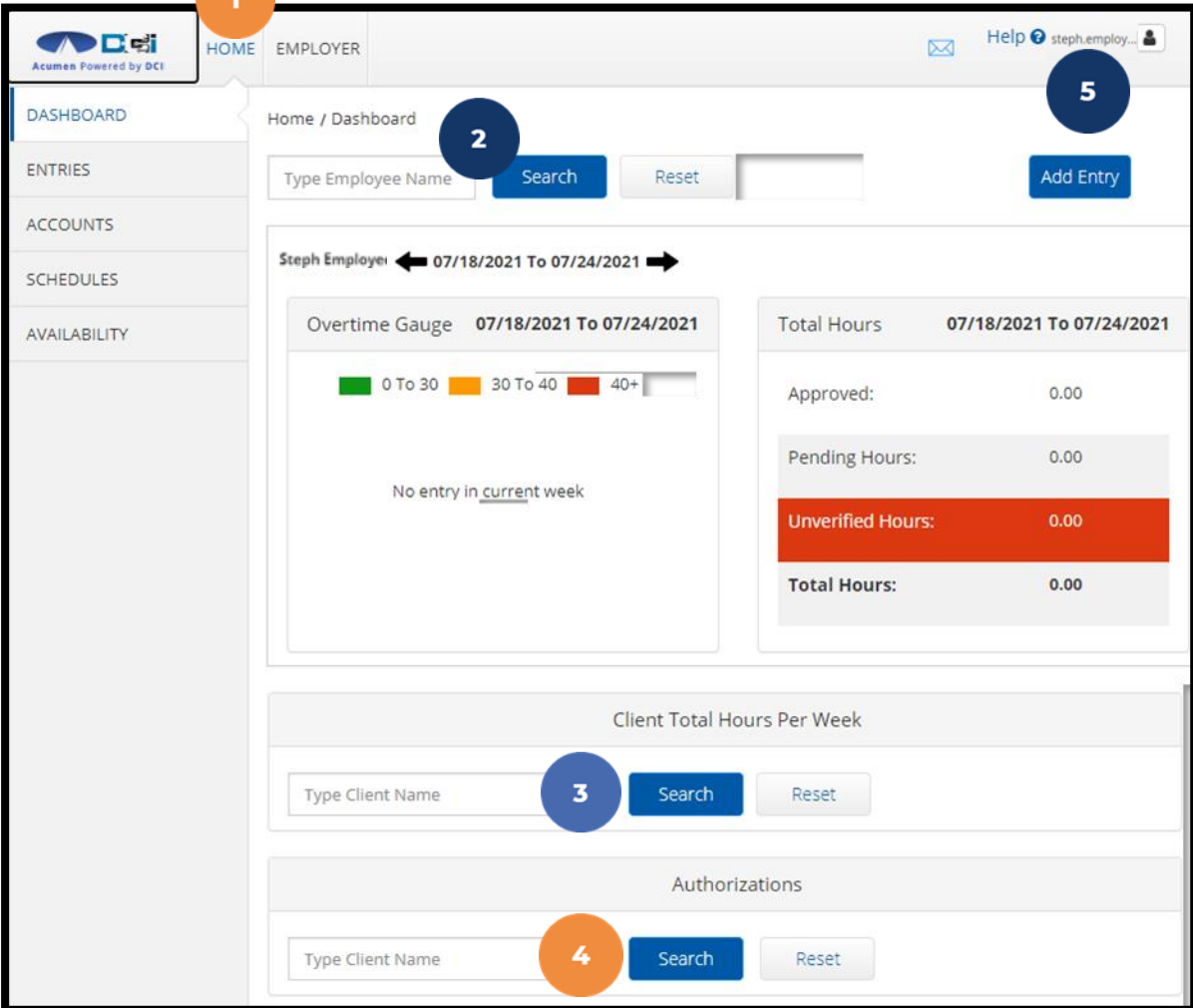
Full Site – Most compatible when accessed via computer or laptop

***Please note!** Employer mobile web portal actions are similar to the web portal but are compatible with a mobile device and do not require horizontal scrolling.

Home Tab Details

1. Select **Home** on the main menu
2. Enter an **employee name** and click the blue **Search** button to view the information below by week. Use the black arrows to toggle between weeks:
 - ✓ Overtime Gauge
 - ✓ Total Hours breakdown
3. Client Total Hours Per Week Widget
 - ✓ Enter the **client name** and click the blue **Search** button to view the total hours worked for the client by week
4. Authorizations (Budget) Widget
 - ✓ Enter the **client name** and click the blue **Search** button to view details of all active authorizations (budgets) detailed on next slide
5. Profile Settings

The Dashboard is the landing page



The screenshot shows the dashboard interface with the following elements and callouts:

- 1**: Points to the **HOME** button in the top navigation bar.
- 2**: Points to the **Search** button in the employee search section.
- 3**: Points to the **Search** button in the Client Total Hours Per Week widget.
- 4**: Points to the **Search** button in the Authorizations widget.
- 5**: Points to the user profile icon in the top right corner.

The dashboard content includes:

- Navigation menu: DASHBOARD, ENTRIES, ACCOUNTS, SCHEDULES, AVAILABILITY.
- Employee search: "Type Employee Name" input, "Search" button, "Reset" button, "Add Entry" button.
- Employee selection: "Steph Employee" with left and right arrows, and date range "07/18/2021 To 07/24/2021".
- Overtime Gauge: "07/18/2021 To 07/24/2021" with a legend (0 To 30, 30 To 40, 40+) and a message "No entry in current week".
- Total Hours breakdown: "07/18/2021 To 07/24/2021" with a table:

Category	Hours
Approved:	0.00
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	0.00
- Client Total Hours Per Week: "Type Client Name" input, "Search" button, "Reset" button.
- Authorizations: "Type Client Name" input, "Search" button, "Reset" button.

Authorizations (Budget) Widget



Authorizations

KZ Client2 - T45158 ✕ Date of Service [calendar icon] Search Reset Display as Time

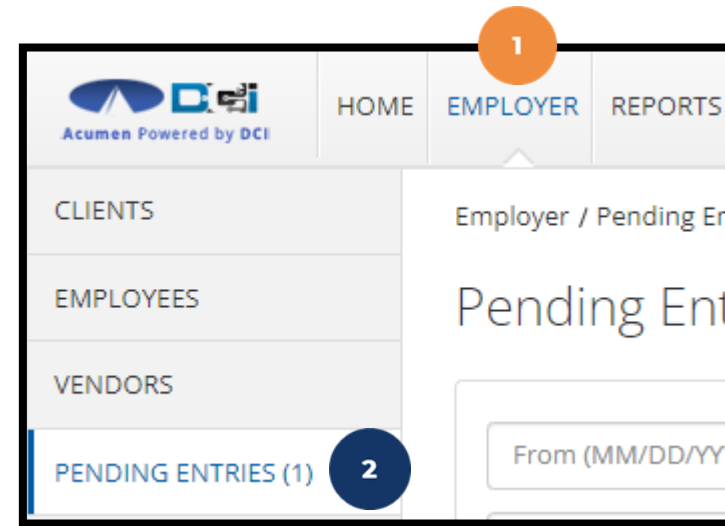
Authorization for Client: KZ Client2 ⓘ

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
PCS	01/17/2022	01/31/2024	1000.00 Dollars	785.00 Dollars	0.30 Dollars	784.70 Dollars	100.00 Dollars	100.00 Dollars	20.00 Dollars

- The authorizations (budget) widget allows the user to search by client (required) to view approved authorizations (budgets) in the past, present, or future.
- Optionally, use both the client and date filter to search for approved authorizations (budget).
- The Employer is responsible for managing the service code (budgets) for both the Personal Choices Services (PCS) and the Savings Fund (SF)
- Acumen **will not automatically deduct** from the Savings Fund (SF) service code (budget) if the Personal Choices Services (PCS) service code (budget) is exhausted
- The Employee should only use the Savings Fund (SF) service code (budget) at the direction of the Employer

Navigate to Pending Entries

1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
 - ✓ The number of pending entries displays in parenthesis on the submenu



All entries requiring review/action appear in the table

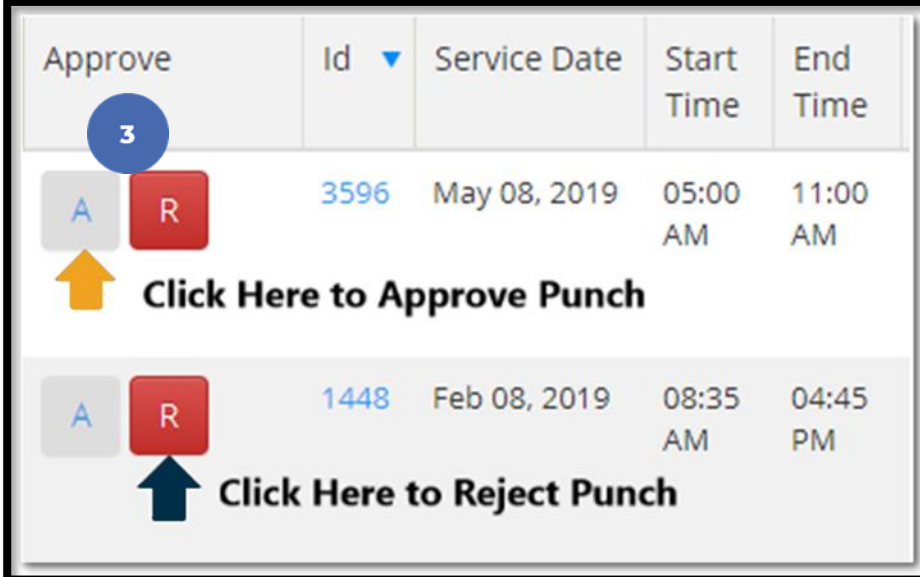
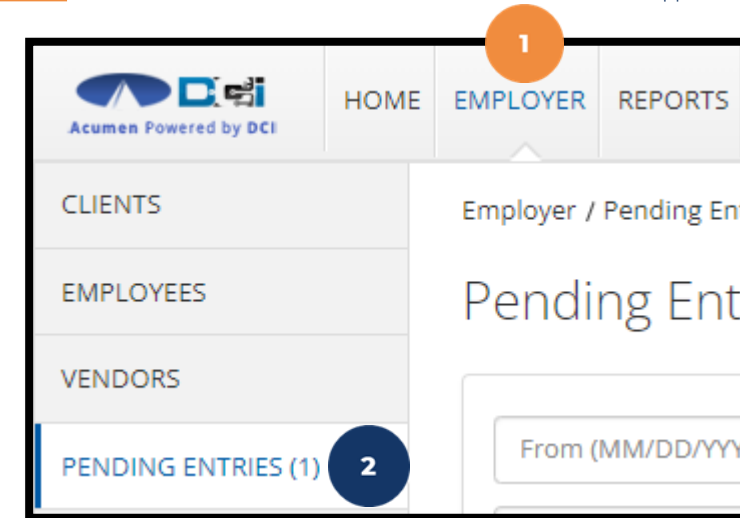
Approve	Punch ID	Service Date	Start Time	End Time	Cost Center	Client/ Program Name	Employee/ Program Name	Service Code/Type	Amount	EWV	Needs Review
A R	68312	Dec 19, 2023	01:06 PM	01:10 PM	JVK Cost Center - JVKCostCenter			EVVRequired	0:00:04	No	?
A R	68310	Dec 19, 2023	12:47 PM	12:51 PM	JVK Cost Center - JVKCostCenter			EVVRequired	0:00:04	YES	👁
A R	68306	Dec 19, 2023	11:57 AM	12:46 PM	Kenneth Cost Center - KEN			Hourly	0:00:49	YES	👁
A R	68304	Dec 19, 2023	01:18 PM	01:18 PM	Default Cost Center - 00-000			DPI Hourly	0:00:00	YES	

Load More

***Please note!** To view all entries, click the Load More button at the bottom of the page.

Manage Pending Entries

1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
 - ✓ The number of pending entries displays in parenthesis on the submenu
3. Any punch that requires approval is listed here
 - ✓ Review each entry
 - Click on the entry to view all details
 - ✓ Approve or reject
 - Click the **A** on the entry line to approve
 - ❖ Entries must be 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
 - Click the red **R** on the entry line to reject
 - ❖ If an entry is rejected, ask the employee to re-enter the time correctly in the DCI web portal.

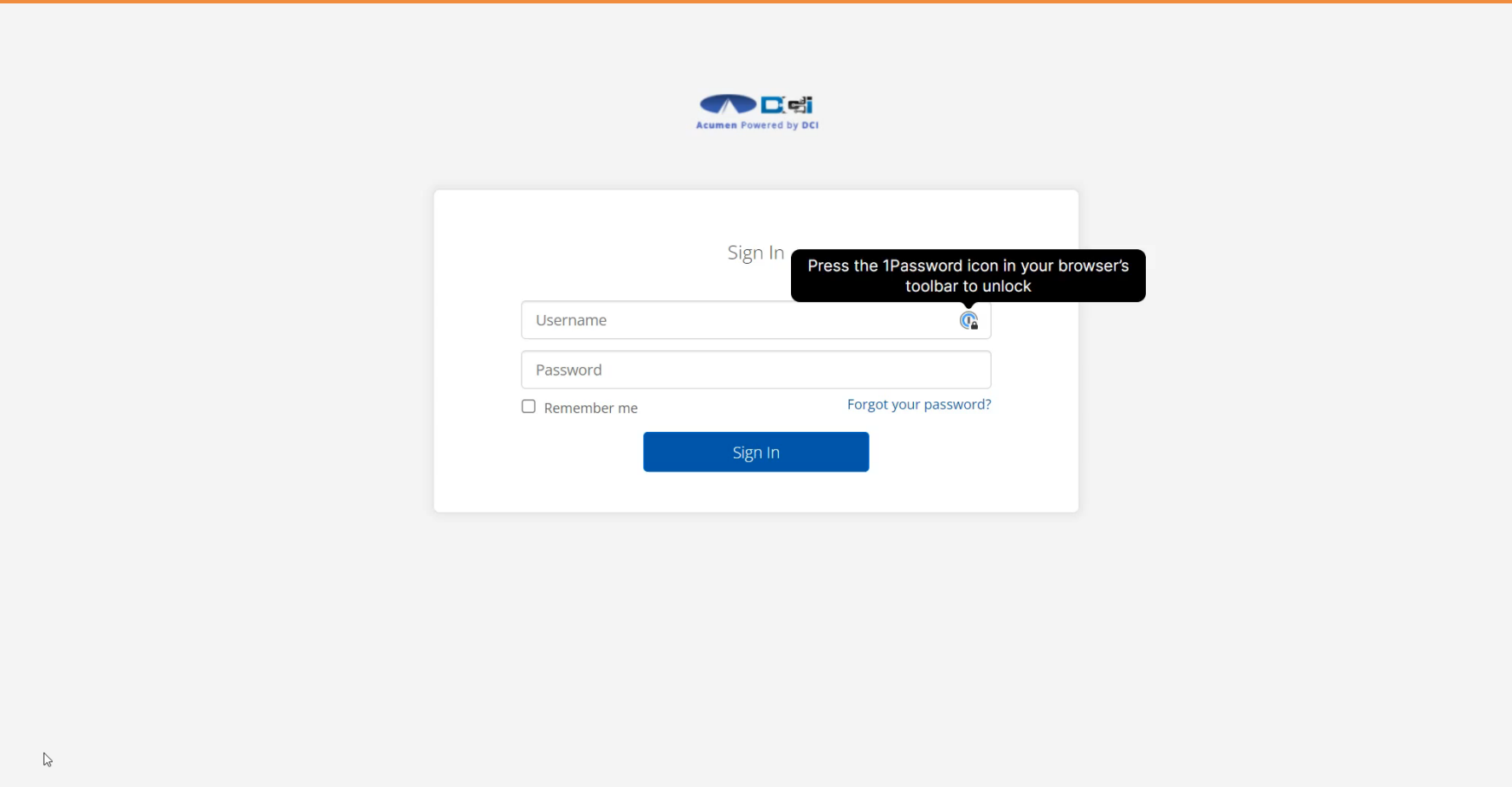


The screenshot shows a table with columns: 'Approve', 'Id', 'Service Date', 'Start Time', and 'End Time'. A blue circle with the number '3' highlights the 'Approve' column header. The first row shows a red 'R' button, the ID '3596', the date 'May 08, 2019', and times '05:00 AM' to '11:00 AM'. Below this row is a yellow arrow pointing to a blue 'A' button with the text 'Click Here to Approve Punch'. The second row shows a red 'R' button, the ID '1448', the date 'Feb 08, 2019', and times '08:35 AM' to '04:45 PM'. Below this row is a blue arrow pointing to a red 'R' button with the text 'Click Here to Reject Punch'.

Approve	Id	Service Date	Start Time	End Time
R	3596	May 08, 2019	05:00 AM	11:00 AM
A				
R	1448	Feb 08, 2019	08:35 AM	04:45 PM
R				

Employer Web Portal Video

Manage Entries



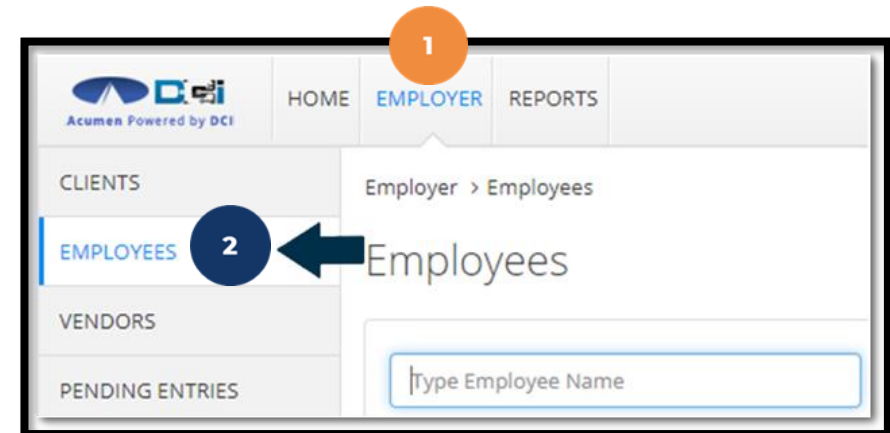
The screenshot shows the Acumen web portal sign-in page. At the top center is the Acumen logo with the text "Acumen Powered by DCI". Below the logo is a "Sign In" heading. A callout box points to a 1Password icon in the Username field, with the text "Press the 1Password icon in your browser's toolbar to unlock". The form includes fields for "Username" and "Password", a "Remember me" checkbox, a "Forgot your password?" link, and a blue "Sign In" button.

Proprietary: For Acumen and Customer Use Only



Using the Employees Page

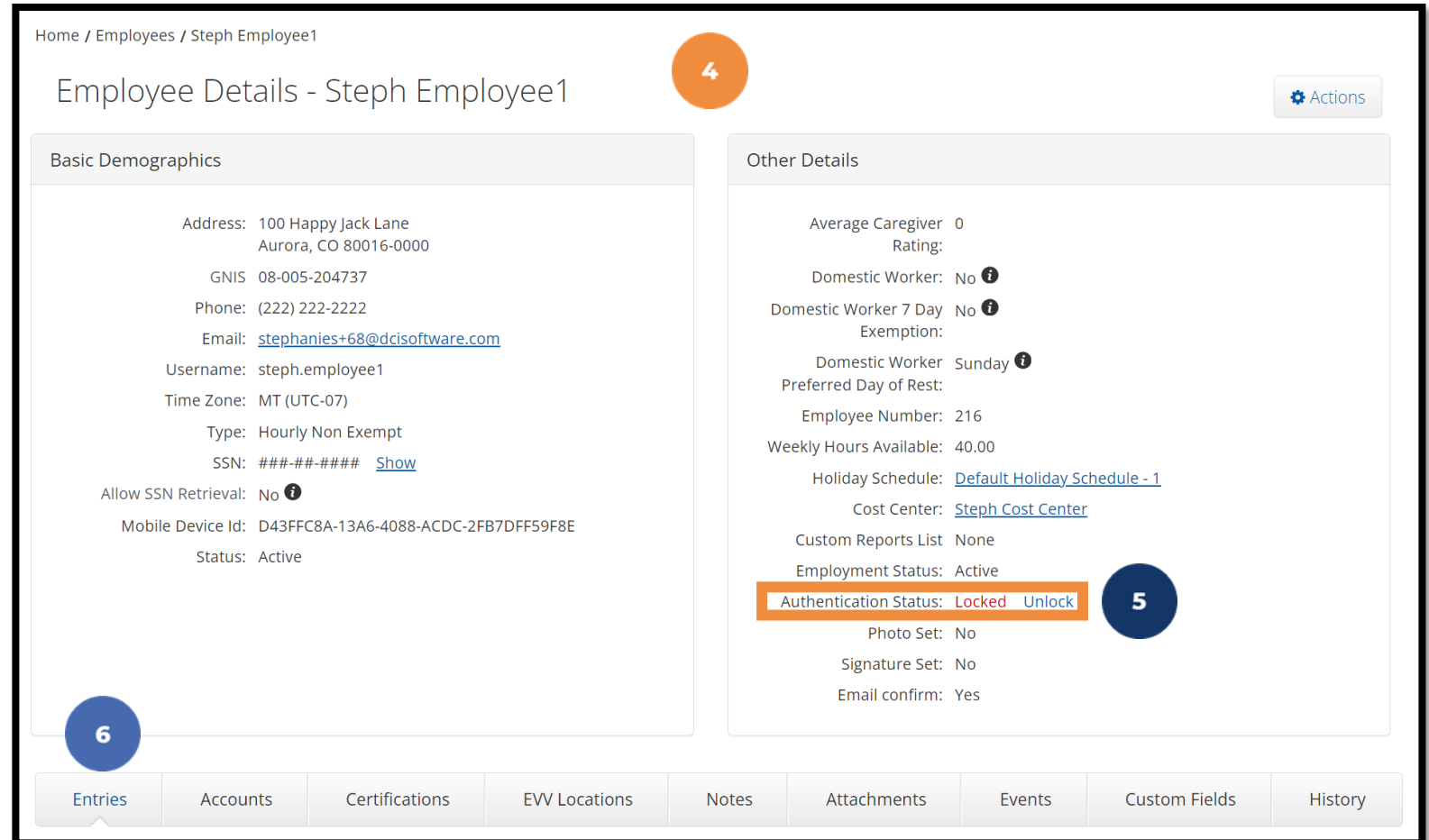
1. Click **Employer** on the main menu
2. Select the **Employees** tab from the submenu
3. Click anywhere on the selected employee's line



Name	Employee #	Phone #	Email	Time Zone	Type	Status
Steph Employee1	721	(222) 222-2222	stephanies+320@dcisoftware.com	MT (UTC-07)	Hourly Non Exempt	Active

Using the Employees Page (cont.)

4. View the employee details page
5. Unlock Employee Profile if needed
6. Scroll down to the Entries tab



Home / Employees / Steph Employee1

Employee Details - Steph Employee1

Actions

Basic Demographics

Address: 100 Happy Jack Lane
Aurora, CO 80016-0000

GNIS: 08-005-204737

Phone: (222) 222-2222

Email: stephanies+68@dcisoftware.com

Username: steph.employee1

Time Zone: MT (UTC-07)

Type: Hourly Non Exempt

SSN: ###-##-#### [Show](#)

Allow SSN Retrieval: No ⓘ

Mobile Device Id: D43FFC8A-13A6-4088-ACDC-2FB7DFF59F8E

Status: Active

Other Details

Average Caregiver Rating: 0

Domestic Worker: No ⓘ

Domestic Worker 7 Day Exemption: No ⓘ

Domestic Worker Preferred Day of Rest: Sunday ⓘ

Employee Number: 216

Weekly Hours Available: 40.00

Holiday Schedule: [Default Holiday Schedule - 1](#)

Cost Center: [Steph Cost Center](#)

Custom Reports List: None

Employment Status: Active

Authentication Status: **Locked** [Unlock](#)

Photo Set: No

Signature Set: No

Email confirm: Yes

6

4

5

Entries Accounts Certifications EVW Locations Notes Attachments Events Custom Fields History

Using the Employees Page (cont.)



7. View the punch entries for the employee
8. Ensure all time for the pay period is entered and approved before the submission due date

Navigation tabs: Entries, Accounts, Certifications, EVV Locations, Notes, Caregiver Ratings, Attachments, Custom Fields, History

Search filters:

- From (MM/DD/YYYY) [calendar icon]
- To (MM/DD/YYYY) [calendar icon]
- Type Punch Id
- Type Client Name
- Type Service Code
- Select Account Type [dropdown]
- Select Status [dropdown]

Buttons: Reset, Search

Entries **7** Export

Showing 13 out of 13 records

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
1897873	Jul 12, 2023			Client Transportation	1897872	Steph Cost Center - 75	Steph Client1	Client Transportation	0.00	Approved
1894616	Jun 07, 2023	05:00 AM	08:00 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:03:00	Approved
1894612	Jun 04, 2023	04:00 PM	05:00 PM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:01:00	Approved
1894611	Jun 03, 2023	04:00 PM	06:00 PM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:02:00	Approved
1897872	Jul 12, 2023	06:22 AM	06:25 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:00:03	Pending
1894620	Jun 23, 2023	07:18 AM	07:19 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:00:01	Pending

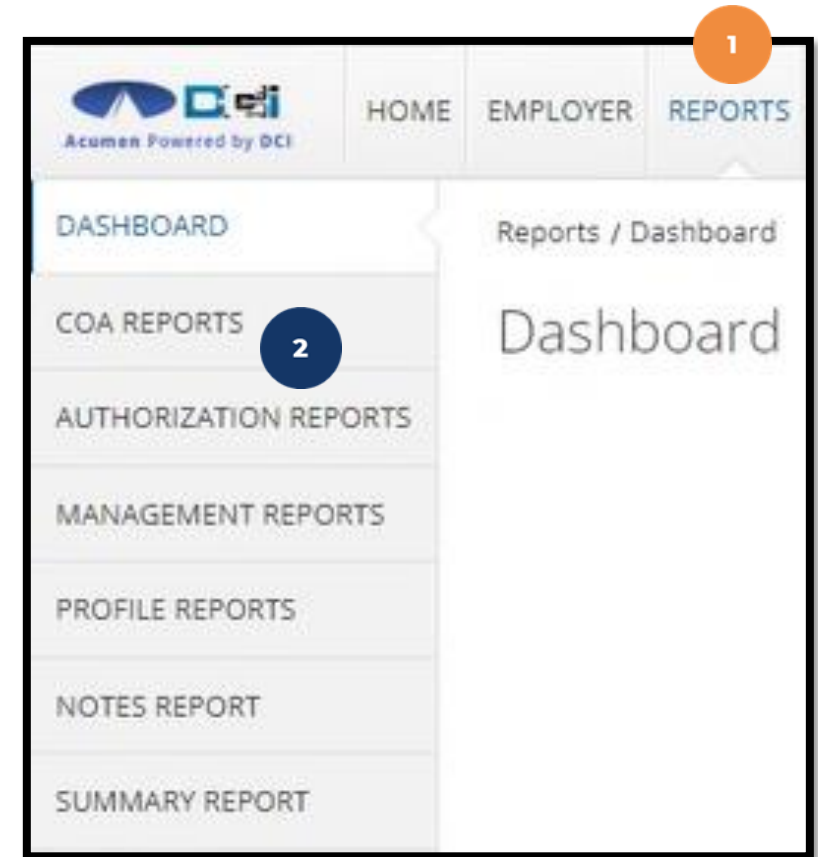
Entry Status



- **Unverified:** Entries that the Employer or Admin (someone other than the employee) enters or edits on behalf of an Employee. It is important to resolve the unverified entries, or they will not be paid.
- **Unvalidated:** Entries that are waiting for the business rule validation process to complete. This process runs multiple times an hour.
- **Pending:** Entries that are awaiting review and approval by the Employer
- **Rejected:** Entries that have been rejected by the Employer or a system process
- **Approved:** Entries that have been approved by the Employer and are ready to be processed
- **Batched:** An approved entry that has been included in a pending payroll batch
- **Processed:** Entries that have been processed and are ready for payroll

Using Reports

1. Select **Reports** on the main menu
2. Select a report category from the submenu
 - ✓ **COA Reports**
 - Punch Entries Report – Use the filters to locate specific entries
 - ✓ **Authorization (Budget) Reports**
 - Authorization Run Rate Report – View the budget usage breakdown by client, account type, or service code.
 - ✓ **Notes Reports**
 - Punch Entry Notes and Canned Statements (Tasks) Report - Pull service notes and canned statements (tasks) entered on punches
 - ✓ **Summary Report** - Breakdown of punches and percentages of budget remaining



Troubleshooting

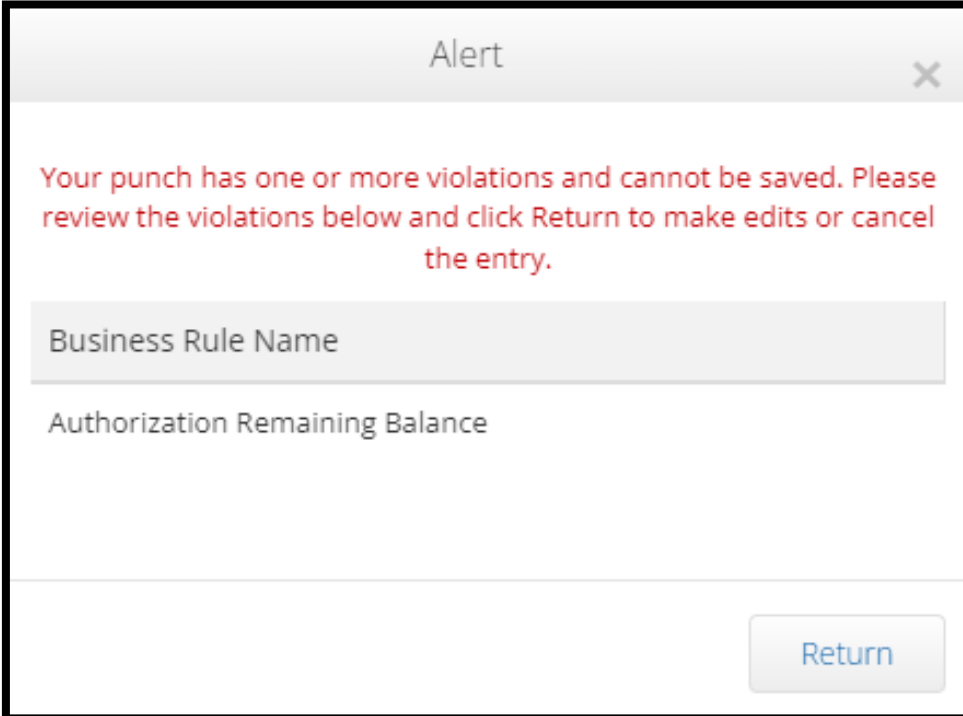
Proprietary: For Acumen and Customer Use Only



Alerts

Business rules are a tool used by your organization to validate, by service code, specific requirements mandated by that service. When a punch violates a business rule, the employee will receive an alert explaining the violation and what action needs to be taken.

One of the most common business rules is the **Authorization Remaining Balance** rule. This rule checks to see that there are enough funds in the authorization/budget to cover the punch.



Alert

Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry.

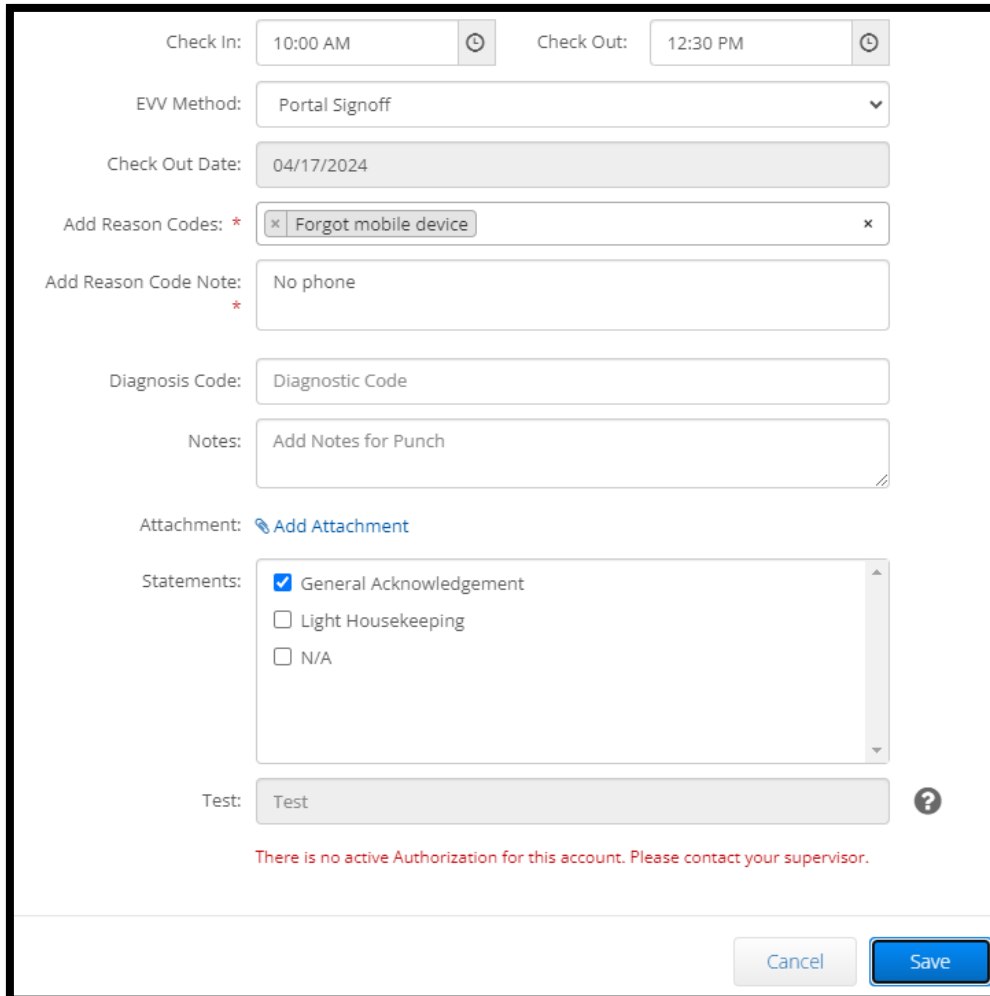
- Business Rule Name
- Authorization Remaining Balance



Return


- The employee will receive this alert and cannot save the punch
- They must edit the punch or cancel the entry
- The employer should review their budget utilization

Alerts


Many other business rules pertain to the authorization/budget such as the **Authorization Expiration Date** rule.



Check In: 10:00 AM  Check Out: 12:30 PM 

EVV Method: Portal Signoff 

Check Out Date: 04/17/2024

Add Reason Codes: * 


Add Reason Code Note: *

Diagnosis Code:

Notes:

Attachment: [Add Attachment](#)

Statements: General Acknowledgement
 Light Housekeeping
 N/A

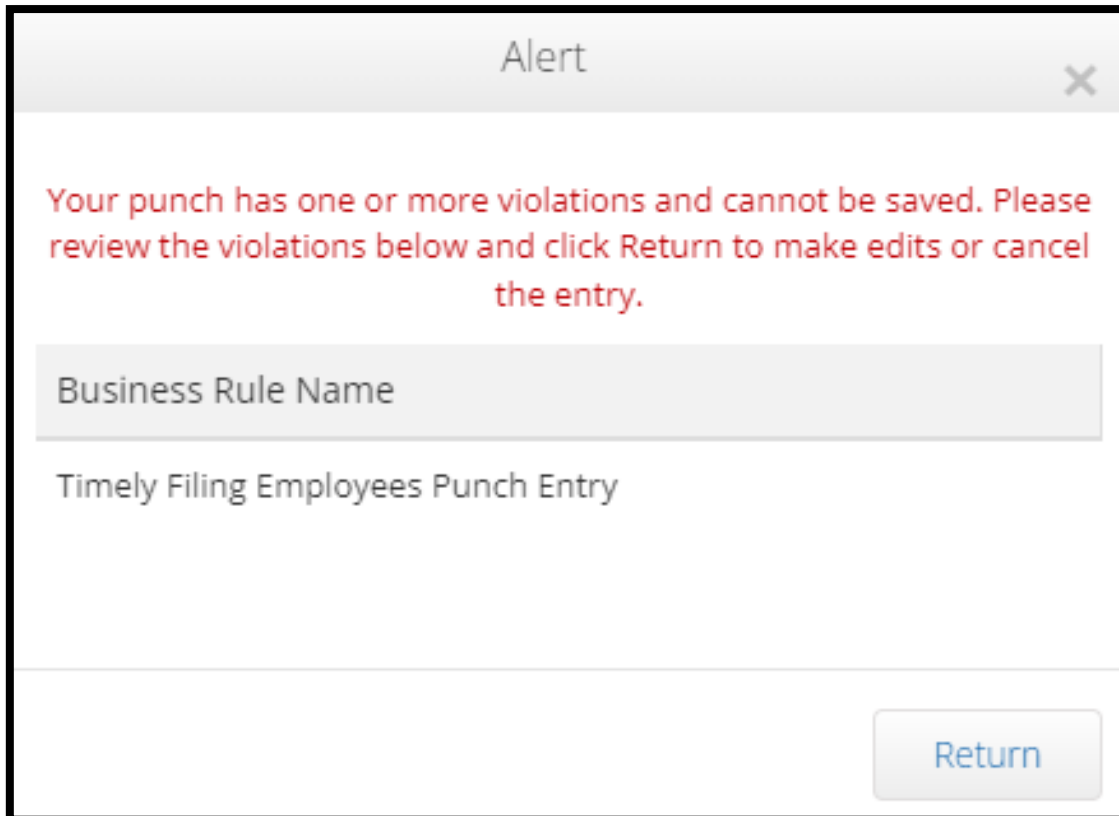
Test: 

There is no active Authorization for this account. Please contact your supervisor.

- The employee will receive this alert when attempting to punch for a date after the authorization/budget has expired
- They cannot save the punch
- The employee should contact the employer
- The employer should verify their authorization data in DCI

Alerts

Punches must be **entered AND approved** within 30 days of the date of service. After 30 days the **Timely Filing Employees Punch Entry** or the **Timely Filing Employee Punch Approval** rules will prohibit the punch from being saved.



Alert

Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry.

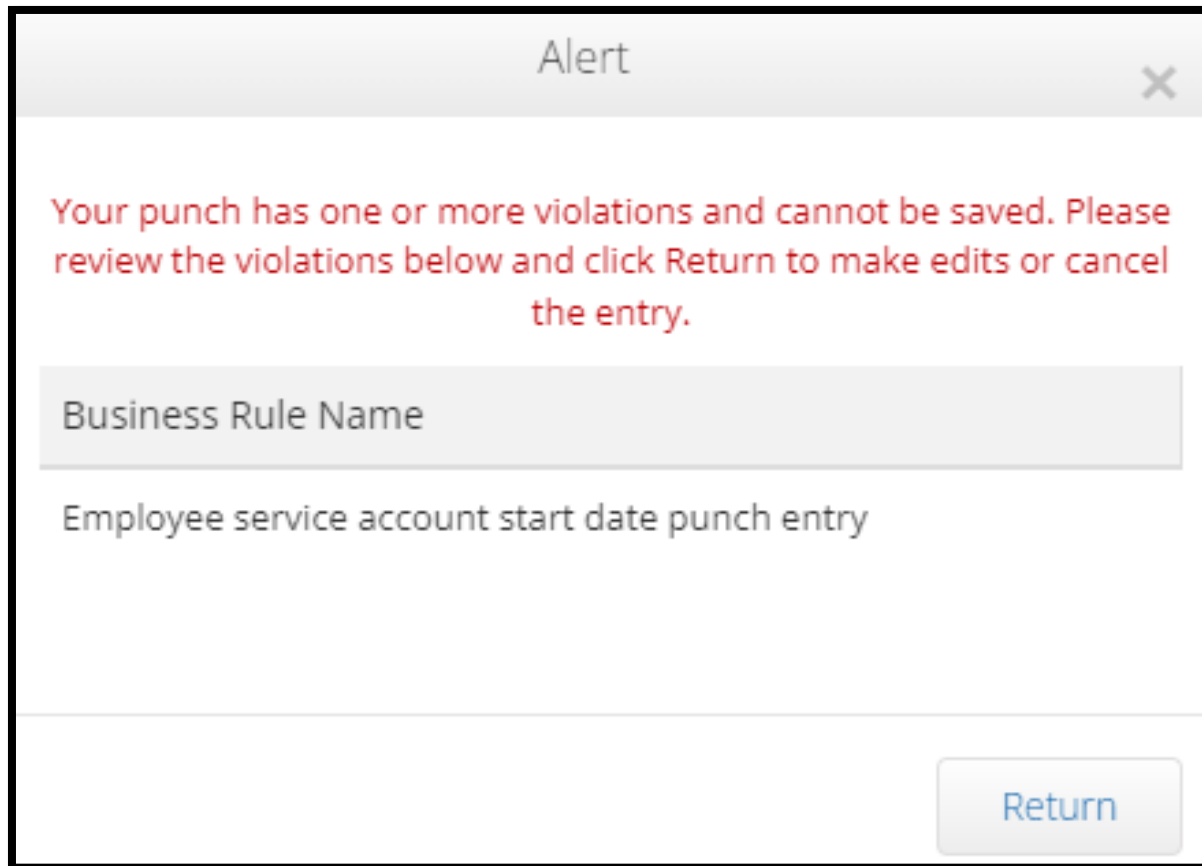
Business Rule Name
Timely Filing Employees Punch Entry

Return

- The employee will receive this alert when attempting to punch for a date that is more than 30 days after the date of service
 - The Timely Filing Employee Punch Approval alert would show if the punch was created within the timeframe, but the employer was attempting to APPROVE the punch more than 30 days after the date of service.
- The employee cannot save the punch
 - Or, in the case of the Timely Filing Employee Punch Approval alert, the employer would be unable to approve the punch.
- No action can be taken

Alerts

Punches may only be entered for an active service account. If the employee attempts to enter a punch before the start date or after the end date of the service account, they cannot save the punch. This triggers either the **Employee Service Account Start Date Punch Entry** rule or the **Employee Service Account End Date Punch Entry** rule.

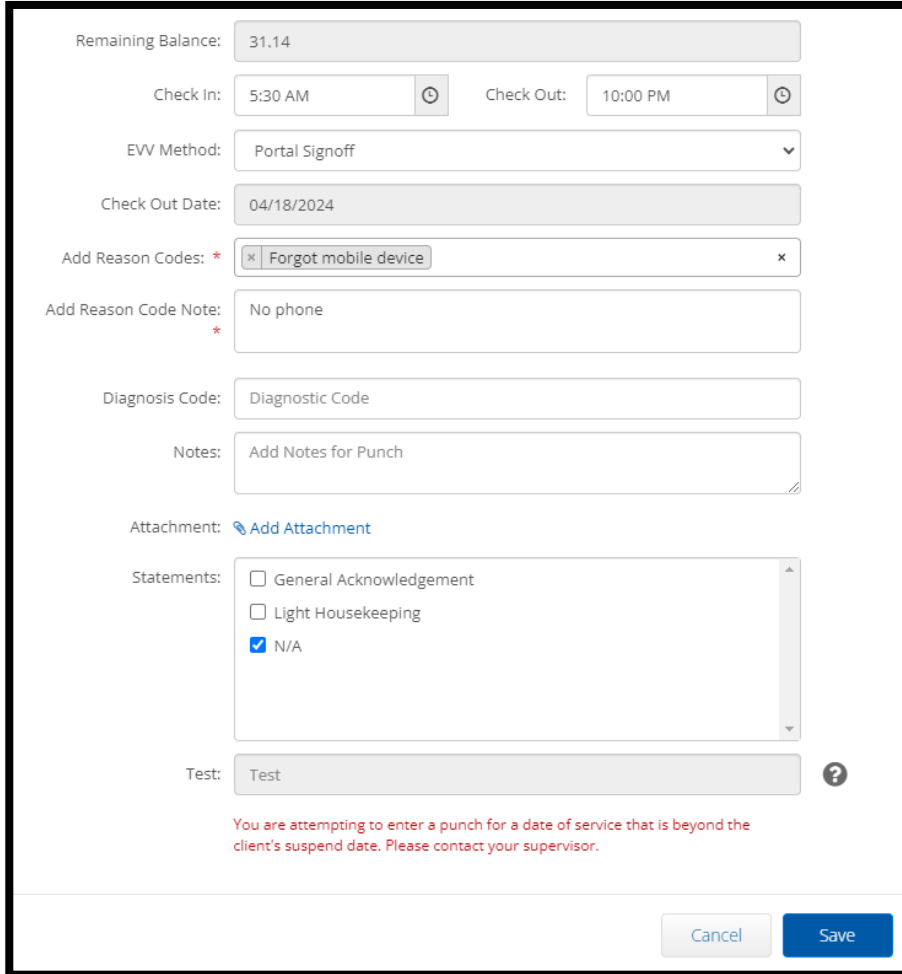


The screenshot shows a dialog box titled "Alert" with a close button (X) in the top right corner. The main text inside the dialog is: "Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry." Below this text is a list item: "Business Rule Name" followed by "Employee service account start date punch entry". At the bottom right of the dialog is a button labeled "Return".

- The employee cannot save the punch
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

Alerts

If enrollment is on hold, or the client cannot receive service, the client profile will be suspended. Punch entries cannot be added after the suspension date.



The screenshot shows a punch entry form with the following fields and values:

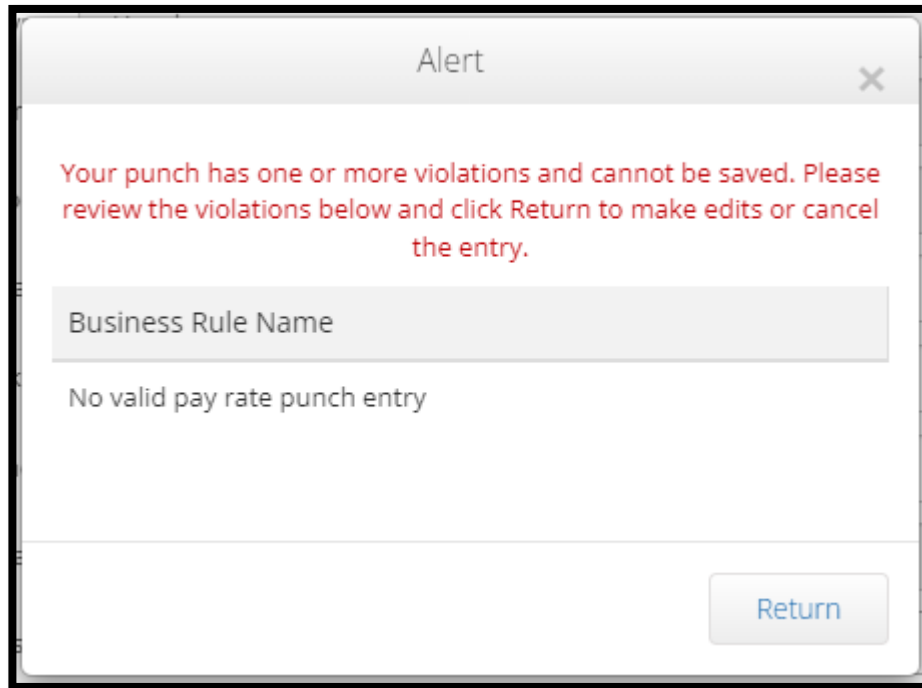
- Remaining Balance: 31.14
- Check In: 5:30 AM
- Check Out: 10:00 PM
- EW Method: Portal Signoff
- Check Out Date: 04/18/2024
- Add Reason Codes: * Forgot mobile device
- Add Reason Code Note: * No phone
- Diagnosis Code: Diagnostic Code
- Notes: Add Notes for Punch
- Attachment: Add Attachment
- Statements: General Acknowledgement, Light Housekeeping, N/A
- Test: Test

A red error message at the bottom of the form reads: "You are attempting to enter a punch for a date of service that is beyond the client's suspend date. Please contact your supervisor." The "Save" button is disabled.

- The employee cannot save the punch
 - While the system allows the employee to log in on the mobile app, they cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

Alerts

If enrollment was on hold, or the client couldn't receive service for a period of time, the employee would have no valid pay rate for that date range. The date of service the employee is attempting to enter a punch entry for has no valid pay rate.



- The employee cannot save the punch
 - While the system allows the employee to clock in on the mobile app, they cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

Check Entries



If a punch entry violates the **Authorization Weekly Max** business rule, it can be saved, but is later rejected when the business rule runs. The employee does not receive an alert but can see that the punch was rejected and that the business rule failed.

Entries Export

Showing 30 out of 380 records

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
39492	Apr 14, 2024	12:00 AM	11:30 PM	Hourly		Steph Cost Center test - Steph Cost Center test	Steph Client1	RESPIRE (Hourly)	0:23:30	Rejected
39491	Apr 15, 2024	12:00 AM	11:30 PM	Hourly		Steph Cost Center test - Steph Cost Center test	Steph Client1	RESPIRE (Hourly)	0:23:30	Rejected

Ref Entries | Notes | Attachments | Verifications | Map | **Business Rules** | Auto Approval | Custom Fields | History

Business Rules

Business Rule Name	Business Rule Result
Employee service account start date punch entry	Pass
Authorization Weekly Max	Fail
Max Hours Per Week Per Client Per Funding Source	Pass
Authorization Expiration Date	Pass

1. The employee should always review their entries and check the status
2. Click on the **punch row** to review the punch details
3. Click the **Business Rules tab** to view the result

The employee should contact the employer

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 Employer – 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 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 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 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) 859-0026 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



Payroll Schedule & Deadlines

Proprietary: For Acumen and Customer Use Only



Ensure Time Entries are Submitted & Approved Electronically by Due Date



IMPORTANT

- All time entries must be submitted via **Mobile App** or **Phone EVV (IVR)**. Entries that occurred during a service interruption can be entered via the Web Portal.
- The last pay period when paper timesheets will be accepted is August 1-15, 2024.
- Time must be entered and approved online by the due date, *even if it falls on a weekend or holiday*.
 - ❖ Time entries approved *after* the due date will be processed on the following pay period's pay date
 - ❖ Please reference the AL SAIL [Pay Schedule](#) for due dates
- 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

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 15th and the last day of the month unless it falls on the weekend or a holiday
- 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. Return the forms to enrollment@acumen2.net.

	Payment Period Start Date	Payment Period End Date	Submissions Due NO Later Than	Direct Deposit/Check Date
"Payment Period Start Date" is the first day of services in the pay period.	07/01/24	07/15/24	Wed, 07/17/24	Wed, 07/31/24
	07/16/24	07/31/24	Fri, 08/02/24	Thu, 08/15/24
"Payment Period End Date" is the last day of services in the pay period.	08/01/24	08/15/24	Sat, 08/17/24	Fri, 08/30/24
	08/16/24	08/31/24	Mon, 09/02/24	Fri, 09/13/24
	09/01/24	09/15/24	Tue, 09/17/24	Mon, 09/30/24
	09/16/24	09/30/24	Wed, 10/02/24	Tue, 10/15/24
	10/01/24	10/15/24	Thu, 10/17/24	Thu, 10/31/24
	10/16/24	10/31/24	Sat, 11/02/24	Fri, 11/15/24
	11/01/24	11/15/24	Sun, 11/17/24	Fri, 11/29/24
	11/16/24	11/30/24	Mon, 12/02/24	Fri, 12/13/24
	12/01/24	12/15/24	Tue, 12/17/24	Tue, 12/31/24
	12/16/24	12/31/24	Thu, 01/02/25	Wed, 01/15/25
	01/01/25	01/15/25	Fri, 01/17/25	Fri, 01/31/25
	01/16/25	01/31/25	Sun, 02/02/25	Fri, 02/14/25
	02/01/25	02/15/25	Mon, 02/17/25	Fri, 02/28/25
	02/16/25	02/28/25	Sun, 03/02/25	Fri, 03/14/25
	03/01/25	03/15/25	Mon, 03/17/25	Mon, 03/31/25
	03/16/25	03/31/25	Wed, 04/02/25	Tue, 04/15/25
	04/01/25	04/15/25	Thu, 04/17/25	Wed, 04/30/25
	04/16/25	04/30/25	Fri, 05/02/25	Thu, 05/15/25
	05/01/25	05/15/25	Sat, 05/17/25	Fri, 05/30/25
	05/16/25	05/31/25	Mon, 06/02/25	Sat, 06/14/25
	06/01/25	06/15/25	Tue, 06/17/25	Mon, 06/30/25
	06/16/25	06/30/25	Wed, 07/02/25	Tue, 07/15/25

"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.

"Submissions Due NO Later Than" is the last date that your employee's time can be approved, and your vendor payment (Goods and Services) requests can be submitted, for the pay period in order to be paid as scheduled.

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



Acumen: (866) 859-0026



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



Enrollment: enrollment@acumen2.net

For payment or other questions please complete the [Contact Us](#) form at www.acumenfiscalagent.com/contact



Questions?

Thank you!

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

acumenfiscalagent.zendesk.com