

# Historical Entries with Reason Codes

Presented By: Acumen Fiscal  
Agent



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## OUR MISSION

*Acumen Fiscal Agent facilitates freedom, choice and opportunity through innovative fiscal agent solutions.*

# Reason Code Basics

- Reason Codes are required for some programs and services
- If you see an option to select a reason, it's required for you.
- The reason code explains why you are entering your time in the DCI Web Portal instead of an EVV Compliant method
- The DCI Web Portal should only be used to enter missed punches or for Live-In Exempt Employees
- Discuss with your Agent for more info on Live-In Exemptions (based on your state guidelines)

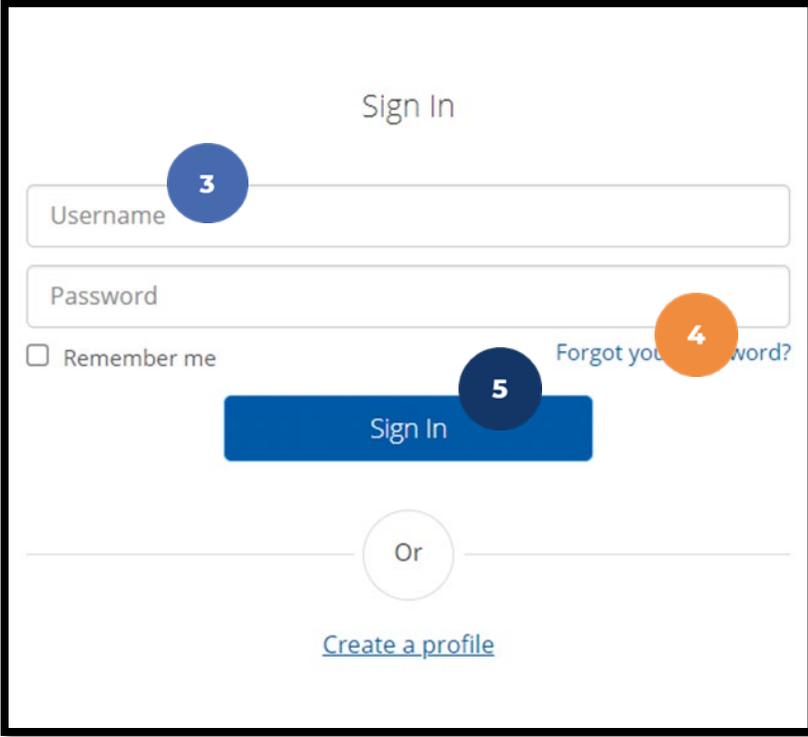


# Accessing the DCI Web Portal

1. Open an internet browser on a computer or mobile device (Google Chrome is preferred) and navigate to the DCI Web Portal.
  - All states except WI, NC Cap: [acumen.dcisoftware.com](https://acumen.dcisoftware.com)
  - WI, NC Cap Only: [outreach.dcisoftware.com](https://outreach.dcisoftware.com)
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

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

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



Sign In

1

3

4

5

Username

Password

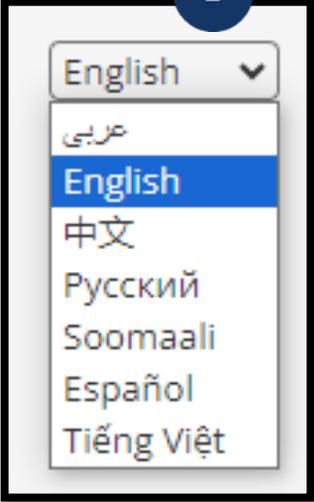
Remember me

Forgot your password?

Sign In

Or

[Create a profile](#)



2

English

عربي

English

中文

Русский

Soomaali

Español

Tiếng Việt

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



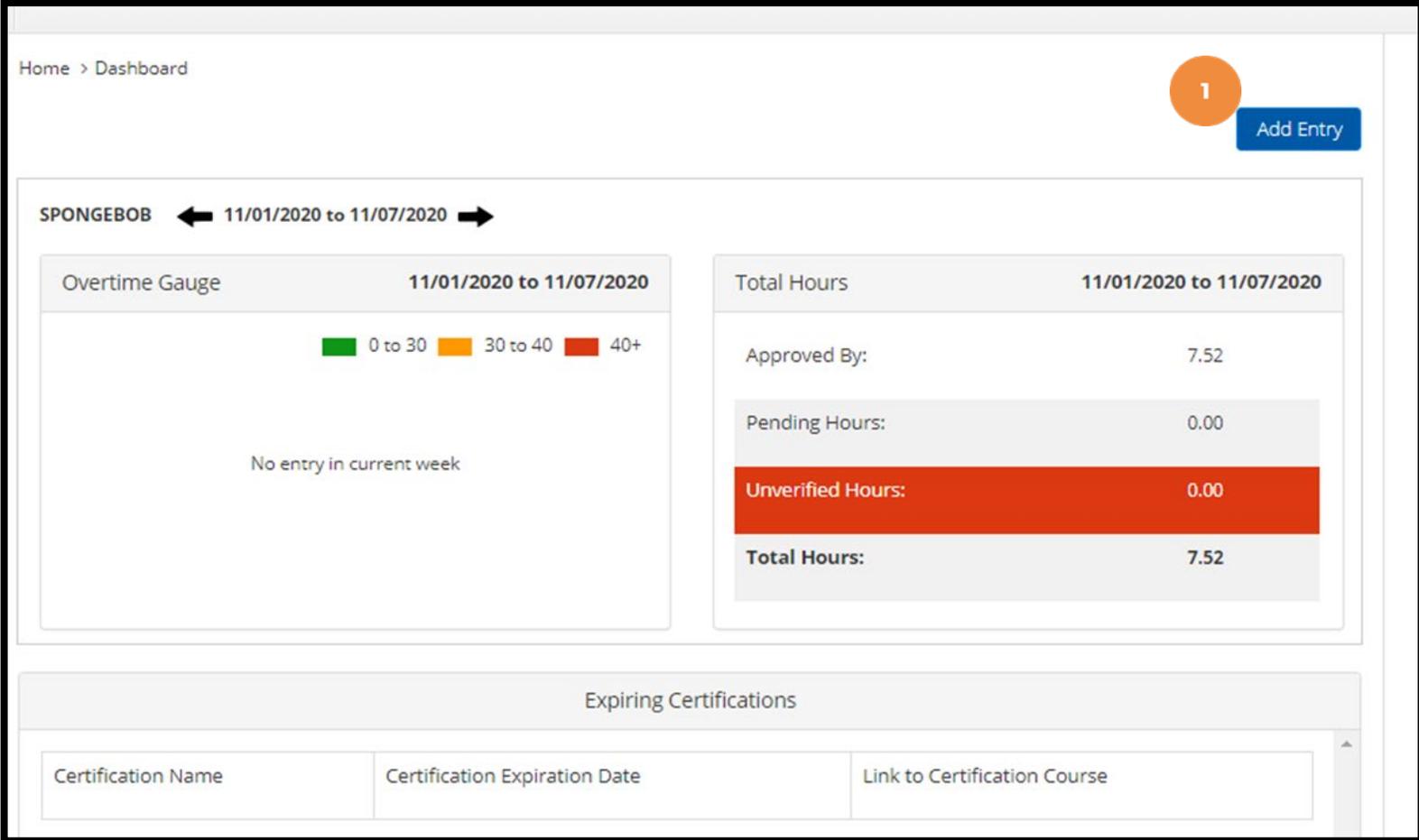
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# DCI Web Portal

**\*On a Desktop or Laptop Computer**

# Add New Entry

1. Once  
Logged, click  
the blue **Add  
Entry** button



Home > Dashboard

1 Add Entry

SPONGEBOB ← 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
<b>Unverified Hours:</b>	<b>0.00</b>
<b>Total Hours:</b>	<b>7.52</b>

Expiring Certifications

Certification Name	Certification Expiration Date	Link to Certification Course
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# Add New Entry (cont.)



2. First three boxes are auto filled.
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

A screenshot of the "Add New Entry" form. The form contains several fields with numbered callouts: 2 (Employee Name), 3 (Client), 4 (Service Code), 5 (Service Date), 6 (Check In/Out times), and 7 (EVV Method). The fields are: Entry Type: \* (Punch), Employee Name: (Steph Employee2), Account Type: \* (Hourly), Client: \* (Steph Client2 - 10), Service Code: \* (PCS), Service Date: \* (12/12/2023), Check In: \* (5:00 AM), Check Out: \* (8:00 AM), EVV Method: \* (Portal Signoff), and Check Out Date: (12/12/2023).

Add New Entry

Entry Type: \* Punch

Employee Name: Steph Employee2

Account Type: \* Hourly

Client: \* Steph Client2 - 10

Service Code: \* PCS

Service Date: \* 12/12/2023

Check In: \* 5:00 AM

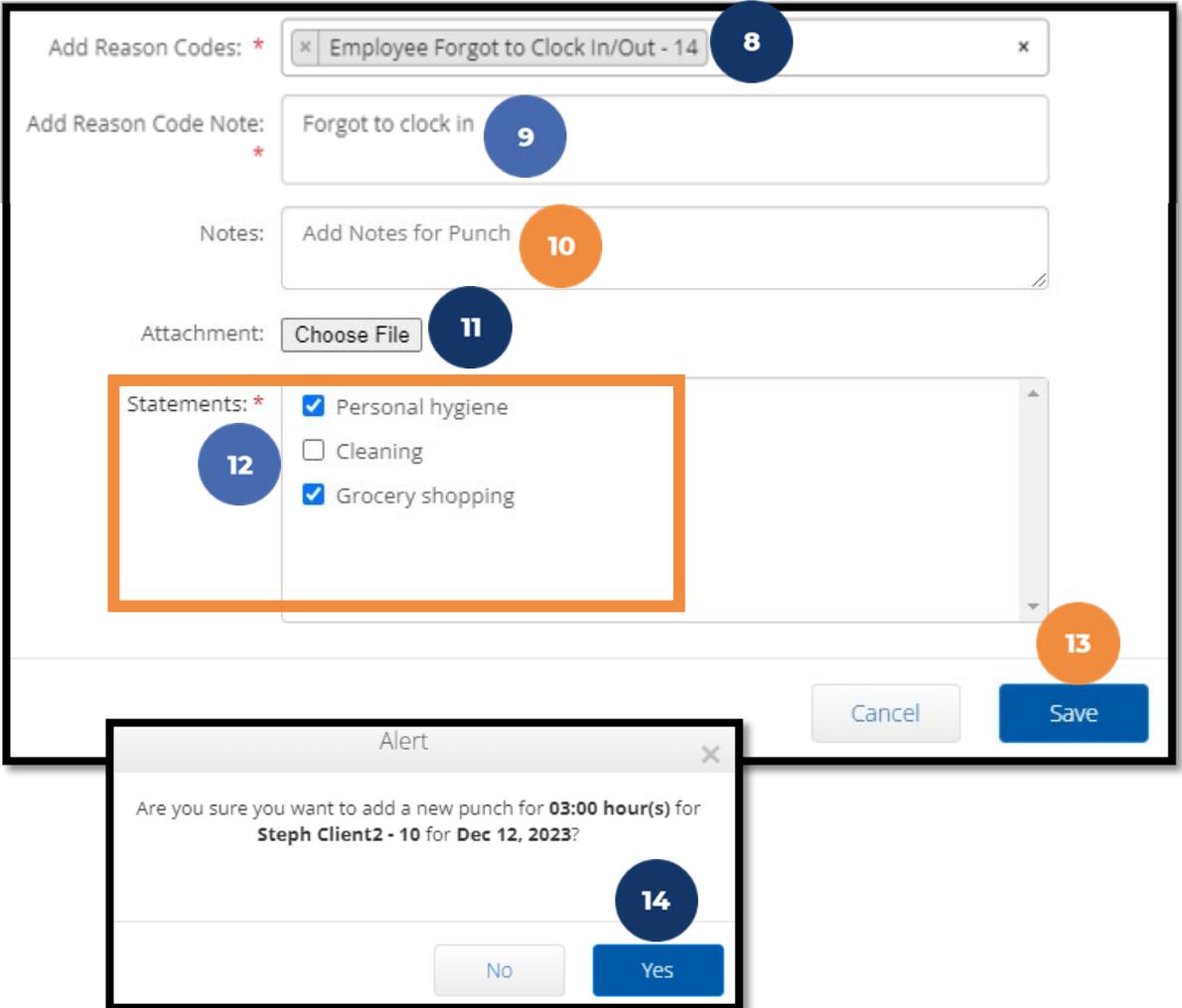
Check Out: \* 8:00 AM

EVV Method: \* Portal Signoff

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 the selected option 'Employee Forgot to Clock In/Out - 14' (callout 8).
- Add Reason Code Note:** A text field containing 'Forgot to clock in' (callout 9).
- Notes:** A text field containing 'Add Notes for Punch' (callout 10).
- Attachment:** A 'Choose File' button (callout 11).
- Statements:** A list box with three items: 'Personal hygiene' (checked), 'Cleaning' (unchecked), and 'Grocery shopping' (checked). The list box is highlighted with an orange border (callout 12).
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right (callout 13).
- Alert:** A dialog box titled 'Alert' with the message 'Are you sure you want to add a new punch for 03:00 hour(s) for Steph Client2 - 10 for Dec 12, 2023?' and 'No' and 'Yes' buttons (callout 14).

# 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
  - All states except WI, NC  
Cap: [acumen.dcisoftware.com](https://acumen.dcisoftware.com)
  - WI, NC  
Cap Only: [outreach.dcisoftware.com](https://outreach.dcisoftware.com)
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

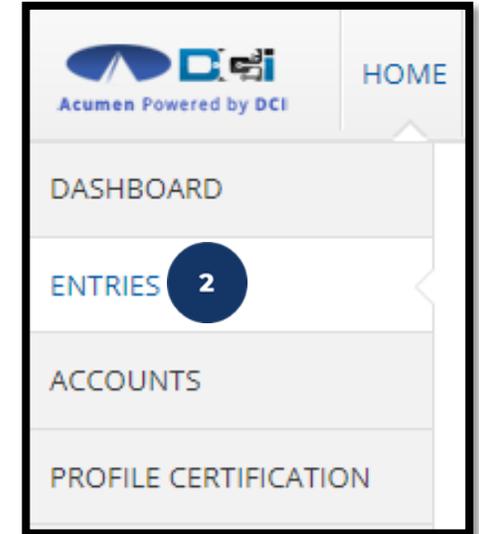
Sign In

Username

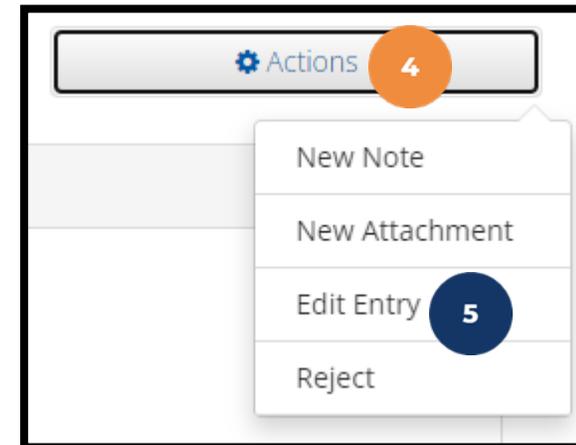
Password

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		<a href="#">Steph_Client1</a>	Steph Hourly	0:04:00	Hourly	Pending





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# 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

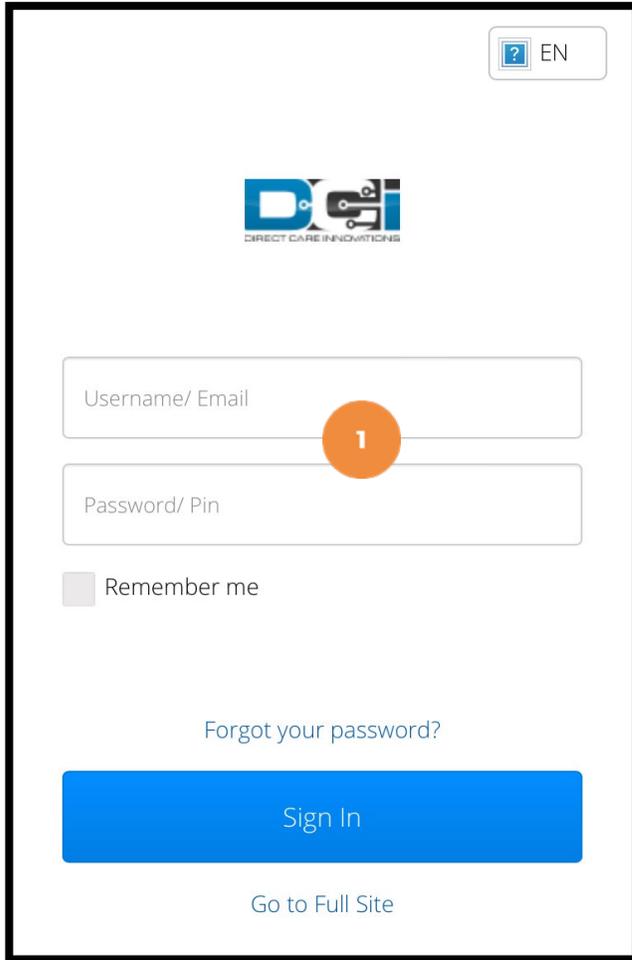


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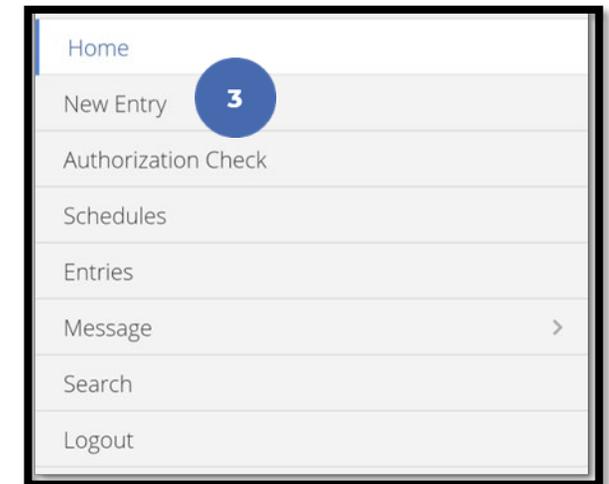
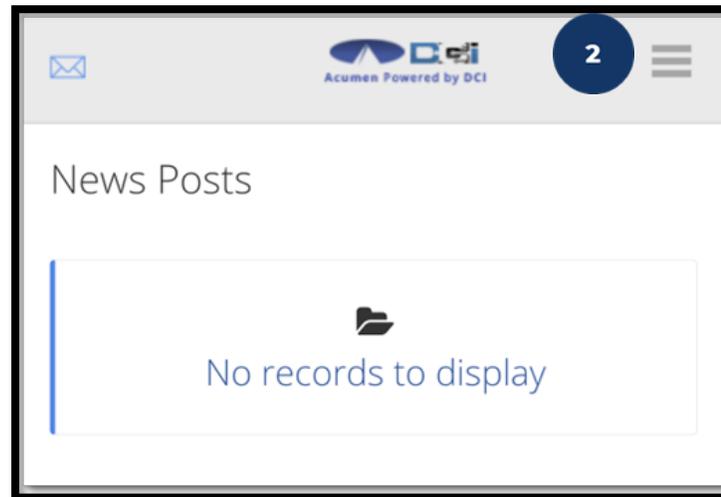
# Mobile Web Portal

**\*On a Smartphone or Tablet**

# Add New Entry - Mobile Web

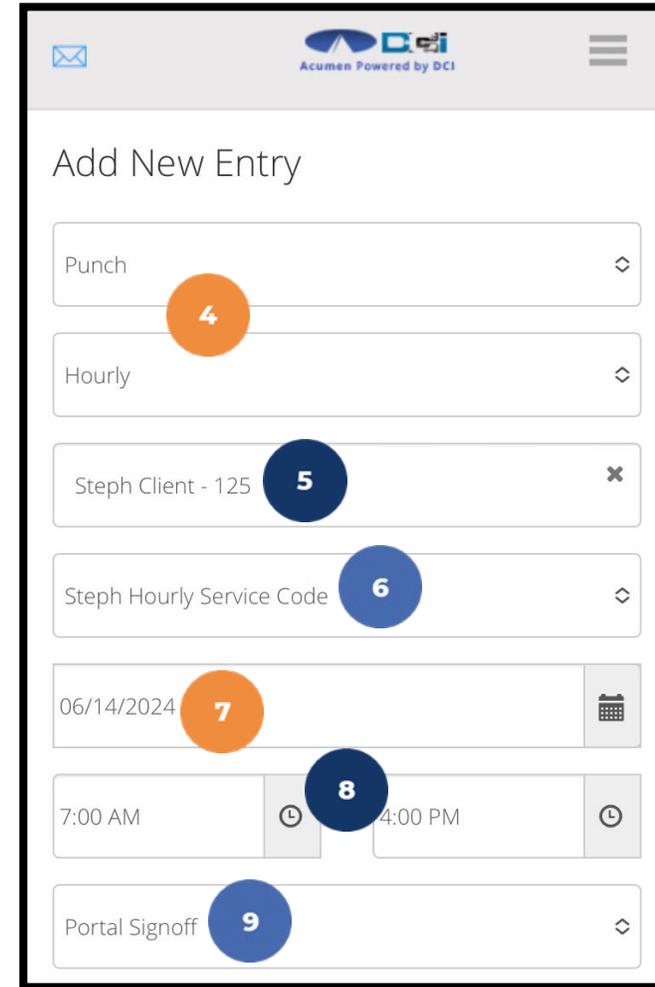


1. Log in to the DCI Web Portal on a mobile device
2. Click the **Menu** in the top right corner of the screen
3. Select the **New Entry** tab from the submenu



# Add New Entry - Mobile Web (cont.)

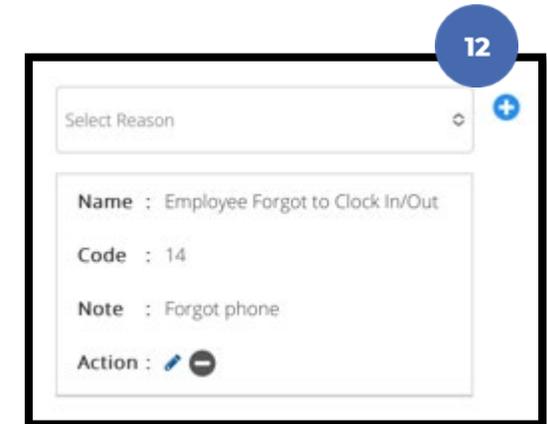
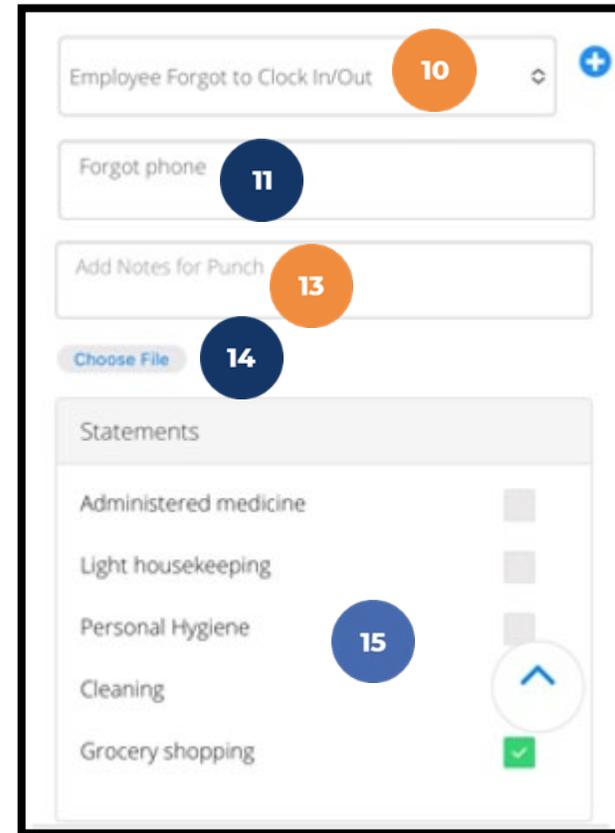
4. The first two fields are prefilled
5. Type a minimum of three characters to generate results and select the Client's name from the list
6. Select the Service Code from the drop-down
7. Select the Service Date
8. Enter the Check In (start) and Check Out (end) times
9. Select Portal Signoff as the Method



The screenshot shows the 'Add New Entry' form on a mobile device. The form is titled 'Add New Entry' and contains several fields with numbered callouts (4-9) indicating the steps described in the list. The fields are: 1. A dropdown menu with 'Punch' selected (callout 4). 2. A dropdown menu with 'Hourly' selected (callout 4). 3. A search field with 'Steph Client - 125' selected (callout 5). 4. A dropdown menu with 'Steph Hourly Service Code' selected (callout 6). 5. A date field with '06/14/2024' selected (callout 7). 6. A time range field with '7:00 AM' and '4:00 PM' selected (callout 8). 7. A dropdown menu with 'Portal Signoff' selected (callout 9).

# Add New Entry - Mobile Web (cont.)

10. Select a Reason Code from the drop-down list
11. Add a Reason Code Note
12. Click the blue **plus sign (+)** to populate the reason code details
13. Enter Notes for the punch (optional)
14. Click the **Choose File** button to select and upload Attachments (optional)
15. 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



**Questions?**

**Thank you!**

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

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