IL Veterans National Time Entry Training for Employers & Employees

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

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DIRECT CARE INNOVATIONS

Acumen powered by DCI

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

Agenda

Overview + Mobile App Download & Login

Employee – Mobile App Entry

Employer – Mobile App – Manage Entries

Employee – Web Portal Historical Entry & Edit Entries

Employer – Web Portal – Manage Entries & Troubleshoot

Phone EVV (IVR) – Real time & Historical Entries

Goods & Services Request

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New Quick Resources

- **Short step-by-step resource documents have been added to the [Illinois – Training Materials](#) page providing instructions for the punch entry and approval process.**

  - **Employee Specific Resources:**

    - ✓ Employee Mobile App Entries

    - ✓ 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

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Ways to Enter Time
Only use one per shift (each clock in/out)

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Mobile App

OR

Phone EVV

OR

Web Portal

- ***Preferred Method**
- Real Time Entry
- Quick & Easy
- Mobile App Guide

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

- Time Management
- Historical Entry & Corrections
- 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 15.0 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.
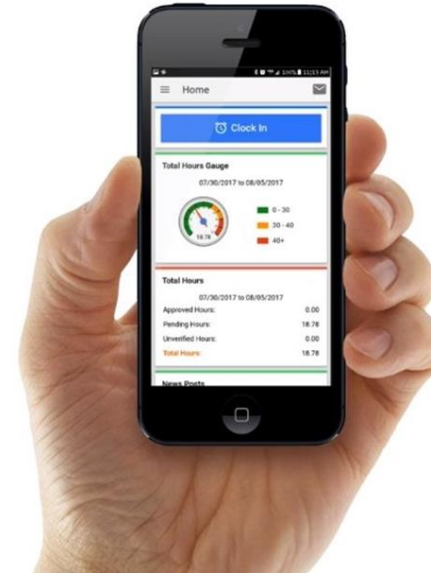
Web Browsers

- ✓ 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

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

   [Available on the App Store]   [GET IT ON Google Play]

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.
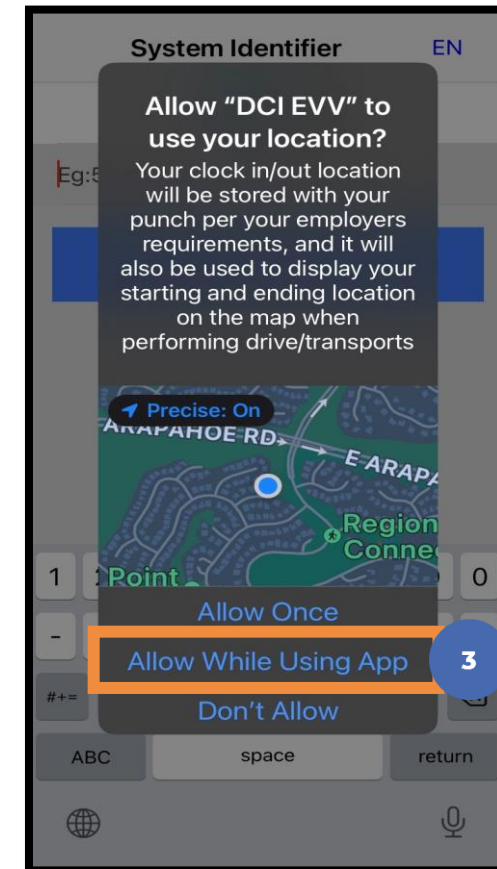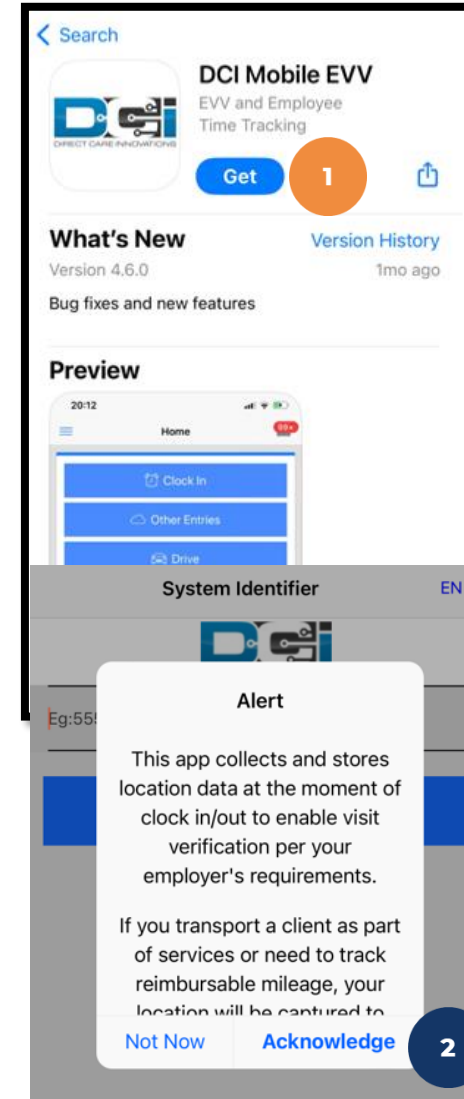
Initial Agency Selection
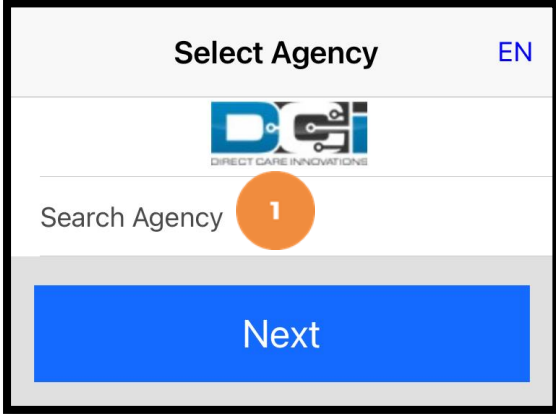
1. After downloading the app, the Select Agency screen appears with a Search Agency field.

2. **Type at least three consecutive characters of the agency name OR the system identifier** in the Search Agency field.

   ❖ The Acumen system identifier for All Other States & Programs (including Kansas Helpers) is **228636**

   ❖ The consecutive characters can be located anywhere in the agency name or system identifier

3. **Select the agency** from the list

4. Click the blue **Next** button
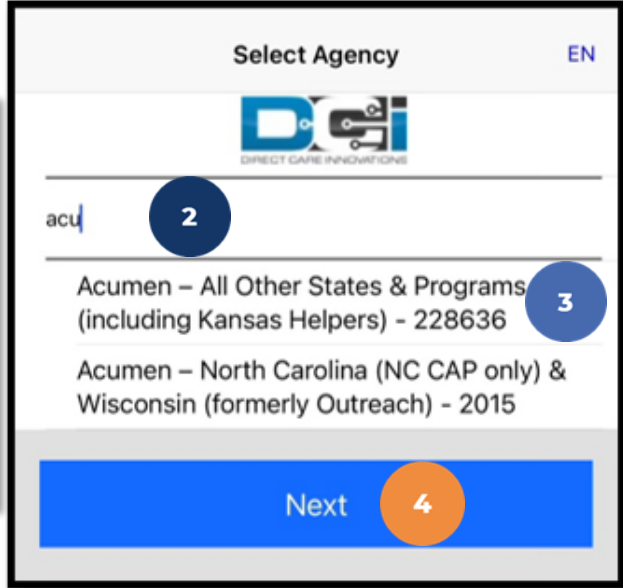
5. The agency is now selected and appears on the login screen
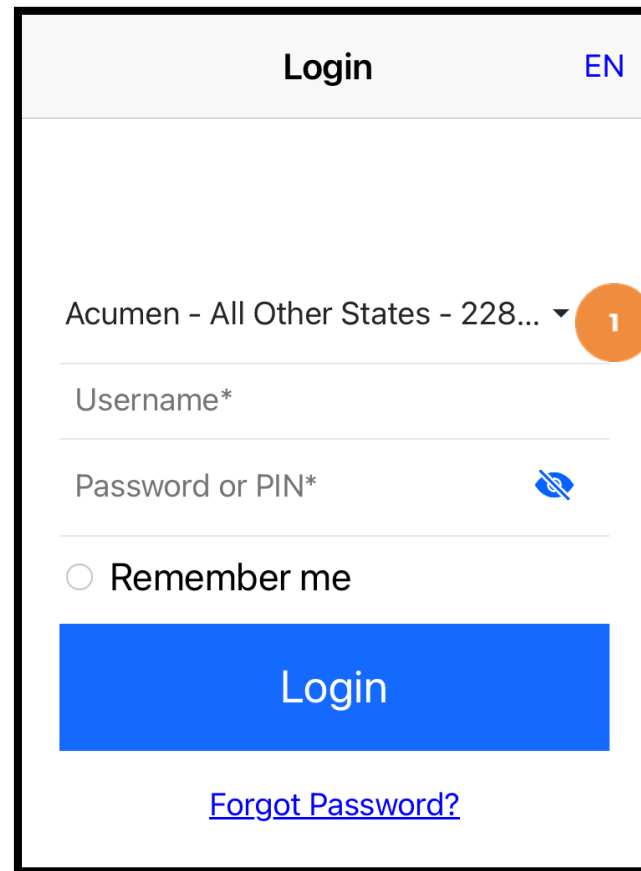
Add More Agencies

1. To add more agencies, click the **drop-down** on the agency field.

2. If the desired agency is not listed, click **Add New** on the Agency results list.
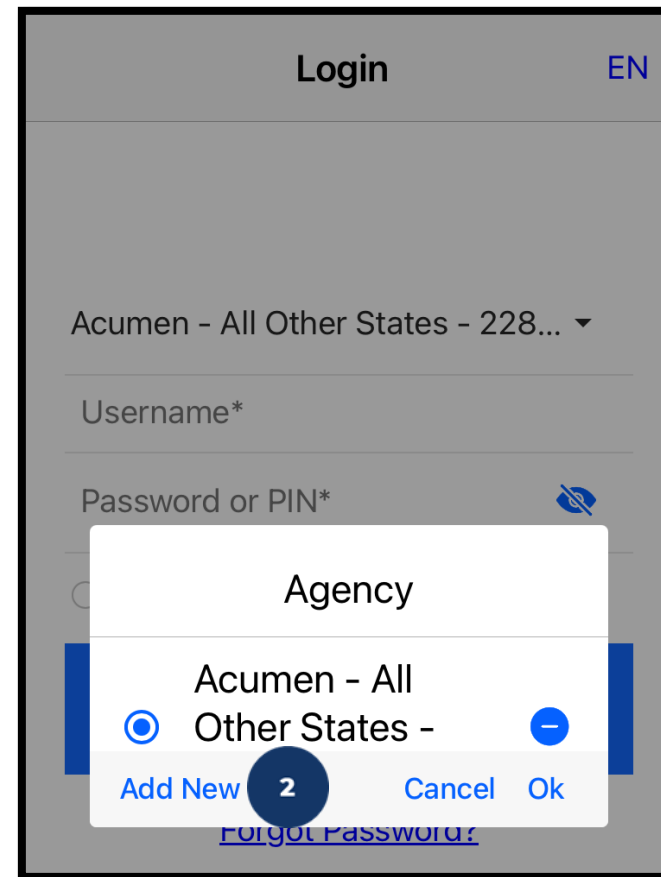
Add More Agencies

3. On the Add Agency window, **type at least three consecutive characters of the agency name OR the system identifier** in the Search Agency field.

   ❖ The consecutive characters can be located anywhere in the agency name or system identifier

4. **Select the agency** from the list

5. Click **Add**

   The agency is now added and displays on the agency drop-down menu. At each log in, select the appropriate agency.

Log into the DCI Mobile EVV App

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1. Enter employee credentials
   - ✓ Acumen provided a **username** and **password** on the Good to Go letter via email or mail

2. Optionally, select the **Remember me** button to remember the Username.

   *Please note: Do not use on a shared device

3. 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 customer service or your support coordinator with any login issues

Login   EN

Acumen – All Other States – 228... ▾

Username*   ①

Password or PIN*   ①

◯ Remember me   ②

Login   ③

Forgot Password?

Mobile App Video

Download the DCI Mobile EVV App

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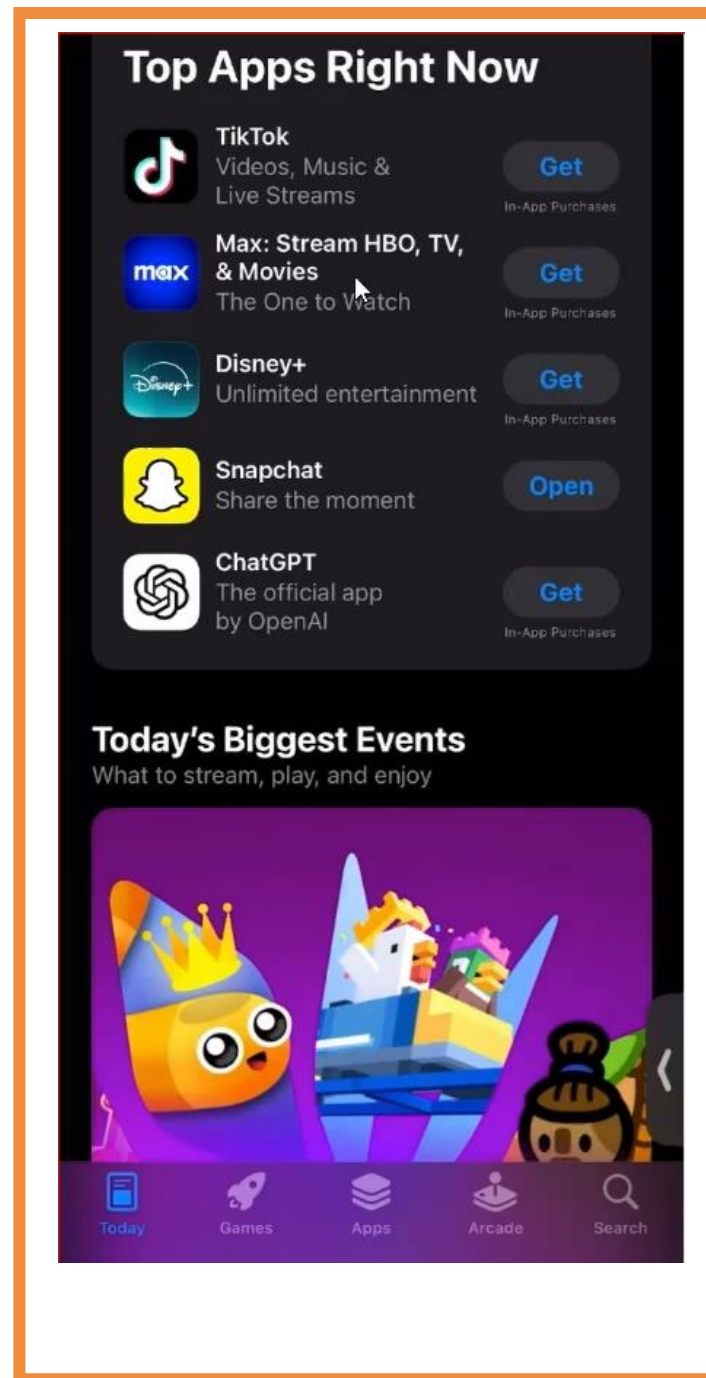
Log into the DCI Mobile App

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

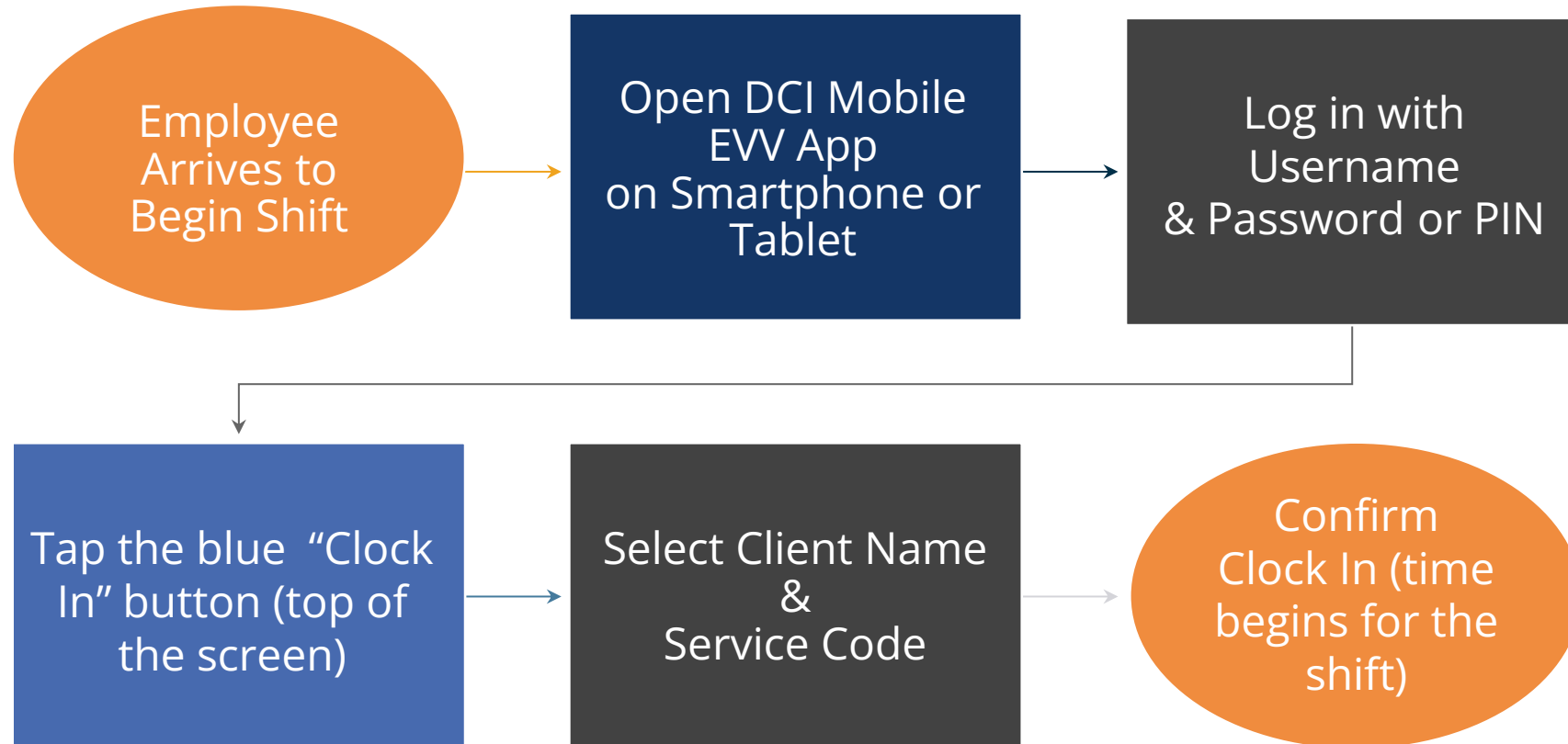   ✓ The **Forgot Password** link is available if necessary but requires a valid email address to be on file

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

Employee Mobile App

Employee Clock In/Out Process

Overview Mobile App Clock In

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Employee Arrives to Begin Shift

Open DCI Mobile EVV App on Smartphone or Tablet

Log in with Username & Password or PIN

Tap the blue "Clock In" button (top of the screen)

Select Client Name & Service Code

Confirm Clock In (time begins for the shift)

Overview Mobile App Clock Out

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End of Shift → Open DCI Mobile EVV App on Smartphone or Tablet → Log in with Username & Password or PIN

Tap the blue "Clock Out" button (top of screen) → Optionally Add Notes or/and Attachments → Confirm Clock Out (time ends for the shift)

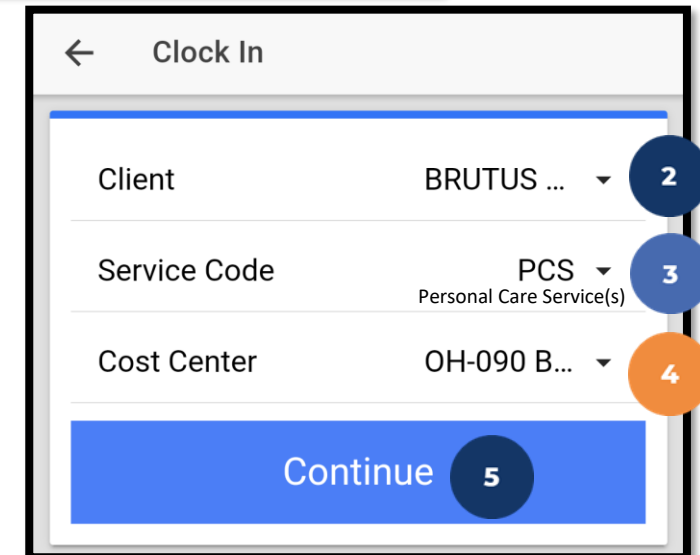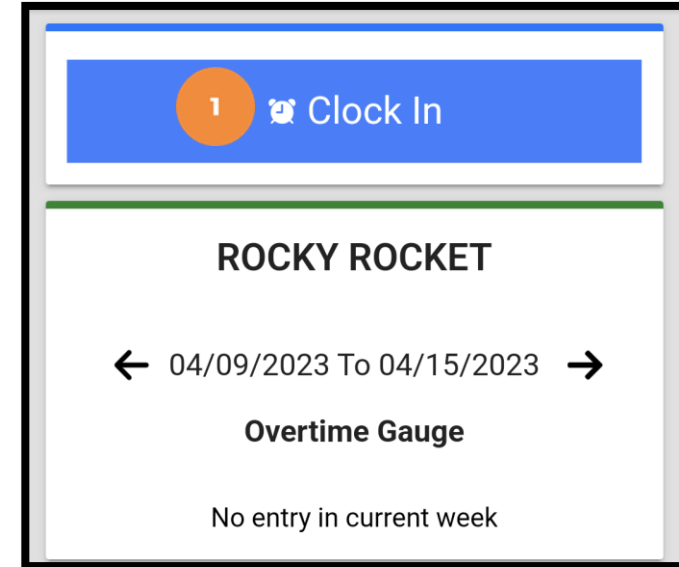# Clock In on Mobile App

1. Click the blue **Clock In** Button

2. Select the Client's Name

    • Auto-fills for a single client

3. Select the Service Code from drop down

4. Cost Center is always auto-filled

5. Click the blue **Continue** button

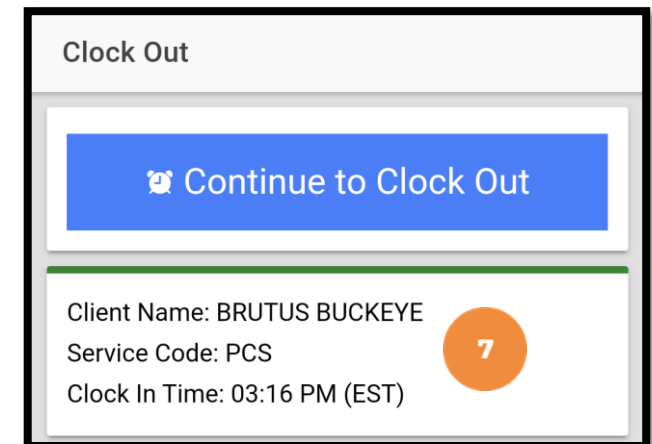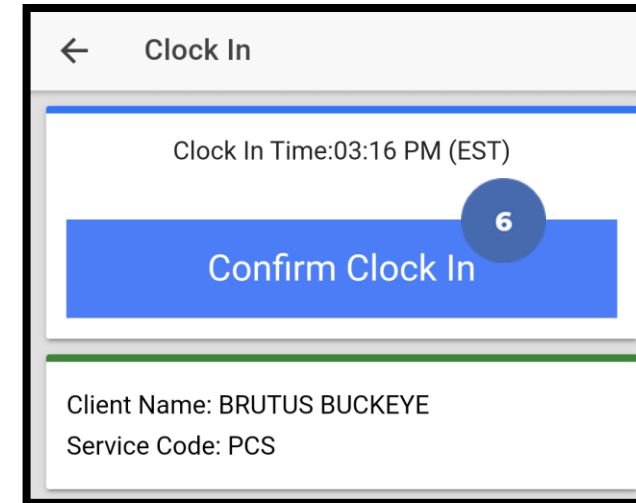# Clock In on Mobile App (cont.)

6. Select Confirm Clock In

   * *This will start the time for the shift*
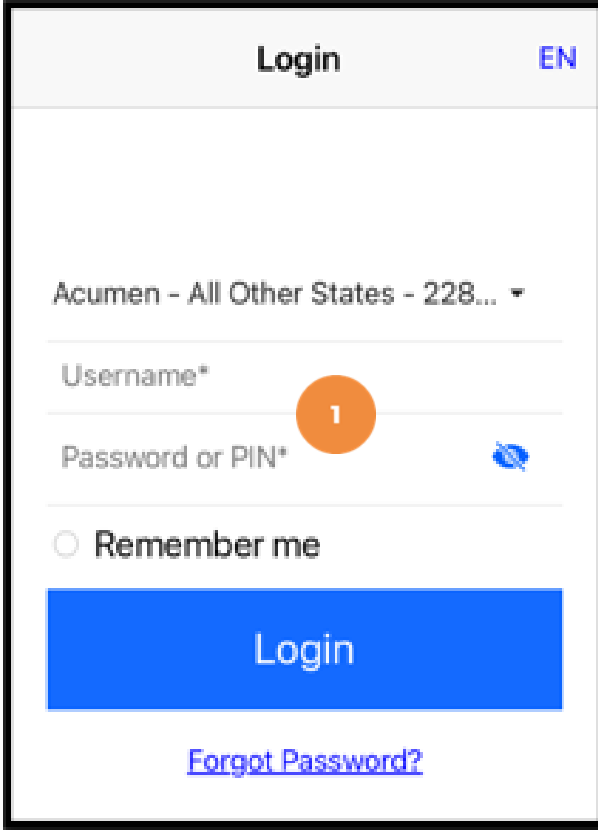
7. Clock In Details Summary

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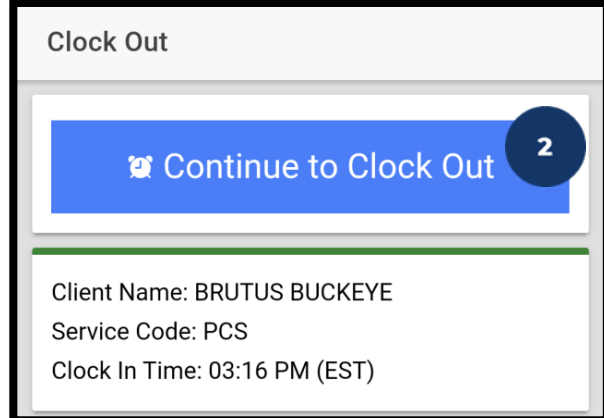
Clock Out on Mobile App
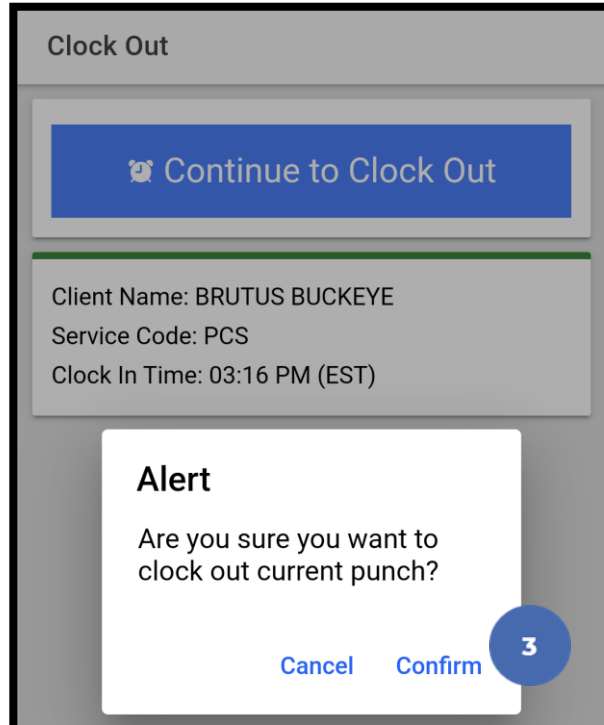
1. At the end of the shift, log in to the mobile app.
2. Click the blue **Continue to Clock Out** button
3. Select **Confirm** to proceed with clocking out

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Login   EN

Acumen - All Other States - 228... ▾

Username*

Password or PIN* 👁

○ 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 on Mobile App (cont.)

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4. Enter any notes for the punch (optional)

5. Add an attachment for the punch (optional)

6. Click the blue **Confirm Clock Out** button when ready
   - ✓ *This will stop the time for the shift*

7. Punch Confirmation
   - ✓ Punch details are shown
   - ✓ Click the blue **Home** button when ready

Clock Out
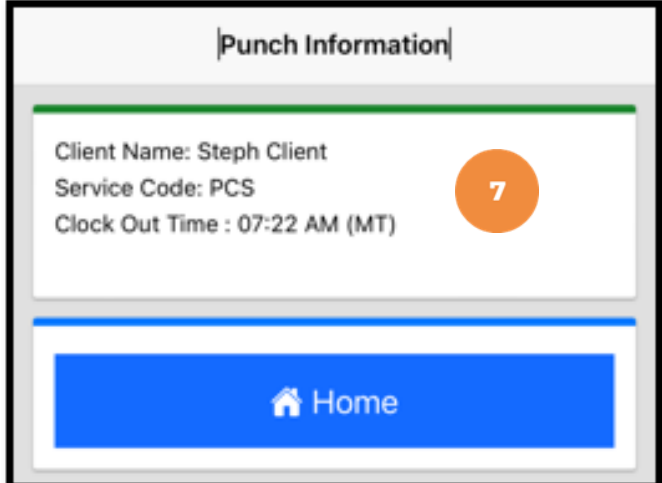
Clock Out Time: 05:23 PM (CST)

Add Notes

4

📎 Add Attachment   **5**

Confirm Clock Out   **6**

|Punch Information|

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

7

🏠 Home

Congratulations!
The shift is complete.

Mobile App Video

Clocking In & Clocking Out

Login   EN

Acumen – All Other States & Programs (inclu... ▼

Username*

Password or PIN*   👁️‍🗨️

◯ Remember me

Login

Forgot Password?

Proprietary: For Acumen and Customer Use Only

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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
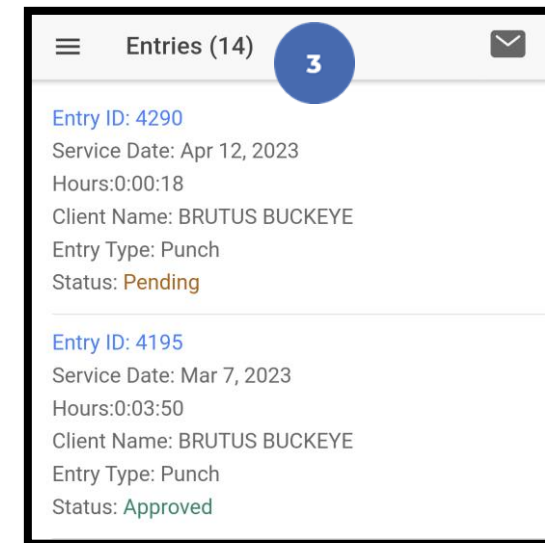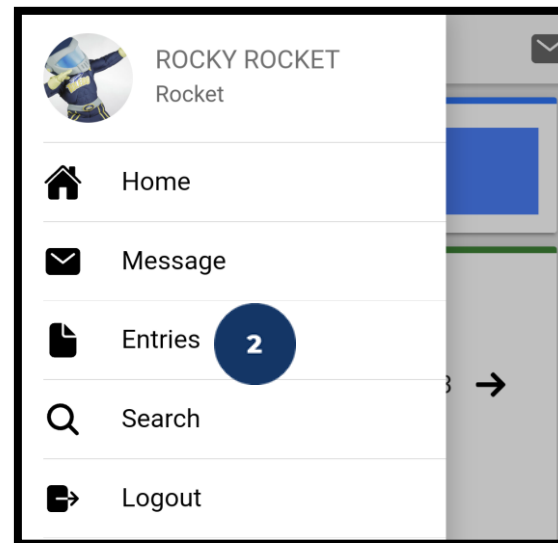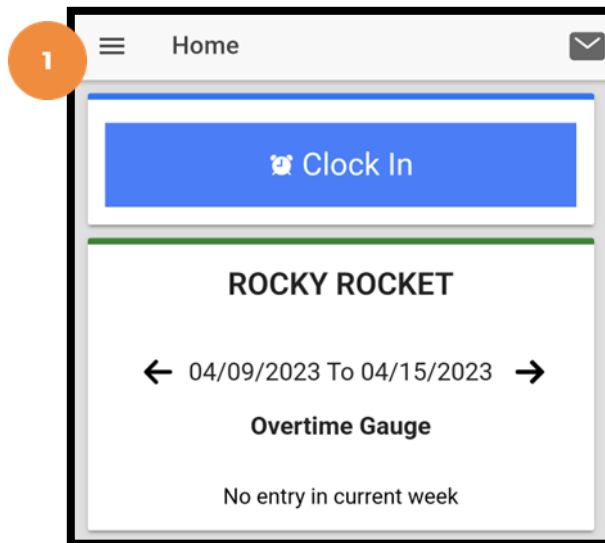
Employer Mobile App

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
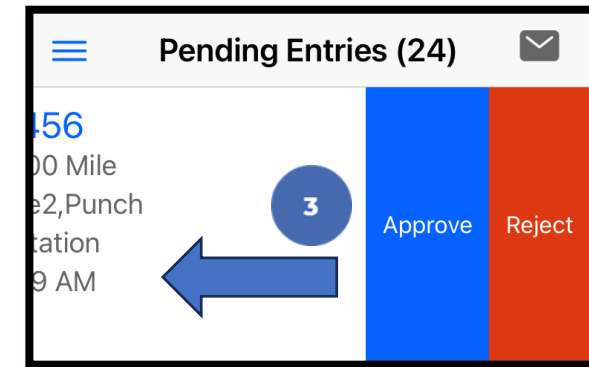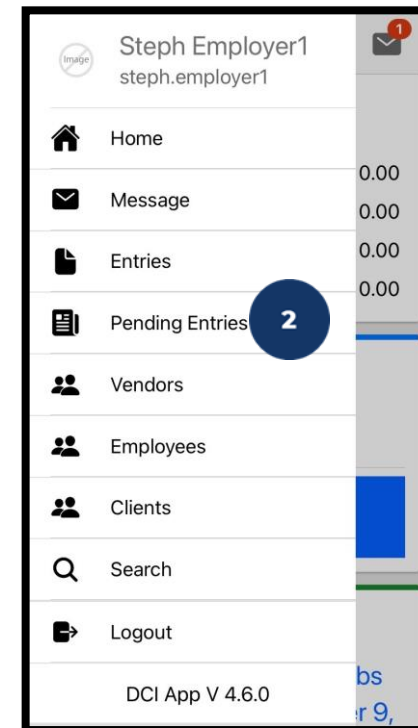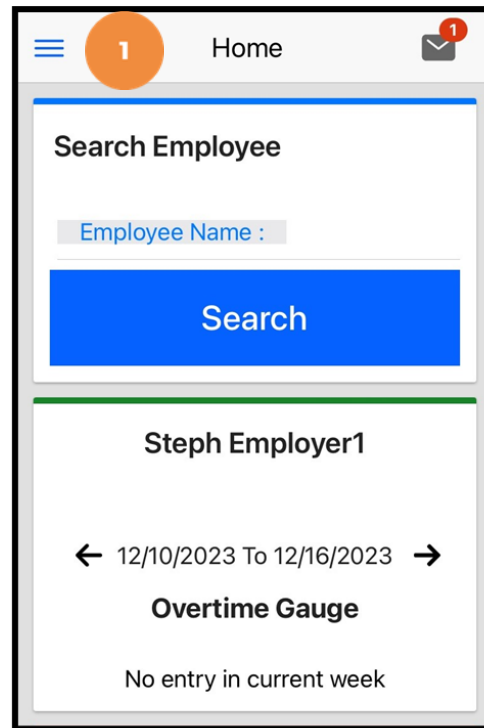
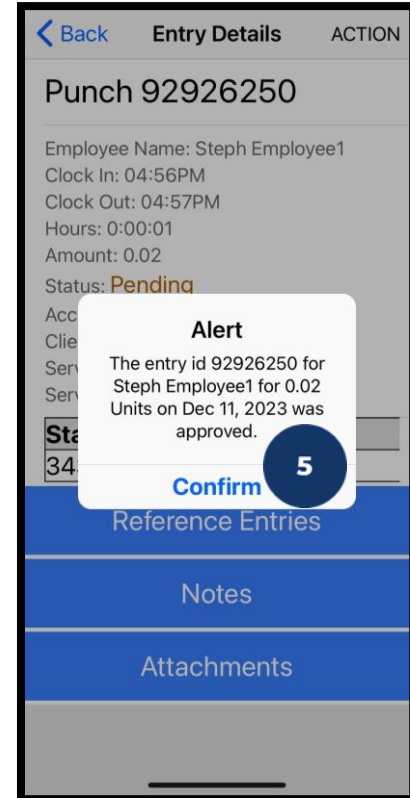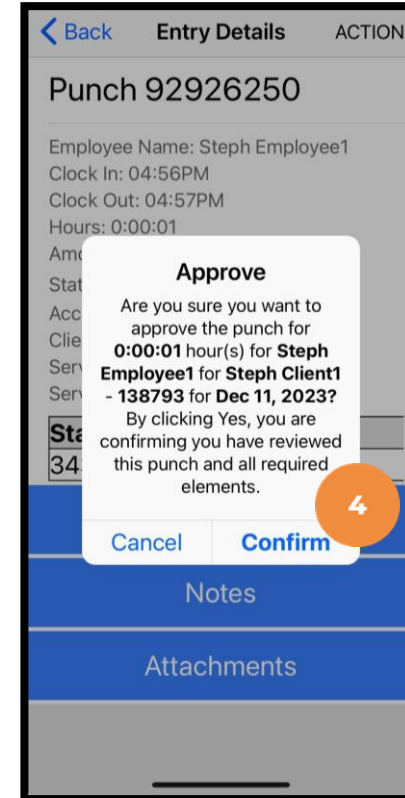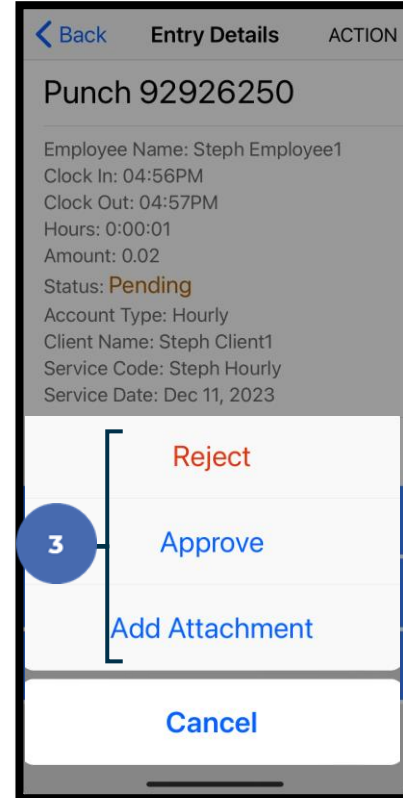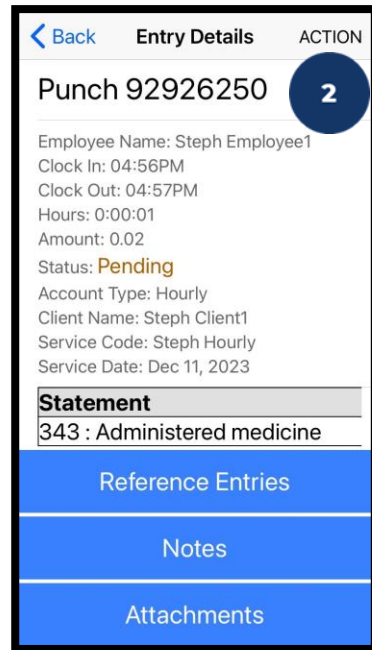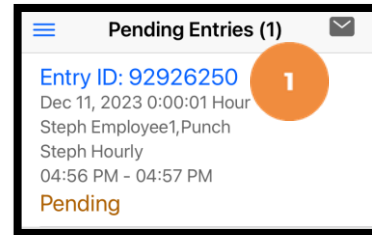# Review & Approve Entries (cont.)

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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.

Pending Entries (1)

Entry ID: 92926250 — (1)
Dec 11, 2023 0:00:01 Hour
Steph Employee1,Punch
Steph Hourly
04:56 PM - 04:57 PM
Pending

Back — **Entry Details** — ACTION

Punch 92926250 — (2)

Employee Name: Steph Employee1
Clock In: 04:56PM
Clock Out: 04:57PM
Hours: 0:00:01
Amount: 0.02
Status: Pending
Account Type: Hourly
Client Name: Steph Client1
Service Code: Steph Hourly
Service Date: Dec 11, 2023

Statement
343 : Administered medicine

Reference Entries
Notes
Attachments

Back — **Entry Details** — ACTION

Punch 92926250

Employee Name: Steph Employee1
Clock In: 04:56PM
Clock Out: 04:57PM
Hours: 0:00:01
Amount: 0.02
Status: Pending
Account Type: Hourly
Client Name: Steph Client1
Service Code: Steph Hourly
Service Date: Dec 11, 2023

Reject

(3) Approve

Add Attachment

Cancel

Back — **Entry Details** — ACTION

Punch 92926250

Employee Name: Steph Employee1
Clock In: 04:56PM
Clock Out: 04:57PM

Approve
Are you sure you want to approve the punch for **0:00:01 hour(s)** for **Steph Employee1** for **Steph Client1 - 138793** for **Dec 11, 2023**? By clicking Yes, you are confirming you have reviewed this punch and all required elements.

Cancel   **Confirm** — (4)

Notes
Attachments

Back — **Entry Details** — ACTION

Punch 92926250

Employee Name: Steph Employee1
Clock In: 04:56PM
Clock Out: 04:57PM
Hours: 0:00:01
Amount: 0.02
Status: Pending

Alert
The entry id 92926250 for Steph Employee1 for 0.02 Units on Dec 11, 2023 was approved.

Confirm — (5)

Reference Entries
Notes
Attachments

*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 21 days of the date of service.

*After 21 days the approval will be prohibited as it will violate the timely filing business rule

Mobile App Video

Employer Reviews & Approves Entries

Login   EN

Acumen – All Other States & Programs (inclu... ▼

Username*

Password or PIN*

◯ Remember me

Login

Forgot Password?

〉

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DCI Web Portal

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Navigation

Full Site – Most compatible when accessed via desktop or laptop
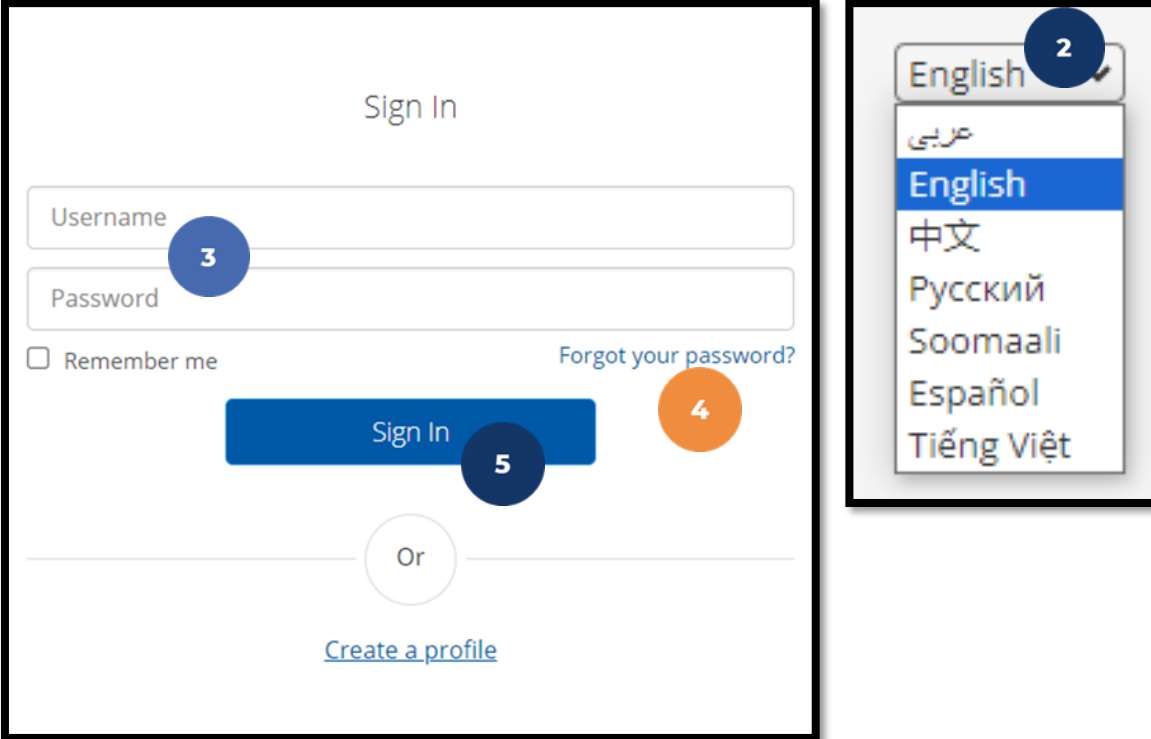
Web Portal Basics

- 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

   *Please note: Contact Acumen with login issues

acumen.dcisoftware.com

Sign In

Username

Password

Remember me   Forgot your password?

Sign In

Or

Create a profile

English
عربى
English
中文
Русский
Soomaali
Español
Tiếng Việt

Profile Settings

Acumen Fiscal Agent
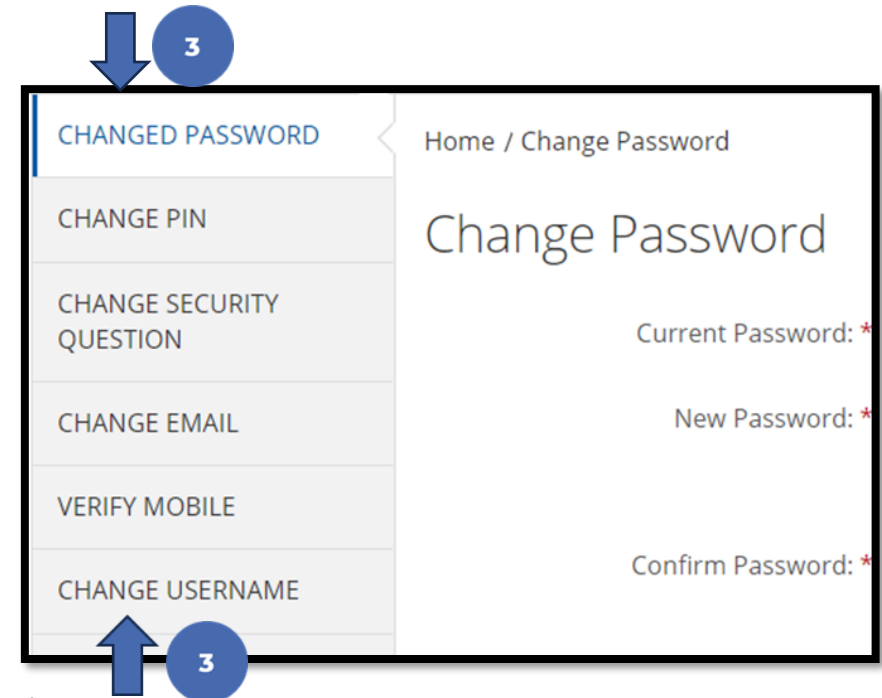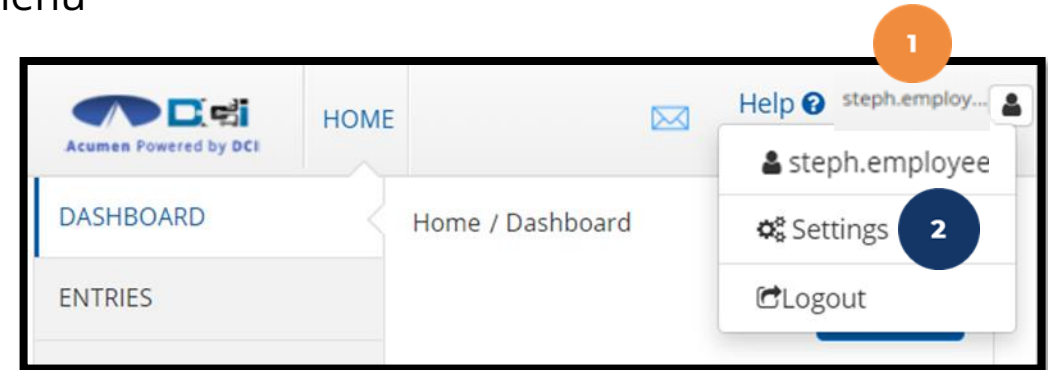Innovation · Opportunity · Freedom

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

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

1. Log in to the DCI web portal

2. Click the username in the top right corner of the main menu

3. Click **Settings** from the drop-down menu

4. Select **Change PIN** or **Add New PIN**

   ✓ Add New PIN after a reset

   ✓ Change PIN anytime

5. Enter password
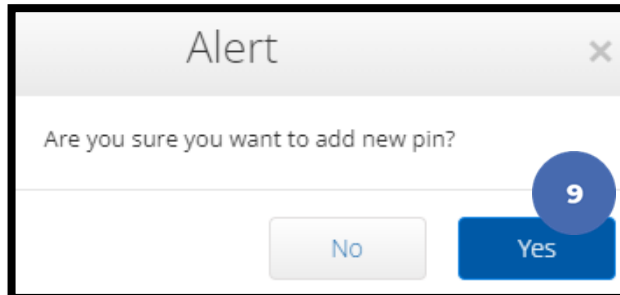
6. Click the blue **Verify** button

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.

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

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.

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

☐	★	Attachments	From	Subject	Date/Time	Action
					Showing 30 out of 72 records	
☐	★	📎	**DCI Support**	**Paystub for check date XX/XX/XXXX**	**11/02/2023 02:00 AM**	📧 🗑
☐	★	📎	Kristen Ziegler	hello there	12/08/2023 05:19 PM	📧 🗑
☐	★		Steph Client1	Checking on the status	11/02/2023 11:50 AM	📧 🗑
☐	★		DCI Support	Punch Rejected	10/12/2023 08:33 AM	📧 🗑

Archive **Delete** 📥 Export

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

Employee Web Portal

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

Add New Entry

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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.

Sign In

| Username | 1 |
| Password | |

☐ Remember me   Forgot your password?

Sign In

Help ❓ steph.employ... 👤

Home > Dashboard

2 Add Entry

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
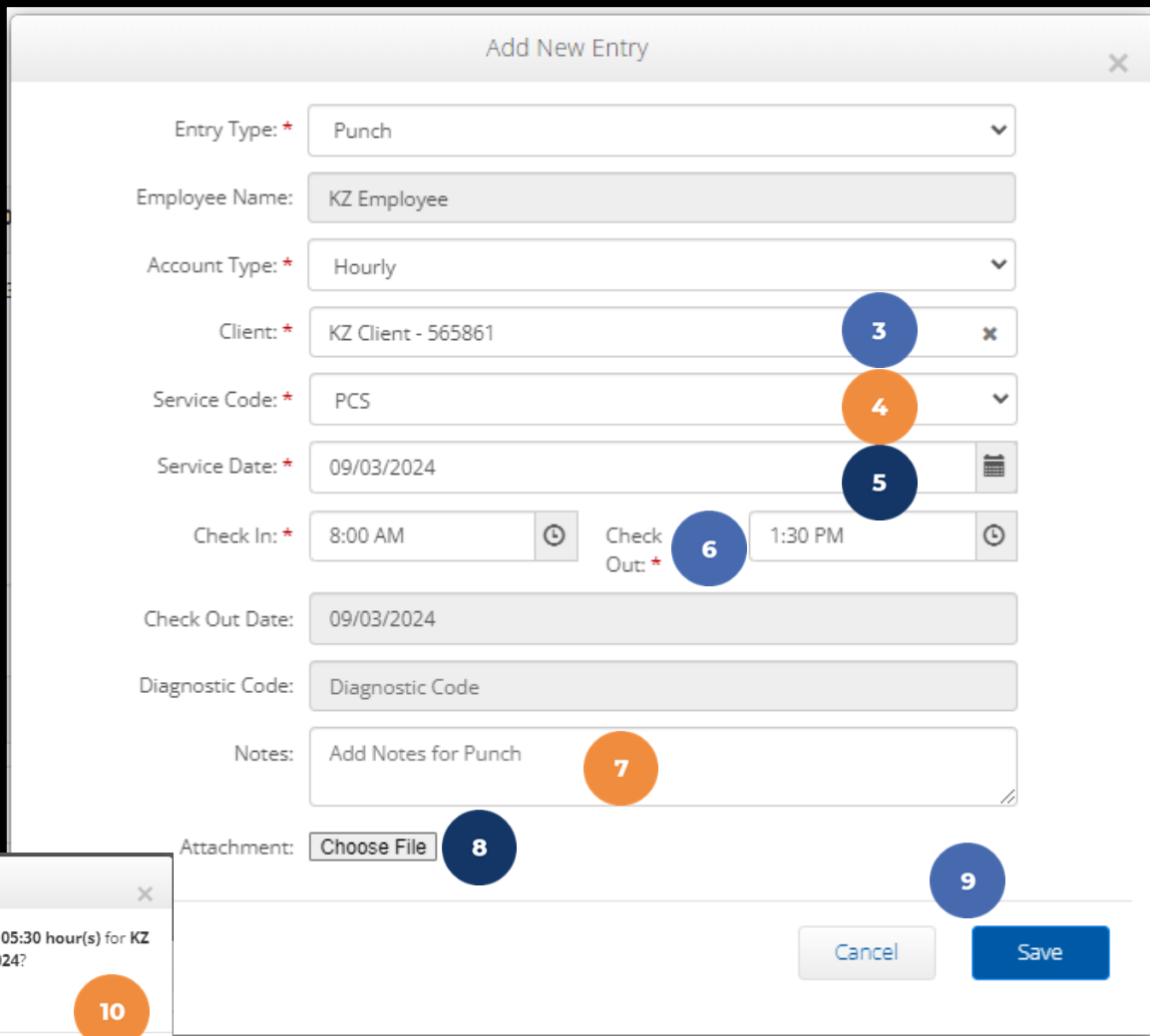
Expiring Certifications

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 Service Code (PCS or SP)
   • Select SP to enter sick pay. Sick pay accrues at a rate of 1 hour for every 40 hours worked.

5. Select the Service Date

6. Enter the Check In (start) and Check Out (end) times

7. Enter Notes for the punch (optional)

8. Click the **Choose File** button to select and upload Attachments (optional)

9. Click **Save**

10. Click **Yes** to submit

Add New Entry

Entry Type: *	Punch
Employee Name:	KZ Employee
Account Type: *	Hourly
Client: *	KZ Client - 565861
Service Code: *	PCS
Service Date: *	09/03/2024
Check In: *	8:00 AM	Check Out: *	1:30 PM
Check Out Date:	09/03/2024
Diagnostic Code:	Diagnostic Code
Notes:	Add Notes for Punch
Attachment:	Choose File

Cancel   Save
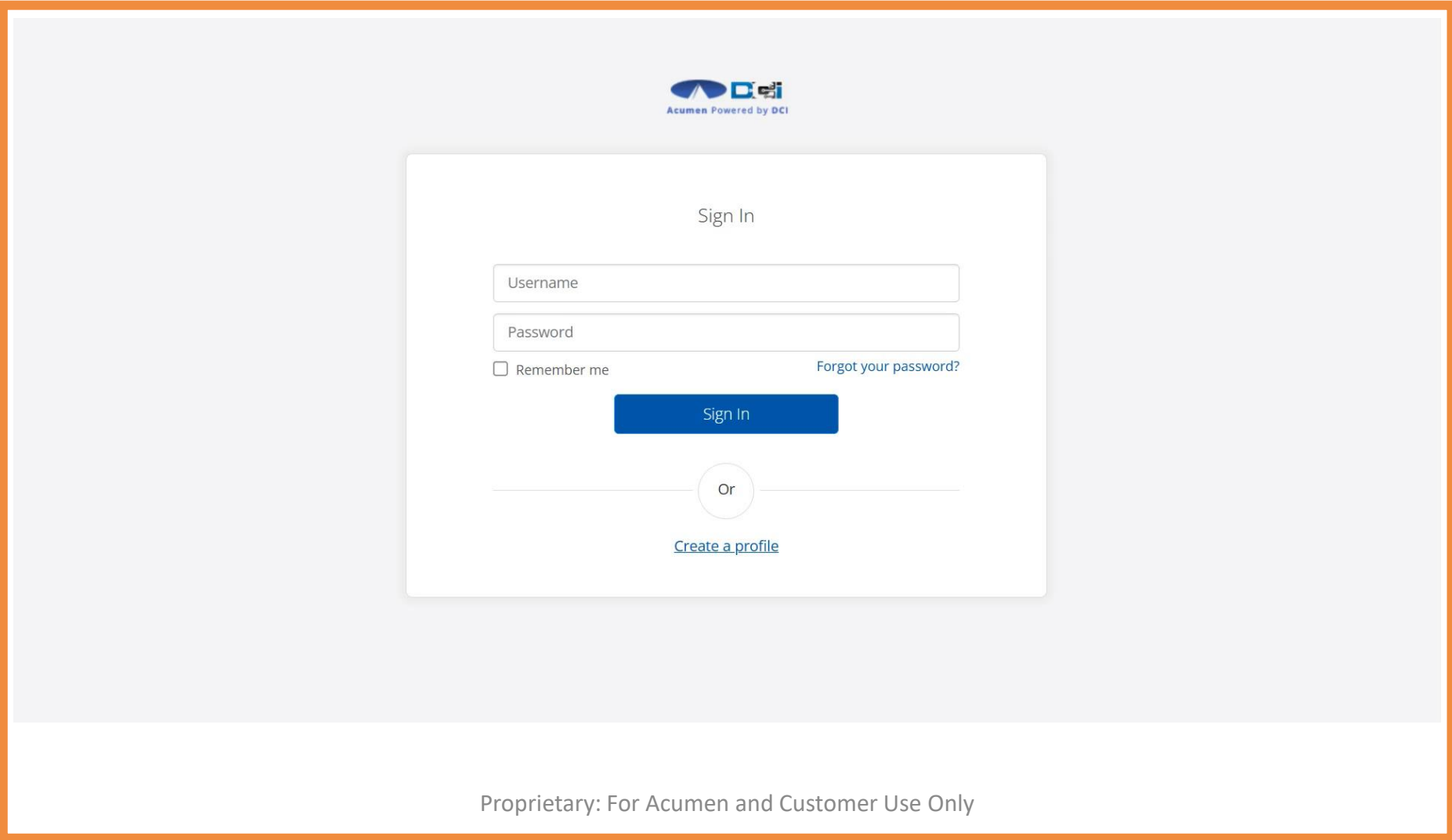
Alert

Are you sure you want to add a new punch for **05:30 hour(s)** for **KZ Client - 565861** for **Sep 03, 2024**?

No   Yes

Web Portal Video
Employee Adds (Historical) Entry

Edit Entry

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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

Acumen Powered by DCI   HOME

DASHBOARD

ENTRIES

ACCOUNTS

PROFILE CERTIFICATION

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

⚙ Actions

New Note

New Attachment

Edit Entry

Reject

Edit Entry (cont.)

*Please note! Only entries in a <u>Pending</u> status can be edited by the employee

6. Complete the necessary changes in the Edit Entry form wizard

   - i.e., Service code, service date, start time (check in) or end time (check out).

7. Click **Save**

8. Click **Yes** to confirm the changes

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

Edit Entry

Entry Type: *	Punch
Employee Name:	KZ Employee - 156886
Account Type: *	Hourly
Client: *	KZ Client - 728
Service Code: *	PCS
Select Date: *	08/21/2024
Check In: *	5:30 PM
Check Out: *	10:30 PM
Check Out Date:	08/21/2024
Diagnostic Code:	Diagnostic Code
Notes:	Add Notes for Punch
Attachment:	Choose File

Cancel   Save

Alert

Are you sure you want to cancel the existing punch for **0:03:30 hour(s)** for **Aug 21, 2024** and add a new punch for **05:00 hour(s)** for **KZ Employee** for **KZ Client-728** for **Aug 21, 2024**?

No   Yes

Web Portal Video
Employee Edits (Historical) Entry
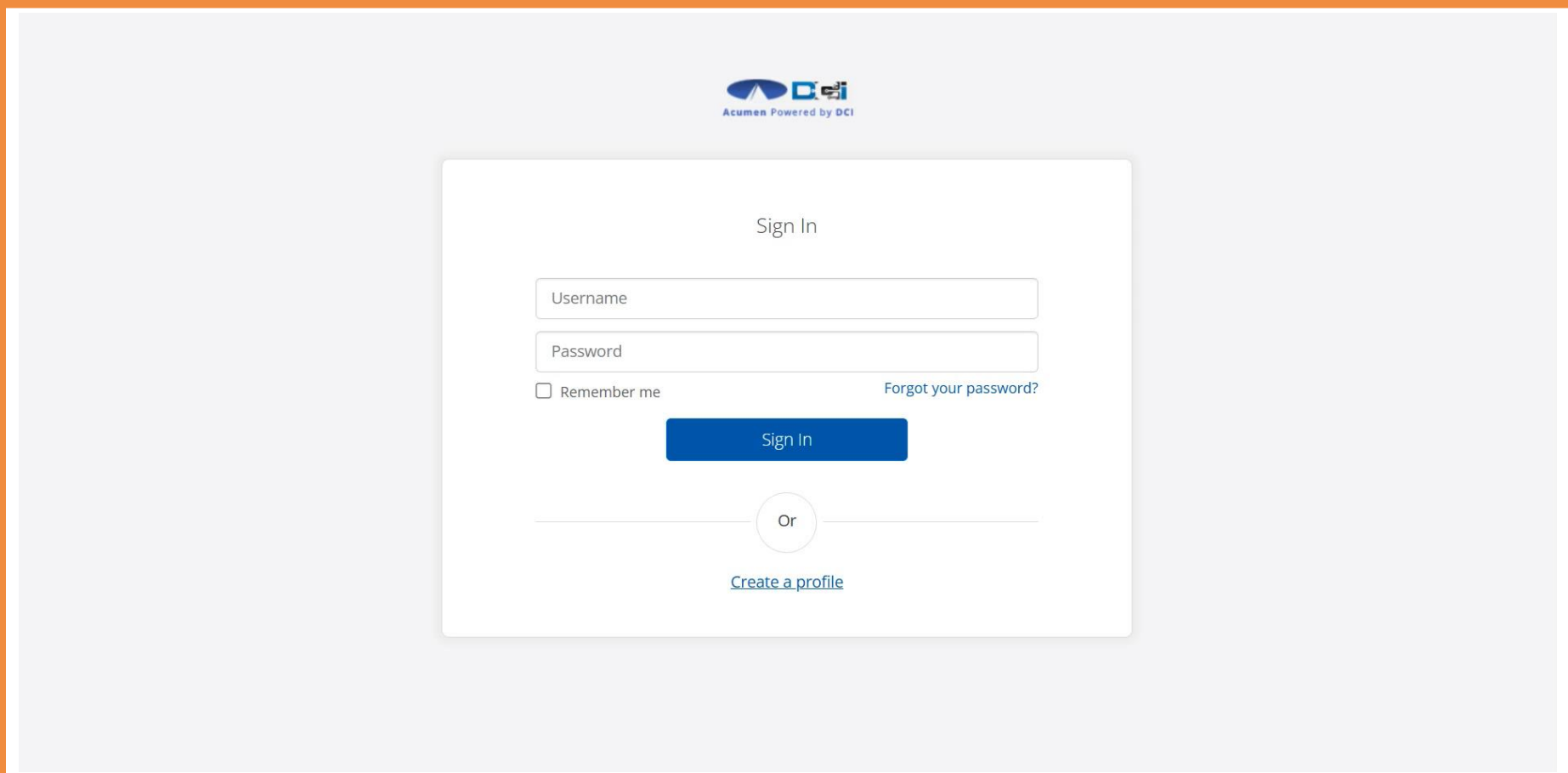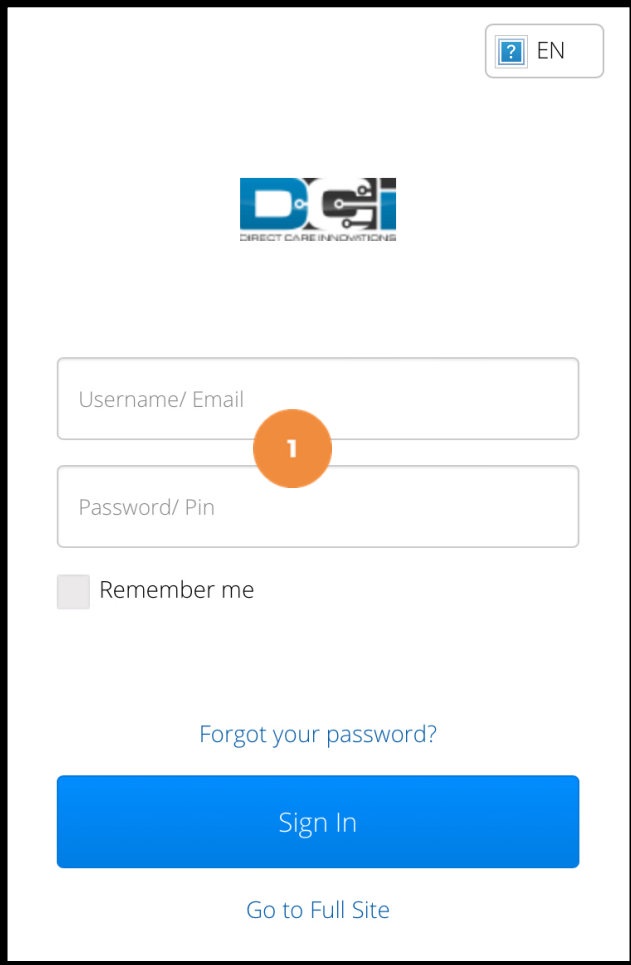
Employee Mobile Web Portal

Accessed via smartphone or tablet

Add New Entry - Mobile Device
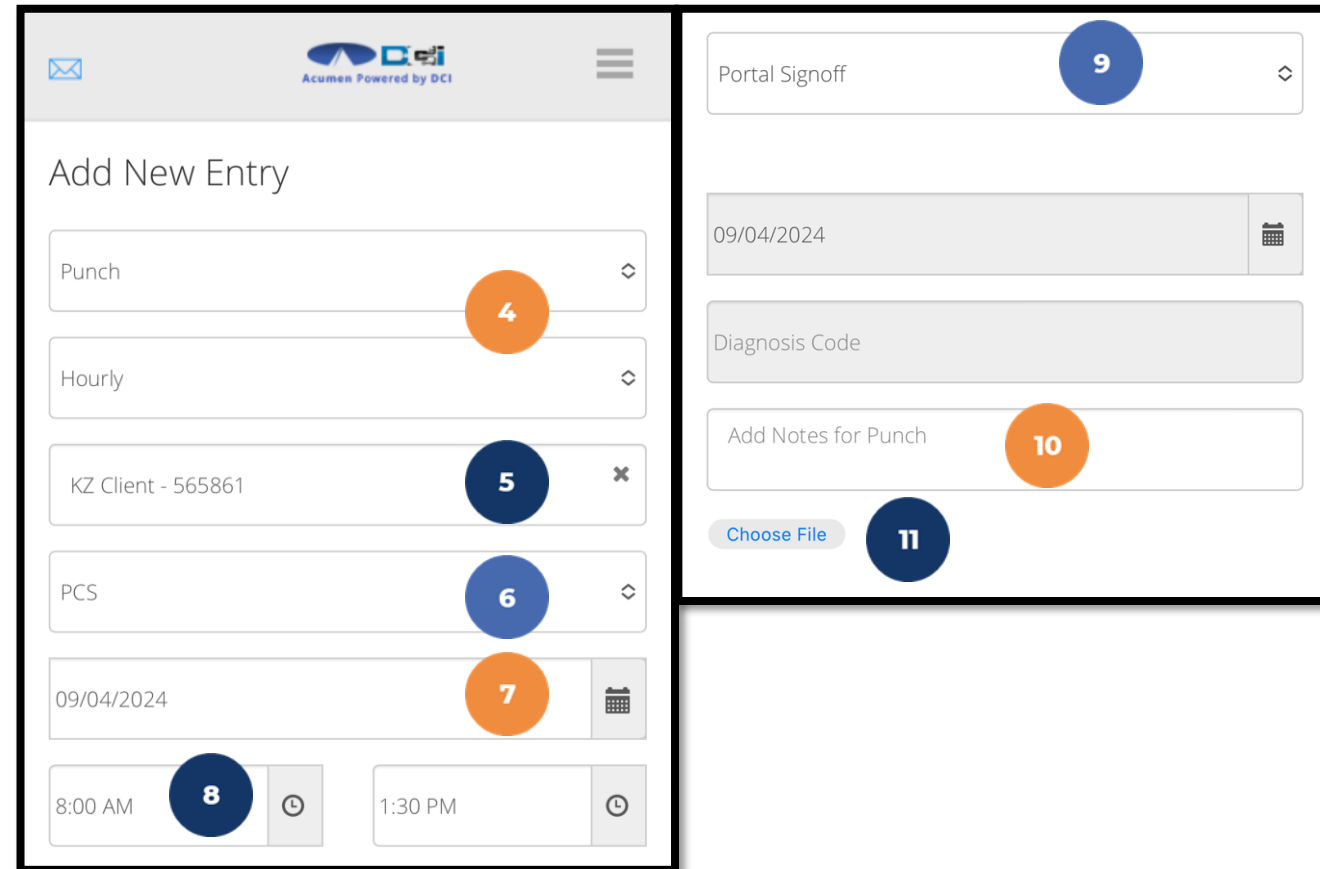
1. Log in to the DCI Web Portal on a mobile device

2. Click the **Menu** in the top right corner of the screen

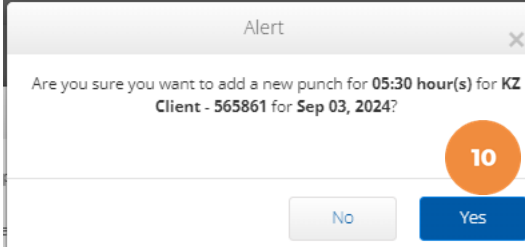3. Select the **New Entry** tab from the submenu

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

3. Select the Service Code (PCS or SP)
   - Select SP to enter sick pay. Sick pay accrues at a rate of 1 hour for every 40 hours worked.

4. Select the Service Date

5. Enter the Check In (start) and Check Out (end) times

6. Select Portal Signoff

10. Enter Notes for the punch (optional)

11. Click the **Choose File** button to select and upload Attachments (optional)

12. Click **Save**

13. Click **Yes** to submit

14. The punch has been submitted

Cancel

12 Save

Alert ✕

Are you sure you want to add a new punch for **05:30 hour(s)** for KZ Client - 565861 for **Sep 04, 2024**?

No   **13**   Yes

Choose File

Cancel

Save

✉   Acumen Powered by DCI   ☰

Punch 5414

Service Date: Sep 04, 2024
Employee Name: KZ Employee
Start Time: 08:00 AM
End Time: 01:30 PM
Hours: 0:05:30
Amount: 5.50
Status: Pending
Account Type: Hourly   **14**
Client Name: KZ Client
Service Code: PCS

Reject

Reference Entries   ›

Notes   ›

Attachments   ›

Back

Employer Web Portal
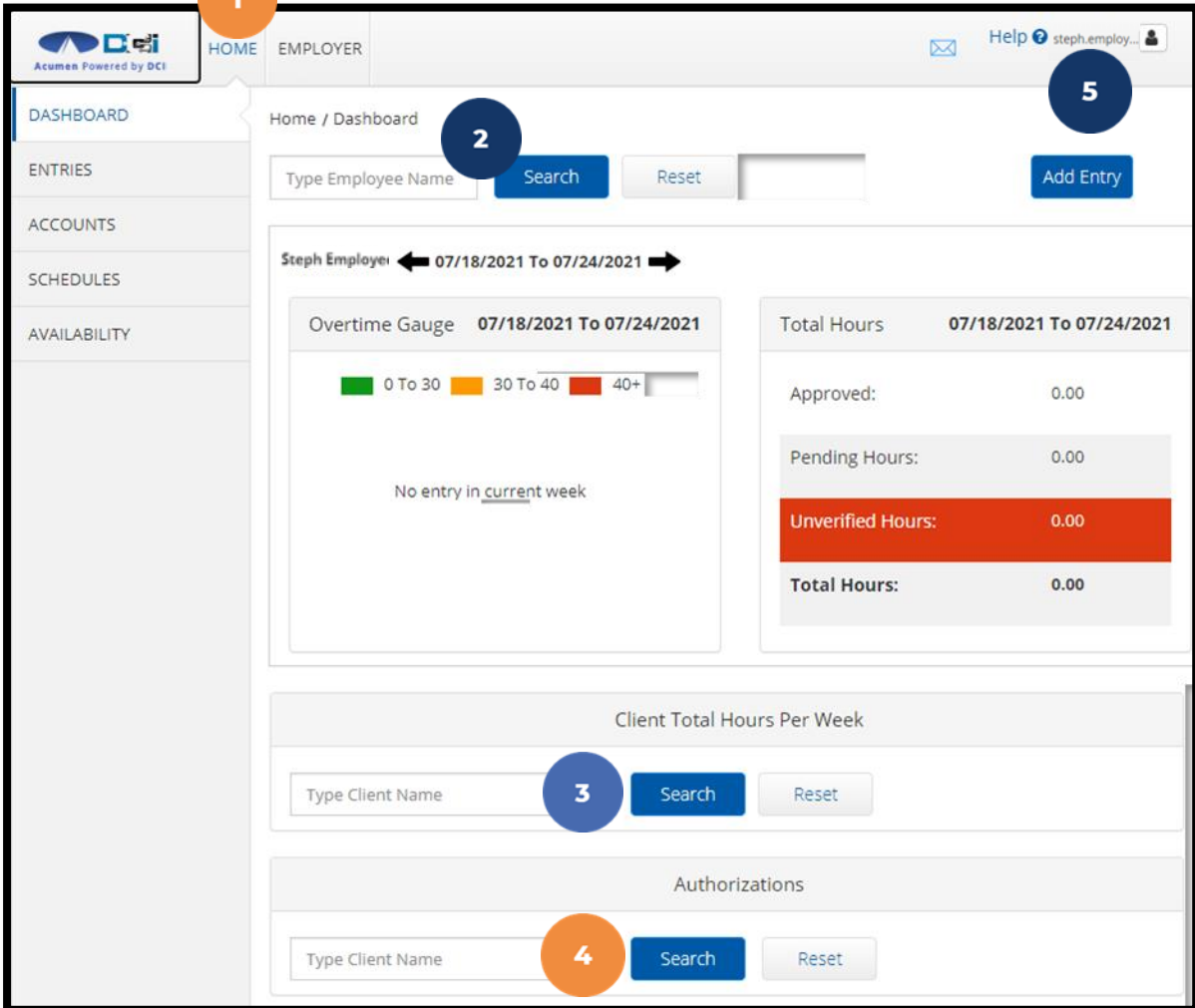
Full Site – Most compatible when accessed via computer or laptop

*Please note! Employer <u>mobile web portal</u> 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

Authorizations (Budget) Widget

- The authorizations (budget) widget allows the user to search by client (required) or optionally use the date filter to view approved authorizations (budgets) in the past, present, or future.

- As employees clock in and clock out, their time will be deducted from the authorization and placed into a pre-authorization hold.

- Units or dollars in a pre-authorization hold remain in that status until billing and payroll have been processed. After payroll and billing completion, the units and dollars that were previously in a pre-authorization hold status will be deducted from the remaining balance and an updated remaining balance will be displayed.

Authorizations

| KZ Client2 - T45158 ✕ | Date of Service 📅 | Search | Reset | Display as Time |

Authorization for Client: **KZ Client2** ⓘ

Service Code	Start Date	End Date	Initial Balance (1)	Remaining Balance (2)	Pre Authorization Holds (3)	Current Available Balance (4)	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

1. Initial Balance - Total amount of authorization
2. Remaining Balance - Amount remaining after pre-authorization holds have been processed for billing and payment
3. Pre-Authorization Holds - Amount deducted from the authorization that has not yet been processed for billing and payment
4. Current Available Balance - The total of the remaining balance minus any pre-authorization holds

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
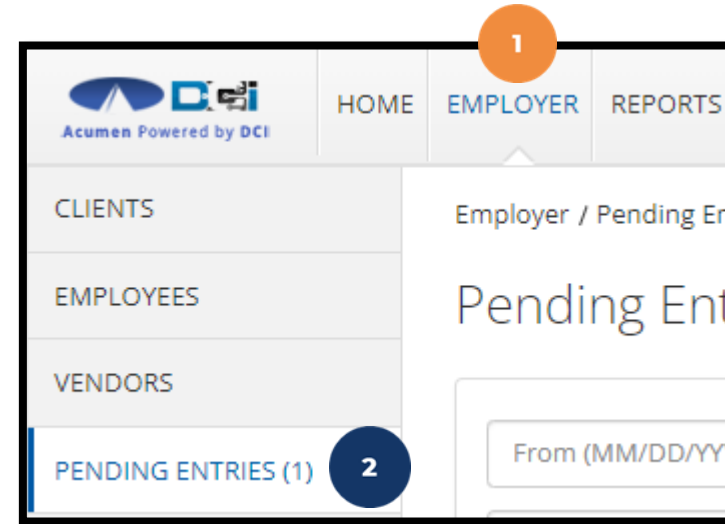
All entries requiring review/action appear in the table

Approve		Punch ID	Service Date ▼	Start Time	End Time	Cost Center	Client/ Program Name	Employee/ Program Name	Service Code/Type	Amount	EVV	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 21 days of the date of service
       - ❖ After 21 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.

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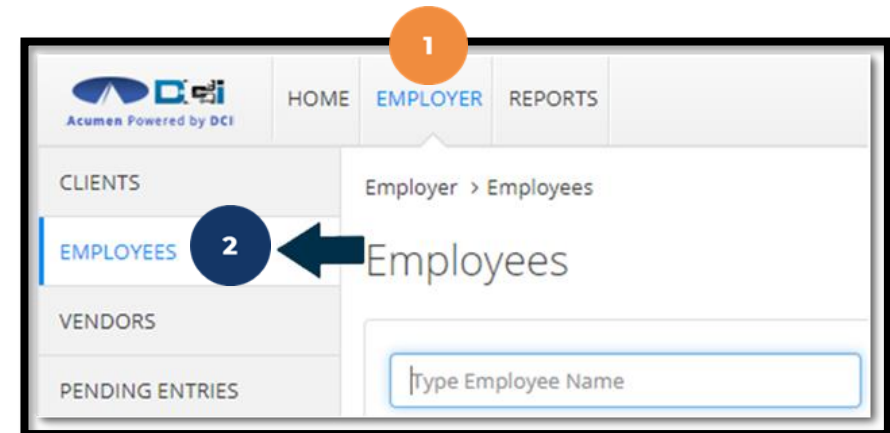
Name	Employee #	Phone #	Email	Time Zone	Type	Status
Steph Employee1	721	(222) 222-2222	stephanies+320@dcisoftware.com	MT (UTC-07)	Hourly Non Exempt	Active

Using the Employees Page (cont.)

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4. View the employee details page

5. Unlock Employee Profile if needed

6. Scroll down to the Entries tab

Home / Employees / Steph Employee1

4

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

5

6

Entries	Accounts	Certifications	EVV 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 <u>entered</u> and <u>approved</u> before the submission due date

| Entries | Accounts | Certifications | EVV Locations | Notes | Caregiver Ratings | Attachments | Custom Fields | History |

| From (MM/DD/YYYY) | To (MM/DD/YYYY) | Type Punch Id | Type Client Name |
| Type Service Code | Select Account Type | Select Status | |

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

8

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
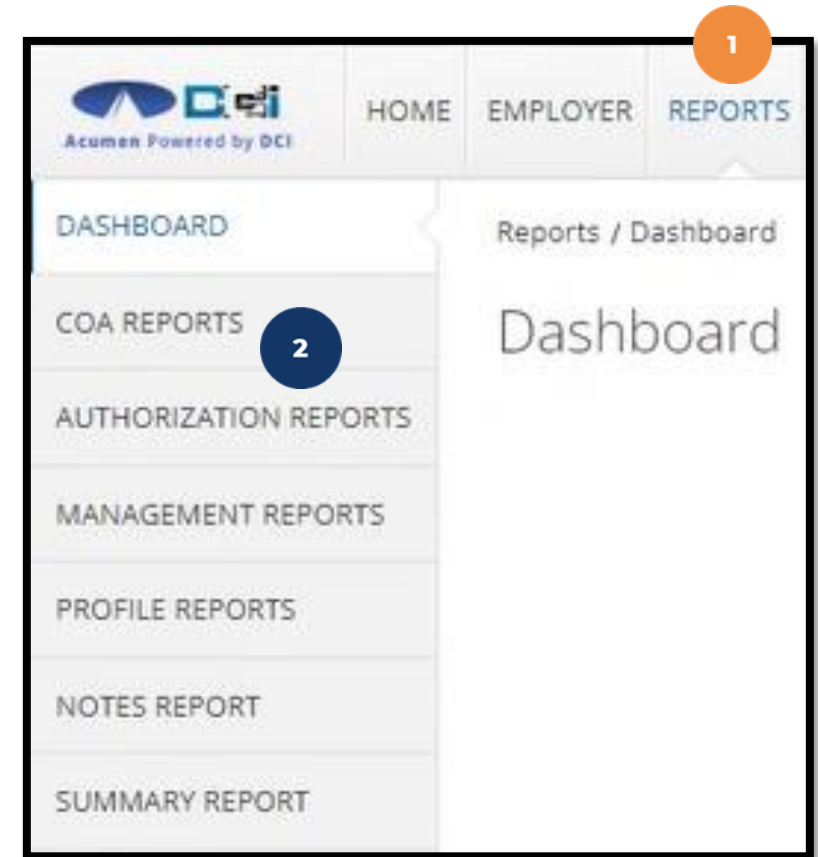
Troubleshooting
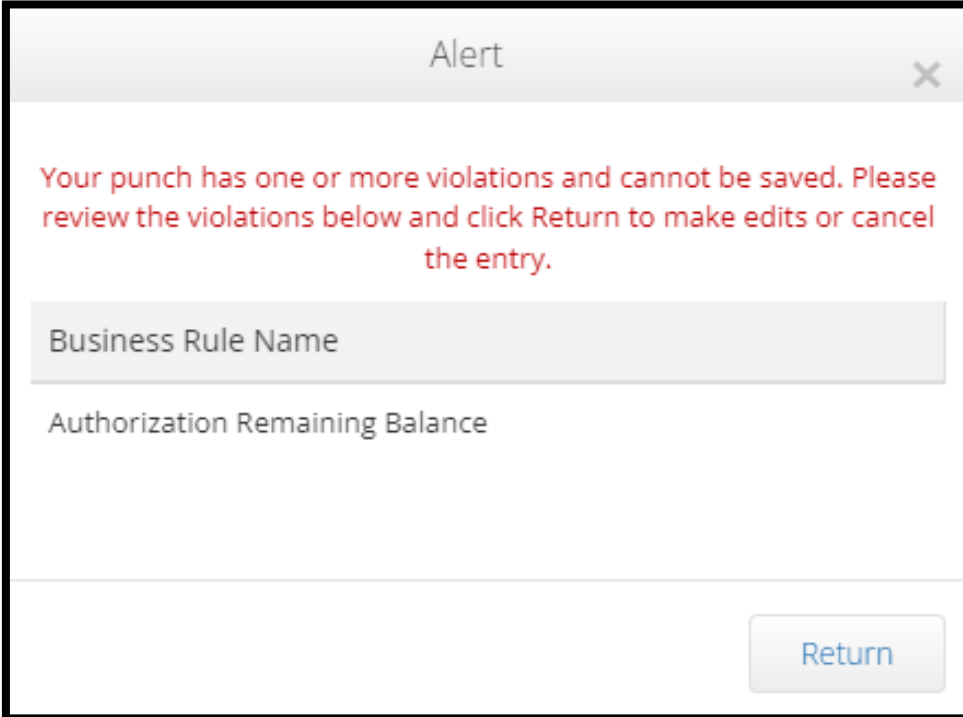
Alerts

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.

Test: | Test | ❓
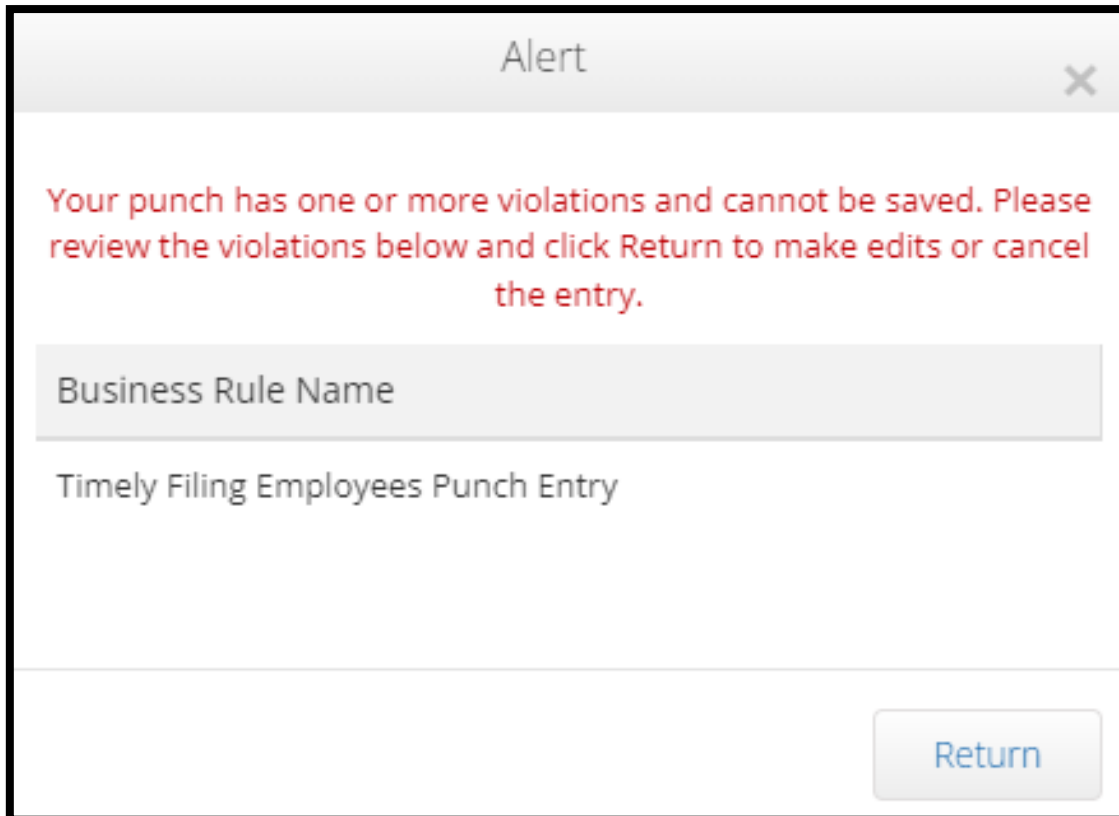
There is no active Authorization for this account. Please contact your supervisor.

Cancel   Save

- 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 21 days of the date of service. After 21 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 21 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 21 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 <u>active</u> 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.
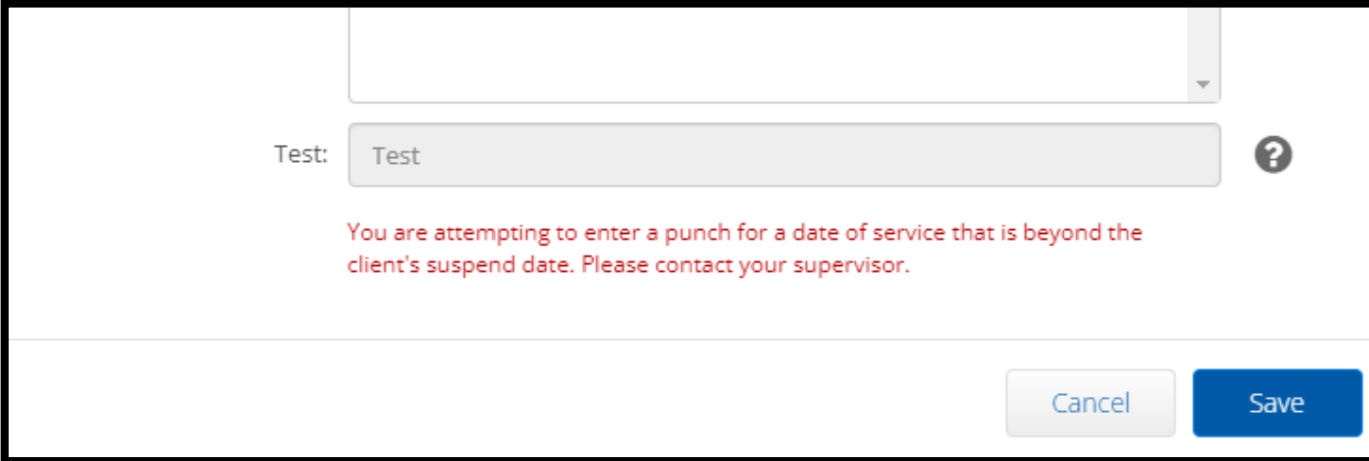
Alert

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.
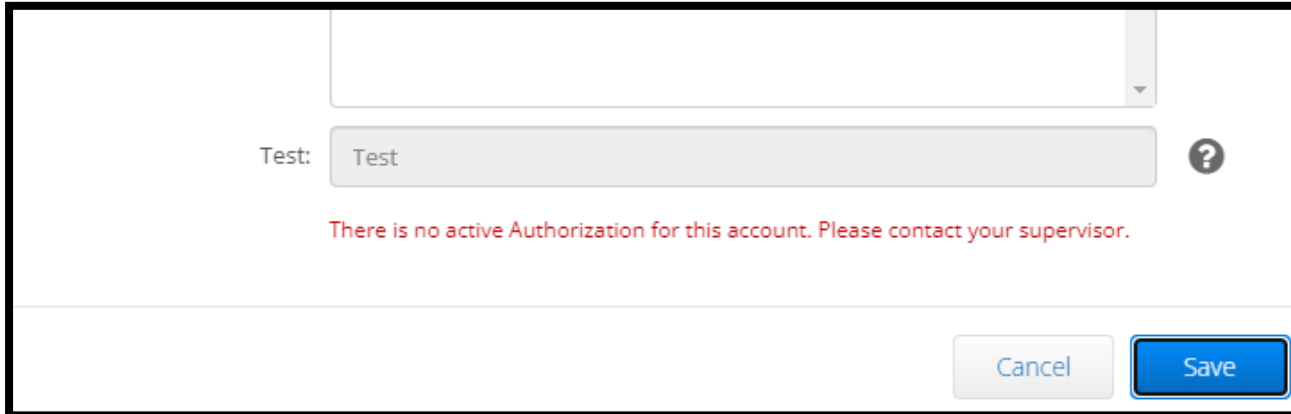
Business Rule Name

Employee service account start date punch entry

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 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.

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.
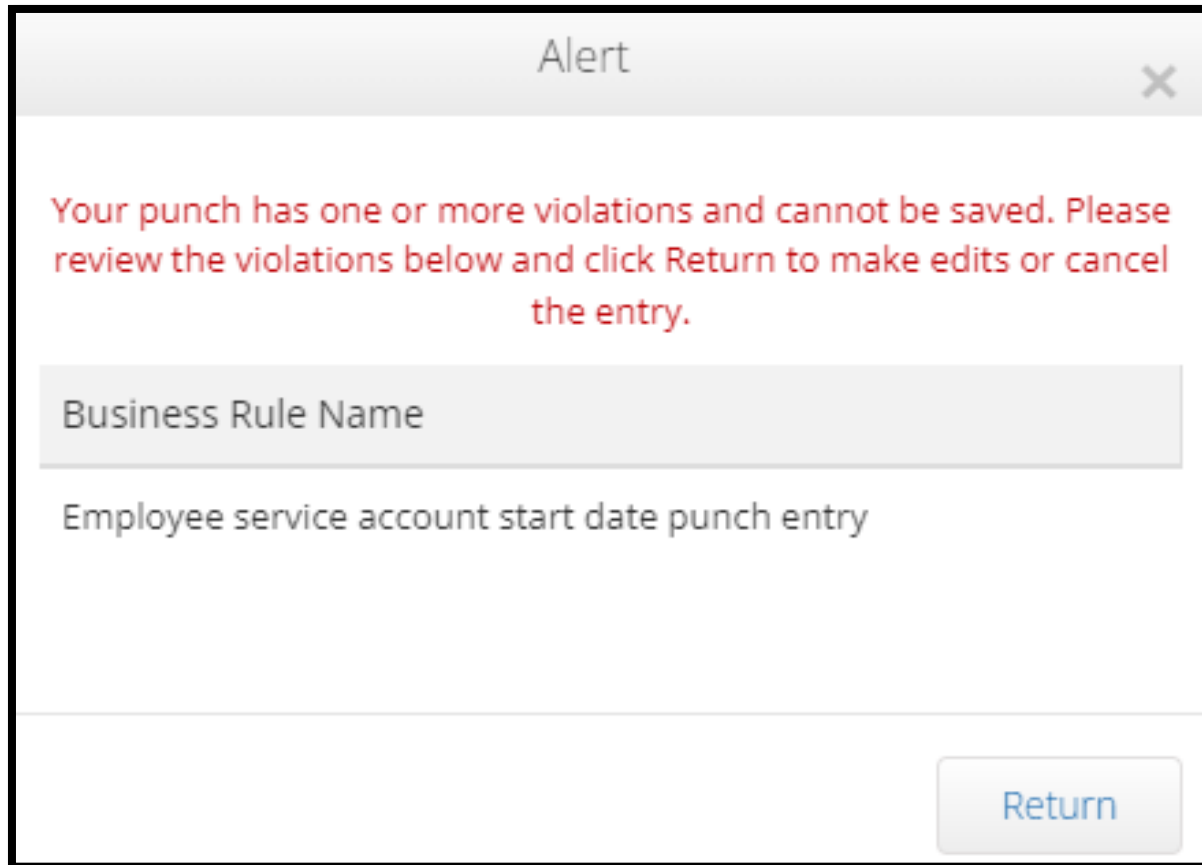
Business Rule Name

No valid pay rate punch entry

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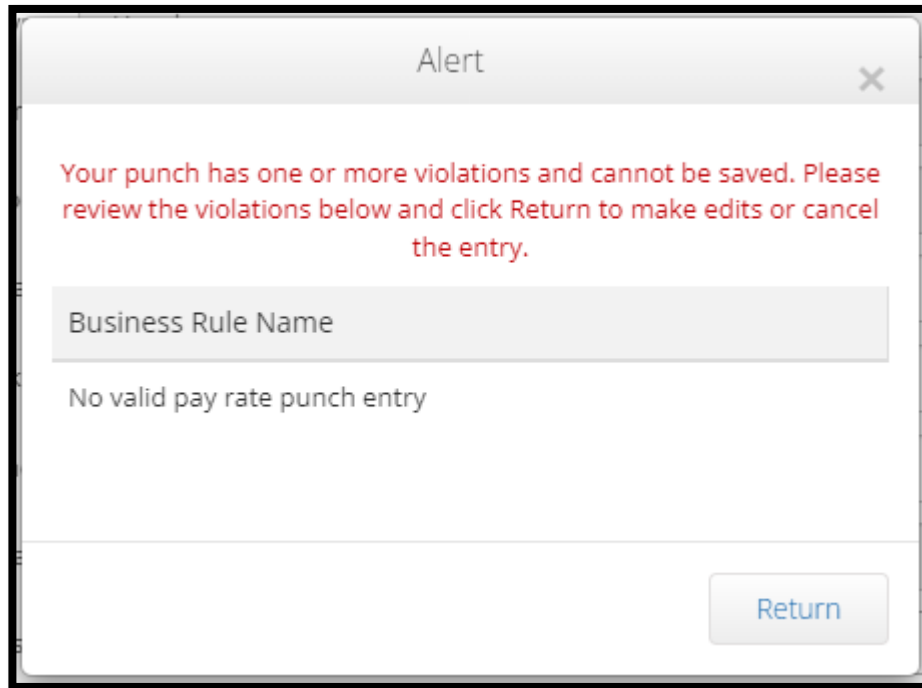
- The employee cannot save the punch
  - ➤ While the system allows the employee to clock in on the mobile app, they cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

Phone IVR
(Interactive Voice Response)
*Option when access to a mobile device or computer is limited

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Phone EVV Basics

- Employer - Confirm the <u>landline</u> phone number on file with Acumen is for the client
  - ✓ Employees must call from a recognized number only

    *Please note! If calling from a number not associated with the client, the employee will receive an error message.
- Employee - Will be asked to validate the following information:
  - ✓ Last four digits of their social security number
  - ✓ PIN (add in the web portal under user settings)
  - ✓ 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. Depending on program settings, the available balance may be announced. Press 1 to continue.

Clock In: Real Time Entry (cont.)

7. Select clock in EVV location

- If required by the program, a selection must be made ("none" will not be an option). The system will provide numbered options for EVV locations associated with the client.

    ➤ If the user is calling from the associated EVV phone number, this step will not be presented as the EVV location will be automatically selected.

- If not required by the program, "none" will be an available option.

8. Press 1 to confirm and save the punch

9. 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 announces that there is an open punch. When prompted, press 1 to confirm closing the punch.

4. Select clock out EVV location

   • If required by the program, a selection must be made ("none" will not be an option). The system will provide numbered options for EVV locations associated with the client.

     ➢ If the user is calling from the associated EVV phone number, this step will not be presented as the EVV location will be automatically selected.

   • If not required by the program, "none" will be an available option.

5. If required by the program, 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.

6. The punch is now closed, and the employee is clocked out. Press 2 to disconnect or 1 to open a new punch.

Historical Entry

*Please note! 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 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. Press 2 for historical entry

5. Select the service code with the prompts given

6. Depending on program settings, the available balance may be announced. Press 1 to continue.

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Historical Entry (cont.)

7. Enter the date of service in MMDDYYYY format (i.e., September 18, 2024 = 09182024)

8. Enter the clock-in time in HH:MM (i.e., 0830)

9. Select 1 for AM or 2 for PM

10. Enter the clock-out time in HH:MM (i.e., 0530)

11. Select 1 for AM or 2 for PM

12. Select clock in EVV location
    - If required by the program, a selection must be made ("none" will not be an option). The system will provide numbered options for EVV locations associated with the client.
        - If the user is calling from the associated EVV phone number, this step will not be presented as the EVV location will be automatically selected.
    - If not required by the program, "none" will be an available option.

Historical Entry (cont.)

13. Select clock out EVV location
   - If required by the program, a selection must be made ("none" will not be an option). The system will provide numbered options for EVV locations associated with the client.
      - ➢ If the user is calling from the associated EVV phone number, this step will not be presented as the EVV location will be automatically selected.
   - If not required by the program, "none" will be an available option.

14. If required by the program, 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.

15. The system will read back the punch details. Press 1 to confirm or 2 to edit.

Historical Entry (cont.)

*Please Note! The client or employer <u>must</u> be present for the following final steps:

16. Hand the phone to the client/employer who presses 1 when ready

17. The client/employer reviews the punch details and presses 1 to accept or 2 to reject the entry

18. The client/employer will validate the call using the client PIN

19. The punch is created

20. 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

  ➢ Call Acumen 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

- Does the employee need to edit or reject an entry?

  ✓ Entries cannot be edited or rejected using Phone EVV. The employee must use the web portal instead.

Payroll Schedule & Deadlines

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Payment Schedule

- Ensure provider payment requests are received by the Submissions Due Date

- Requests submitted after the due date will be processed in the following pay period

- First paycheck from Acumen will be January 3rd, 2025.

- Pay day is every other Friday

- Time must be **entered and approved** within **21 days of the date of service**

"MONTH" refers to the month that services were provided.

"Payment Period End Date" is the last day of services in the pay period.

MONTH	Payment Period End Date	Submissions Due NO Later Than	Direct Deposit/Check Date
DECEMBER	12/28/2024	12/30/2024	Fri, 01/03/25
	1/11/2025	1/13/2025	Fri, 01/17/25
JANUARY	1/25/2025	1/27/2025	Fri, 01/31/25
	2/8/2025	2/10/2025	Fri, 02/14/25
FEBRUARY	2/22/2025	2/24/2025	Fri, 02/28/25
	3/8/2025	3/10/2025	Fri, 03/14/25
MARCH	3/22/2025	3/24/2025	Fri, 03/28/25
	4/5/2025	4/7/2025	Fri, 04/11/25
APRIL	4/19/2025	4/21/2025	Fri, 04/25/25
	5/3/2025	5/5/2025	Fri, 05/09/25
MAY	5/17/2025	5/19/2025	Fri, 05/23/25
	5/31/2025	6/2/2025	Fri, 06/06/25
JUNE	6/14/2025	6/16/2025	Fri, 06/20/25
	6/28/2025	6/30/2025	Thu, 07/03/25
JULY	7/12/2025	7/14/2025	Fri, 07/18/25

Please share this schedule with your employees and keep a copy in a safe place for easy reference.

"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 requests can be submitted, for the pay period in order to be paid as scheduled.

Goods & Services Request

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Goods & Services Request

✓ Goods and Services Requests will need to be reviewed by the Counselor

✓ For any Goods and Services, it must be identified and approved on the Veteran Spending Plan.

- **For payment and submission:**
  ✓ Acumen can pay the vendor directly **OR** reimburse the Employer for out-of-pocket expenses

  ✓ Provide the Counselor at AgeGuide a copy of the request including invoices **OR** reach out for support in completing the form

  ✓ The Counselor and the Veteran or Representative must sign off on the request

  ✓ The Counselor will submit to Acumen electronically

- **For Item availability & Cost Increases**
  ✓ If the item is no longer available or there is a significant cost increase, this should be reviewed with the VAMC (Veterans Administration Medical Center) for approval.

  Please note: This form refers to the Case Manager, also known as the Counselor. Contact your Counselor for assistance with vendor payments and employer reimbursements.

Illinois Veteran Directed Care
Goods and Service Provider (GSP) Payment Request Form

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

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THANK YOU!

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