Phone EVV IVR Guide*

Presented By:

Acumen Fiscal Agent

*GA requires DCH approval

Acumen Fiscal Agent

Innovation • Opportunity • Freedom

OUR MISSION

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

Phone EVV IVR 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 (their employee pin)
    - ✓ MMDD of their birthday
    - ✓ Client Name & Service Code for the shift
- Client or Employer – Need client PIN for historical phone entries
    - ✓ Client PIN is on the Employer Good To Go letter

Clock In: Real Time Entry

1. Sign in:
   - ✓ Call from the client's landline to start the shift
     - ✓ **All States** except WI, & NC Cap: (855) 807-9595
     - ✓ **WI & NC Cap Only:** Call (844) 608-0047
   - ✓ 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 from the client's landline to end the shift
     - ✓ **All States** except WI, & NC Cap: (855) 807-9595
     - ✓ **WI & NC Cap Only:** Call (844) 608-0047
   - ✓ Enter the last four digits of the social security number
   - ✓ Enter PIN
   - ✓ Enter month/day of birth (MMDD)

2. Recording announces that there is an open punch

3. When prompted press #1 to confirm closing the punch

4. The punch is now closed, and the employee is clocked out

5. 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 client or employer must be present at the end of this process.

1. Sign in:
   - ✓ Call from the client's landline to start the shift
     - ✓ **All States** except WI, & NC: (855) 807-9595
     - ✓ **WI & NC Cap Only:** Call (844) 608-0047
   - ✓ 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., April 28, 2024 = 04282024)

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 recording will read back the punch details

12. Press #1 to confirm

Historical Entry (cont.)

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

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

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

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

16. The punch is created

17. The phone disconnects and the shift is recorded

Troubleshooting

- Is the employee having trouble signing in?

  - ✓ PIN not working? [Add/Change PIN](#) inside 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

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

   1. All states **except** WI/NC Cap: acumen.dcisoftware.com

   2. WI/NC Cap **Only**: outreach.dcisoftware.com

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
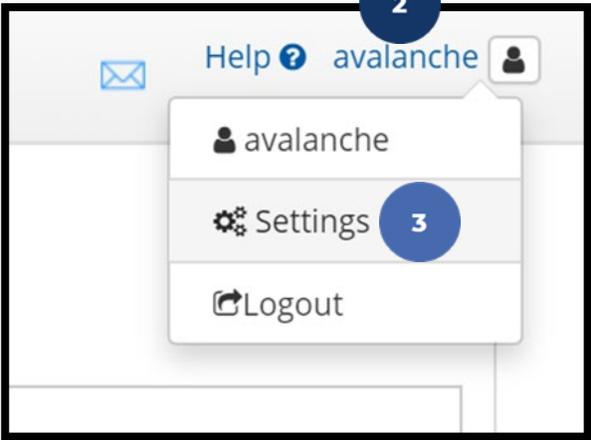
   ✓ Change PIN anytime

5. Enter password

6. Click the blue **Verify** button
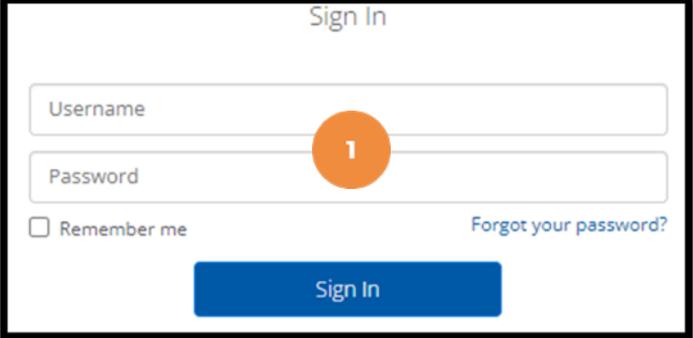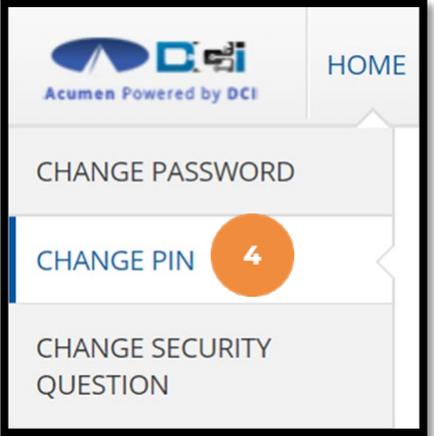
Add / Change PIN (cont.)

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

Questions?

Thank you!

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

Acumen Fiscal Agent
Innovation • Opportunity • Freedom