

Nevada OCL-CS 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



Overview & Requirements



Mobile App



Web Portal



Phone IVR



**Payroll Schedule, Critical
Dates & Resources**



**Vendor Payments & New
Vendor Requests**



Quick Resources

- Short step-by-step resource documents have been added to the [Nevada OCL CS – Training Materials](#) page providing instructions for the vendor entry, new vendor request, punch entry and approval processes.
- **Employer Specific Resources:**
 - ✓ Mobile App Vendor Entry & New Vendor Request
 - ✓ Web Portal Vendor Entry & New Vendor Request
 - ✓ Employer Managing Entries
- **Employee Specific Resources:**
 - ✓ Employee Mobile App Entries
 - ✓ Employee Web Portal Entries
- **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



Ways to Enter Time & Vendor Payments*

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

Mobile App *



- Preferred Method
- Real Time Entry
- Quick & Easy
- Mobile or tablet friendly
- Vendor Payments
- [Mobile App Guide](#)

OR

Phone EVV



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

OR

Web Portal *



- Time Management
- [Historical Entry](#) & Corrections
- Manual Time Approval
- Vendor Payments
- [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**

Proprietary: For Acumen and Customer Use Only



Mobile App Basics

- The DCI Mobile App is used for time entries & vendor payment entries
- Can be downloaded on a mobile device or tablet
- Quick & easy
- View all entries including status & details



Download DCI Mobile EVV

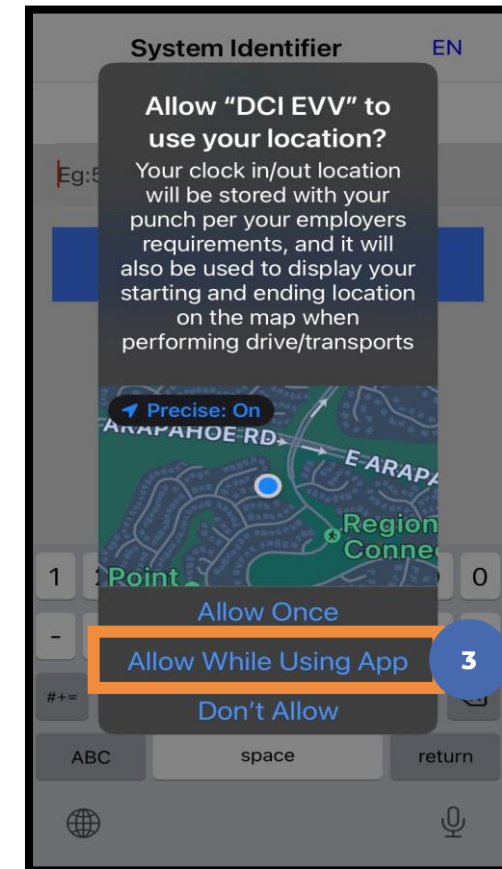
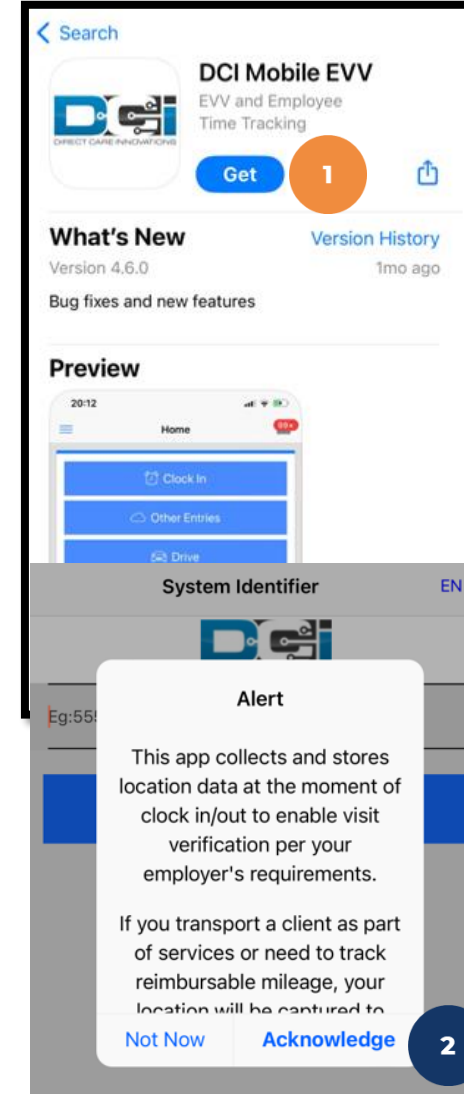
1. [Download](#) the **DCI Mobile EVV** App



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

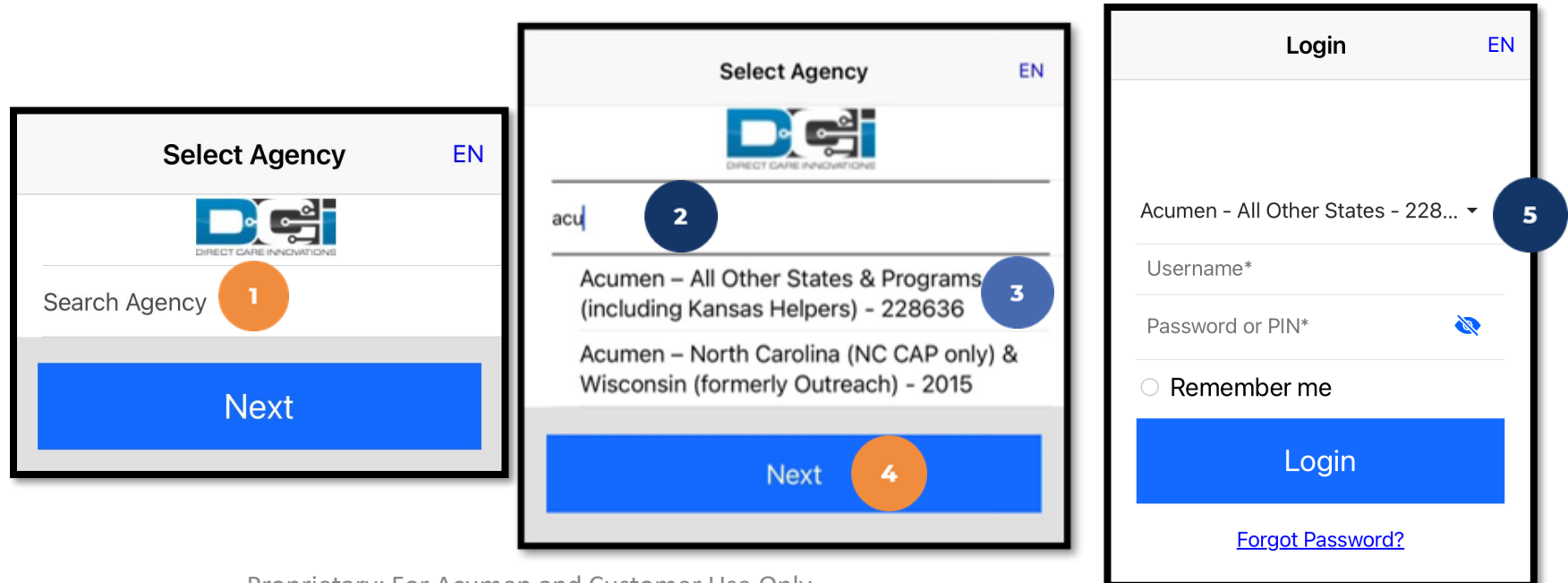
***Please note!**

- 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.



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

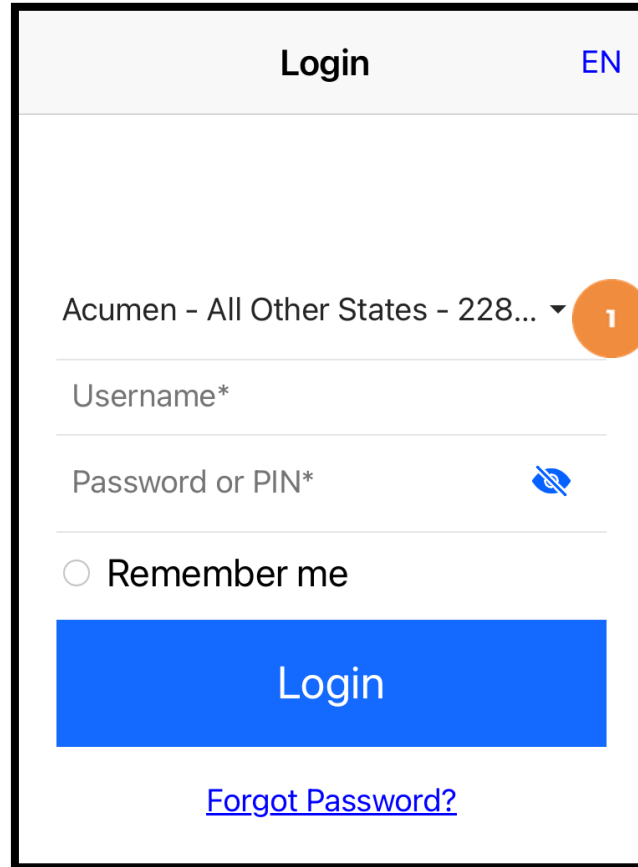


The screenshots illustrate the initial agency selection process:

- Screenshot 1 (Left):** The 'Select Agency' screen. It features the Direct Care Innovations logo, a search field labeled 'Search Agency', and a prominent blue 'Next' button at the bottom.
- Screenshot 2 (Middle):** The search results screen. The search field contains 'acu'. Below the header, two agency options are listed: 'Acumen – All Other States & Programs (including Kansas Helpers) - 228636' and 'Acumen – North Carolina (NC CAP only) & Wisconsin (formerly Outreach) - 2015'. A blue 'Next' button is at the bottom.
- Screenshot 3 (Right):** The 'Login' screen. It displays the selected agency 'Acumen - All Other States - 228...' in a dropdown menu. Below are fields for 'Username*' and 'Password or PIN*' with an eye icon for toggling visibility. There is a 'Remember me' checkbox and a blue 'Login' button. A 'Forgot Password?' link is at the bottom.

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.



Login EN

Acumen - All Other States - 228... ▾ 1

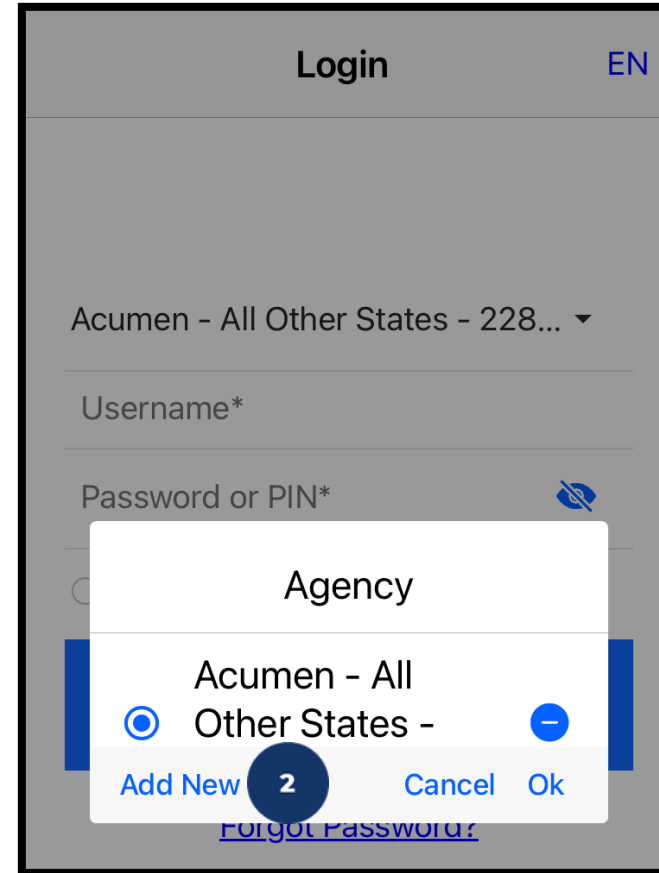
Username*

Password or PIN* 

☐ Remember me

Login


[Forgot Password?](#)



Login EN


Acumen - All Other States - 228... ▾

Username*

Password or PIN* 

Agency

Acumen - All

☒ Other States - 

[Add New](#) 2 [Cancel](#) [Ok](#)

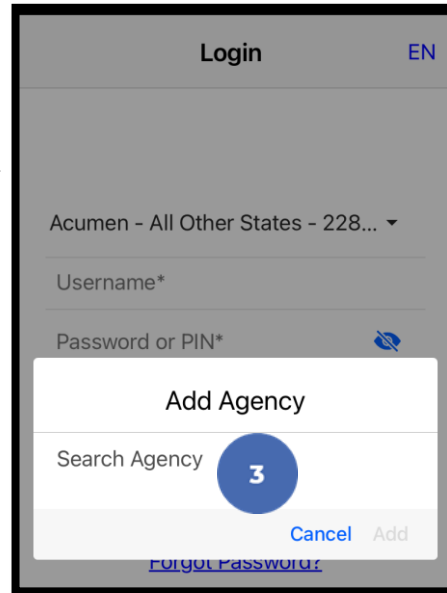
[Forgot Password?](#)

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



Login EN

Acumen - All Other States - 228... ▾

Username*

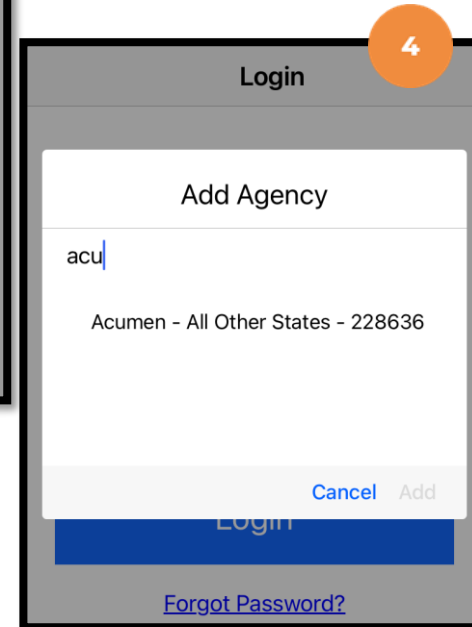
Password or PIN* 

Add Agency

Search Agency **3**

Cancel Add

[Forgot Password?](#)



Login **4**

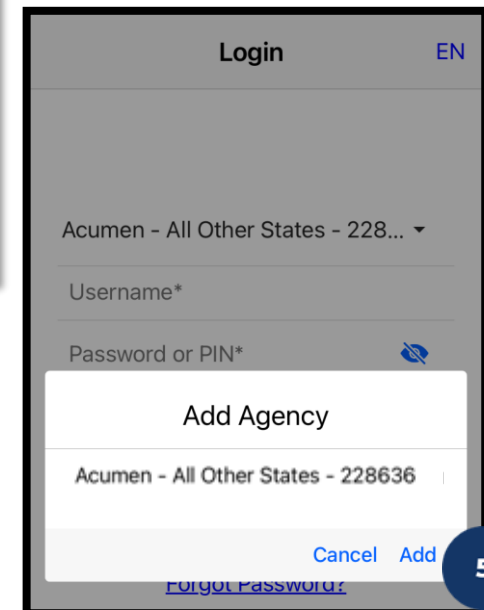
Add Agency

acu

Acumen - All Other States - 228636

Cancel Add


[Forgot Password?](#)



Login EN

Acumen - All Other States - 228... ▾

Username*

Password or PIN* 

Add Agency

Acumen - All Other States - 228636

Cancel Add **5**

[Forgot Password?](#)

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 App



1. Enter credentials

- ✓ Acumen provided a **username** and **password** 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 DCI Mobile App login interface. At the top, it says "Login" with a language selector "EN". Below this is a dropdown menu showing "Acumen - All Other States - 228...". There are two input fields: "Username*" and "Password or PIN*", with an orange circle containing the number "1" next to the password field. To the right of the password field is an eye icon. Below the input fields is a radio button labeled "Remember me". At the bottom is a large blue "Login" button with an orange circle containing the number "2" next to it. Below the button is a link that says "Forgot Password?".

Login EN

Acumen - All Other States - 228... ▾

Username*

Password or PIN* 1

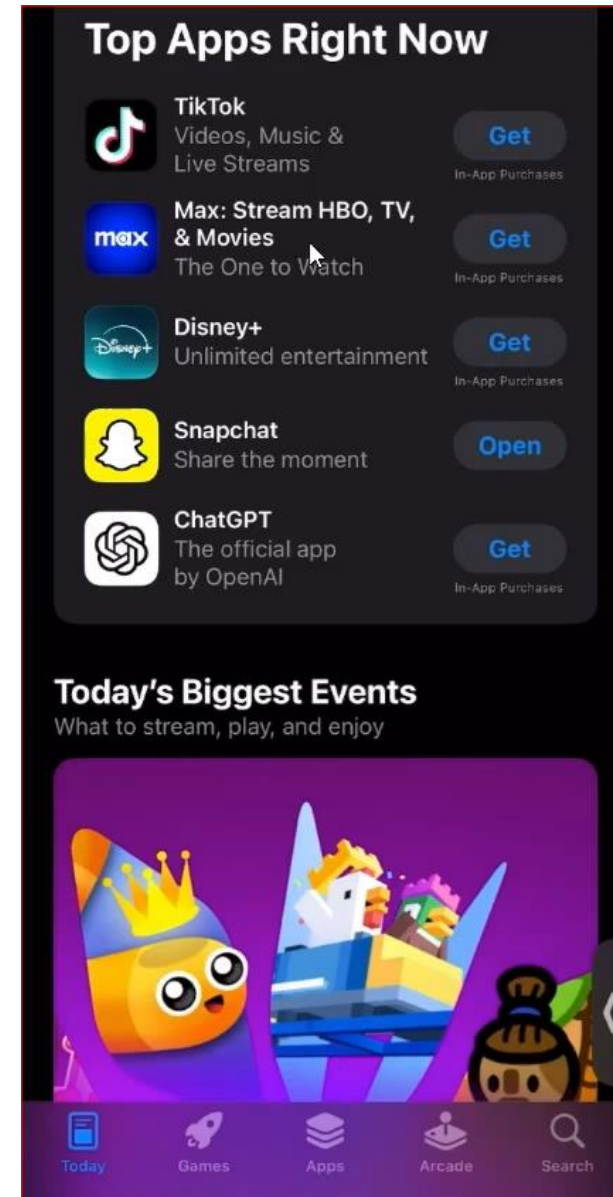
☐ Remember me

Login 2

[Forgot Password?](#)

Mobile App Video

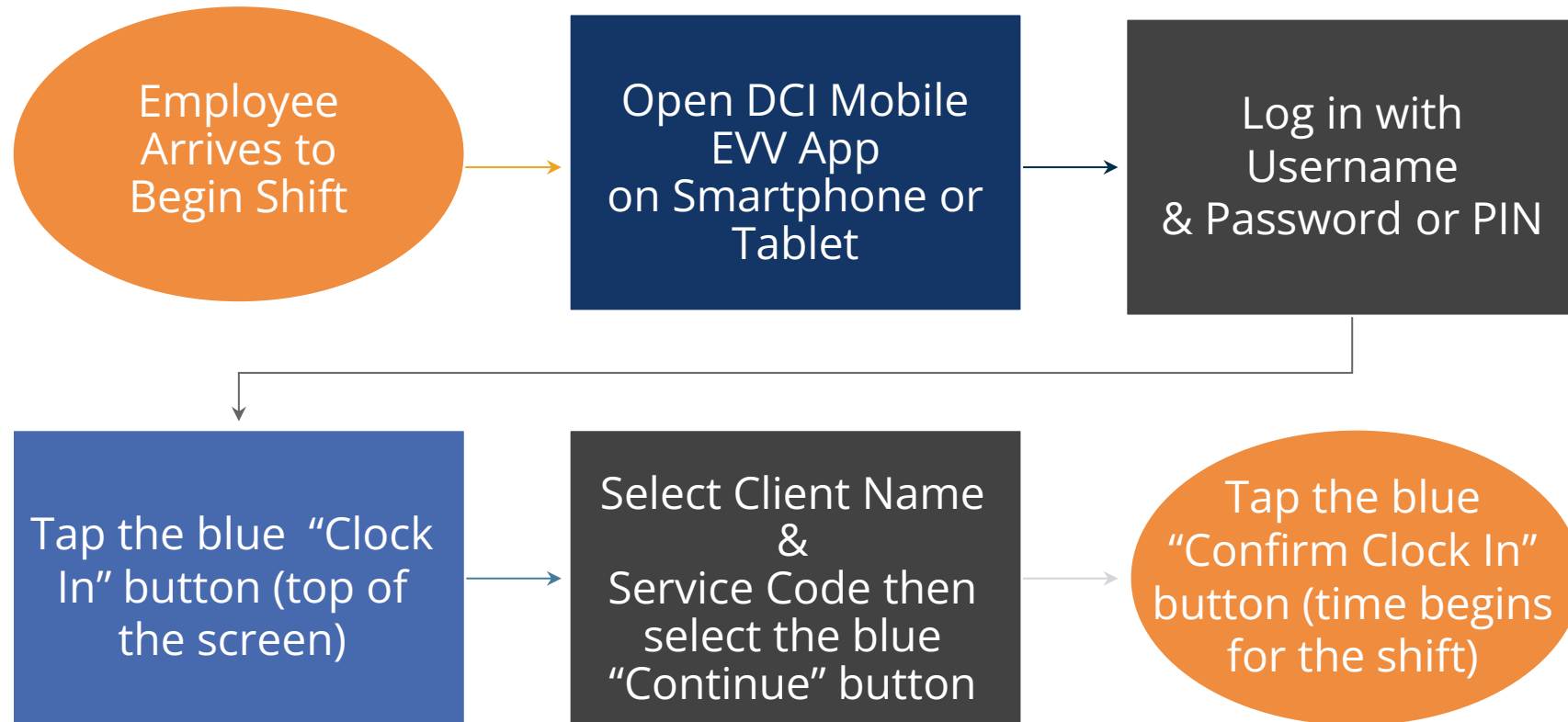
Download the DCI Mobile EVV App



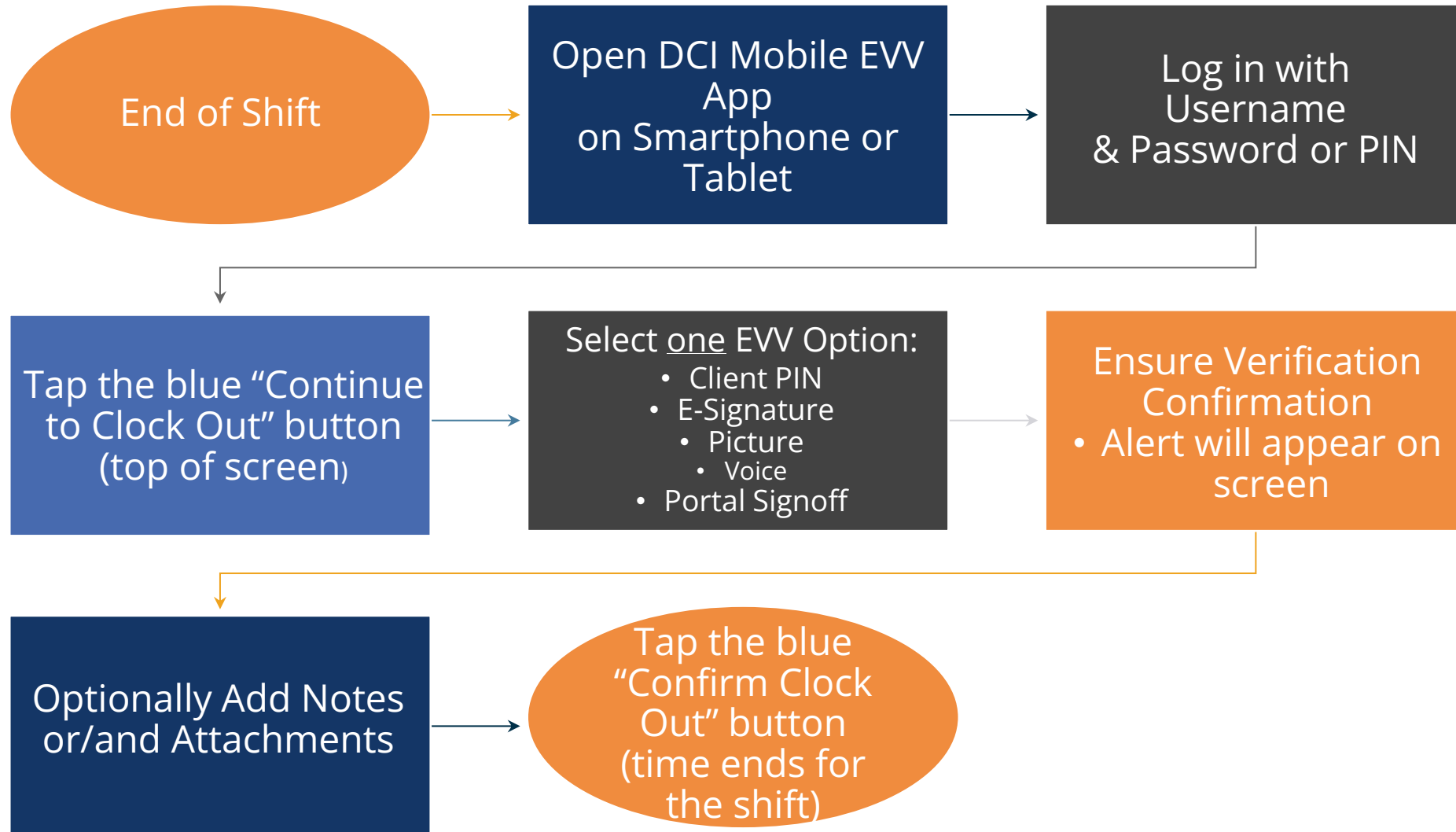
Employee Mobile App

Employee Clock In/Out Process

Overview Mobile App Clock In

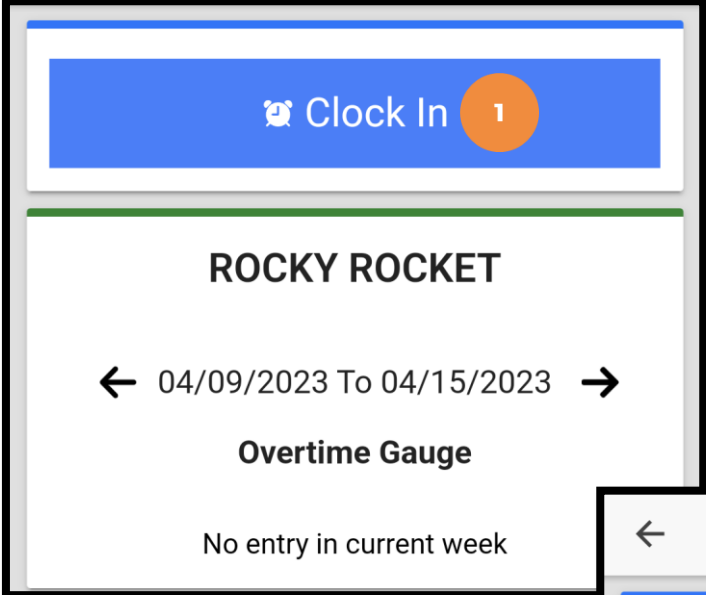


Overview Mobile App Clock Out

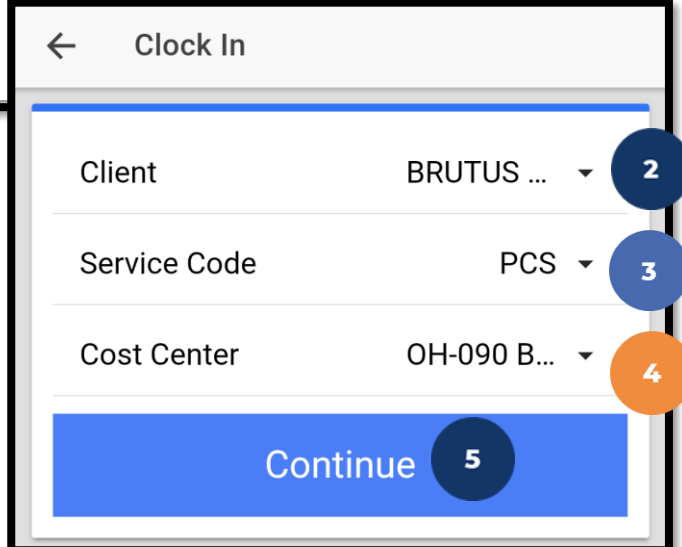


Clock In on Mobile App

1. Click the blue **Clock In** Button
2. Select the Client's Name
 - Auto-fills for a single client
3. Select the Service Code
 - Auto-fills for a single service
4. Cost Center is always auto-filled
5. Click the blue **Continue** button



The screenshot shows the top of the mobile app interface. At the top is a blue button with a clock icon and the text "Clock In", marked with a red circle containing the number 1. Below this is a white card with a green header bar. The card displays the client name "ROCKY ROCKET". Below the name is a date range "04/09/2023 To 04/15/2023" flanked by left and right arrows. Underneath is the text "Overtime Gauge" and at the bottom, "No entry in current week".



The screenshot shows the "Clock In" form. It has a back arrow and the title "Clock In". Below the title are three dropdown menus: "Client" with the value "BRUTUS ..." (marked with a red circle 2), "Service Code" with the value "PCS" (marked with a red circle 3), and "Cost Center" with the value "OH-090 B..." (marked with a red circle 4). At the bottom is a blue button with the text "Continue", marked with a red circle 5.

Clock In on Mobile App (cont.)

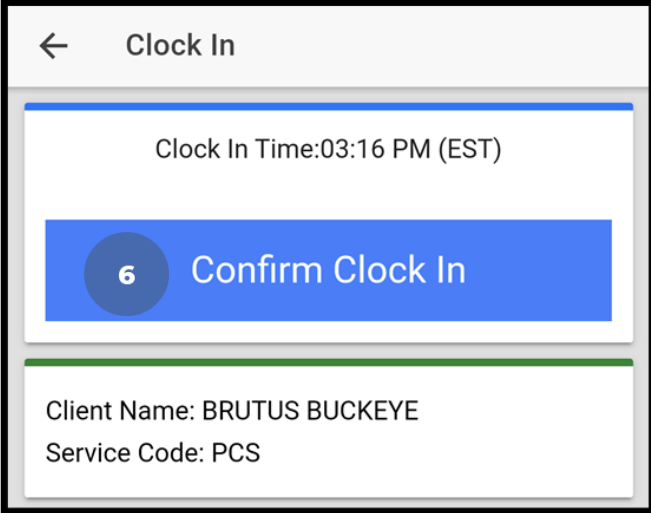
6. Select Confirm Clock In

* *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.

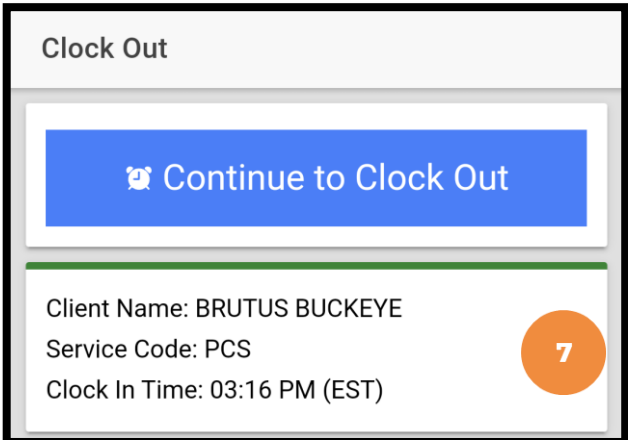


← Clock In

Clock In Time: 03:16 PM (EST)

6 Confirm Clock In

Client Name: BRUTUS BUCKEYE
Service Code: PCS



Clock Out

Continue to Clock Out

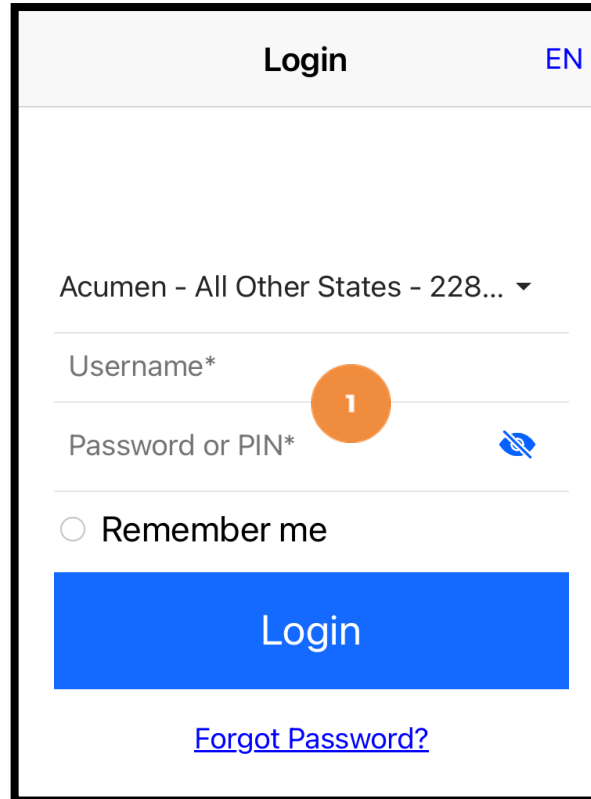
Client Name: BRUTUS BUCKEYE
Service Code: PCS
Clock In Time: 03:16 PM (EST)

7

Initial Clock Out Process

***The first three steps in the clock out process are the same regardless of the EVV (client attestation) option selected**

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



EN

Acumen - All Other States - 228... ▾

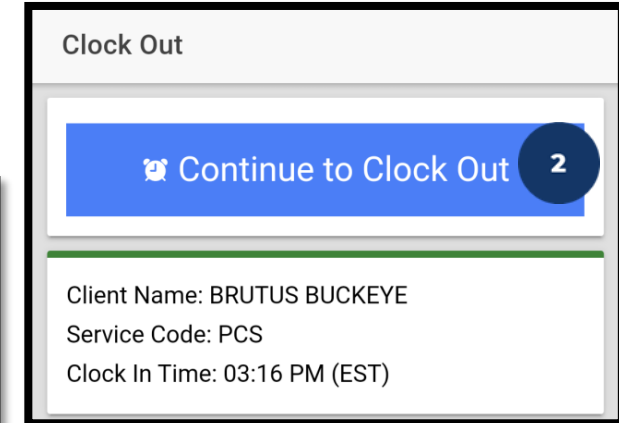
Username*

Password or PIN*


☐ Remember me

Login

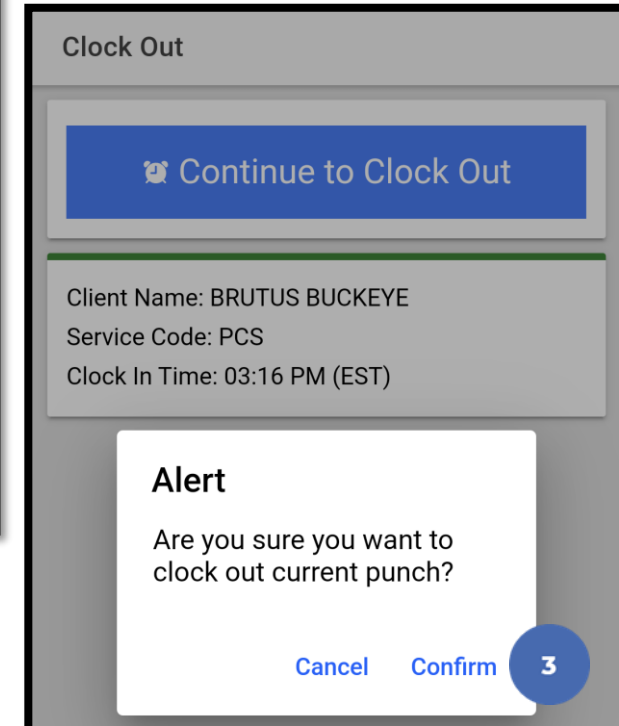
[Forgot Password?](#)




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

Mobile App – EVV Options (Client/Employer Attestation)



- EVV (client attestation) options are visible if required by the program. They 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

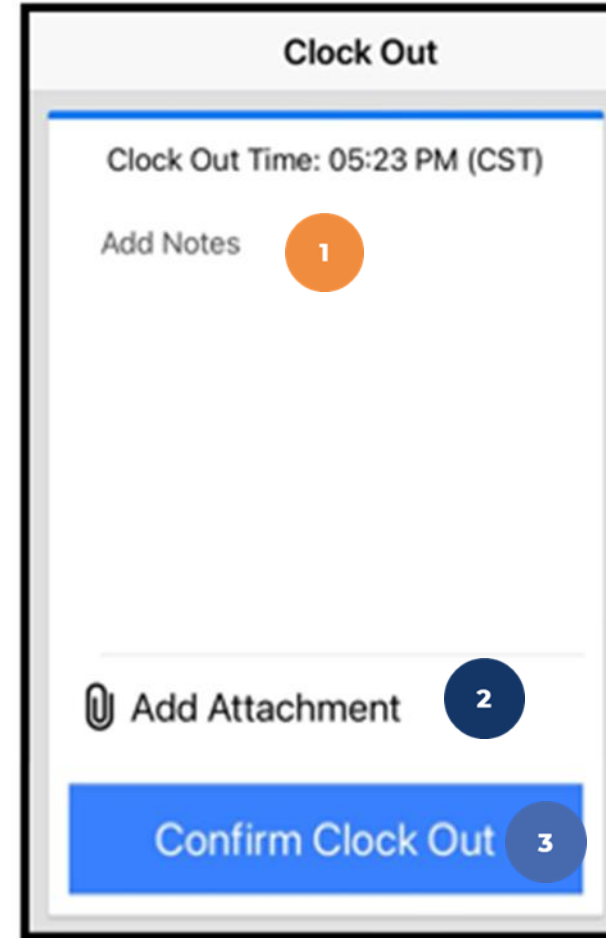
***Please note:** The employer must still review and may need to approve punch entries in their Pending Entries tab each pay period.

The screenshot shows a mobile app interface for "Clock Out Verification". At the top, there is a "Back" button and the title "Clock Out Verification". Below this is a section titled "Clock Out Verification Required" which contains five blue buttons with white icons and text: "Client PIN or Password" (with a lock icon), "E-Signature" (with a pen icon), "Picture" (with a camera icon), "Voice" (with a microphone icon), and "Portal Signoff" (with a person icon). To the right of these buttons is a bracket with the text "Choose one at clock out". At the bottom of the screen, there is a white box containing the following information: "Client Name: Steph Client1", "Service Code: RESPITE (Hourly)", and "Clock In Time: 01:42 PM (CST)".

Clock Out Process After the EVV (Client Attestation) Option is Selected

The employee:

1. Enters any notes for the punch (optional)
2. Adds an attachment for the punch (optional)
3. Clicks the blue **Confirm Clock Out** button when ready
 - ✓ *This will stop the time for the shift*
4. Punch Confirmation
 - ✓ Punch details, including verification option selected, display.
 - ✓ Optionally, click the blue **Home** button to return to the dashboard.



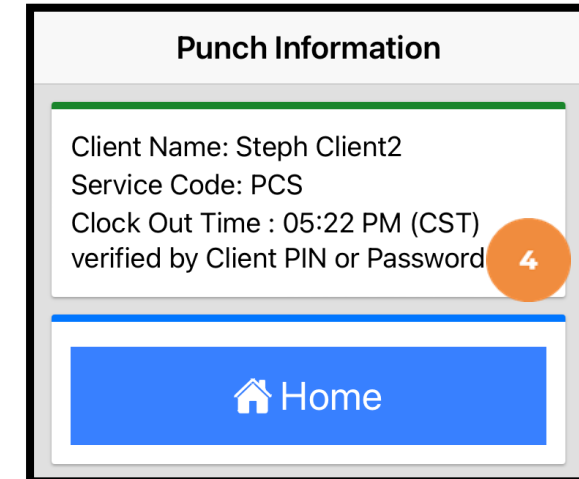
Clock Out

Clock Out Time: 05:23 PM (CST)

Add Notes **1**

Add Attachment **2**

Confirm Clock Out **3**



Punch Information

Client Name: Steph Client2
Service Code: PCS
Clock Out Time : 05:22 PM (CST)
verified by Client PIN or Password **4**

Home

EVV or Client Attestation Options

***There are five options.**

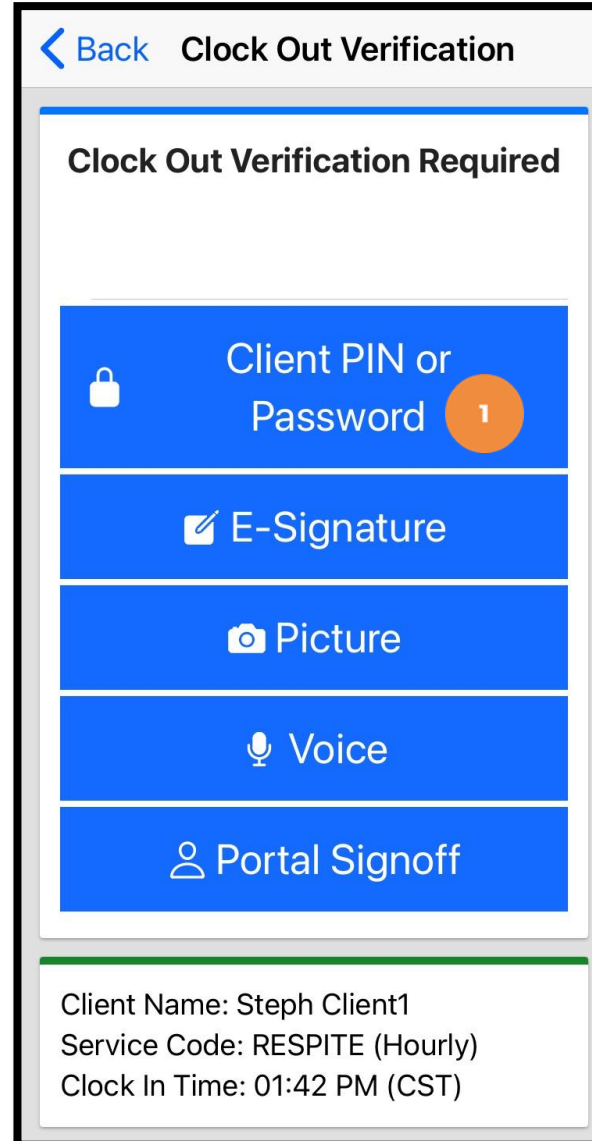
Choose only one at clock out:

- **Client PIN**
- **E-Signature**
- **Picture**
- **Voice**
- **Portal Signoff**

Clock Out - EVV Option #1

Client PIN

1. Select the clock out verification type:
 - ✓ Client PIN or Password
2. Hand the mobile device to the client or employer, who enters the Client PIN (client PIN issued on the Employer Good to Go/Welcome letter).
3. The client or employer clicks the blue **Submit** button when ready
4. 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 1

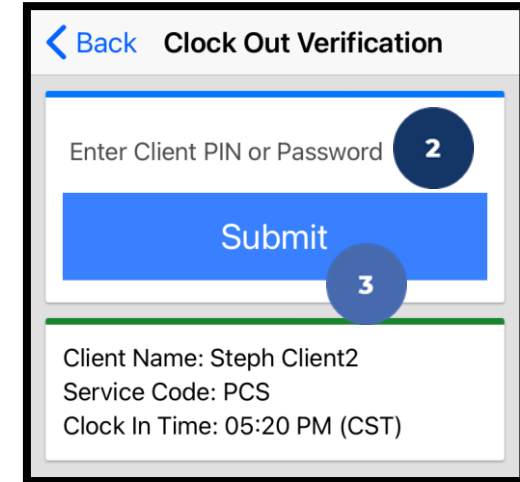
E-Signature

Picture

Voice

Portal Signoff

Client Name: Steph Client1
Service Code: RESPITE (Hourly)
Clock In Time: 01:42 PM (CST)

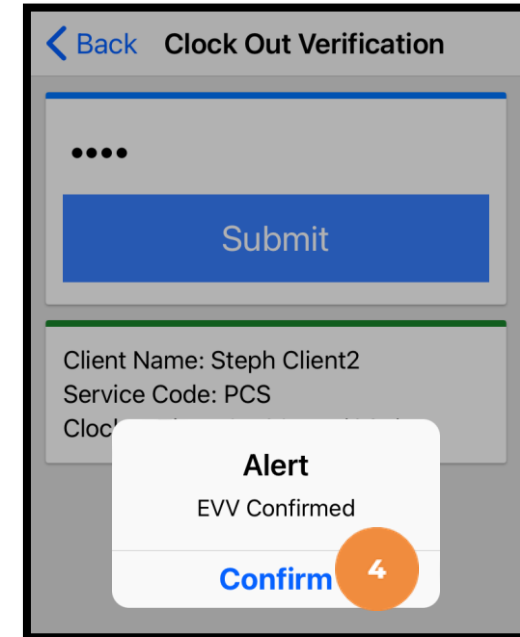


< Back Clock Out Verification

Enter Client PIN or Password 2

Submit 3

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 4

Mobile App Video


Clock in and Out Using Client PIN Option

Proprietary: For Acumen and Customer Use Only

LoginEN

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

Username*

Password or PIN* 

☐ Remember me

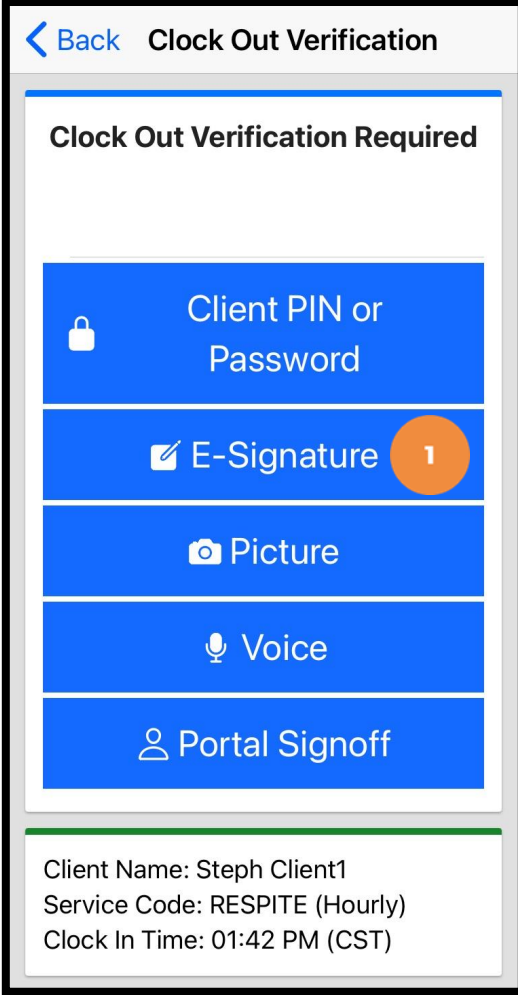
Login

[Forgot Password?](#)

Clock Out - EVV Option #2

E-Signature

1. Select the clock out verification type:
 - ✓ E-Signature
2. Hand the mobile device to the client or employer, who signs their name on the device screen.
3. The client or employer clicks **Save** to accept the signature
 - ✓ Optionally, they may click **Clear** to rewrite their signature.
4. The client or employer clicks **Confirm** to validate the signature and hands the mobile device back to the employee



< Back Clock Out Verification

Clock Out Verification Required

Client PIN or Password

✓ E-Signature 1

Picture

Voice

Portal Signoff

Client Name: Steph Client1
Service Code: RESPITE (Hourly)
Clock In Time: 01:42 PM (CST)

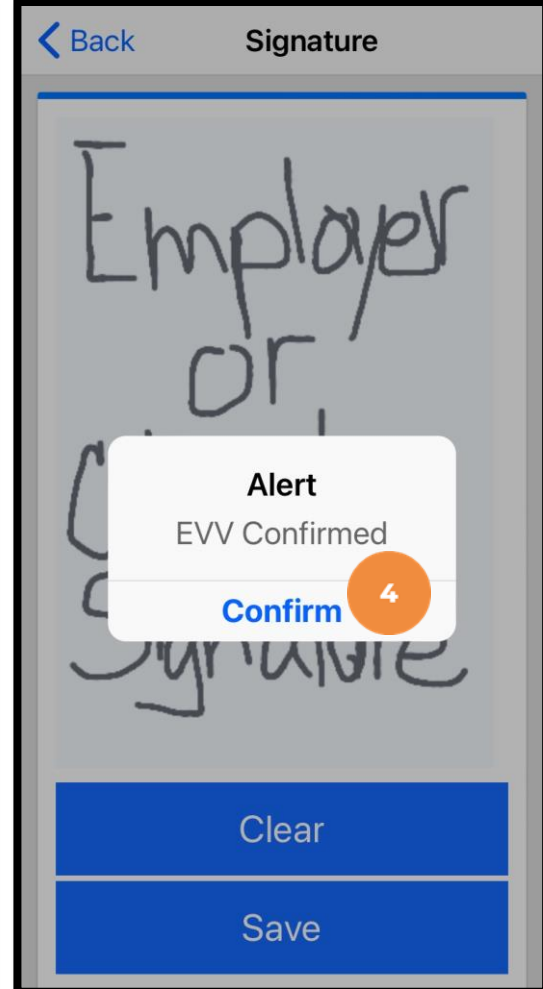


< Back Signature

Employer or Client Signature 2

Clear

Save 3



< Back Signature

Alert
EVV Confirmed

Confirm 4

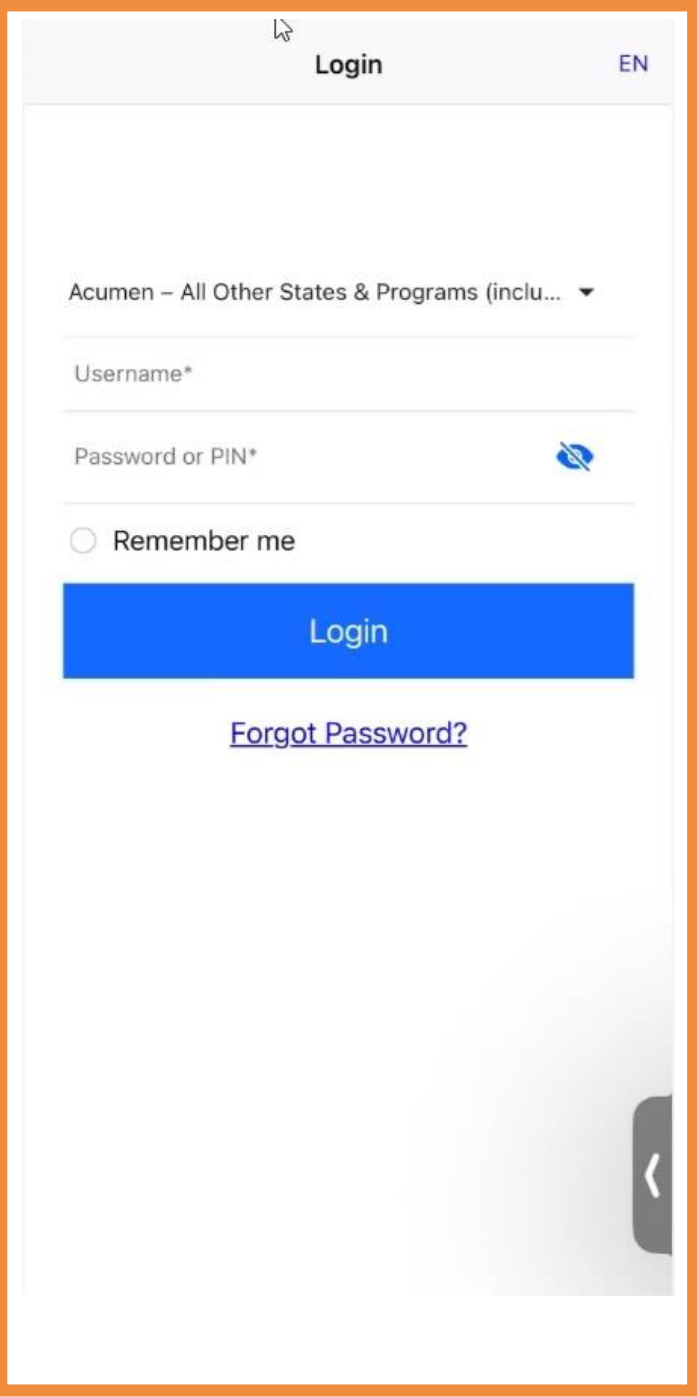
Clear

Save

Mobile App Video

Clock in and Out Using E-Signature Option

Proprietary: For Acumen and Customer Use Only



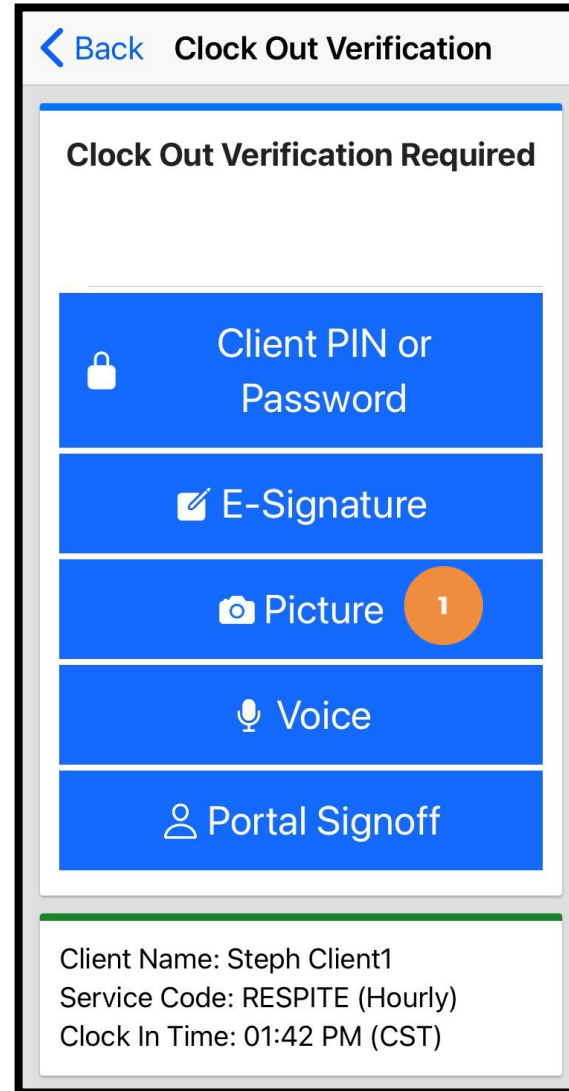
The screenshot shows the login interface of the Acumen mobile app. At the top, there is a header bar with a mouse cursor icon on the left, the word "Login" in the center, and "EN" on the right. Below the header, there is a dropdown menu labeled "Acumen – All Other States & Programs (inclu..." with a downward arrow. Underneath the dropdown are two input fields: "Username*" and "Password or PIN*", the latter with a blue eye icon for toggling visibility. Below these fields is a radio button labeled "Remember me". A large blue button with the text "Login" is positioned below the radio button. Underneath the "Login" button is a link that says "Forgot Password?". At the bottom right of the screen, there is a grey button with a white left-pointing arrow.

Clock Out - EVV Option #3

Picture

1. Select the clock out verification type:
 - ✓ Picture
2. A pop-up stating "DCI EVV" Would Like to Access the Camera appears. Select Allow.
3. Click the **camera** icon to take a picture of the client

***Please note:** Client photos taken by the employee for electronic visit verification (EVV) are never stored on the employee's cell phone when using the DCI Mobile App



< Back Clock Out Verification

Clock Out Verification Required

- Client PIN or Password
- E-Signature
- Picture 1**
- Voice
- Portal Signoff

Client Name: Steph Client1
Service Code: RESPITE (Hourly)
Clock In Time: 01:42 PM (CST)

"DCI EVV" Would Like to Access the Camera
This app provides the ability to use the camera to perform Electronic Visit Verification per your employers policies

Don't Allow

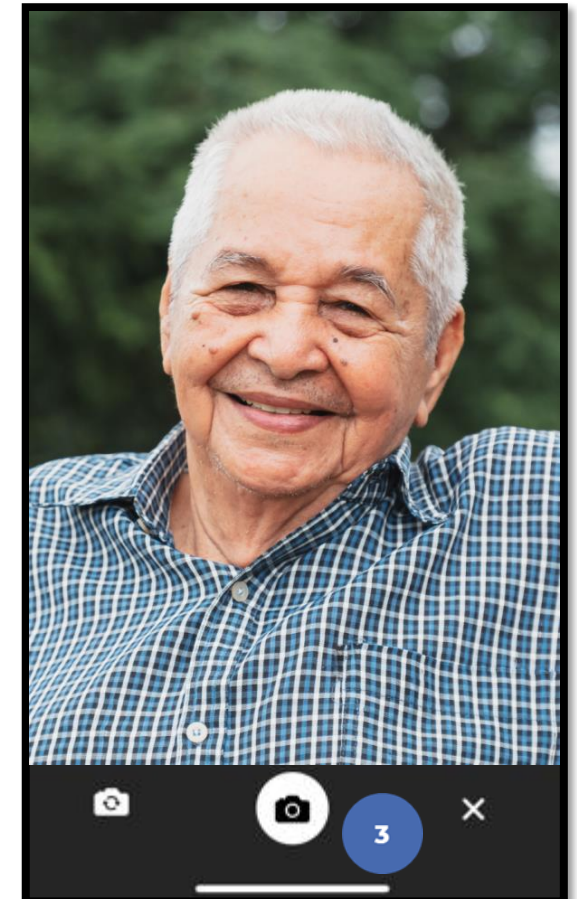
Allow

2



Acumen Fiscal Agent

Innovation • Opportunity • Freedom

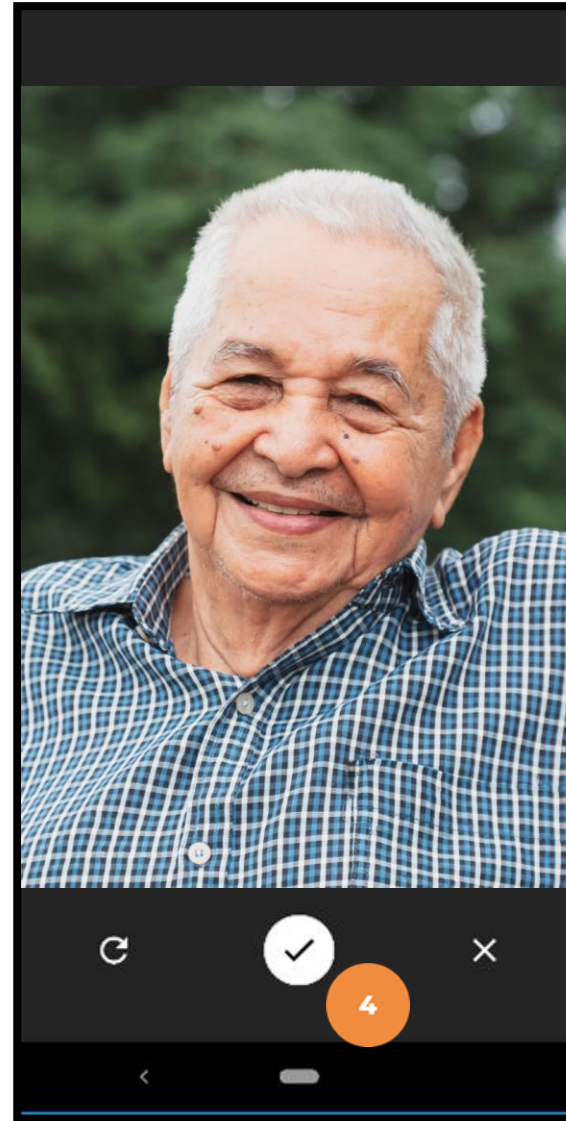


Clock Out - EVV Option #3

Picture

4. Click the **checkmark** to accept the picture, the X to cancel, or the circular arrow to retake the picture.
5. Click **Confirm** in the alert pop-up box to confirm the punch

***Please note:** Client photos taken by the employee for electronic visit verification (EVV) are never stored on the employee's cell phone when using the DCI Mobile App



Mobile App Video

Clock in and Out Using Picture Option

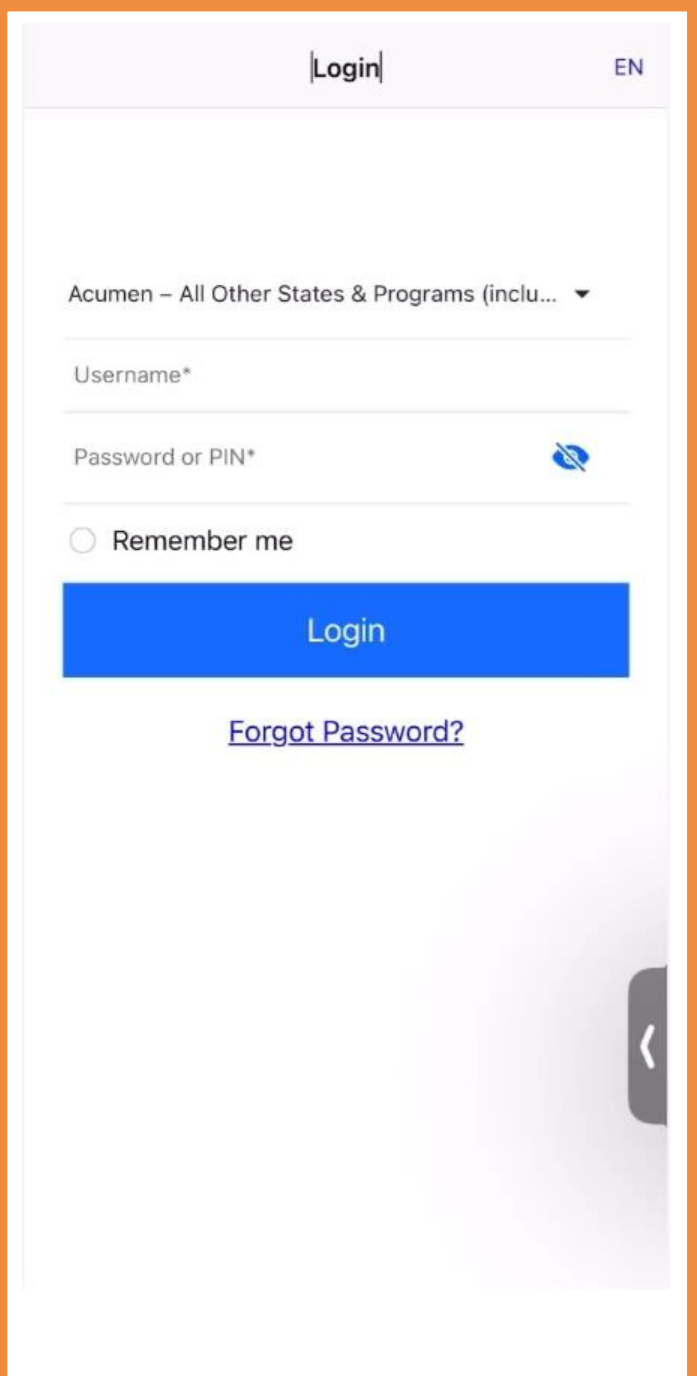
Proprietary: For Acumen and Customer Use Only

Login

EN

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

Username*

Password or PIN* 

☐ Remember me

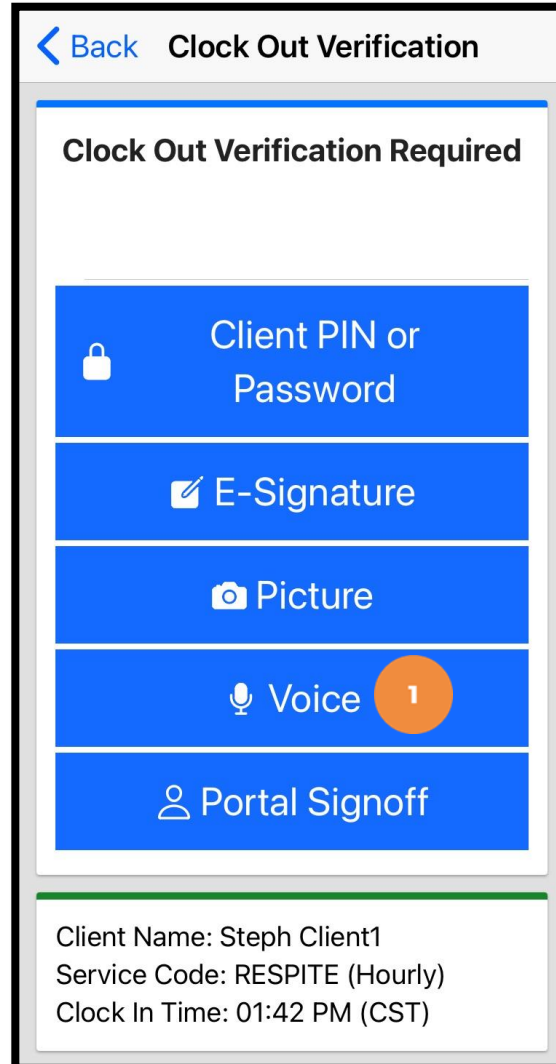
Login

[Forgot Password?](#)

Clock Out - EVV Option #4

Voice

1. Select the clock out verification type:
✓ Voice
2. Hand the device to the client or employer. A pop-up stating "DCI EVV" Would Like to Access the Microphone appears. The client or employer selects **Allow**.



Back Clock Out Verification

Clock Out Verification Required

EVV Location Home

Client PIN or Password

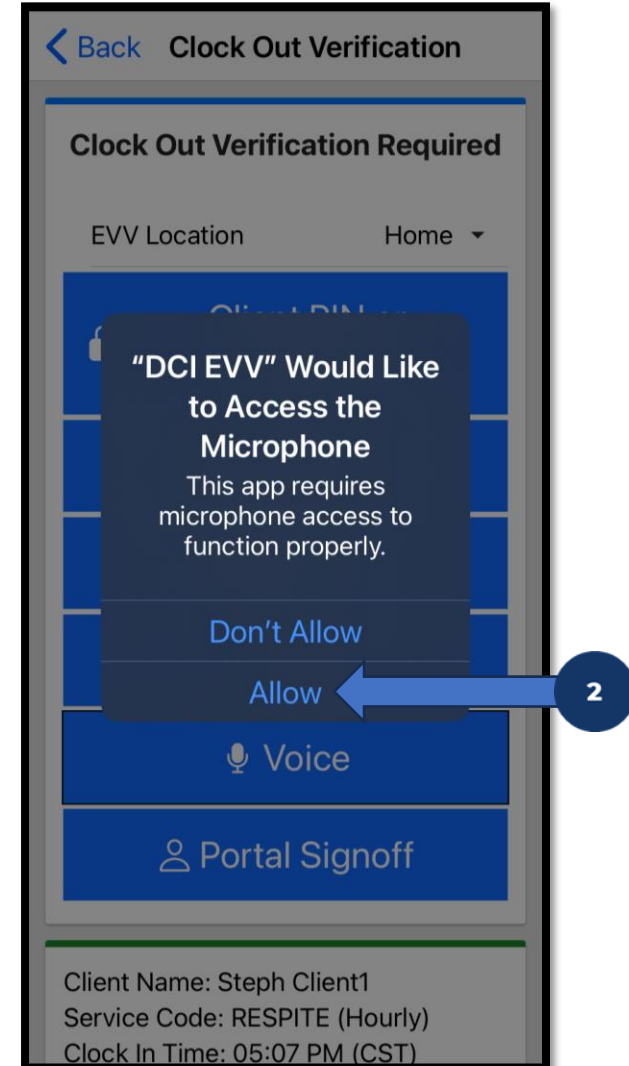
E-Signature

Picture

Voice 1

Portal Signoff

Client Name: Steph Client1
Service Code: RESPITE (Hourly)
Clock In Time: 01:42 PM (CST)



Back Clock Out Verification

Clock Out Verification Required

EVV Location Home

"DCI EVV" Would Like to Access the Microphone
This app requires microphone access to function properly.

Don't Allow

Allow 2

Voice

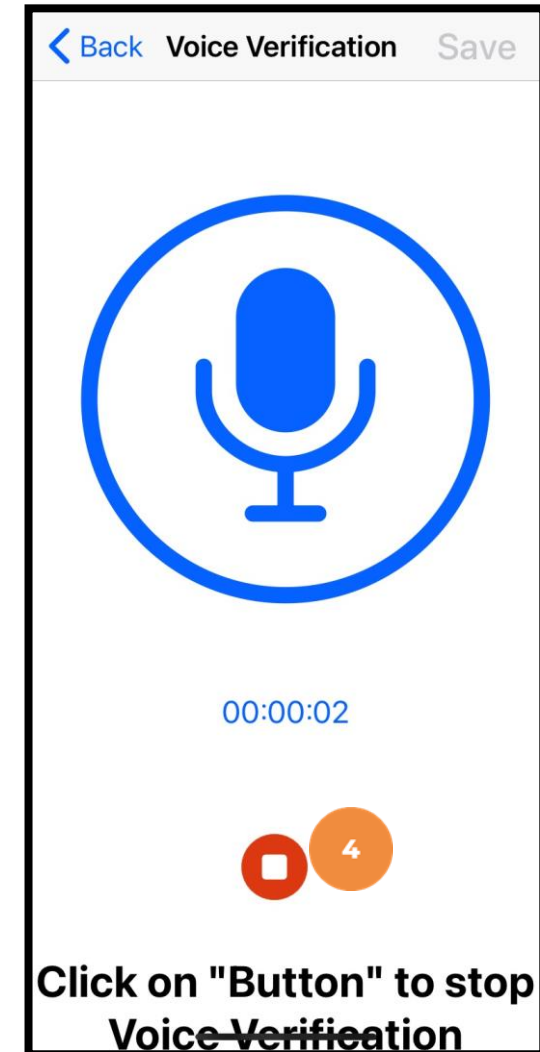
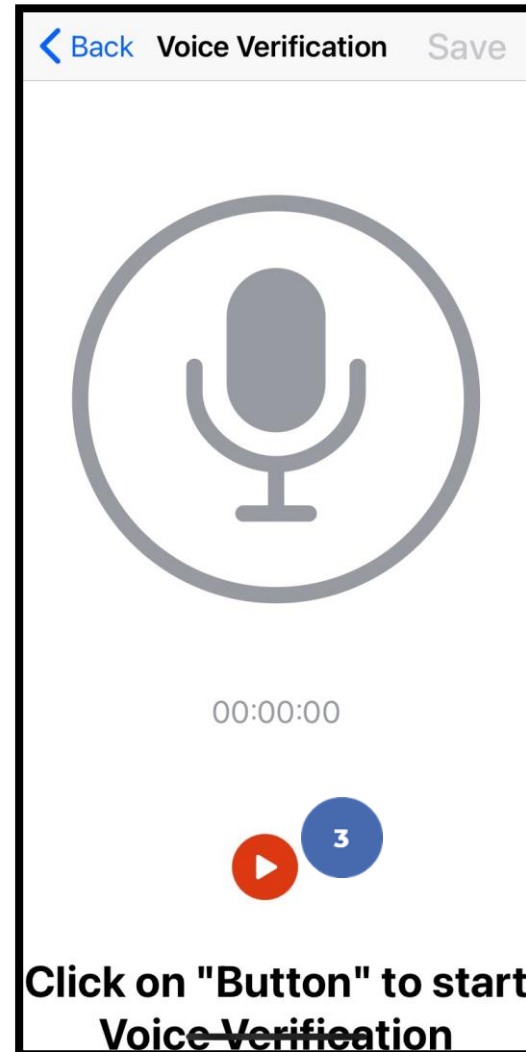
Portal Signoff

Client Name: Steph Client1
Service Code: RESPITE (Hourly)
Clock In Time: 05:07 PM (CST)

Clock Out - EVV Option #4

Voice

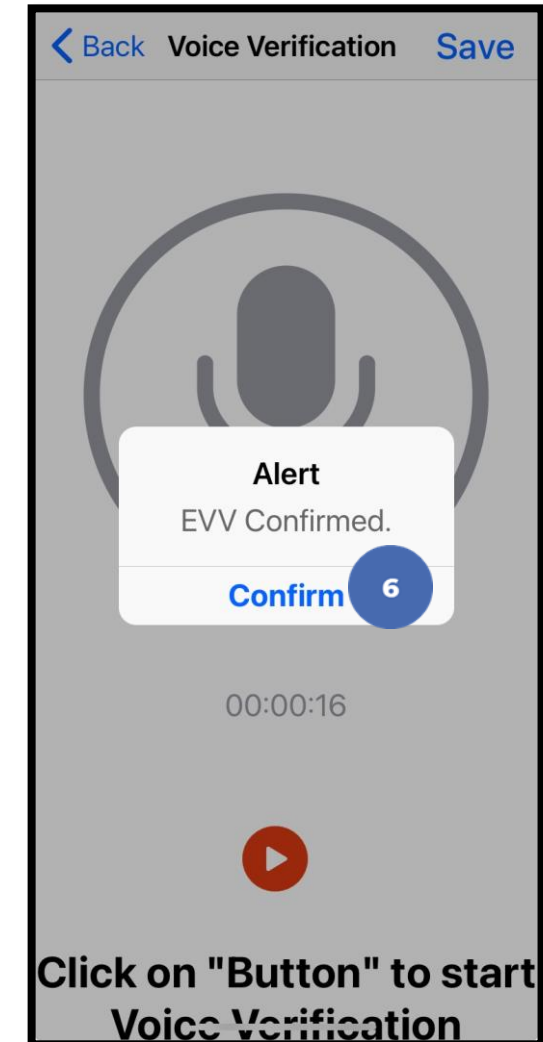
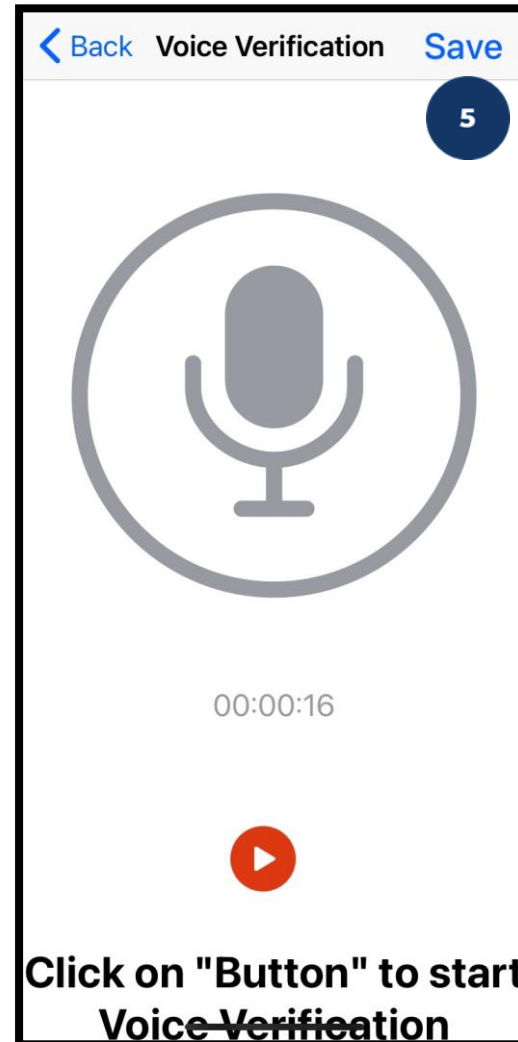
3. The client or employer clicks the **red play** button to start the voice verification
 - ✓ An automated voice will say "Please repeat after me. My name is (client name) and I am verifying this visit."
4. The client or employer states "My name is (client or employer name) and I am verifying this visit." When finished, they press the **red stop** button to stop the voice verification.



Clock Out - EVV Option #4

Voice

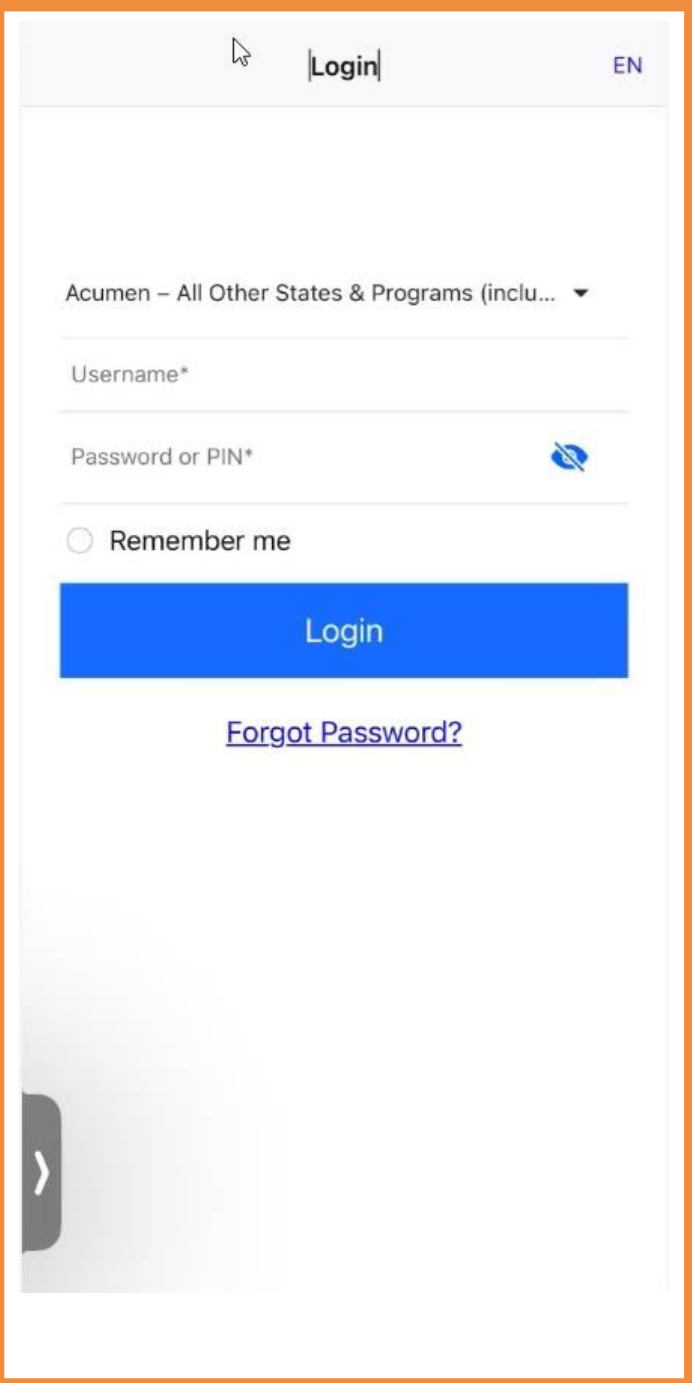
5. The client or employer clicks the blue **Save** button in the upper right corner to accept the voice verification, or the blue **<Back** button in the upper left corner to re-record it.
6. The client or employer clicks **Confirm** to validate the voice recording and hands the mobile device back to the employee



Mobile App Video

Clock in and Out Using Voice Option

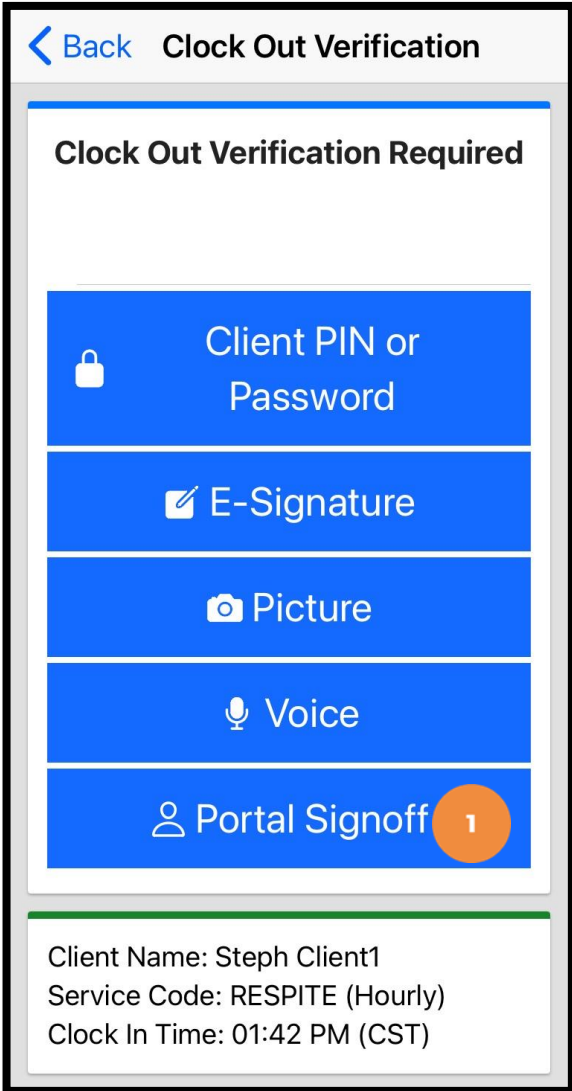
Proprietary: For Acumen and Customer Use Only

A screenshot of a mobile application's login screen, framed by an orange border. At the top, there is a header bar with a mouse cursor icon on the left, the text "Login" in the center, and "EN" on the right. Below the header, there is a dropdown menu showing "Acumen - All Other States & Programs (inclu..." with a downward arrow. Underneath the dropdown are two input fields: "Username*" and "Password or PIN*", each with a horizontal line for text entry. To the right of the "Password or PIN*" field is a blue icon of a crossed-out eye. Below these fields is a radio button followed by the text "Remember me". A large blue button with the word "Login" in white text is positioned below the radio button. Underneath the button is a blue, underlined link that says "Forgot Password?". At the bottom left of the screen, there is a dark grey button with a white right-pointing chevron symbol.

Clock Out - EVV Option #5

Portal Signoff

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

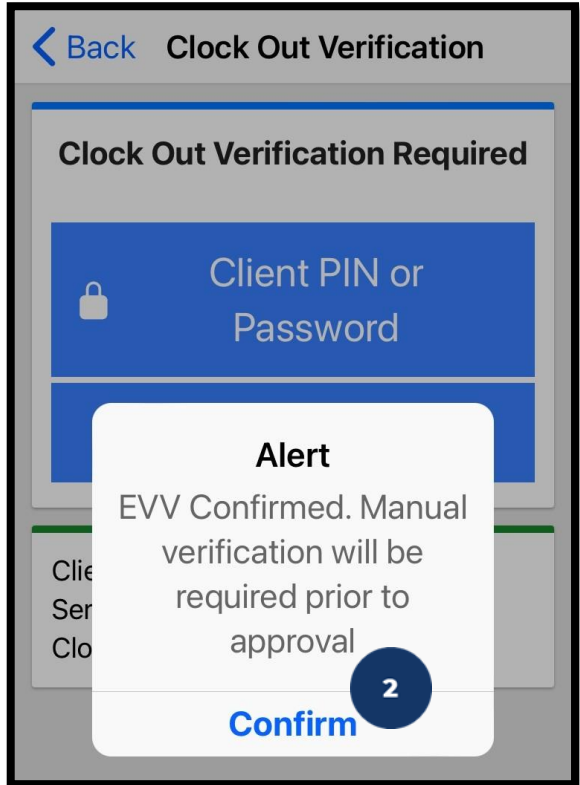


← Back Clock Out Verification

Clock Out Verification Required

- Client PIN or Password
- E-Signature
- Picture
- Voice
- Portal Signoff **1**

Client Name: Steph Client1
Service Code: RESPITE (Hourly)
Clock In Time: 01:42 PM (CST)



← Back Clock Out Verification

Clock Out Verification Required

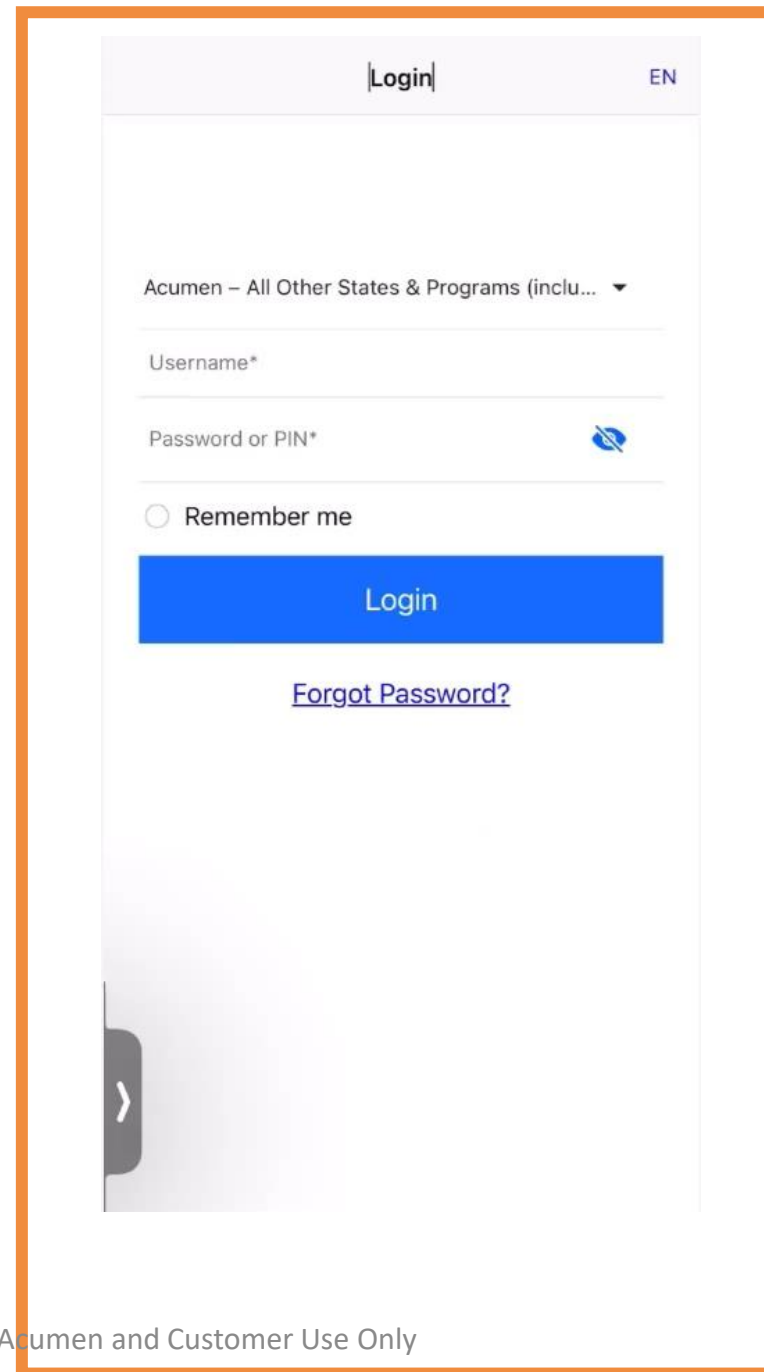
- Client PIN or Password

Alert
EVV Confirmed. Manual verification will be required prior to approval

Confirm **2**

Mobile App Video

Clock in and Out Using Portal Signoff Option

A screenshot of the Acumen mobile app login screen, framed by an orange border. The screen has a white background. At the top, there is a header bar with the word "Login" on the left and "EN" on the right. Below the header, there is a dropdown menu showing "Acumen - All Other States & Programs (inclu..." with a downward arrow. Underneath the dropdown are two input fields: "Username*" and "Password or PIN*", each with a small blue eye icon to its right. Below the password field is a radio button labeled "Remember me". A large blue button with the word "Login" in white text is positioned below the radio button. Underneath the button is a link that says "Forgot Password?". At the bottom left of the screen, there is a grey tab with a white right-pointing chevron symbol.

Proprietary: For Acumen and Customer Use Only

Mobile App Offline Mode

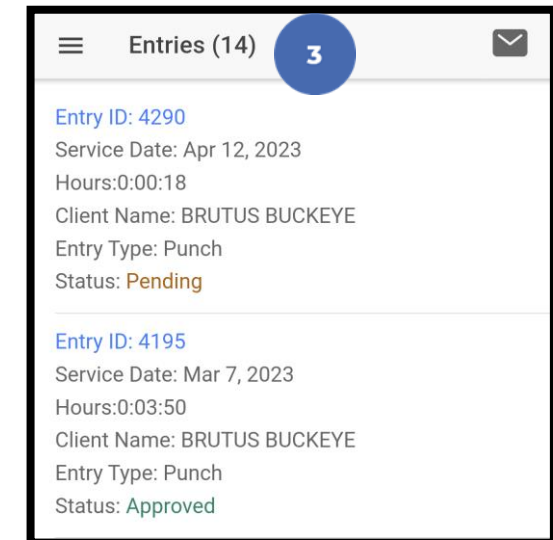
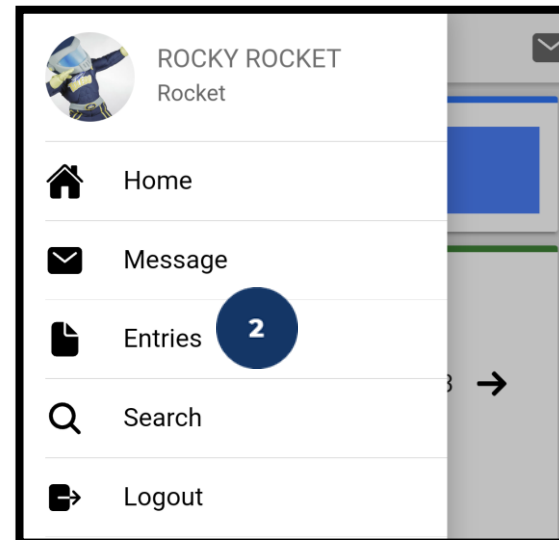
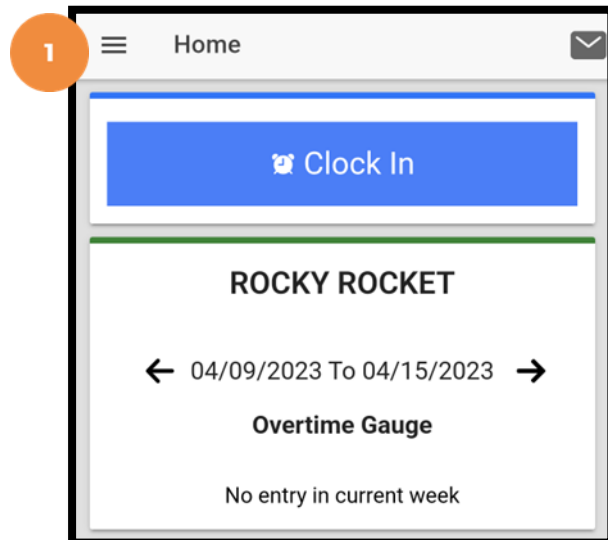


- Offline mode allows the employee to use the mobile app on a **registered device** when the device is not connected to the internet or loses connection while the app is in use
 - ✓ **Please note:** A device is registered automatically the first time the user logs into the mobile app while connected to a cellular network or internet
 - ✓ A user can only have one registered device
- Useful when there is limited or no cellular or Wi-Fi 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

***Please note:** Punches cannot be edited in the mobile app. Please edit the punch via the web portal.

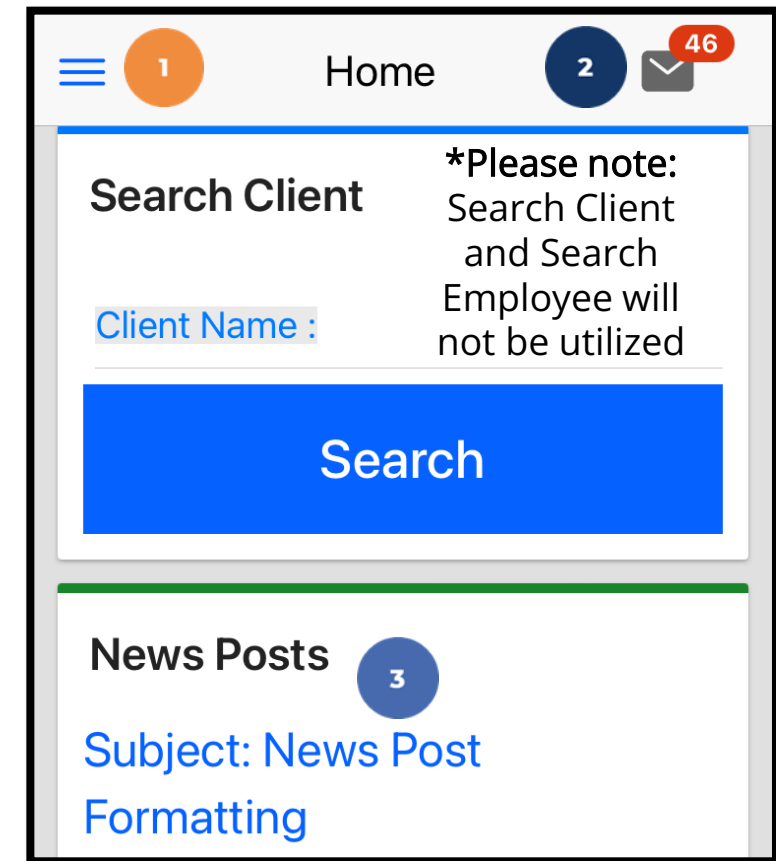


Employer Mobile App

Dashboard

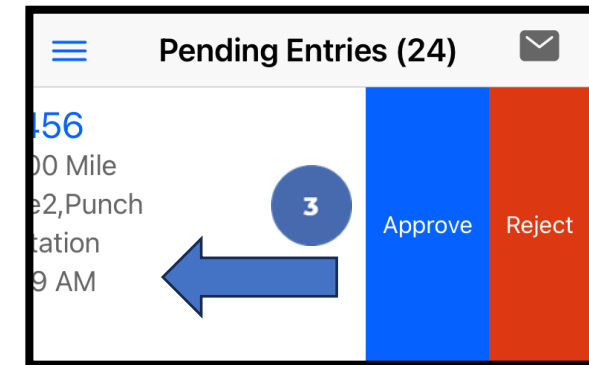
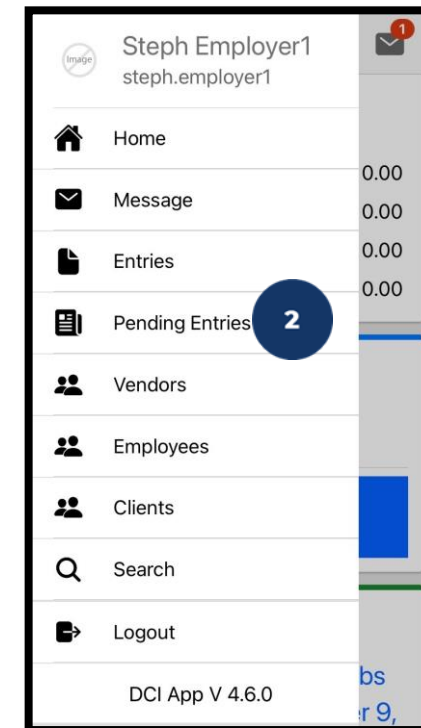
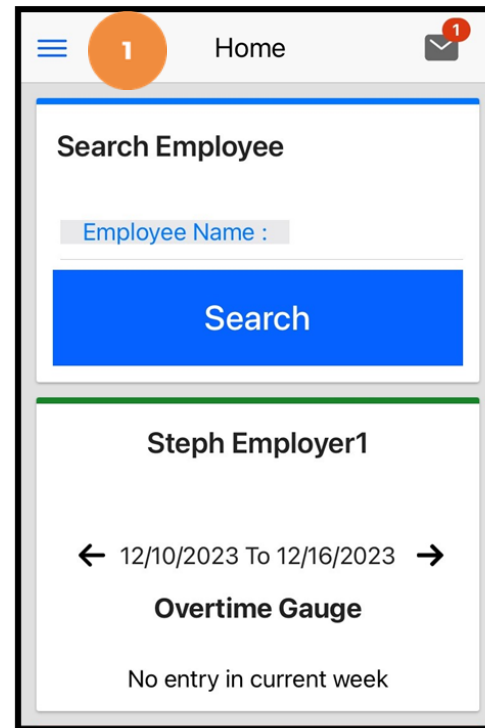
After logging in, the Dashboard or home page, displays.

1. Click the **Menu** in the top left corner of the screen to access all available submenu items
2. Click the envelope icon to access the messaging module
 - ✓ View and send secure messages within DCI
3. Scroll down to view News Posts
 - ✓ Important information from the program
 - ✓ News Posts may also display as splash screens which show immediately after log-in. Read and click **OK** to acknowledge.



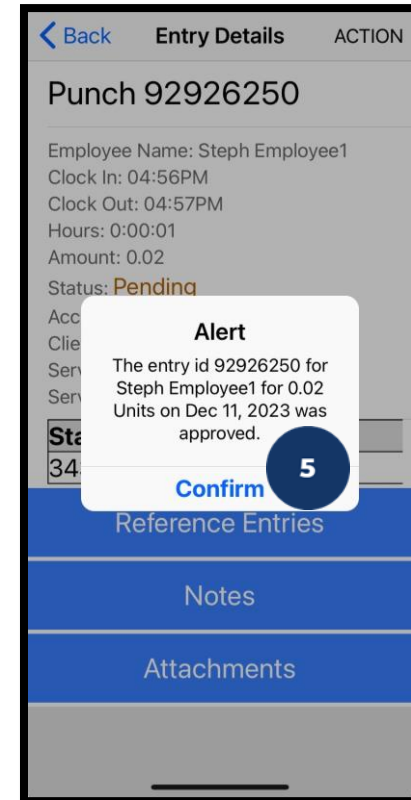
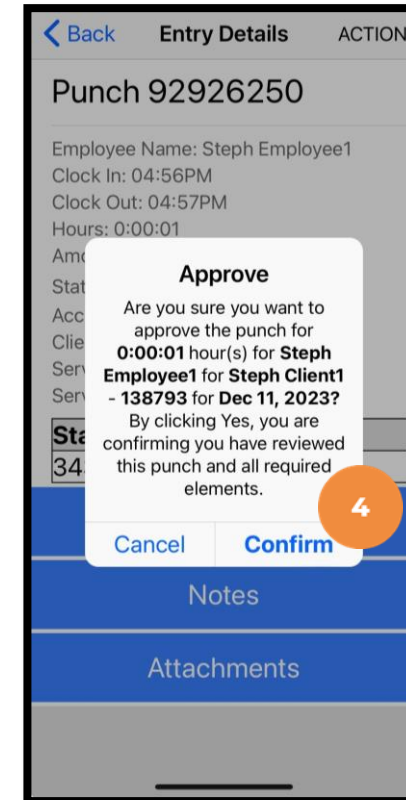
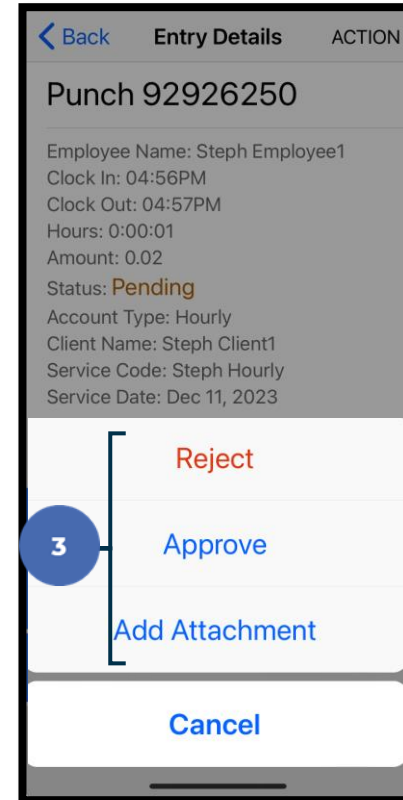
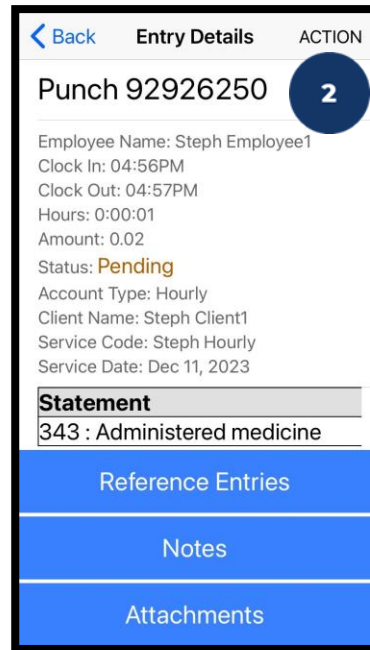
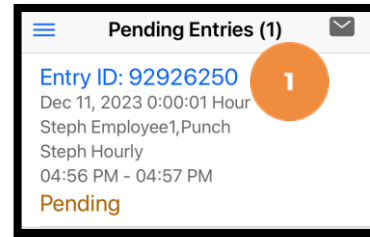
Review & Approve Entries

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.)

1. Alternatively, click the blue entry ID hyperlink to open the entry details.
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

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

Username*

Password or PIN* 

☐ Remember me

Login

[Forgot Password?](#)

Proprietary: For Acumen and Customer Use Only

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 & enters vendor payments
- 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](https://acumen.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



The screenshot shows the login page for the DCI Web Portal. At the top, a blue box with a white '1' contains the URL **acumen.dcisoftware.com**. On the right, a language drop-down menu with a blue '2' shows 'English' selected, with other options like 'عربي', '中文', 'Русский', 'Soomaali', 'Español', and 'Tiếng Việt'. The main sign-in form has a title 'Sign In'. It includes a 'Username' field with a blue '3', a 'Password' field with a blue '3', a 'Remember me' checkbox, and a 'Forgot your password?' link with an orange '4'. A blue 'Sign In' button with a dark blue '5' is at the bottom. Below the button is an 'Or' separator and a 'Create a profile' link.

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

Profile Settings

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

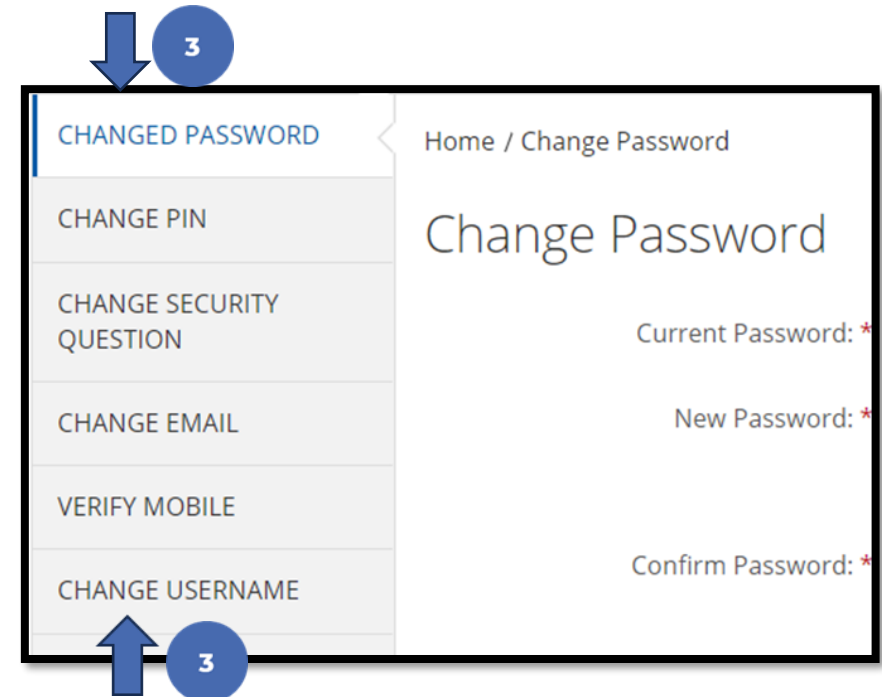
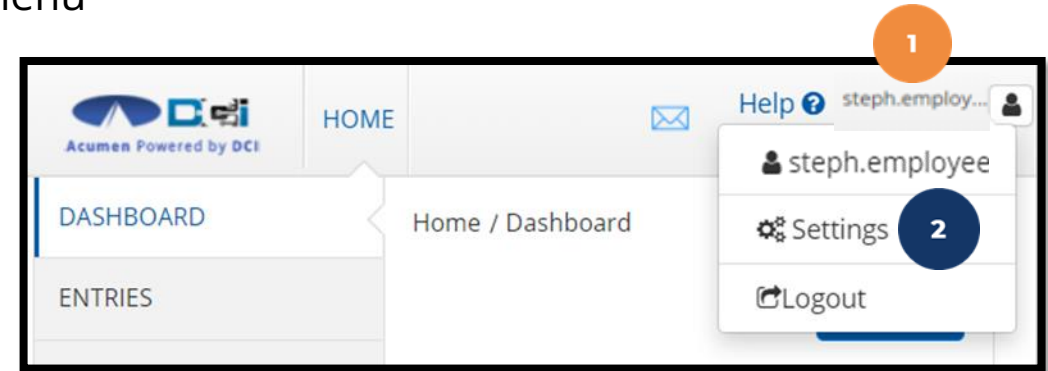


1. Click the **username** in the top right corner of the main menu

2. Click **Settings**

3. Select a submenu tab to update:

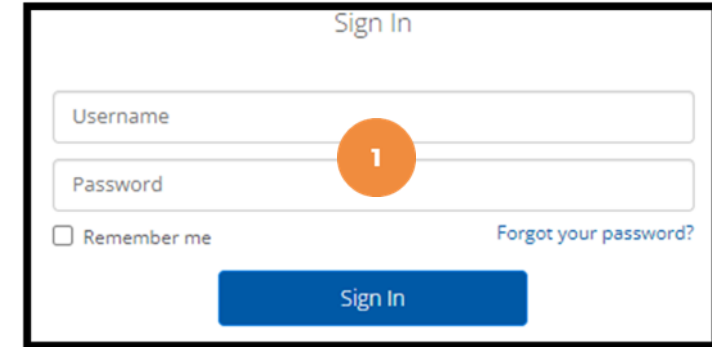
- Change Password – Used for login
- Change PIN – A number that can be used instead of a password when logging into the mobile app. *Required for employees if using Phone EVV IVR.*
- Change Security Question
- Change Email – A valid and correct email address is required for password recovery
- Verify 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



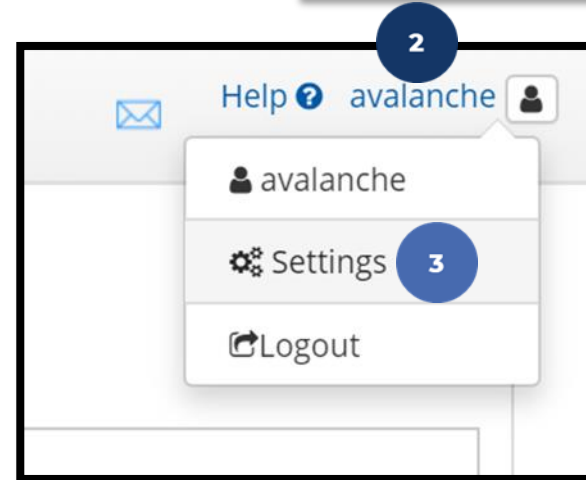
Sign In

Username 1

Password

☐ Remember me [Forgot your password?](#)

Sign In

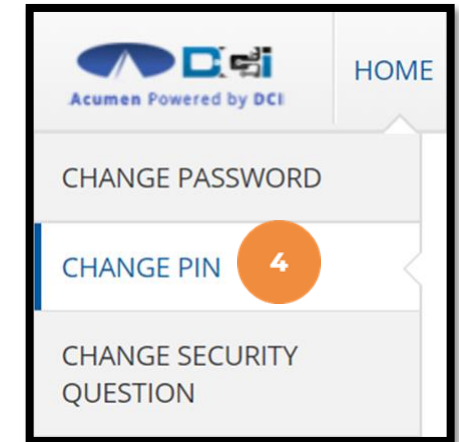


Help ? avalanche 2

avalanche

Settings 3

Logout



HOME

CHANGE PASSWORD

CHANGE PIN 4

CHANGE SECURITY QUESTION



Password: * Please enter password 5

Cancel Verify 6

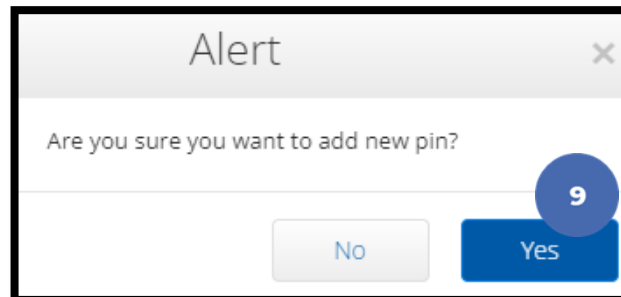
Add / Change PIN (cont.)

- Complete the New Pin field and retype the pin in the Confirm Pin field
- Click the blue **Change Pin** button
- Select **Yes** to confirm the pin change
- A green bar stating “Pin Changed Successfully!” appears



The screenshot shows a web form for changing a PIN. It has two input fields: "New Pin: *" and "Confirm Pin: *". Both fields contain the placeholder text "Please enter New Pin" and "Please Confirm Pin" respectively. An orange 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



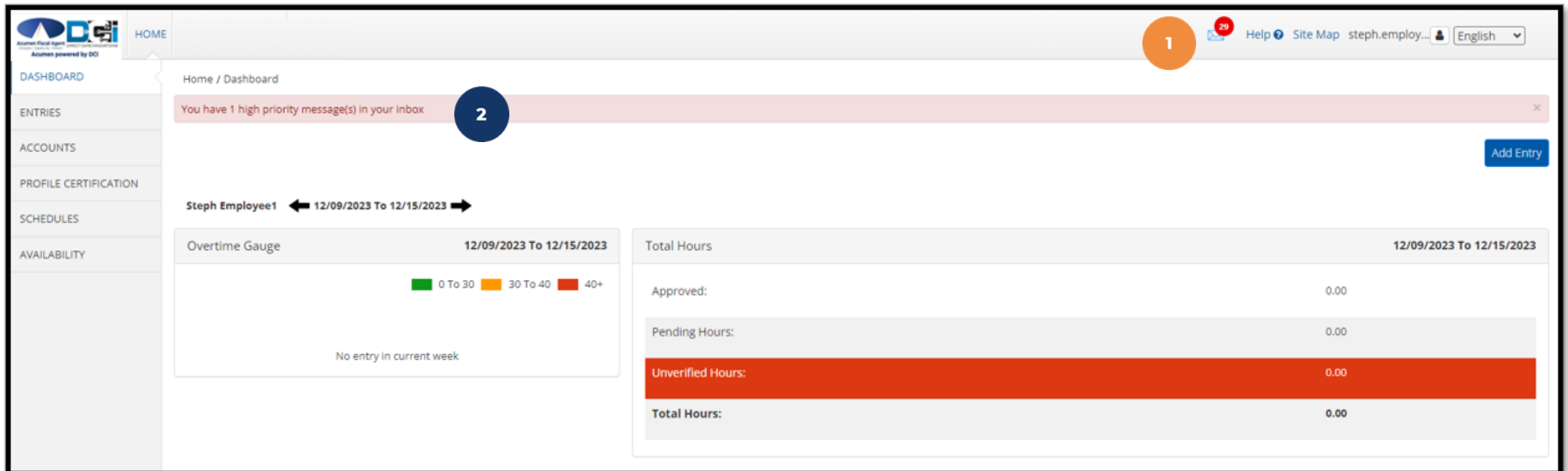
The screenshot shows a confirmation alert dialog box titled "Alert". It contains the text "Are you sure you want to add new pin?". At the bottom are two buttons: a grey "No" button and a blue "Yes" button. A blue circle with the number 9 is positioned over the "Yes" button.



The screenshot shows a green success message bar with the text "Pin Changed Successfully!". An orange circle with the number 10 is positioned at the end of the bar.

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.



HOME

Acumen Fiscal Agent
Acumen powered by DCI

DASHBOARD

ENTRIES

ACCOUNTS

PROFILE CERTIFICATION

SCHEDULES

AVAILABILITY

Home / Dashboard

You have 1 high priority message(s) in your inbox

Steph Employee1 12/09/2023 To 12/15/2023

Overtime Gauge 12/09/2023 To 12/15/2023

0 To 30 30 To 40 40+

No entry in current week

Total Hours 12/09/2023 To 12/15/2023

| | |
|-------------------|------|
| Approved: | 0.00 |
| Pending Hours: | 0.00 |
| Unverified Hours: | 0.00 |
| Total Hours: | 0.00 |

Add Entry

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 7 out of 7 records

| <input type="checkbox"/> | ★ | Attachments | From | Subject | Date/Time | Action |
|--------------------------|---|---|-------------|-----------------------|---------------------|---|
| <input type="checkbox"/> | |  | DCI Support | Account Statement | 07:42 AM |   |
| <input type="checkbox"/> | ★ | | DCI Support | Pin Added | 06/04/2024 03:28 PM |   |
| <input type="checkbox"/> | ★ | | DCI Support | User Profile Unlocked | 12/05/2023 02:53 PM |   |
| <input type="checkbox"/> | ★ | | DCI Support | User Locked Out | 12/05/2023 02:48 PM |   |

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 | Account Statement | 07:42 AM | |

Notes

Attachments

2

| <input type="checkbox"/> | Date | File Name | File Type | File Size | Added By | Download | Status |
|--------------------------|--------------|-----------------------|-----------|-----------|---------------------------------|----------|--------|
| <input type="checkbox"/> | Aug 27, 2024 | Account Statement.pdf | | 82.16 KB | Stephanie Smith | | Active |

3

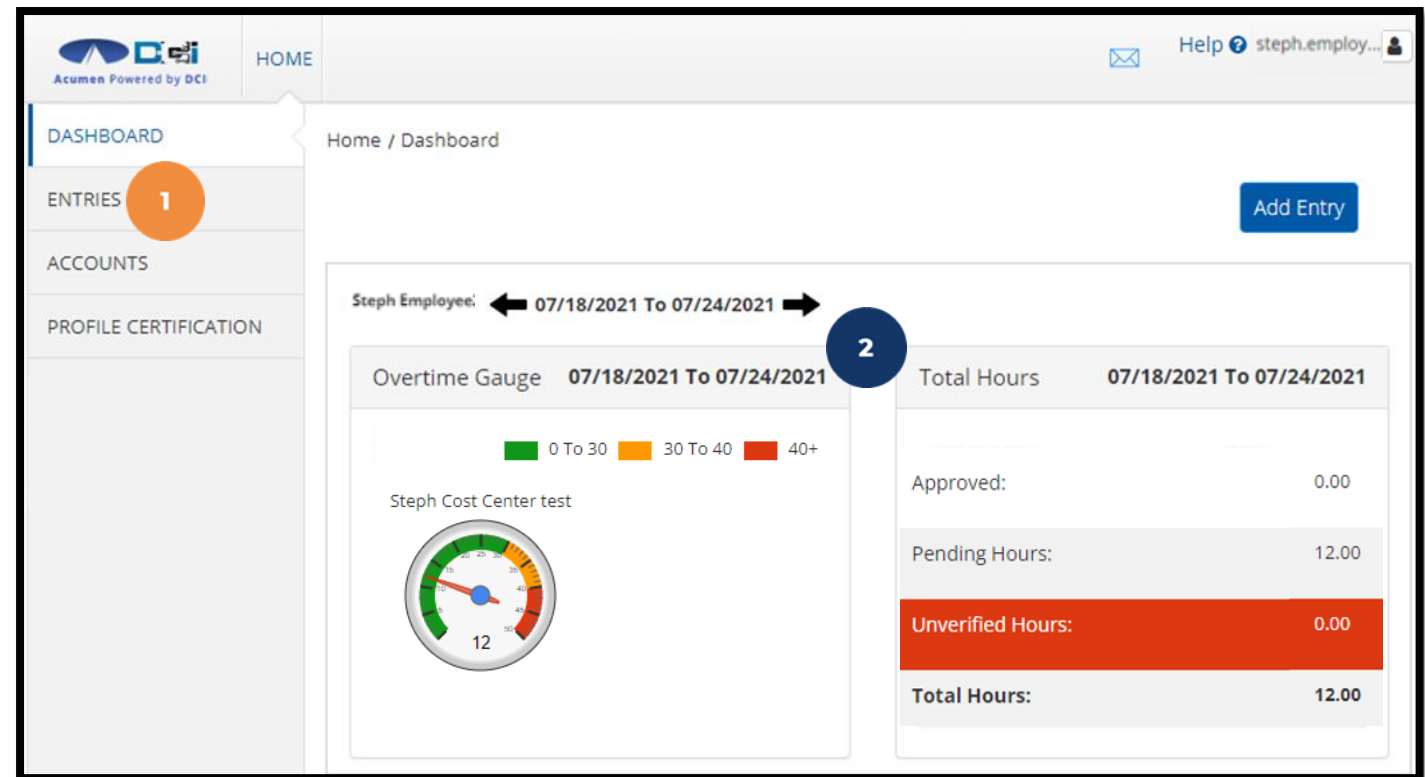
Employee Web Portal

***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



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 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.



Sign In

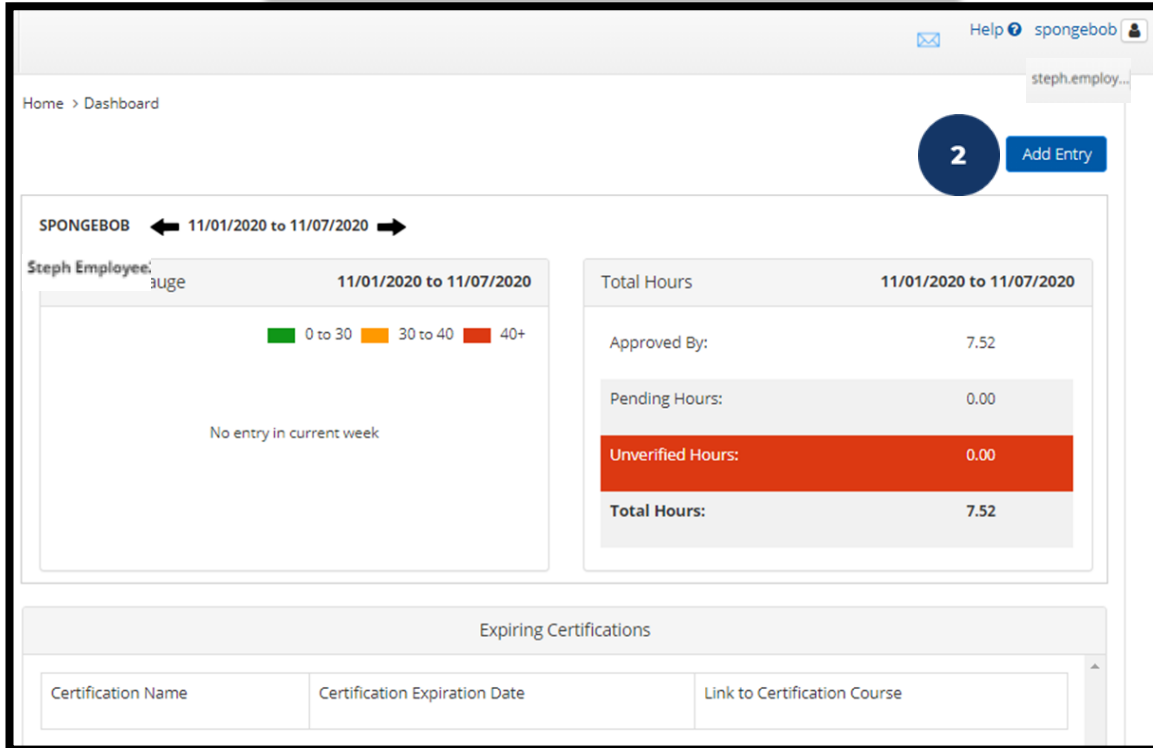
Username

Password

☐ Remember me [Forgot your password?](#)

Sign In

A red circle with the number 1 is placed over the Password field.



Home > Dashboard

Help spongebob

steph.employ...

2 Add Entry

SPONGEBOB ← 11/01/2020 to 11/07/2020 →

Steph Employee: auge 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

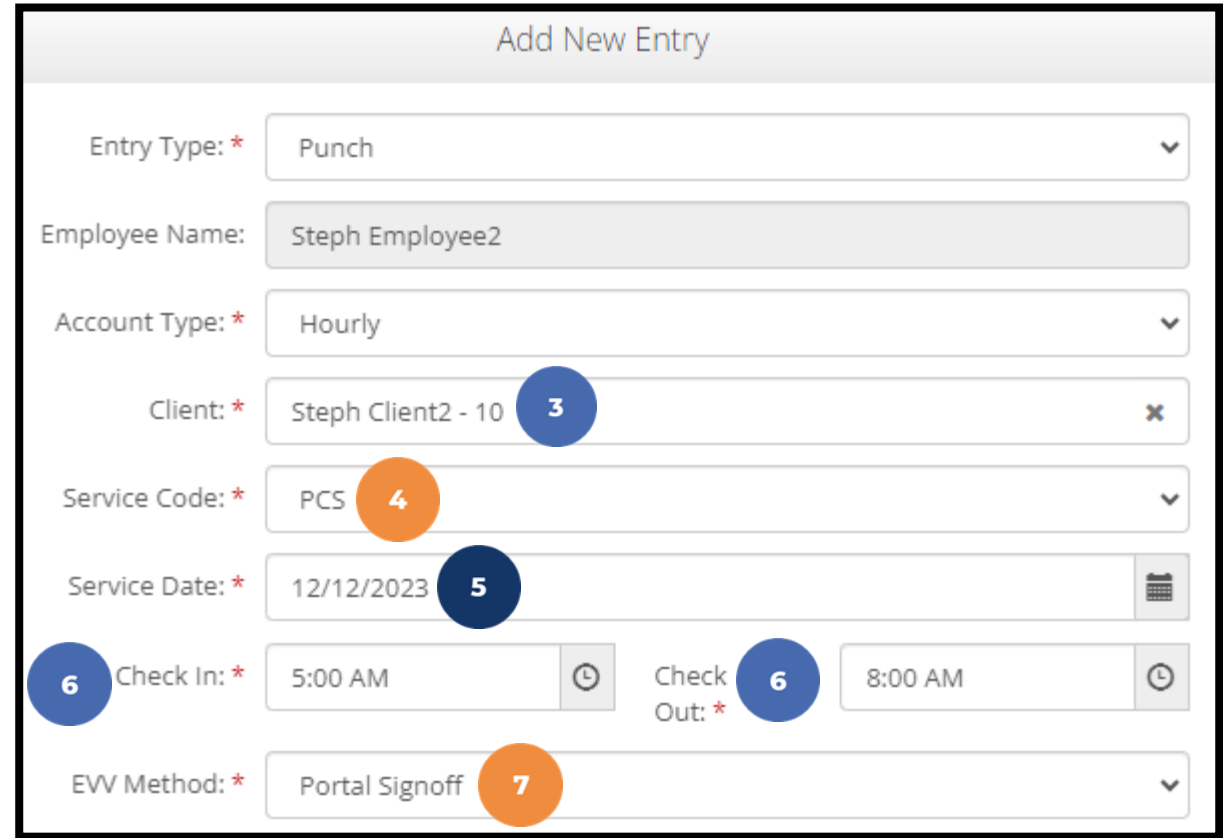
| | |
|-------------------|------|
| Approved By: | 7.52 |
| Pending Hours: | 0.00 |
| Unverified Hours: | 0.00 |
| Total Hours: | 7.52 |

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 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)

Add New Entry (cont.)


14

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. Click **Save**
13. Click **Yes** to submit

The screenshot shows a web form for adding a new entry. At the top, there is a 'Check Out Date' field with the value '06/11/2024'. Below it is an 'Add Reason Codes' field with a red asterisk, containing a dropdown menu with 'Forgot device' selected. To the right of this dropdown is a blue circle with the number 8. Below the reason codes is an 'Add Reason Code Note' field with a red asterisk, containing the placeholder text 'Add Reason Code Note'. To the right of this field is a blue circle with the number 9. Below that is a 'Notes' field with the placeholder text 'Add Notes for Punch'. To the right of this field is an orange circle with the number 10. Below the notes is an 'Attachment' section with a 'Choose File' button. To the right of this button is a blue circle with the number 11. At the bottom right of the form are 'Cancel' and 'Save' buttons. To the right of the 'Save' button is a blue circle with the number 12. An 'Alert' dialog box is overlaid on the bottom half of the form. It has a title bar 'Alert' with a close button. The main text of the alert says: 'Are you sure you want to add a new punch for 03:00 hour(s) for Steph Client2 - 10 for Dec 12, 2023?'. At the bottom of the alert are 'No' and 'Yes' buttons. To the right of the 'Yes' button is an orange circle with the number 13.

Web Portal Video

Employee Adds (Historical) Entry



Acumen Powered by DCI

Sign In

Username

I

Password

☐ Remember me

[Forgot your password?](#)

Sign In

Or

[Create a profile](#)

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

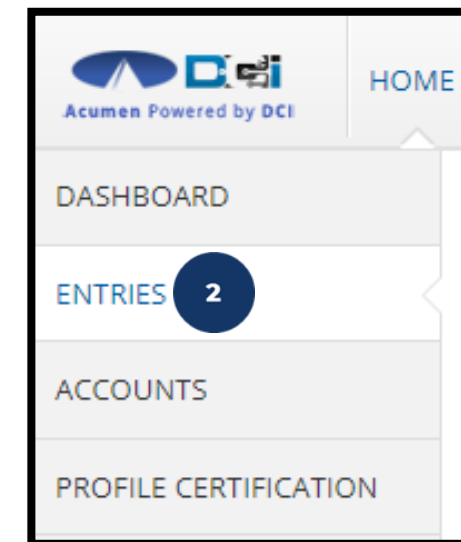
Sign In

Username

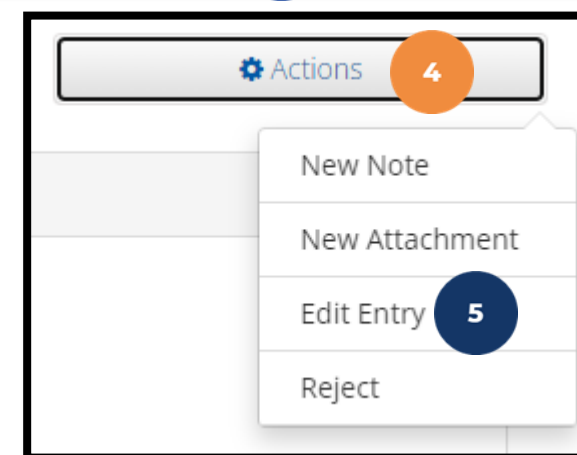
Password

☐ 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 |

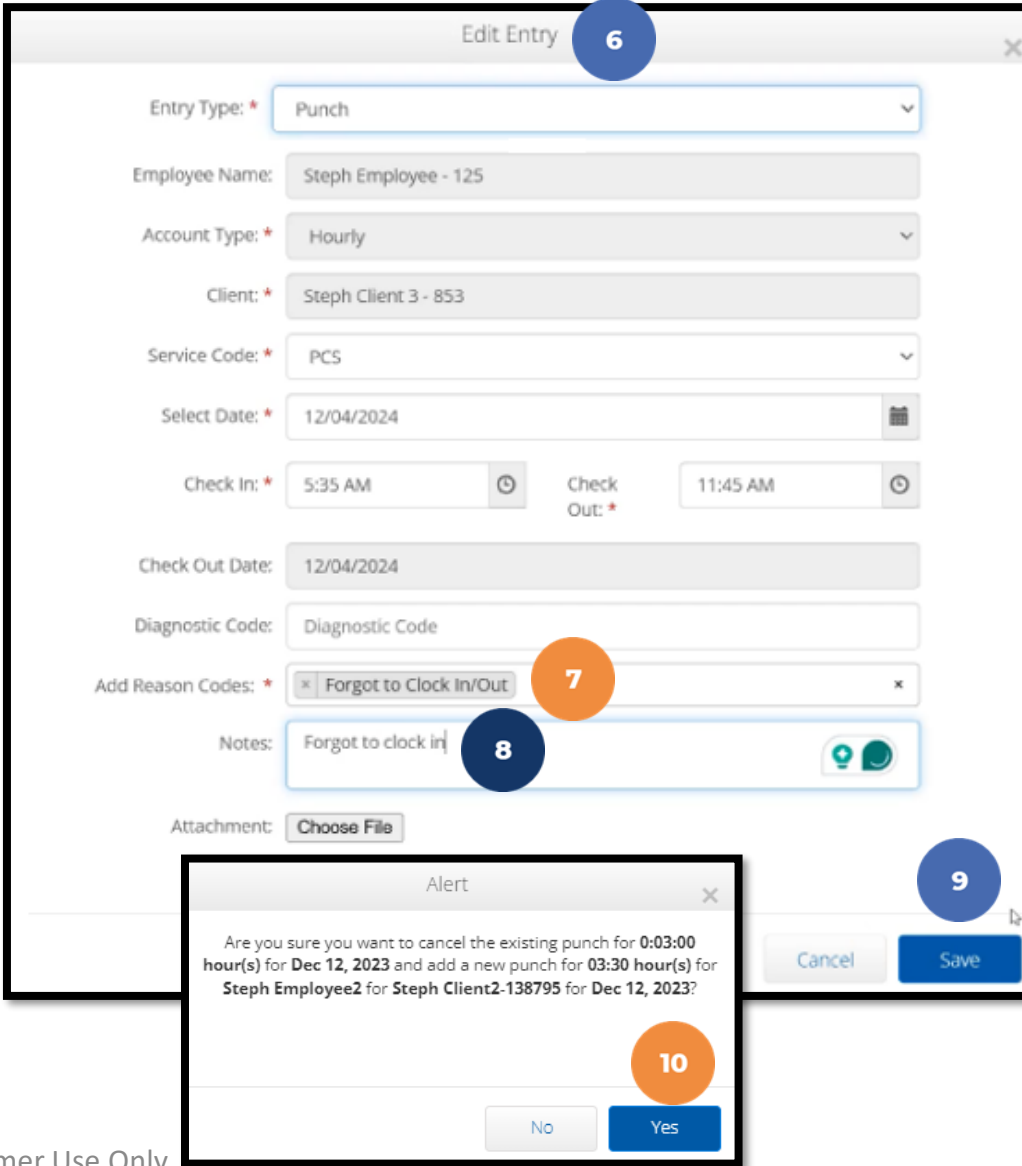


Edit Entry (cont.)

***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 displays the 'Edit Entry' form and an 'Alert' dialog box. The 'Edit Entry' form is titled 'Edit Entry' and contains the following fields:

- Entry Type: * Punch
- Employee Name: Steph Employee - 125
- Account Type: * Hourly
- Client: * Steph Client 3 - 853
- Service Code: * PCS
- Select Date: * 12/04/2024
- Check In: * 5:35 AM
- Check Out: * 11:45 AM
- Check Out Date: 12/04/2024
- Diagnostic Code: Diagnostic Code
- Add Reason Codes: * Forgot to Clock In/Out
- Notes: Forgot to clock in
- Attachment: Choose File


The 'Alert' dialog box is titled 'Alert' and contains the following text:

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?

The dialog box has two buttons: 'No' and 'Yes'.

Web Portal Video

Employee Edits (Historical) Entry



Sign In

☐ Remember me [Forgot your password?](#)

Or

[Create a profile](#)

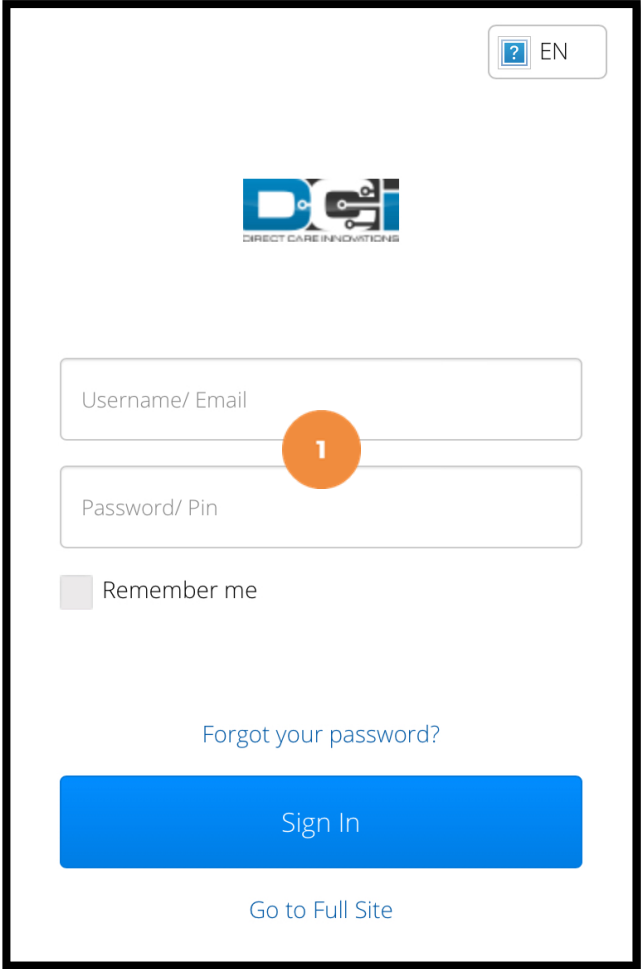
Proprietary: For Acumen and Customer Use Only

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 Web



EN

DCI
DIRECT CARE INNOVATIONS

Username/ Email

1

Password/ Pin

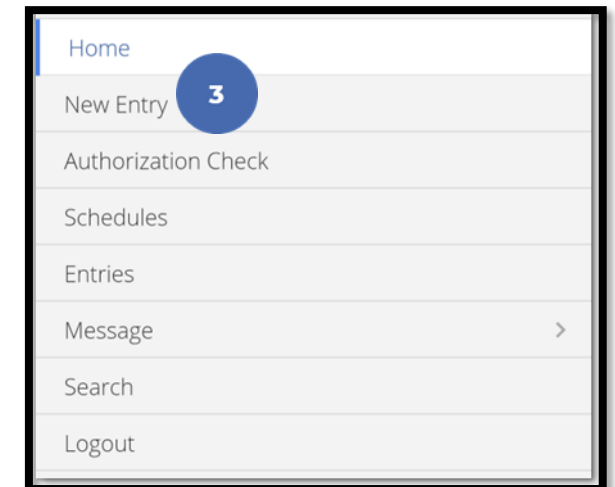
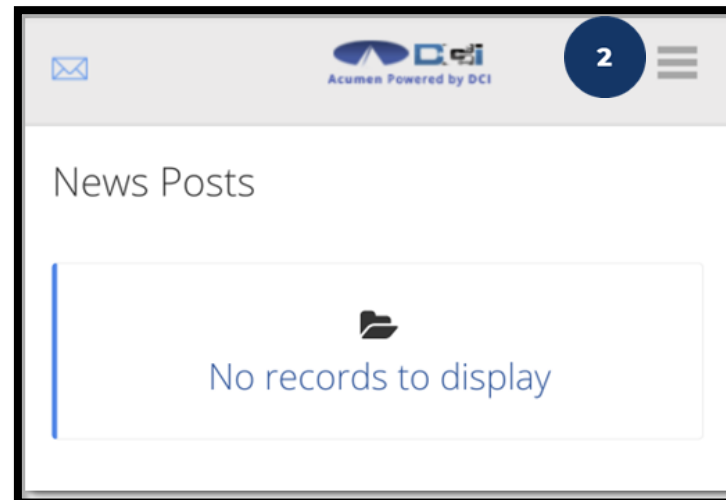
☐ Remember me

[Forgot your password?](#)

Sign In

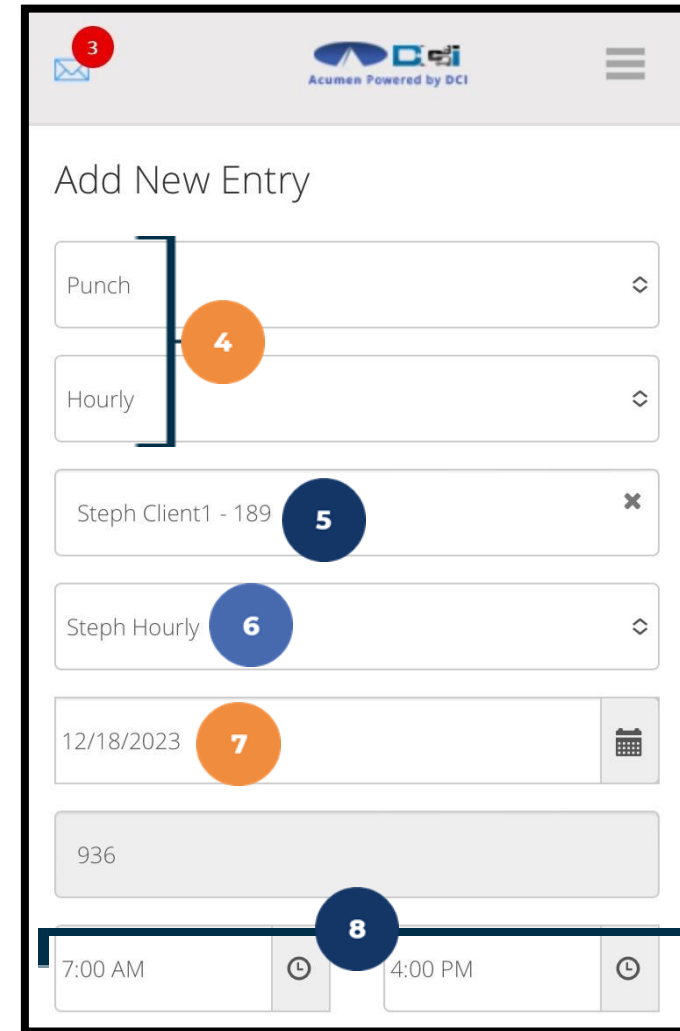
[Go to Full Site](#)

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.)

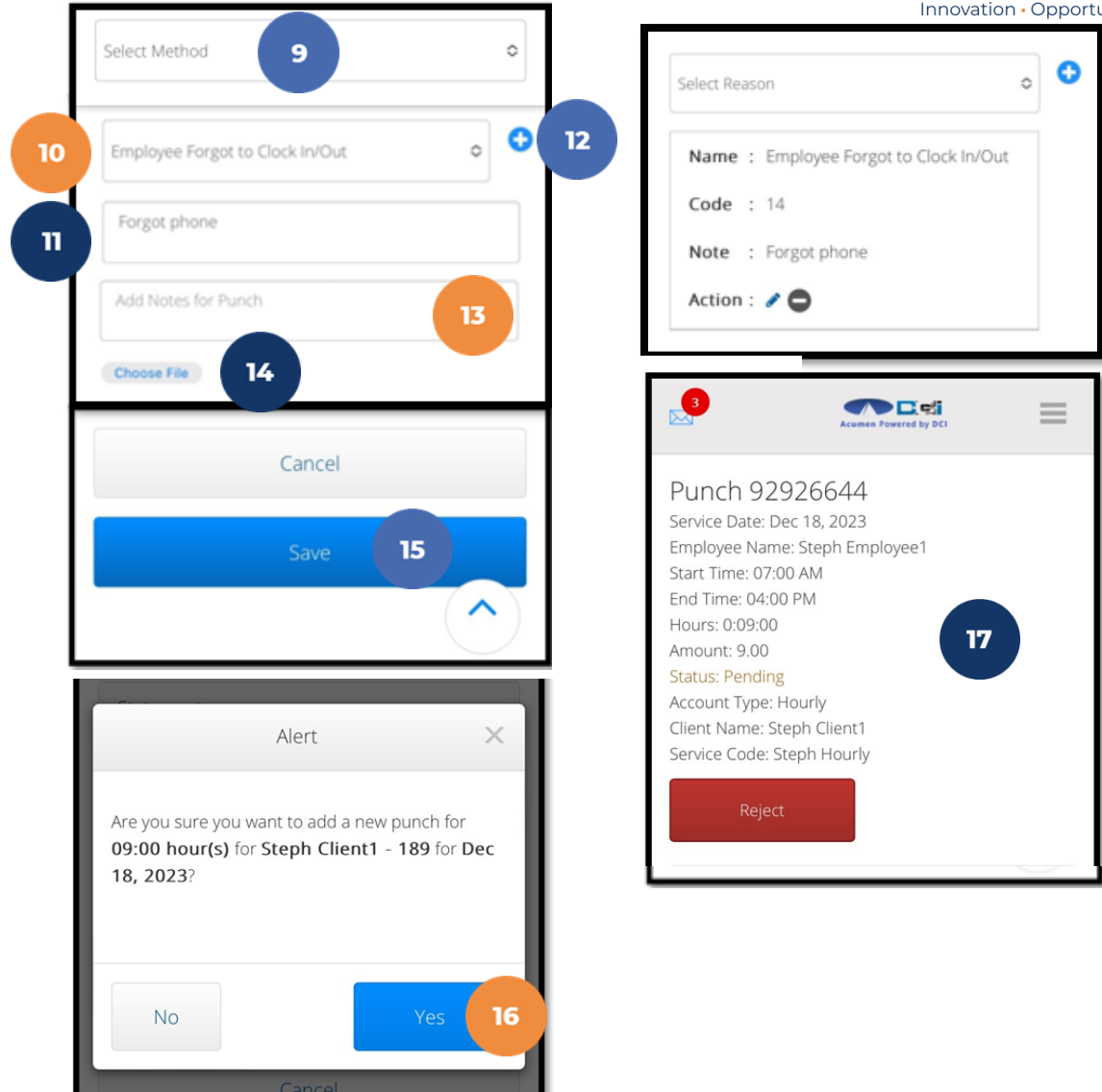
4. The first two fields are prefilled
5. Type a minimum of three characters to generate results and select the Client's name from the list
6. Select the Service Code from the drop-down
7. Select the Service Date
8. Enter the Check In (start) and Check Out (end) times



The image shows a mobile web interface for adding a new entry. The header includes a notification icon with a red circle containing the number 3, the Acumen logo, and a menu icon. The title "Add New Entry" is displayed. The form contains several fields: a "Punch" dropdown menu, an "Hourly" dropdown menu, a client selection field showing "Steph Client1 - 189" with a blue circle containing the number 5, a service code dropdown showing "Steph Hourly" with a blue circle containing the number 6, a date field showing "12/18/2023" with a calendar icon and a blue circle containing the number 7, a text input field containing "936", and a time selection field with "7:00 AM" and "4:00 PM" options, each with a clock icon and a blue circle containing the number 8. A blue bracket on the left side of the "Punch" and "Hourly" dropdowns indicates they are prefilled.

Add New Entry - Mobile Web (cont.)

9. Select Portal Signoff as the Method
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. Click **Save**
16. Click **Yes** to submit
17. The punch has been submitted



The image displays a mobile web interface for adding a new punch entry, with numbered callouts (9-17) indicating the steps:

- 9:** Select Method (Portal Signoff)
- 10:** Select a Reason Code from the drop-down list (Employee Forgot to Clock In/Out)
- 11:** Add a Reason Code Note (Forgot phone)
- 12:** Click the blue plus sign (+) to populate the reason code details
- 13:** Enter Notes for the punch (optional) (Add Notes for Punch)
- 14:** Click the **Choose File** button to select and upload Attachments (optional)
- 15:** Click **Save**
- 16:** Click **Yes** to submit
- 17:** The punch has been submitted

The interface shows the following details for the punch entry:

- Select Reason:** Employee Forgot to Clock In/Out
- Name:** Employee Forgot to Clock In/Out
- Code:** 14
- Note:** Forgot phone
- Action:** [Edit] [Delete]

The punch entry details are displayed below the form:

- Punch 92926644**
- Service Date:** Dec 18, 2023
- Employee Name:** Steph Employee1
- Start Time:** 07:00 AM
- End Time:** 04:00 PM
- Hours:** 0:09:00
- Amount:** 9.00
- Status:** Pending
- Account Type:** Hourly
- Client Name:** Steph Client1
- Service Code:** Steph Hourly

A **Reject** button is visible at the bottom of the punch entry details.

Employer Web Portal

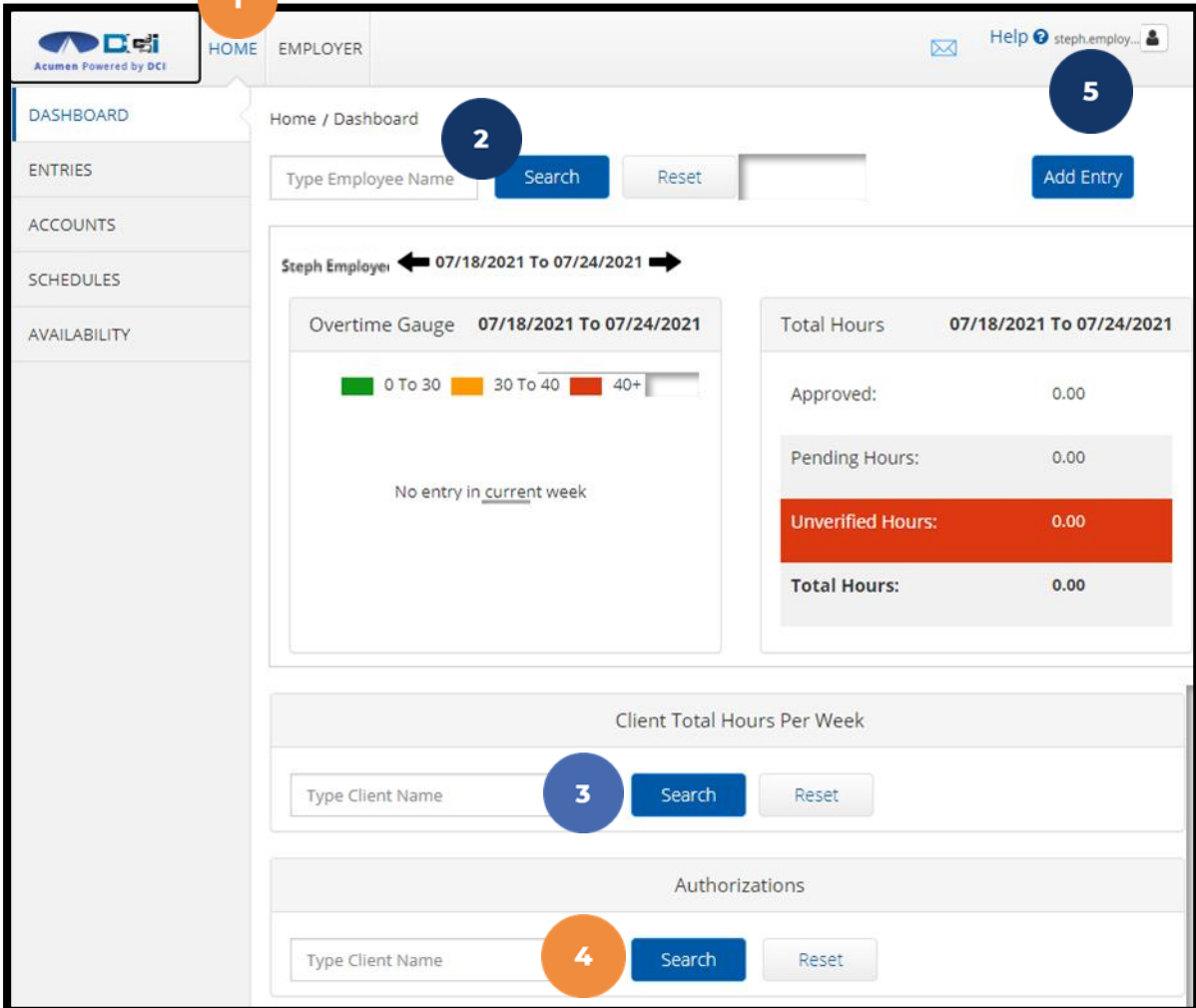
Full Site – Most compatible when accessed via computer or laptop

***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 Acumen Fiscal Agent Dashboard. The interface includes a top navigation bar with 'HOME' and 'EMPLOYER' tabs, and a left sidebar with menu items: DASHBOARD, ENTRIES, ACCOUNTS, SCHEDULES, and AVAILABILITY. The main content area displays the 'Home / Dashboard' page. It features a search bar for 'Type Employee Name' with a blue 'Search' button and a 'Reset' button. Below the search bar, there's a section for 'Steph Employee' showing an 'Overtime Gauge' and 'Total Hours' breakdown for the week of 07/18/2021 to 07/24/2021. The 'Overtime Gauge' shows 'No entry in current week'. The 'Total Hours' section lists 'Approved: 0.00', 'Pending Hours: 0.00', 'Unverified Hours: 0.00', and 'Total Hours: 0.00'. At the bottom, there are two more search sections: 'Client Total Hours Per Week' and 'Authorizations', both with 'Type Client Name' input fields, blue 'Search' buttons, and 'Reset' buttons. Numbered callouts (1-5) are placed over the interface to correspond with the steps in the list on the left.

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

1

2

3

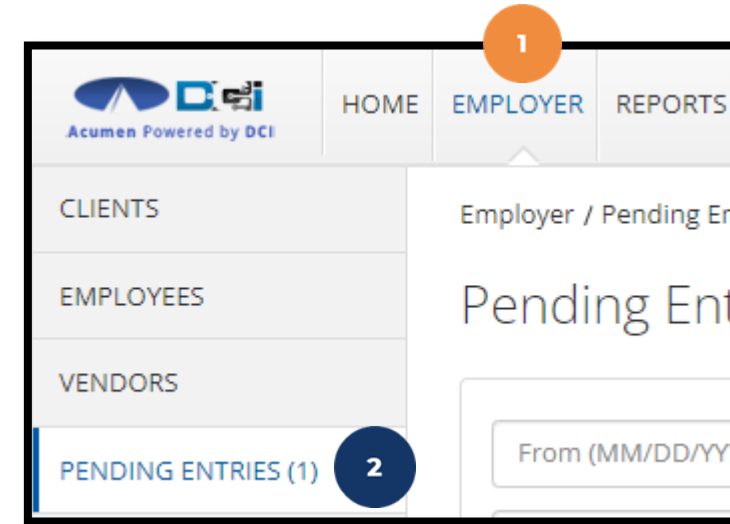
4

| 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 |

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

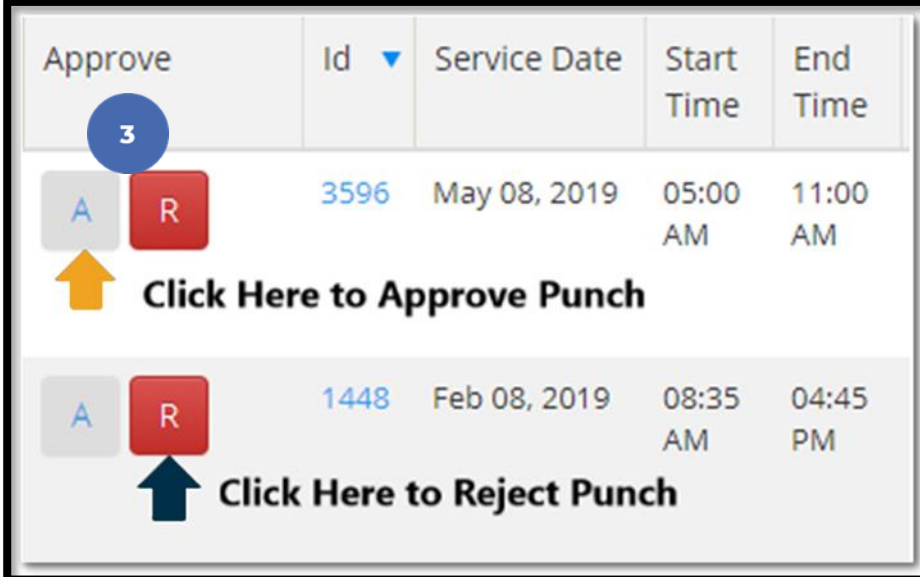
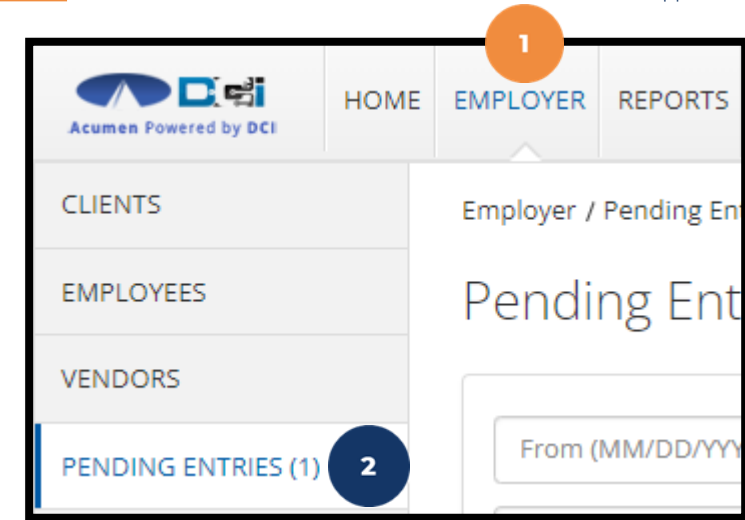
| Approve | Punch ID | Service Date | Start Time | End Time | Cost Center | Client/ Program Name | Employee/ Program Name | Service Code/Type | Amount | EVV | Needs Review |
|--|----------|--------------|------------|----------|---------------------------------|----------------------|------------------------|-------------------|---------|-----|--------------|
| <input type="checkbox"/> A <input checked="" type="checkbox"/> R | 68312 | Dec 19, 2023 | 01:06 PM | 01:10 PM | JVK Cost Center - JVKCostCenter | | | EVVRequired | 0:00:04 | No | |
| <input type="checkbox"/> A <input checked="" type="checkbox"/> R | 68310 | Dec 19, 2023 | 12:47 PM | 12:51 PM | JVK Cost Center - JVKCostCenter | | | EVVRequired | 0:00:04 | YES | |
| <input type="checkbox"/> A <input checked="" type="checkbox"/> R | 68306 | Dec 19, 2023 | 11:57 AM | 12:46 PM | Kenneth Cost Center - KEN | | | Hourly | 0:00:49 | YES | |
| <input type="checkbox"/> A <input checked="" type="checkbox"/> 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'. The first entry has Id 3596, Service Date May 08, 2019, Start Time 05:00 AM, and End Time 11:00 AM. The second entry has Id 1448, Service Date Feb 08, 2019, Start Time 08:35 AM, and End Time 04:45 PM. Both entries have 'A' (Approve) and 'R' (Reject) buttons. A red circle '3' highlights the 'A' button for the first entry. Below the first entry is a yellow arrow pointing to the 'A' button with the text 'Click Here to Approve Punch'. Below the second entry is a blue arrow pointing to the 'R' button with the text 'Click Here to Reject Punch'.

| Approve | Id | Service Date | Start Time | End Time |
|---|------|--------------|------------|----------|
|   | 3596 | May 08, 2019 | 05:00 AM | 11:00 AM |
|  Click Here to Approve Punch | | | | |
|   | 1448 | Feb 08, 2019 | 08:35 AM | 04:45 PM |
|  Click Here to Reject Punch | | | | |

Employer Web Portal Video

Manage Entries



Sign In

Username

1Password icon

Password

☐ Remember me

[Forgot your password?](#)

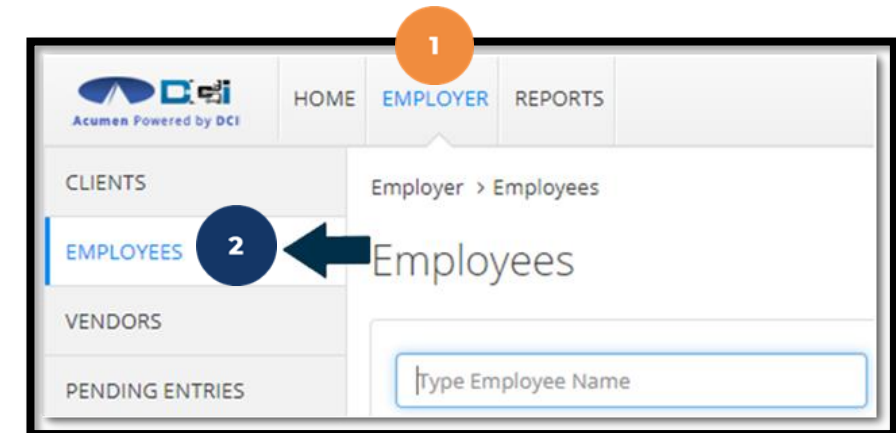
Sign In

Press the 1Password icon in your browser's toolbar to unlock



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

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 entered and approved before the submission due date

EntriesAccountsCertificationsEVV LocationsNotesCaregiver RatingsAttachmentsCustom FieldsHistory

From (MM/DD/YYYY)

To (MM/DD/YYYY)

Type Punch Id

Type Client Name

Type Service Code

Select Account Type

Select Status

Reset

Search

Entries7

Showing 13 out of 13 records

Export

| 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 |

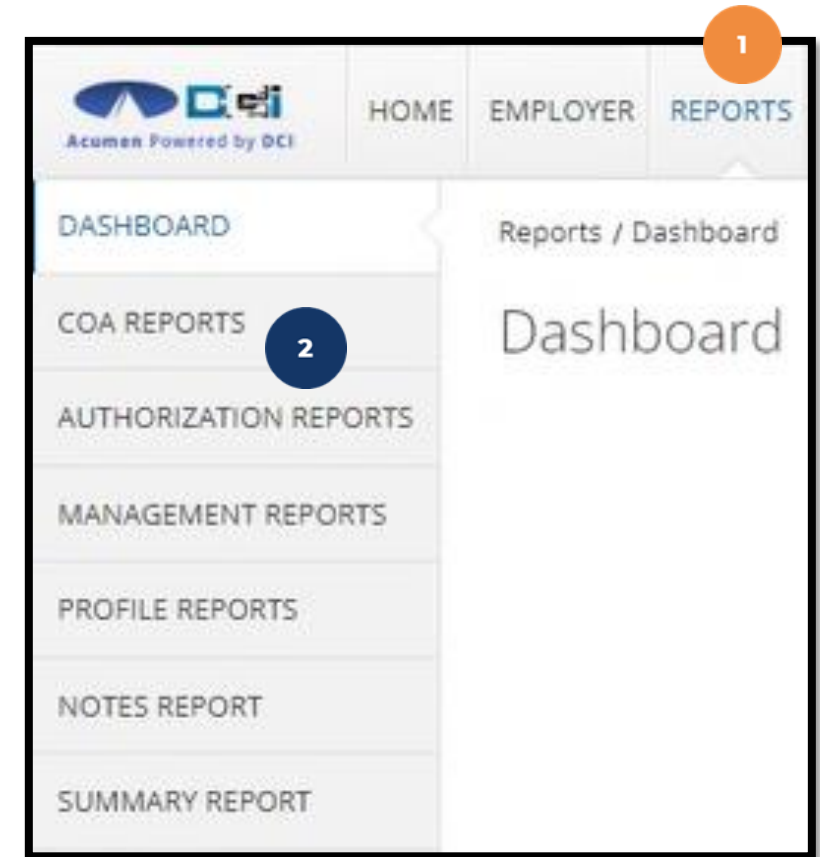
Entry Status



- **Unverified:** Entries that the Employer or Admin (someone other than the employee) enters or edits on behalf of an employee. The employee must resolve the unverified entries so the employer can review.
- **Unvalidated:** Temporary status. Entries that are waiting for the business rule validation process to complete. This process runs multiple times an hour. Moves to pending or rejected status after processes run.
- **Pending:** Entries that are awaiting review and approval by the Employer. Display on the Pending Entries page.
- **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



Phone IVR (Interactive Voice Response)

***Option when access to a mobile device
or computer is limited**

Phone EVV Basics

- Employer - Confirm the landline 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.
7. Select "none" for the clock in EVV location
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 "none" for the clock out EVV location
5. 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.



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 "none" for the clock in EVV location
13. Select "none" for the clock out EVV location
14. 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 must be present for the following final steps:

15. Hand the phone to the client/employer who presses 1 when ready
16. The client/employer reviews the punch details and presses 1 to accept or 2 to reject the entry
17. The client/employer will validate the call using the client PIN
18. The punch is created
19. 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

Proprietary: For Acumen and Customer Use Only



OSL CS Payment Schedule

- Employee time & vendor payment must be entered and approved by 11:59 PM PST on the Due NO Later Than date, even if it falls on a weekend or holiday.
- Employee time & vendor payments received after the due date will be processed in the following pay period
- All employee time & vendor payments must be entered and approved within 30 days of the date of service
- Questions? Contact Acumen customer service at (866) 496-4551 or email payroll-NV@acumen2.net

| "MONTH" refers to the month that services were provided. | MONTH | Payment Period End Date | Submissions Due NO Later Than | Direct Deposit/Check Date | "Direct Deposit/ Check Date" shows the date that payment will be issued. For those payees that have selected direct deposit or pay cards, this is also the date that funds will be available in their accounts. |
|--|-----------|-------------------------|-------------------------------|---------------------------|---|
| "Payment Period End Date" is the last day of services in the pay period. | SEPTEMBER | 09/30/24 | Tue, 10/01/24 | Tue, 10/08/24 | "Submissions Due NO Later Than" is the last date that your time sheets or payment requests can be received, or that your WTE approvals can be entered, for the pay period. |
| | OCTOBER | 10/15/24 | Wed, 10/16/24 | Wed, 10/23/24 | |
| | | 10/31/24 | Fri, 11/01/24 | Fri, 11/08/24 | |
| | NOVEMBER | 11/15/24 | Sat, 11/16/24 | Fri, 11/22/24 | |
| | | 11/30/24 | Sun, 12/01/24 | Fri, 12/06/24 | |
| | DECEMBER | 12/15/24 | Mon, 12/16/24 | Mon, 12/23/24 | |
| | | 12/31/24 | Wed, 01/01/25 | Wed, 01/08/25 | |
| | JANUARY | 01/15/25 | Thu, 01/16/25 | Thu, 01/23/25 | |
| | | 01/31/25 | Sat, 02/01/25 | Fri, 02/07/25 | |
| | FEBRUARY | 02/15/25 | Sun, 02/16/25 | Fri, 02/21/25 | |
| | | 02/28/25 | Sat, 03/01/25 | Fri, 03/07/25 | |
| | MARCH | 03/15/25 | Sun, 03/16/25 | Fri, 03/21/25 | |
| | | 03/31/25 | Tue, 04/01/25 | Tue, 04/08/25 | |
| | APRIL | 04/15/25 | Wed, 04/16/25 | Wed, 04/23/25 | |
| | | 04/30/25 | Thu, 05/01/25 | Thu, 05/08/25 | |
| | MAY | 05/15/25 | Fri, 05/16/25 | Fri, 05/23/25 | |
| | | 05/31/25 | Sun, 06/01/25 | Fri, 06/06/25 | |
| | JUNE | 06/15/25 | Mon, 06/16/25 | Mon, 06/23/25 | |
| | | 06/30/25 | Tue, 07/01/25 | Tue, 07/08/25 | |

Where to go for help?

- Utilize the website acumenfiscalagent.zendesk.com for more help

- This will give you a full list of Training Materials for DCI



Acumen phone: (866) 644-4188



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

acumenfiscalagent.zendesk.com



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



Vendor Payments & New Vendor Requests

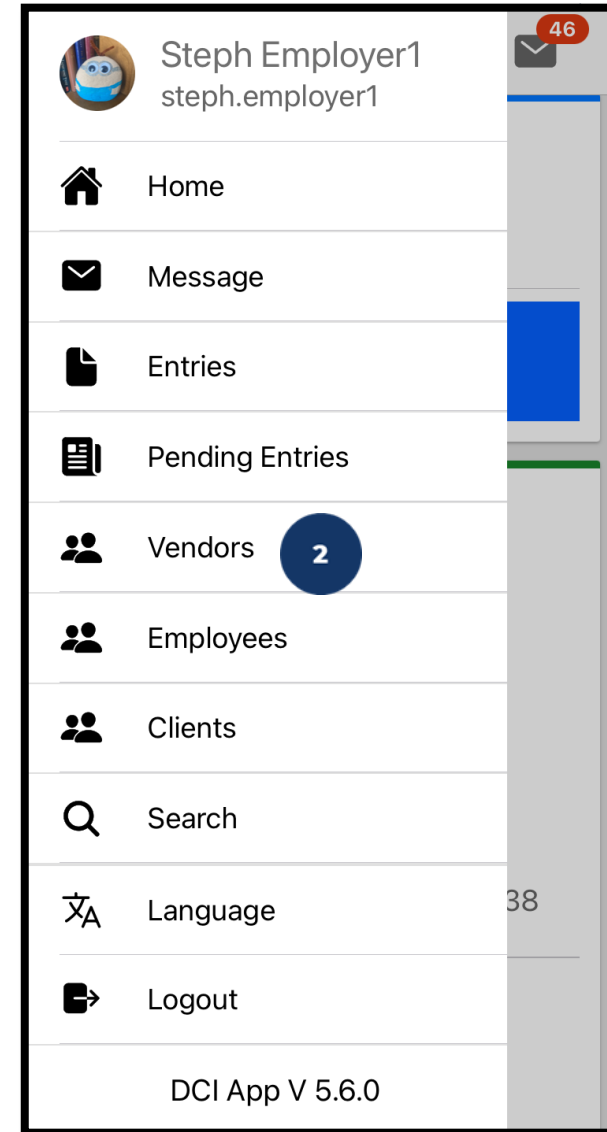
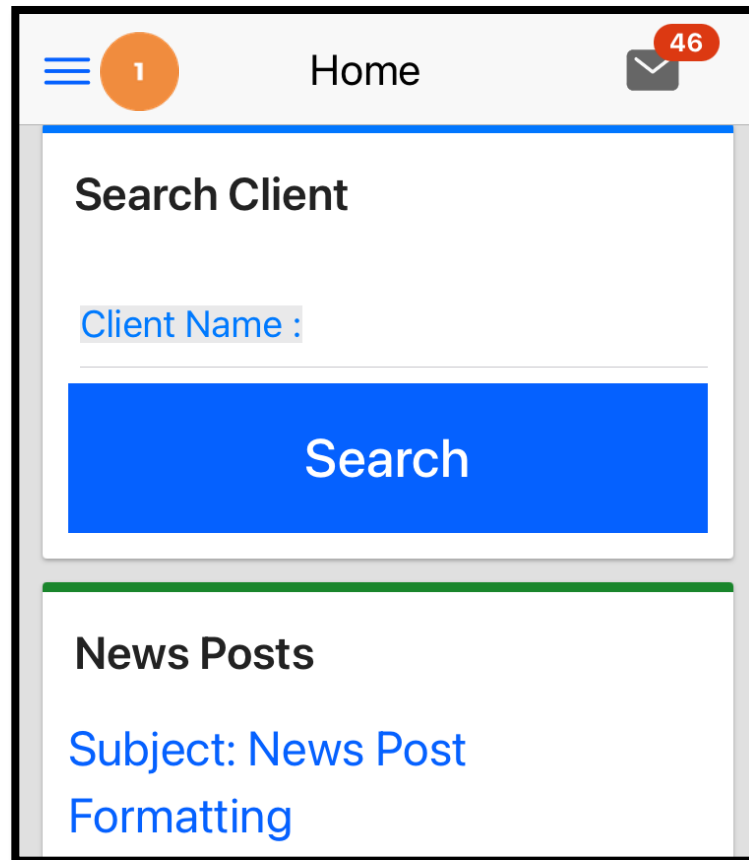
***The employer is responsible for creating these for their vendors**

Vendor Payment Entry

Mobile App

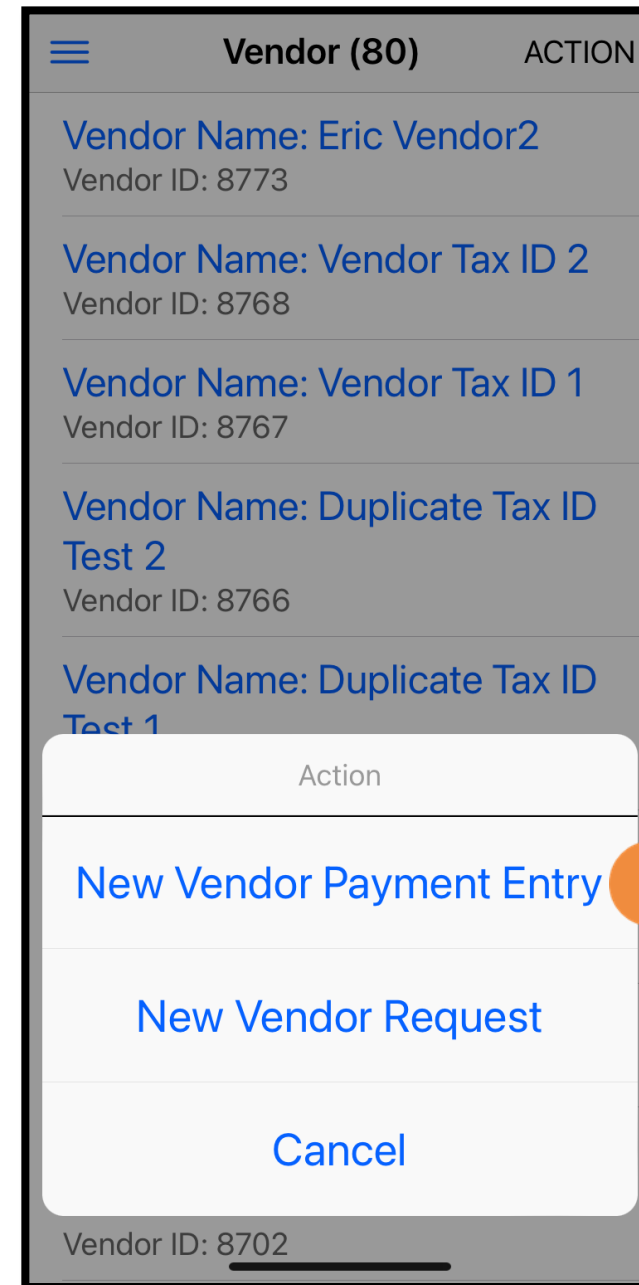
Vendor Payment

1. Click the **Menu** in the top left corner of the screen
2. Select **Vendors** on the submenu



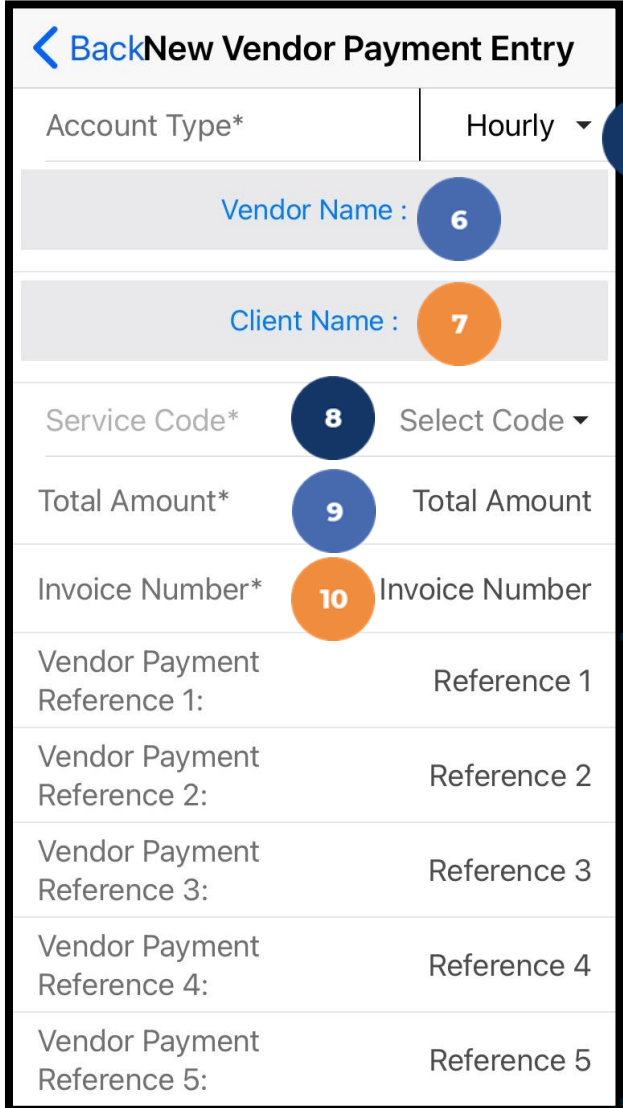
Vendor Payment

3. Click **ACTION** in the top right corner
4. Select **New Vendor Payment Entry**



Vendor Payment

5. Click the **Account Type** drop-down to select Hourly
6. Click **Vendor Name** to type and select the vendor
 - Can't find the vendor? View the New Vendor Request section in this training document.
7. Click **Client Name** to type and select the client
8. Click the **Select Code** drop-down to select the service code
 - If the appropriate service code is not available in the drop-down menu, please contact your local office or service coordinator.
9. Enter the Total Amount for the invoice for all dates of service
10. Enter the Invoice Number *along with the client's name*
11. Optionally enter any additional information in Vendor Payment Reference fields 1-5



New Vendor Payment Entry

Account Type* Hourly **5**

Vendor Name : **6**

Client Name : **7**

Service Code* **8** Select Code ▾

Total Amount* **9** Total Amount

Invoice Number* **10** Invoice Number

Vendor Payment Reference 1: Reference 1

Vendor Payment Reference 2: Reference 2

Vendor Payment Reference 3: Reference 3

Vendor Payment Reference 4: Reference 4

Vendor Payment Reference 5: Reference 5 **11**

Vendor Payment

12. Click the **calendar icon** to select the Date(s) of Service


❖ **Please note:** Multiple dates may be selected. Click the date again to unselect it.

13. Click the blue **Ok** button to confirm the selected date(s)

14. If multiple dates are selected, enter the amount for each date.

❖ **Please note:** The sum of the individual amounts must match the Total Amount of the payment (step 9)


Dates of Service* : 12 

Dates of Service* : 

< Aug 2024 >

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

13 Ok

Dates of Service* : 

1. Date: 08/18/2024

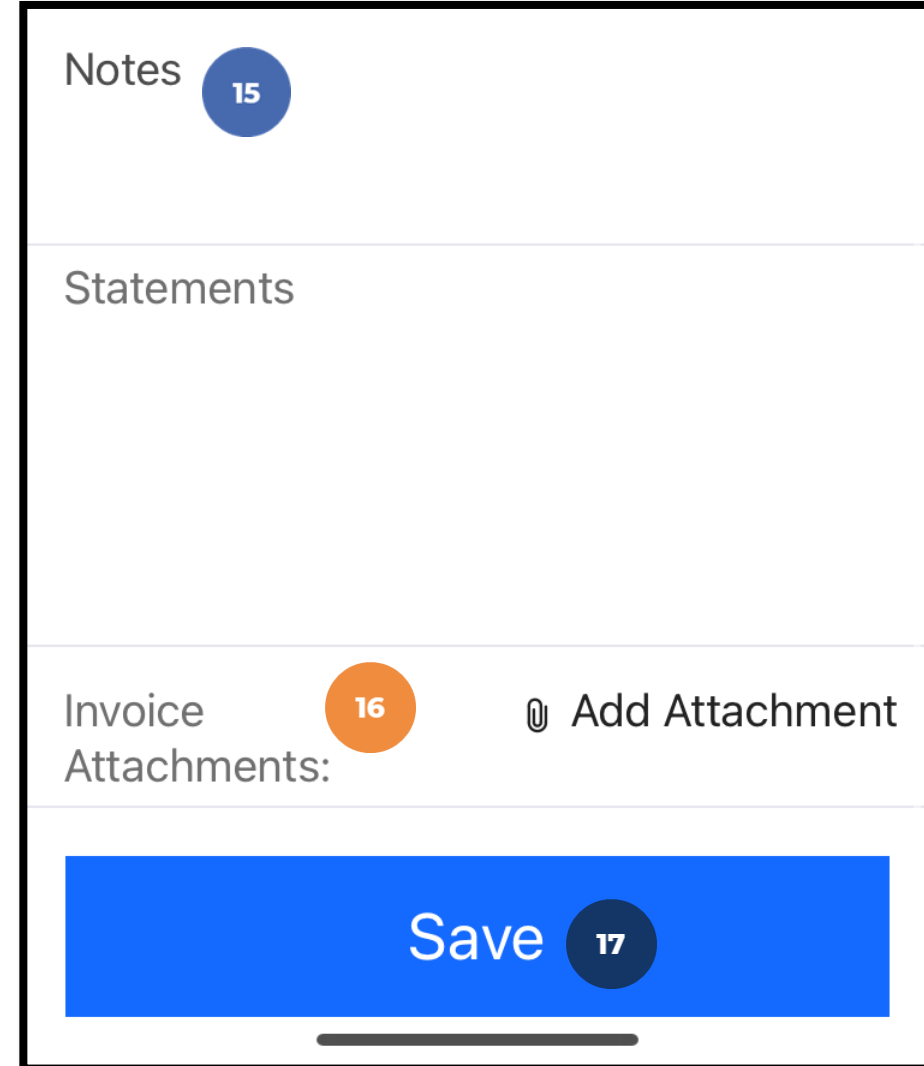
Amount* Amount 14

2. Date: 08/19/2024

Amount* Amount 14

Vendor Payment

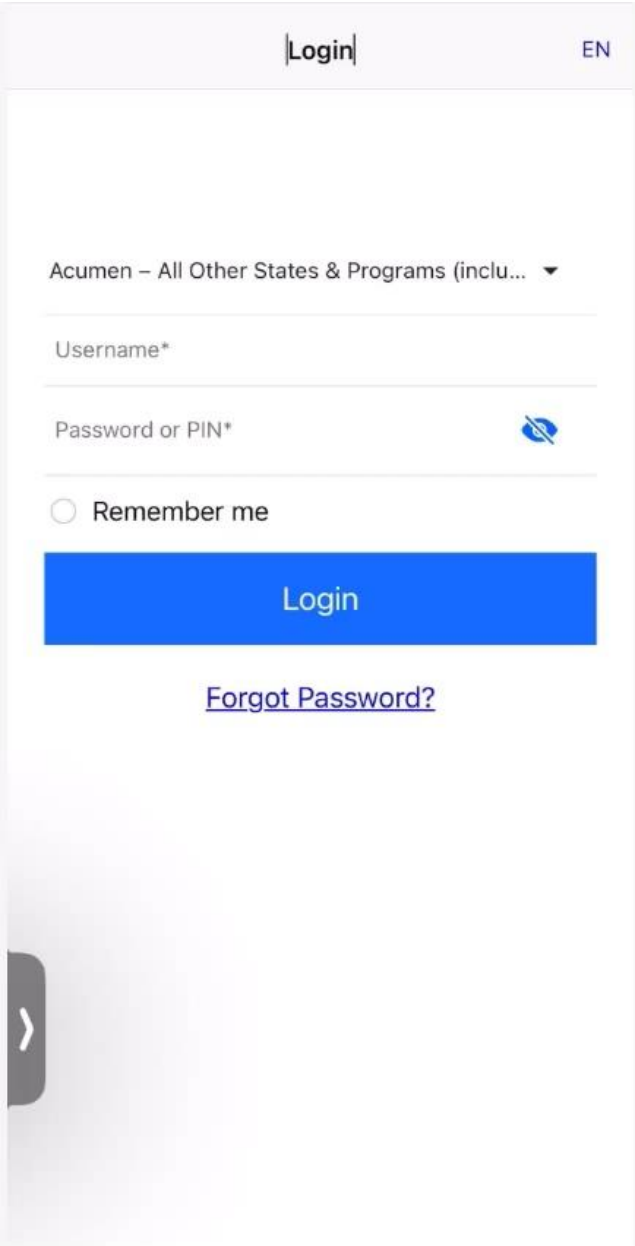
15. Optionally add Notes for the payment
16. Click **Add Attachment** to access the device camera to take a picture of the invoice
17. Click the blue **Save** button when all fields are complete



The screenshot shows a mobile application interface for entering a vendor payment. It features several sections: a 'Notes' section at the top with a blue circle containing the number 15; a 'Statements' section below it; an 'Invoice Attachments:' section with an orange circle containing the number 16 and a camera icon next to the text 'Add Attachment'; and a large blue 'Save' button at the bottom with a dark blue circle containing the number 17. The interface is clean with white backgrounds and light blue horizontal dividers.

Employer Mobile App Video

Create a Vendor Payment Entry

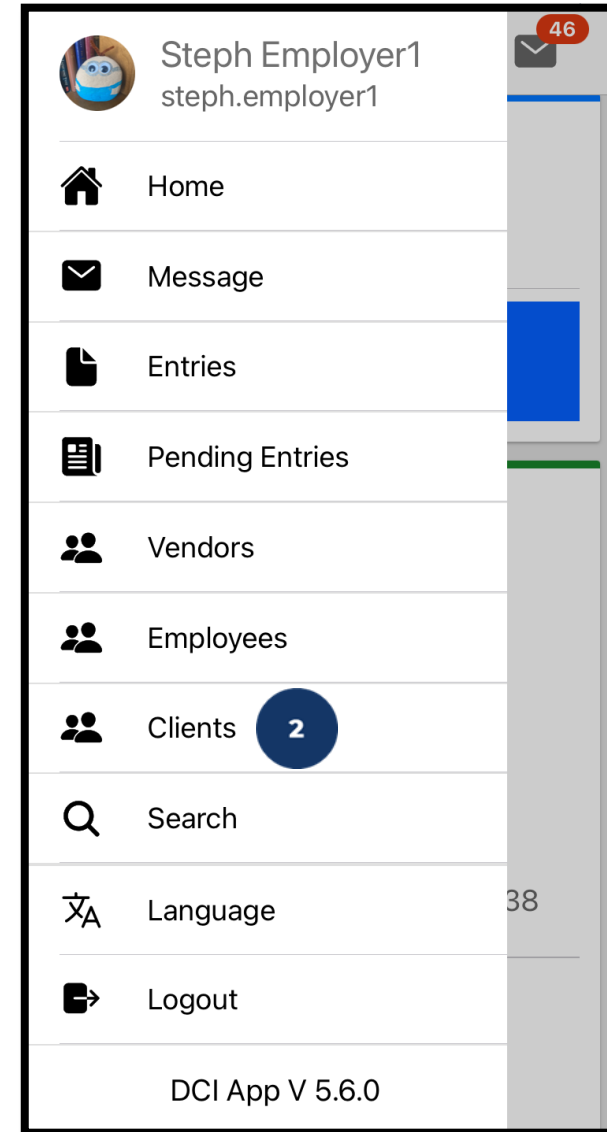
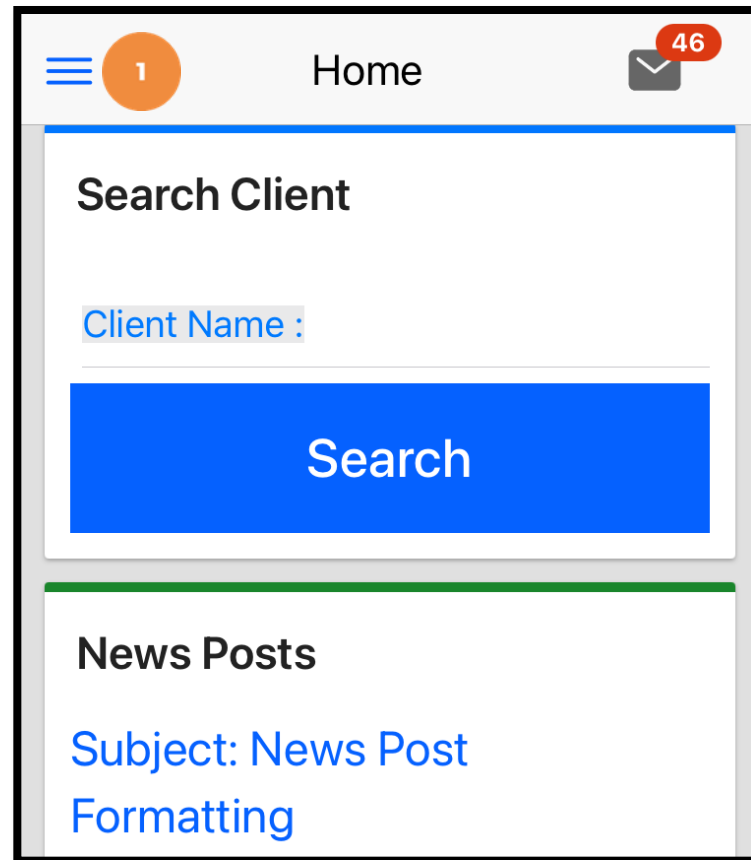


The screenshot shows the login interface of the Acumen mobile app. At the top, there is a header bar with a "Login" button on the left and "EN" on the right. Below the header, there is a dropdown menu labeled "Acumen – All Other States & Programs (inclu..." with a downward arrow. Underneath the dropdown are two input fields: "Username*" and "Password or PIN*", the latter featuring an eye icon for toggling visibility. Below these fields is a radio button labeled "Remember me". A large blue "Login" button is positioned below the radio button. At the bottom of the login section, there is a link that says "Forgot Password?". The entire app interface is framed by an orange border.

View Vendor Payment Entries

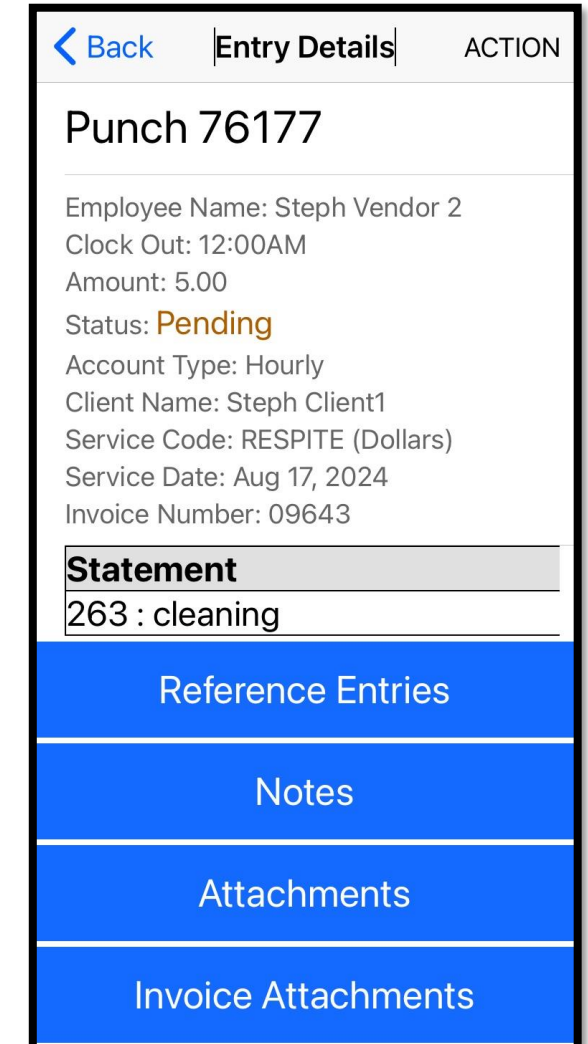
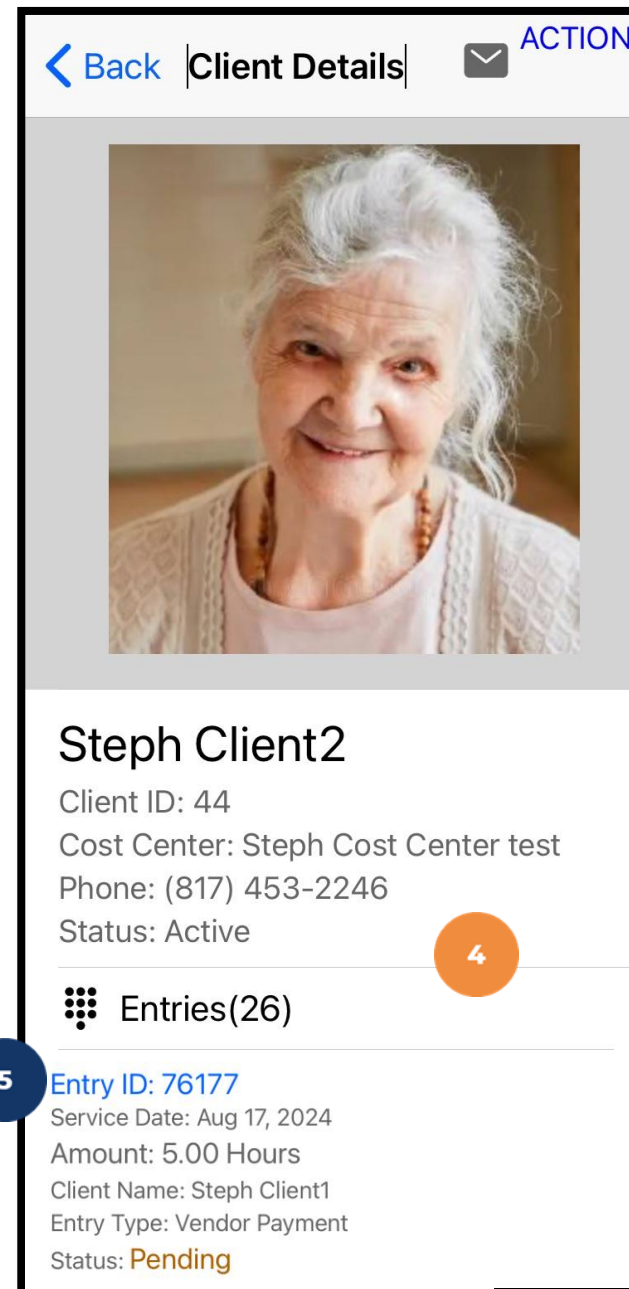
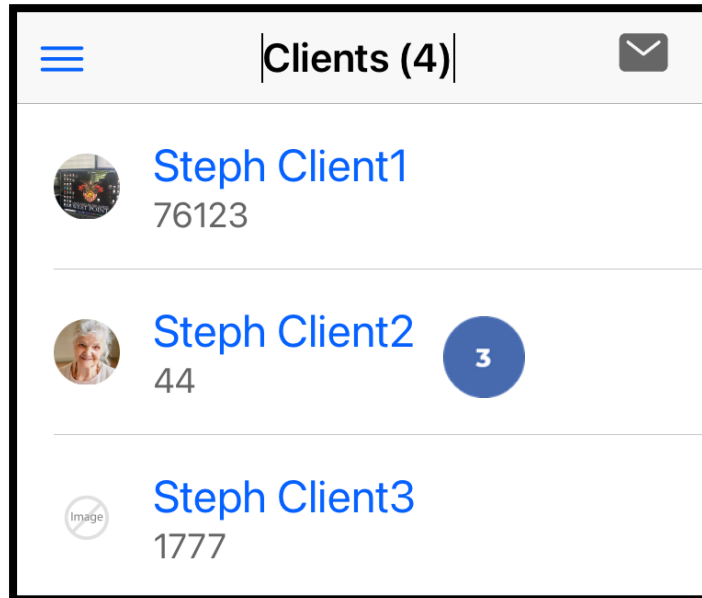
View By Client

1. Click the **Menu** in the top left corner of the screen
2. Select **Clients** on the submenu



View By Client

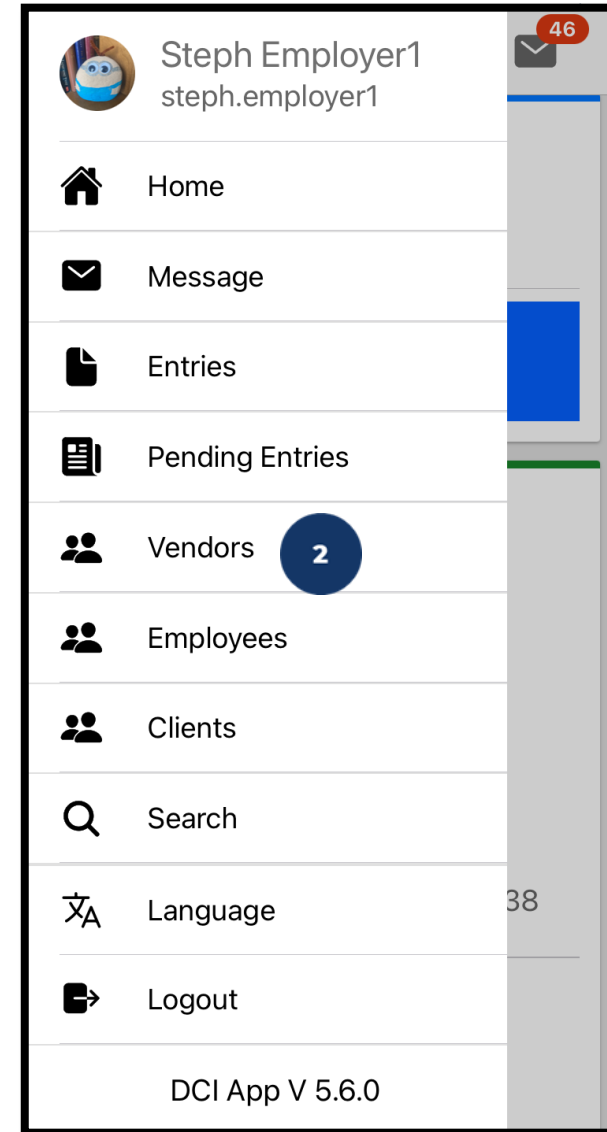
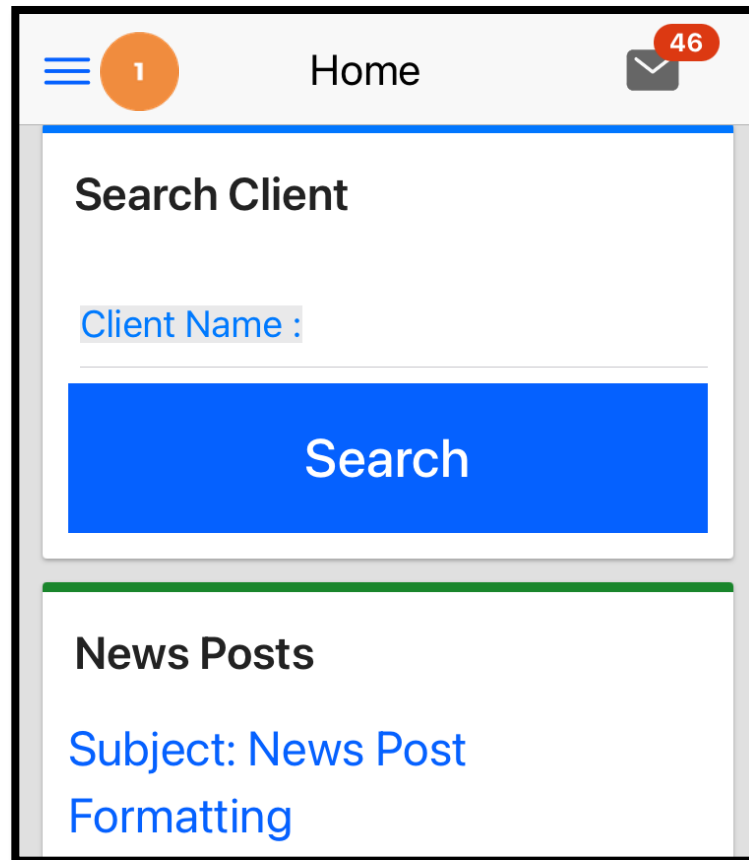
3. View the list of clients and click on the client's name (blue hyperlink) to select it
4. View the client details and entries
5. Select the blue hyperlink Entry ID to view the vendor entry details



View By Vendor

To check the status of the vendor payment entry:

1. Click the **Menu** in the top left corner of the screen
2. Select **Vendors** on the submenu



View By Vendor



- 3. Click on the vendor's name (blue hyperlink) to select it
- 4. View the list of entries for that vendor
- 5. Click on an entry to select it
- 6. View the Entry Details page

Vendor (80)ACTION

Vendor Name: Vendor 9212

Vendor ID: 8429

Vendor Name: Eric Vendor

Vendor ID: 8394

Vendor Name: Juan Vendorf1

Vendor ID: 8224

Vendor Name: CQ Vendor

Vendor ID: 8136

Vendor Name: JVK Vendor

Vendor ID: 8128

Vendor Name: Boys and Girls Club

Vendor ID: 8118

Vendor Name: Reilly Vendor

Vendor ID: 8026

Vendor Name: Ernesto vendor

Vendor ID: 7985

Vendor Name: Steph test

Vendor ID: 7929

BackVendor Details

Name: Steph test

Vendor ID: 7929

Tax ID: ##-#####

Cost Center: Steph Cost Center test

Phone: (222) 222-2222

Status: Active

Entries(6)

Aug 18, 2024 10.00

Steph Client1, Vendor Payment

Pending

Jul 29, 2024 16.00

Steph Client1, Vendor Payment

Pending

Jul 20, 2024 25.00

Steph Client1, Vendor Payment

Pending

Jul 21, 2024 5.00

Steph Client1, Vendor Payment

Pending

BackEntry DetailsACTION

Punch 76166

Employee Name: Steph test

Clock Out: 12:00AM

Amount: 10.00

Status: Pending

Account Type: Vendor

Client Name: Steph Client1

Service Code: Vendor

Service Date: Aug 18, 2024

Invoice Number: 123456789

Reference Entries

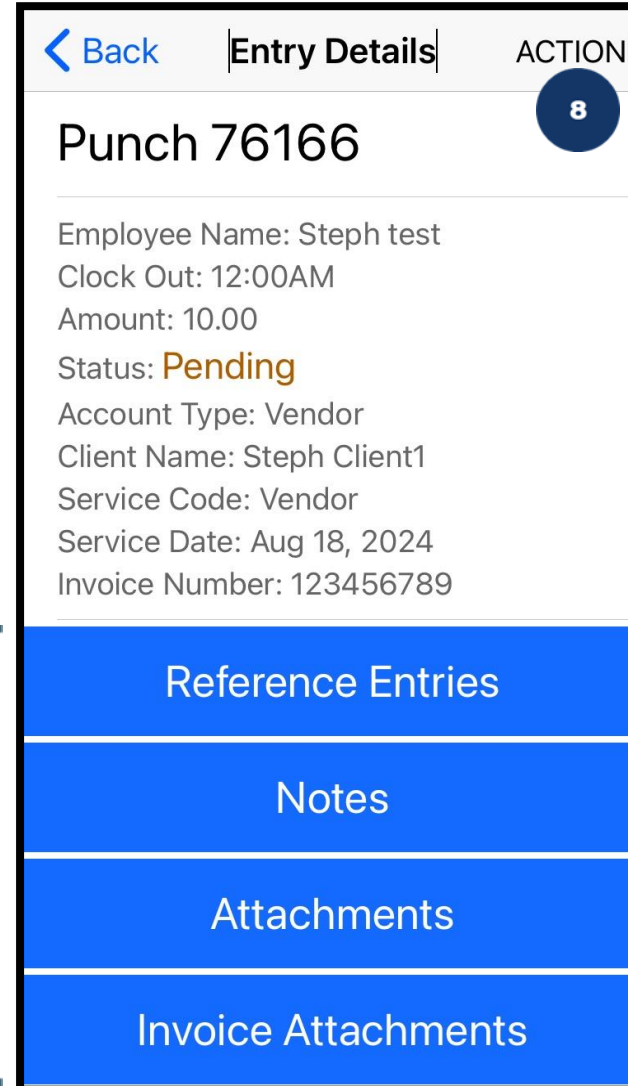
Notes

Attachments

Invoice Attachments

View By Vendor

7. Optionally click on any of the blue buttons to view or add additional information:
 - ✓ Reference Entries (view)
 - ✓ Notes (view or add)
 - ✓ Attachments (view)
 - ✓ Invoice Attachments (view)
8. Optionally click **ACTION** in the upper right corner
9. Optionally select **Add Attachment** to access the device camera and add an attachment to the entry



[Back](#) | Entry Details | ACTION

Punch 76166

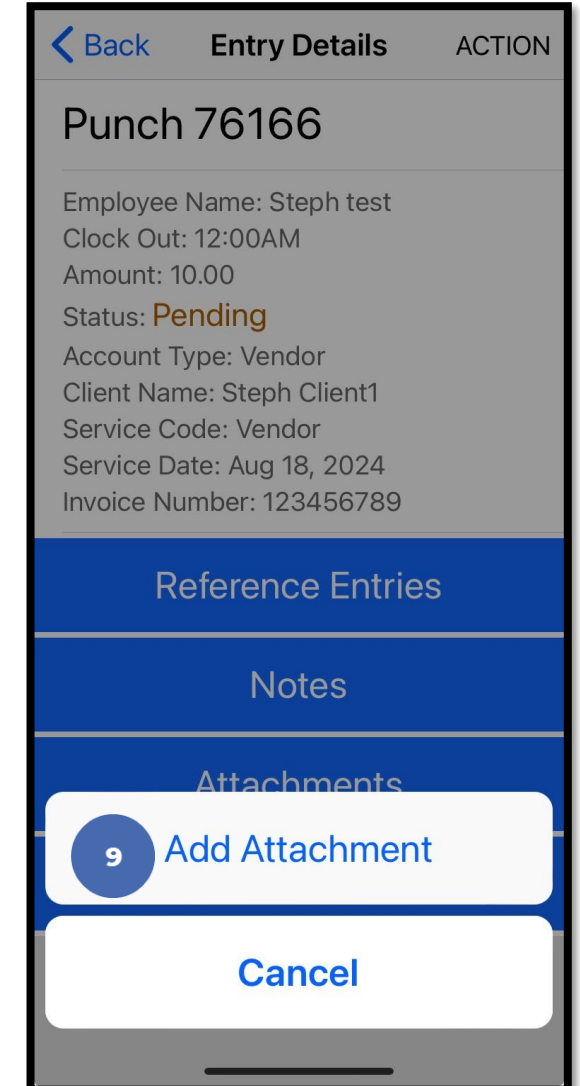
Employee Name: Steph test
Clock Out: 12:00AM
Amount: 10.00
Status: **Pending**
Account Type: Vendor
Client Name: Steph Client1
Service Code: Vendor
Service Date: Aug 18, 2024
Invoice Number: 123456789

Reference Entries

Notes

Attachments

Invoice Attachments



[Back](#) | Entry Details | ACTION

Punch 76166

Employee Name: Steph test
Clock Out: 12:00AM
Amount: 10.00
Status: **Pending**
Account Type: Vendor
Client Name: Steph Client1
Service Code: Vendor
Service Date: Aug 18, 2024
Invoice Number: 123456789

Reference Entries

Notes

Attachments

9 Add Attachment

Cancel

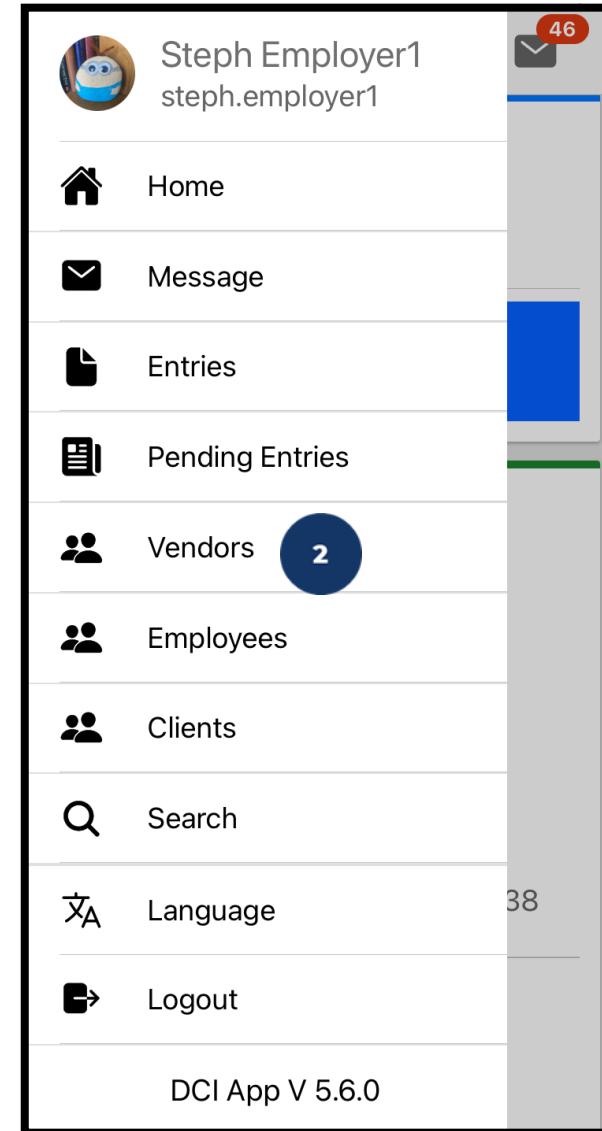
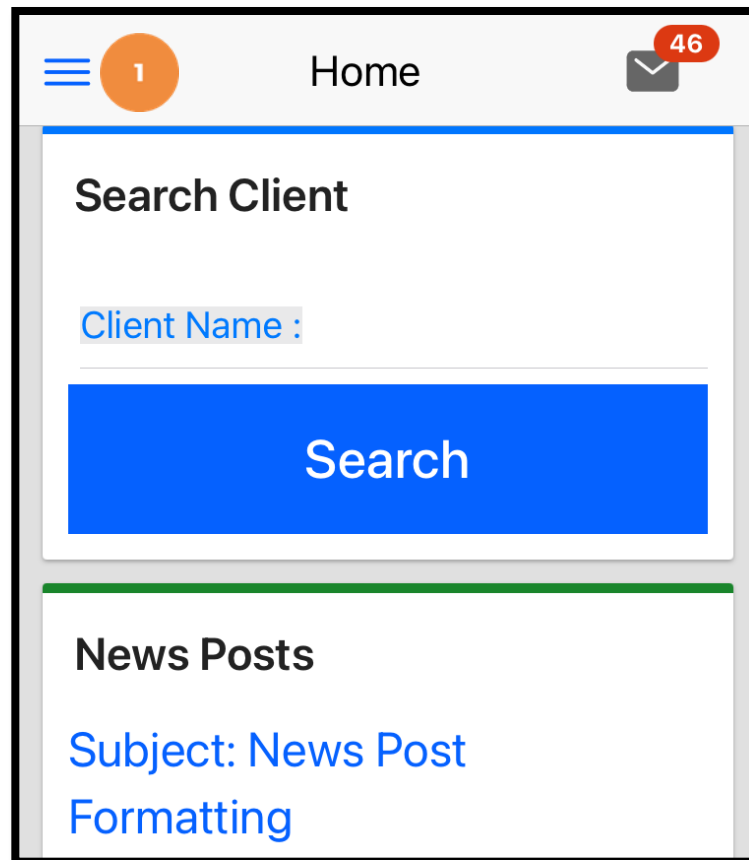
New Vendor Request

Mobile App

- If unable to locate the vendor when attempting to create a vendor payment, complete a New Vendor Request.
- A W9 is required. If the vendor does not wish to share the W9 with the employer, they may email it to vendor-nv@acumen2.net.
- The online vendor request will only be processed if all required fields are completed and the W9 is attached

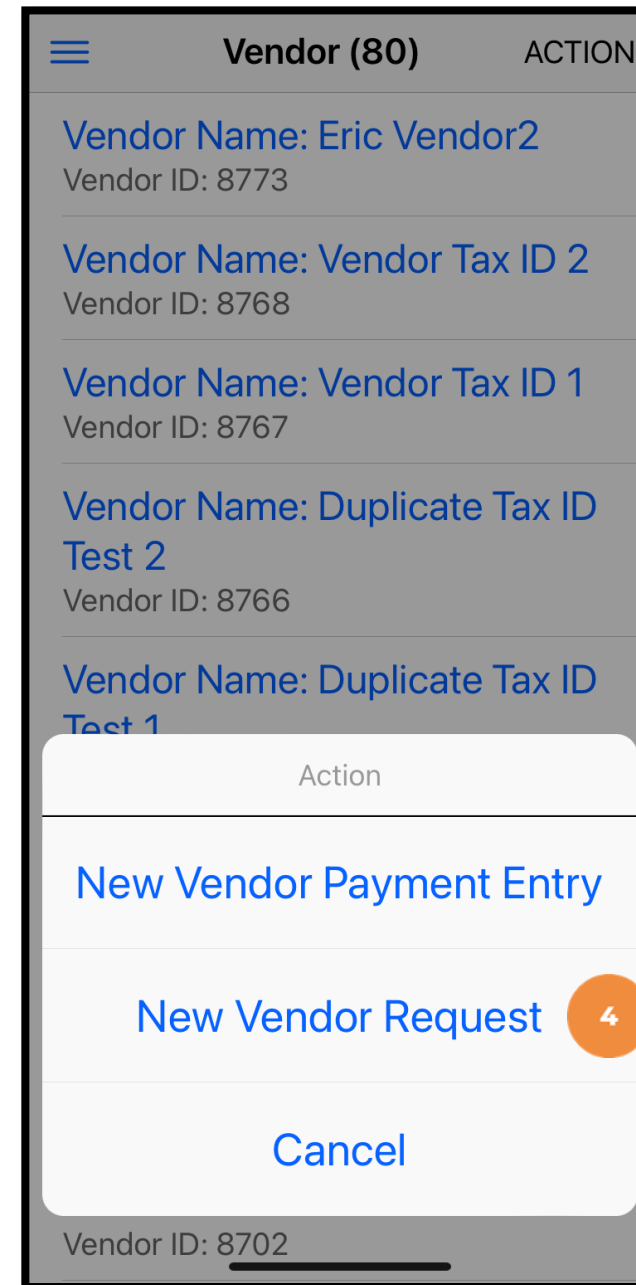
New Vendor Request

1. Click the **Menu** in the top left corner of the screen
2. Select **Vendors** on the submenu



New Vendor Request

3. Click **ACTION** in the top right corner
4. Select **New Vendor Request**



3



New Vendor Request



5. Enter the name and DBA (Doing Business As) of the new vendor
6. Enter the vendor's street address
7. Click the **Select State** drop-down menu and select the vendor's state
8. Enter the vendor's city
9. Enter the vendor's zip code
10. Enter the vendor's main company phone number
11. Optionally enter an alternate phone number for the vendor
12. Click **Add Attachment** to access the device camera to take a picture of the W-9 completed by the vendor. For the most up-to-date Form W-9, please visit <https://www.irs.gov/forms-instructions-and-publications>.
13. Click the blue **Save** button when all fields are complete

Proprietary: For Acumen and Customer Use Only

A screenshot of a mobile application form titled "New Vendor Request". The form contains several input fields and a "Save" button, each with a numbered callout circle. The callouts are: 5 (Type Vendor Name*), 6 (Address Line 1*), 7 (State* dropdown menu), 8 (City*), 9 (ZipCode*), 10 (Phone*), 11 (Alternate Phone), 12 (Add Attachment button), and 13 (Save button). The "Save" button is a large blue rectangle at the bottom of the form.

< Back | New Vendor Request

Type Vendor Name* 5

Address Line 1* 6

Address Line 2

State* Select State 7

City* 8

ZipCode* 9

Phone* 10

Alternate Phone 11

Attachments*: Add Attachment 12

13 Save

Request Review



- New Vendor Requests are reviewed by the payroll team
 - ✓ The Employer is notified of the review results via the email listed on the DCI profile
 - ✓ If the new vendor request is approved, the Employer may create the Vendor Payment entry.
- To pay the vendor via EFT (electronic funds transfer):
 - ✓ Email vendor-nv@acumen2.net to request the form and send completed form back

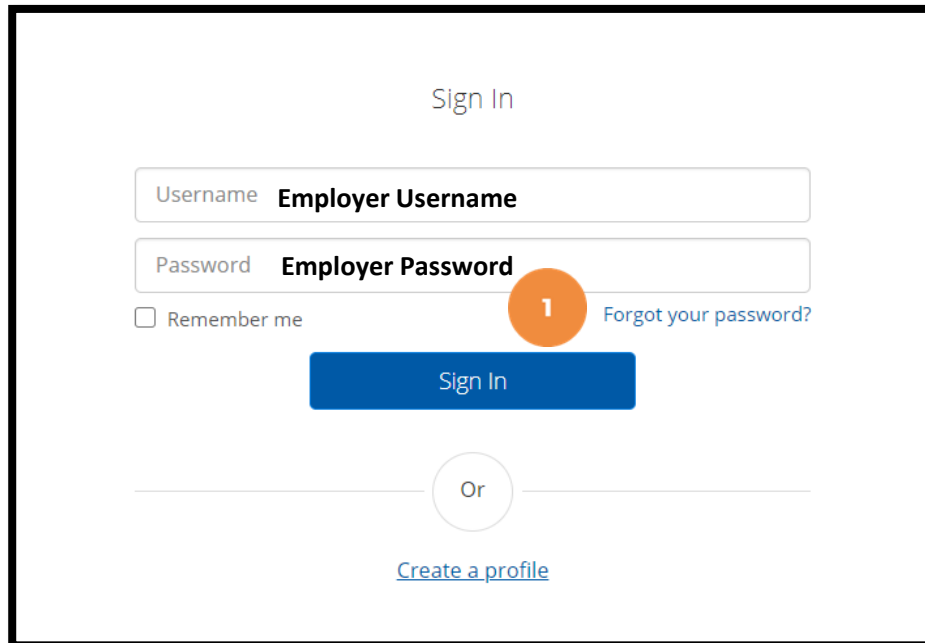
Vendor Payment Entry

Web Portal

Vendor Payment

***Please note!** The Employer is responsible for creating the vendor payment entry for their vendor(s)

1. Navigate to acumen.dcisoftware.com and log into the **Employer Profile**



Sign In

Username **Employer Username**

Password **Employer Password**

☐ Remember me

[Forgot your password?](#)

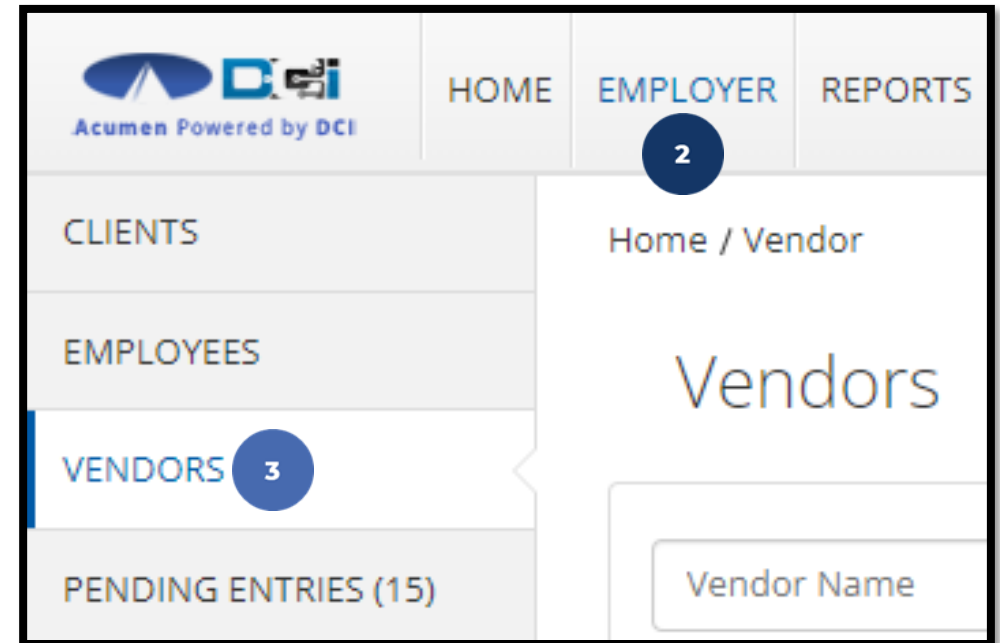
1

Sign In

Or

[Create a profile](#)

2. Click **Employer** on the main menu
3. Click **Vendors** on the submenu



Acumen Powered by DCI

HOME EMPLOYER REPORTS

2

Home / Vendor

CLIENTS

EMPLOYEES

VENDORS **3**

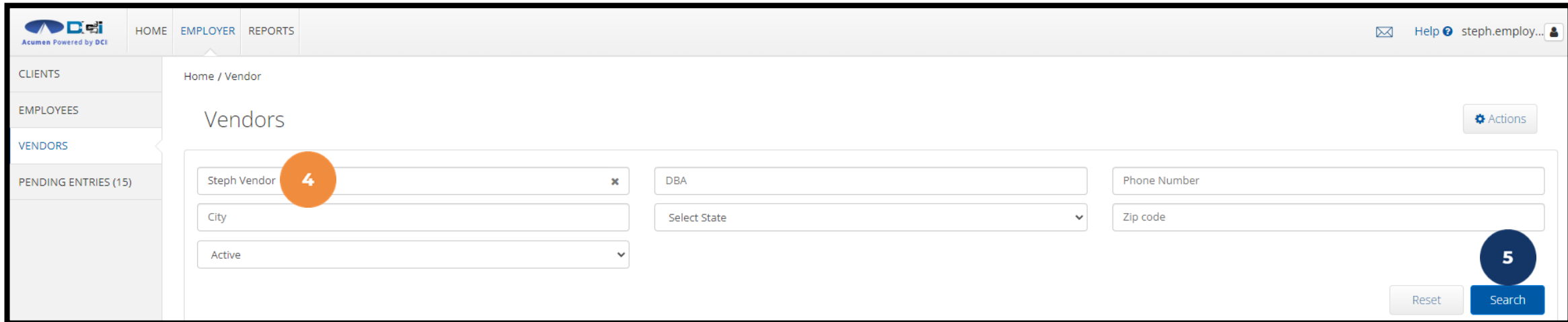
PENDING ENTRIES (15)

Vendors

Vendor Name

Vendor Payment

4. Type and select the Vendor Name in the filter
5. Click the blue **Search** button
6. Click anywhere in the vendor row to open the details page



Acumen Powered by DCI

HOME EMPLOYER REPORTS

Help steph.employ...

CLIENTS

EMPLOYEES

VENDORS

PENDING ENTRIES (15)

Home / Vendor

Vendors

Actions

Steph Vendor 4

DBA

Phone Number

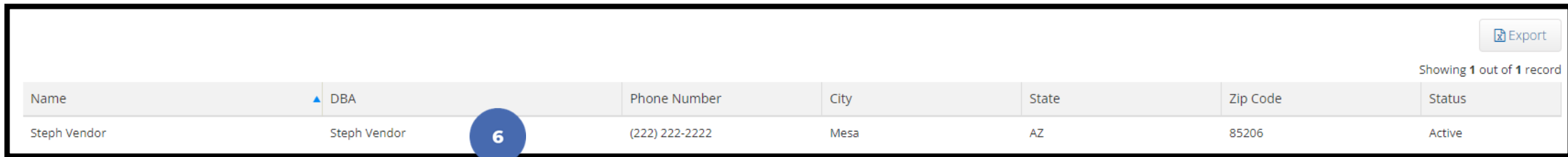
City

Select State

Zip code

Active

Reset Search 5



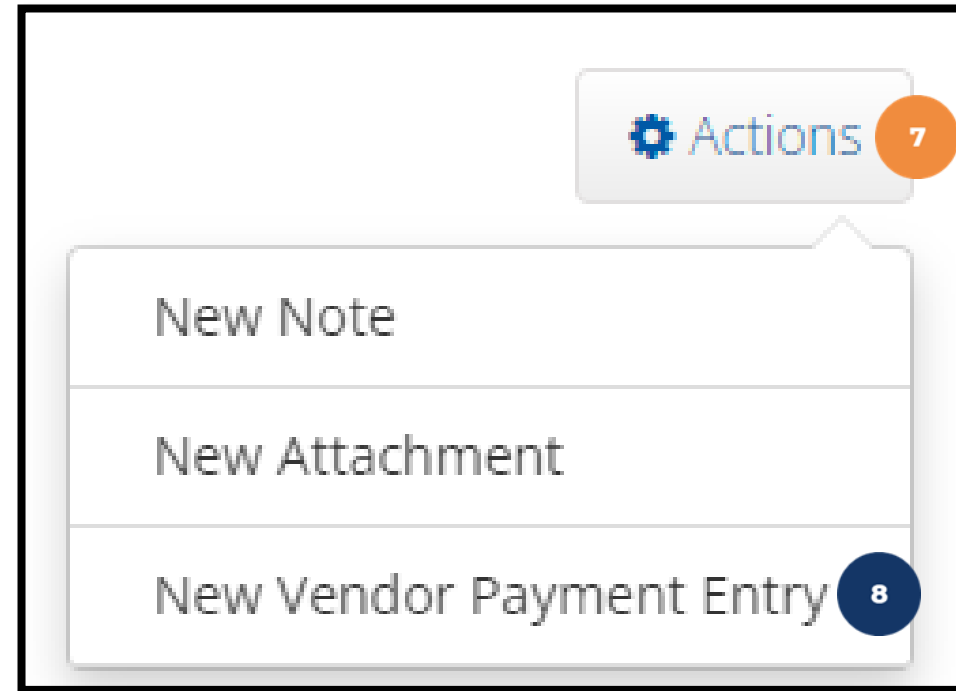
Export

Showing 1 out of 1 record

| Name | DBA | Phone Number | City | State | Zip Code | Status |
|--------------|----------------|----------------|------|-------|----------|--------|
| Steph Vendor | Steph Vendor 6 | (222) 222-2222 | Mesa | AZ | 85206 | Active |

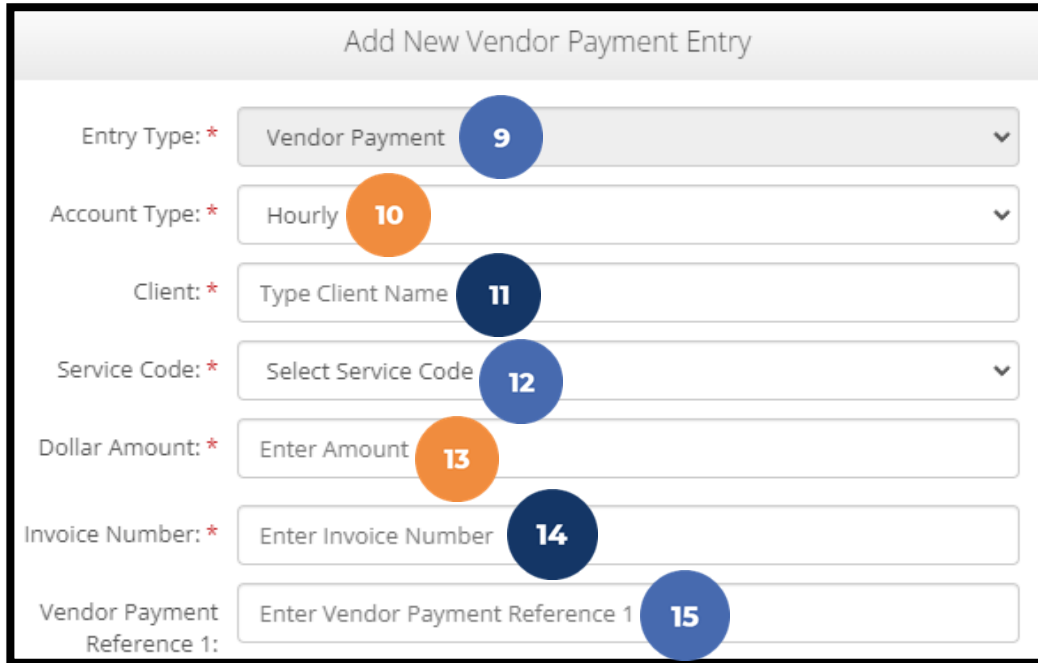
Vendor Payment

7. On the Vendor Details page, click **Actions**.
8. Select **New Vendor Payment Entry** from the drop-down menu



Vendor Payment

Complete the **Add New Vendor Payment Entry** form wizard:



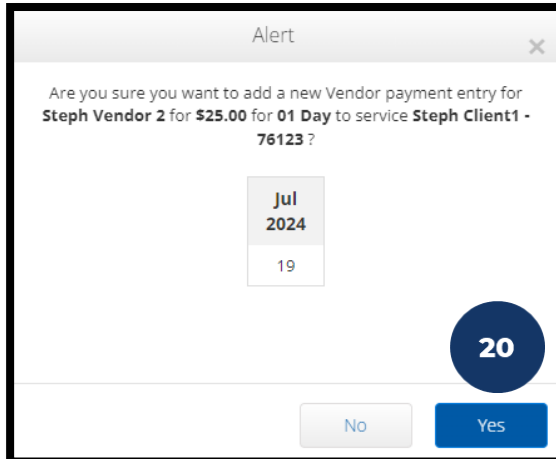
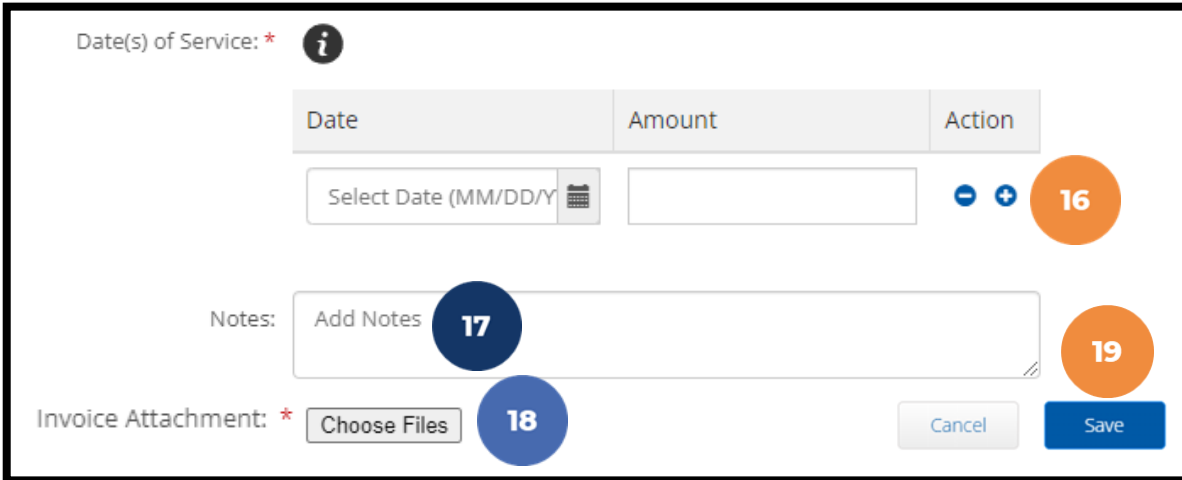
The screenshot shows a form titled "Add New Vendor Payment Entry" with the following fields and callouts:

- Entry Type:** * Vendor Payment (9)
- Account Type:** * Hourly (10)
- Client:** * Type Client Name (11)
- Service Code:** * Select Service Code (12)
- Dollar Amount:** * Enter Amount (13)
- Invoice Number:** * Enter Invoice Number (14)
- Vendor Payment Reference 1:** Enter Vendor Payment Reference 1 (15)

9. Entry Type: Auto-populates
10. Account Type: Select Hourly
11. Client: Type & select from the drop-down
12. Service Code: Select from the drop-down
 - If the appropriate service code is not available in the drop-down menu, please contact your local office or service coordinator.
13. Dollar Amount: Enter the total amount for the invoice for all dates of service
14. Invoice Number: Enter the invoice number *along with the client's name*
15. Vendor Payment Reference fields 1-5: Optionally add any additional information regarding the vendor payment

Vendor Payment

Add New Vendor Payment Entry form wizard continued:



16. Date(s) of Service: This may be one date or multiple dates. Enter the date and the amount for that date then click the blue **plus sign (+)** to add more as needed.

➤ The sum of the dates of service must match the dollar amount entered in the Dollar Amount field (see step 5)

17. Notes (optional)


18. Invoice Attachment: Click the **Choose Files** button. Attachment must be in PDF, JPG, or PNG format.

19. Click **Save**

20. Click **Yes** to confirm

Employer Web Portal Video

Create a Vendor Payment Entry



Sign In

☐ Remember me

[Forgot your password?](#)

Sign In

Or

[Create a profile](#)

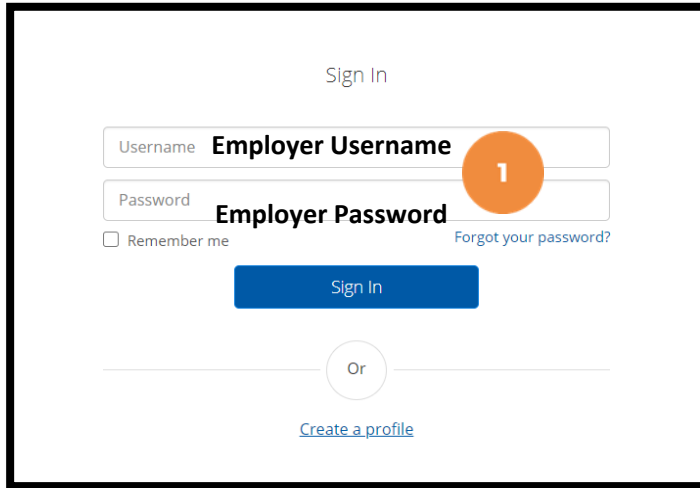
Proprietary: For Acumen and Customer Use Only



View Clients & Submitted Entries

View Clients

1. Navigate to acumen.dcisoftware.com and log into the **Employer Profile**



Sign In

Username **Employer Username** 1

Password **Employer Password** 1

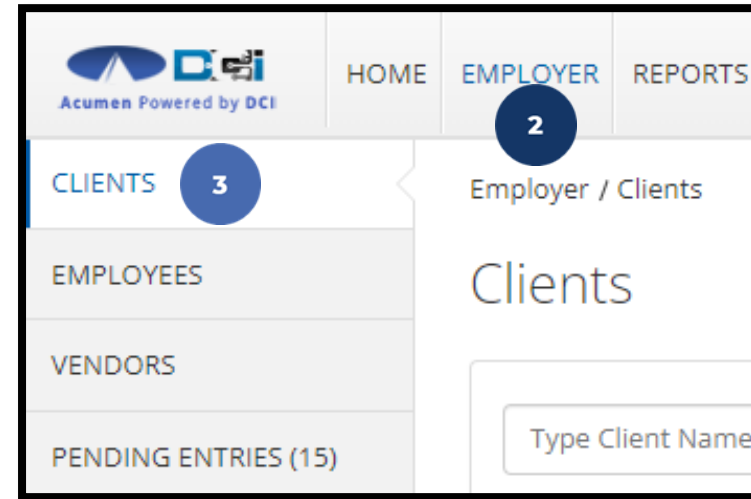
☐ Remember me [Forgot your password?](#)

Sign In

Or

[Create a profile](#)

2. Click **Employer** on the main menu
3. Click **Clients** on the submenu



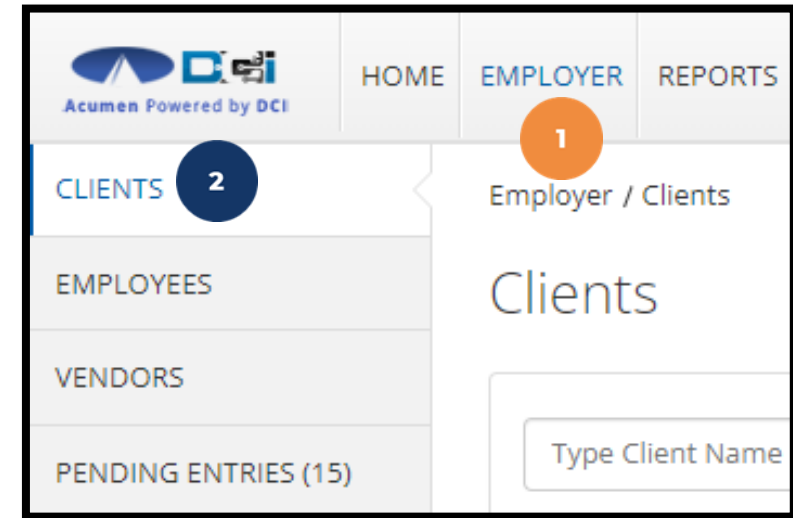
4. Click anywhere in the client row to open the details page

| Name | Client Id |
|--------------|-----------|
| SMITH JOHN 4 | 12340 |

View Submitted Entry

To check the status of the vendor payment entry:

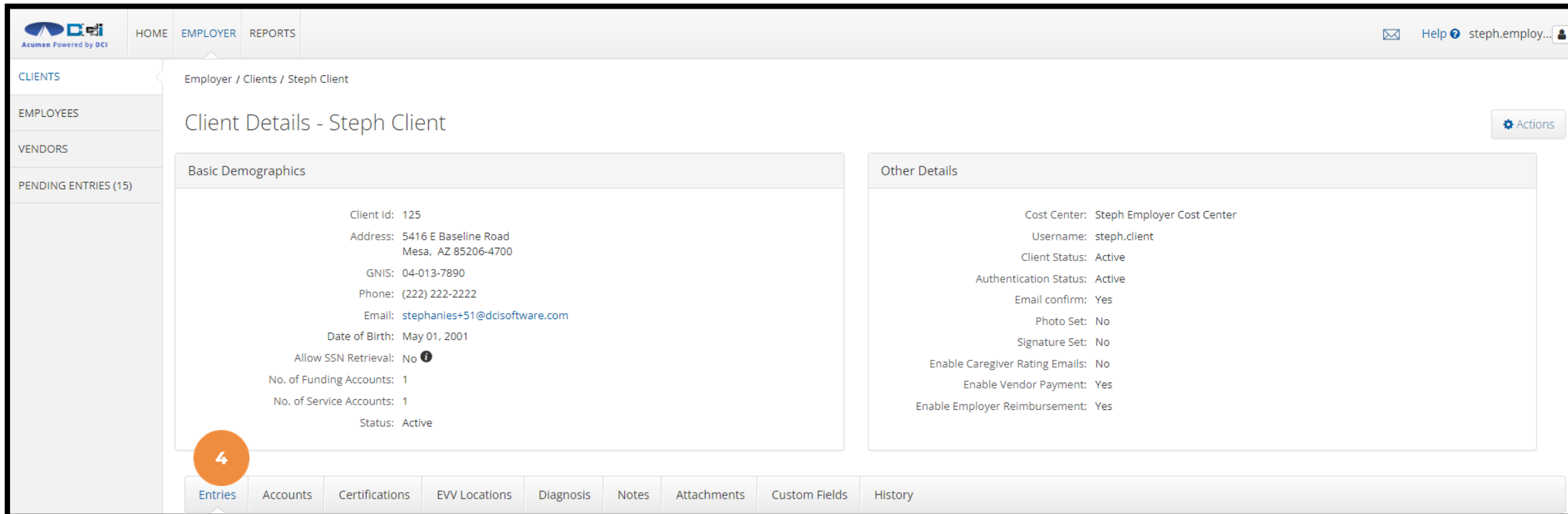
1. Click **Employer** on the main menu
2. Select the **Clients** tab from the submenu
3. Click anywhere on the **client row**



| Name | Client Id | Status |
|--------------|-----------|--------|
| Steph Client | 125 | Active |

View Submitted Entry

- From the Client Details page, scroll down to select the **Entries** tab.



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HOME EMPLOYER REPORTS

Help steph.employ...

CLIENTS

EMPLOYEES

VENDORS

PENDING ENTRIES (15)

Employer / Clients / Steph Client

Client Details - Steph Client

Actions

Basic Demographics

Client Id: 125
Address: 5416 E Baseline Road
Mesa, AZ 85206-4700
GNIS: 04-013-7890
Phone: (222) 222-2222
Email: stephanies+51@dcisoftware.com
Date of Birth: May 01, 2001
Allow SSN Retrieval: No ⓘ
No. of Funding Accounts: 1
No. of Service Accounts: 1
Status: Active

Other Details

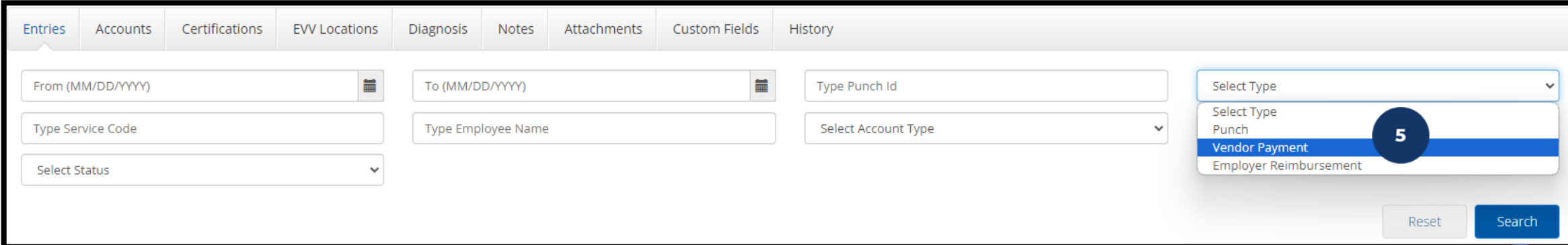
Cost Center: Steph Employer Cost Center
Username: steph.client
Client Status: Active
Authentication Status: Active
Email confirm: Yes
Photo Set: No
Signature Set: No
Enable Caregiver Rating Emails: No
Enable Vendor Payment: Yes
Enable Employer Reimbursement: Yes

4

Entries Accounts Certifications EVV Locations Diagnosis Notes Attachments Custom Fields History

View Submitted Entry

5. Select **Vendor Payment** from the Select Type filter
6. Click the blue **Search** button to return results



Entries Accounts Certifications EVV Locations Diagnosis Notes Attachments Custom Fields History

From (MM/DD/YYYY) To (MM/DD/YYYY) Type Punch Id

Type Service Code Type Employee Name Select Account Type

Select Status

Select Type

Select Type
Punch
Vendor Payment
Employer Reimbursement

Reset Search

View Submitted Entry

If more than one Date of Service was entered for the vendor payment, an entry is created for each and the entry for the total amount is canceled.

| Entries | | | | | | | | | | |
|-----------------------|--------------|------------|----------|--------------|-----------------------|--|-------------------------------|----------------|--------|----------|
| Id | Service Date | Start Time | End Time | Account Type | Ref. | Cost Center | Client Name | Service Code | Amount | Status |
| 75689 | Jul 29, 2024 | | | Vendor | | Steph Cost Center test - Steph Cost Center test | Steph Client1 | Steph Vendor 2 | 16.00 | Pending |
| 75316 | Jul 20, 2024 | | | Vendor | 75314 | Steph Cost Center test - Steph Cost Center test | Steph Client1 | Steph Vendor 2 | 25.00 | Pending |
| 75315 | Jul 21, 2024 | | | Vendor | 75314 | Steph Cost Center test - Steph Cost Center test | Steph Client1 | Steph Vendor 2 | 5.00 | Pending |
| 75314 | Jul 20, 2024 | | | Vendor | | Steph Cost Center test - Steph Cost Center test | Steph Client1 | Steph Vendor 2 | 30.00 | Canceled |



If only one Date of Service was entered for the vendor payment, only one entry is created.

| | | | | | | | | | | |
|-----------------------|--------------|---|--|--------|--|--|-------------------------------|----------------|-------|---------|
| 75689 | Jul 29, 2024 | 7 | | Vendor | | Steph Cost Center test - Steph Cost Center test | Steph Client1 | Steph Vendor 2 | 16.00 | Pending |
|-----------------------|--------------|---|--|--------|--|--|-------------------------------|----------------|-------|---------|



7. Click anywhere on the entry row to view the details

View the entry status

Entry Review



- Entries are reviewed by the payroll team and approved or rejected
 - ✓ If approved, the entry status changes to Approved and payment is made according to the program pay schedule.
 - ✓ If rejected, the entry status changes to Rejected and communication is sent to the Employer via the email listed on the DCI profile.
- Contact Acumen to cancel or edit the entry

New Vendor Request

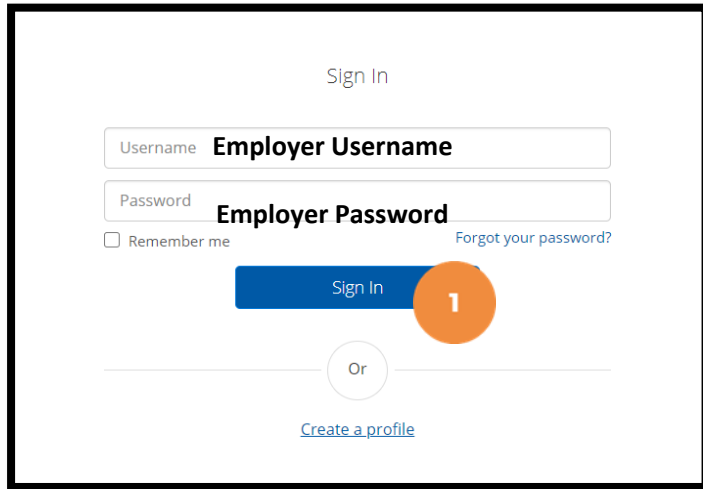
Web Portal

- If unable to locate the vendor when attempting to create a vendor payment, complete a New Vendor Request.
- A W9 is required. If the vendor does not wish to share the W9 with the employer, they may email it to vendor-nv@acumen2.net.
- The online vendor request will only be processed if all required fields are completed and the W9 is attached

New Vendor Request

***Please note!** The Employer is responsible for requesting the new vendor

1. Navigate to acumen.dcisoftware.com and log into the **Employer Profile**



Sign In

Username **Employer Username**

Password **Employer Password**

☐ Remember me [Forgot your password?](#)

Sign In 1

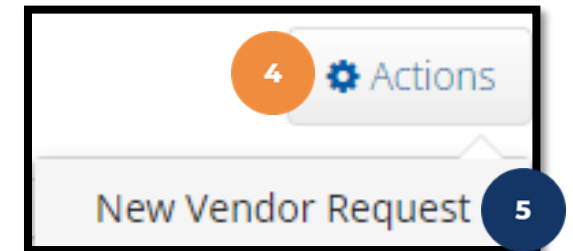
Or

[Create a profile](#)

2. Click **Employer** on the main menu
3. Click **Vendors** on the submenu

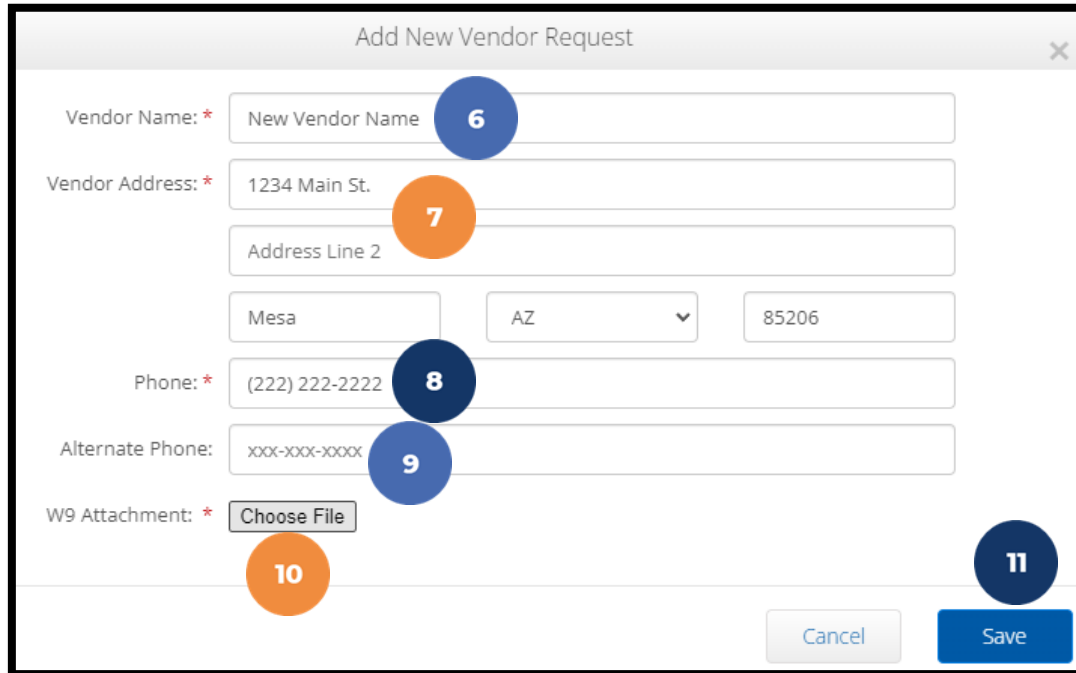


4. Click **Actions**
5. Select **New Vendor Request** from the drop-down menu



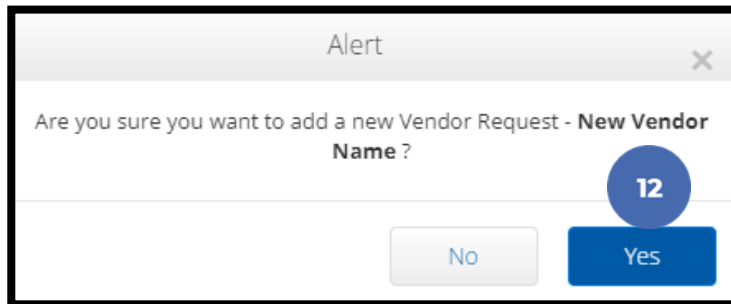
New Vendor Request

Complete the Add New Vendor Request form wizard:



The 'Add New Vendor Request' form wizard contains the following fields and controls, numbered 6 through 11:

- 6. Vendor Name: * (Text input field)
- 7. Vendor Address: * (Text input field, Address Line 1)
- 8. Address Line 2 (Text input field)
- 9. City (Text input field, e.g., Mesa)
- 10. State (Dropdown menu, e.g., AZ)
- 11. Zip (Text input field, e.g., 85206)
- 12. Phone: * (Text input field, e.g., (222) 222-2222)
- 13. Alternate Phone: (Text input field, e.g., xxx-xxx-xxxx)
- 14. W9 Attachment: * (Choose File button)
- 15. Cancel button
- 16. Save button



The 'Alert' dialog box contains the following text and controls, numbered 12:

Are you sure you want to add a new Vendor Request - **New Vendor Name** ?

- 12. Yes button
- No button

6. Vendor Name: Enter the name of the new vendor on the invoice along with the DBA Name (Doing Business As)
7. Vendor Address: Enter the address of the new vendor on the invoice
8. Phone: Enter the new vendor's main company phone number
9. Alternate Phone (optional)
10. W9 Attachment: Click the **Choose File** button to upload the W9 completed by the vendor. Must be in PDF, JPG, or PNG format. For the most up-to-date Form W-9, please visit <https://www.irs.gov/forms-instructions-and-publications>.
11. Click **Save**
12. Click **Yes** to confirm

Request Review

- New Vendor Requests are reviewed by the payroll team
 - ✓ The Employer is notified of the review results via the email listed on the DCI profile
 - ✓ If the new vendor request is approved, the Employer may create the Vendor Payment entry.
- To pay the vendor via EFT (electronic funds transfer):
 - ✓ Email vendor-nv@acumen2.net to request the form and send completed form back

Troubleshooting

- Not seeing your vendor?
 - Submit a New Vendor Request
- Not seeing your client?
 - Please contact Acumen customer service at (866) 644-4188
- Need to verify, add, or update your email address?
 - Log into the web portal, click on your username, select Settings, then select Change Email.

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



Acumen Fiscal Agent

Innovation • Opportunity • Freedom

THANK YOU!

acumenfiscalagent.com

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