Nevada OCL-CS

Time Entry Training for Employers & Employees

Welcome to Acumen!

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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

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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

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Ways to Enter Time & Vendor Payments*

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

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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

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<u>Devices & Operating Systems (OS)</u>

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.

<u>Web Browsers</u>

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

DCI Mobile App

*Preferred Time Entry Method

Mobile App Basics

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- 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

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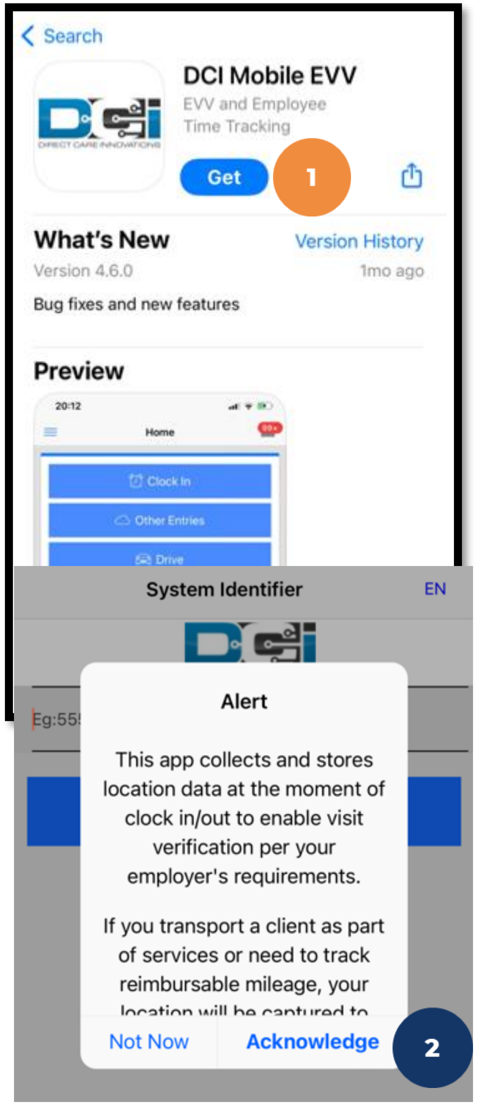
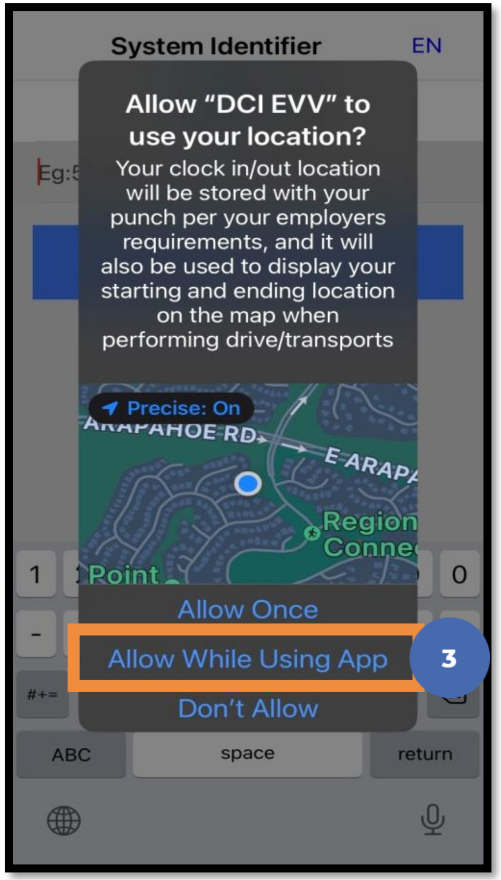
1. Download the ***DCI Mobile EVV*** App

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

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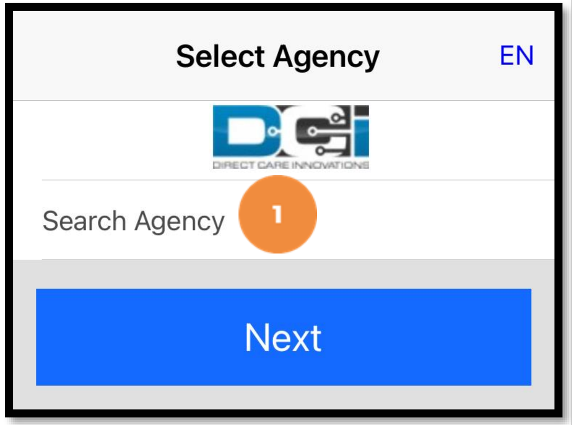
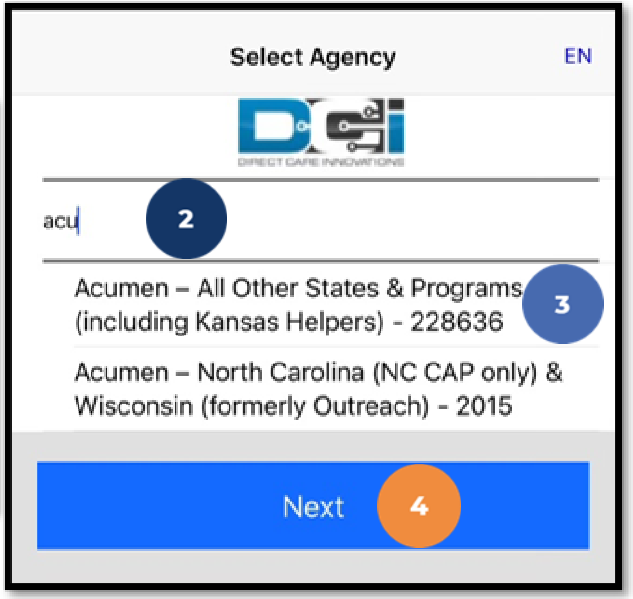
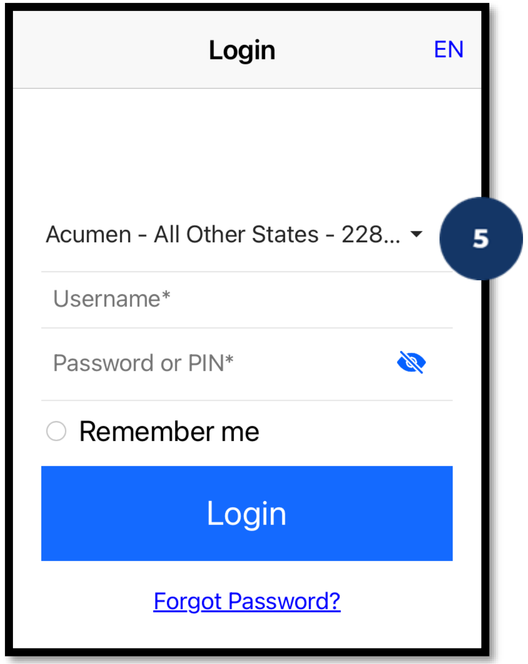
1. After downloading the app, the Select Agency screen appears with a Search Agency field.
2. **Type at least three consecutive characters of the agency name OR the system identifier** in the Search Agency field.
   - ❖ The Acumen system identifier for All Other States & Programs (including Kansas Helpers) is **228636**
   - ❖ The consecutive characters can be located anywhere in the agency name or system identifier
3. **Select the agency** from the list
4. Click the blue **Next** button
5. The agency is now selected and appears on the login screen

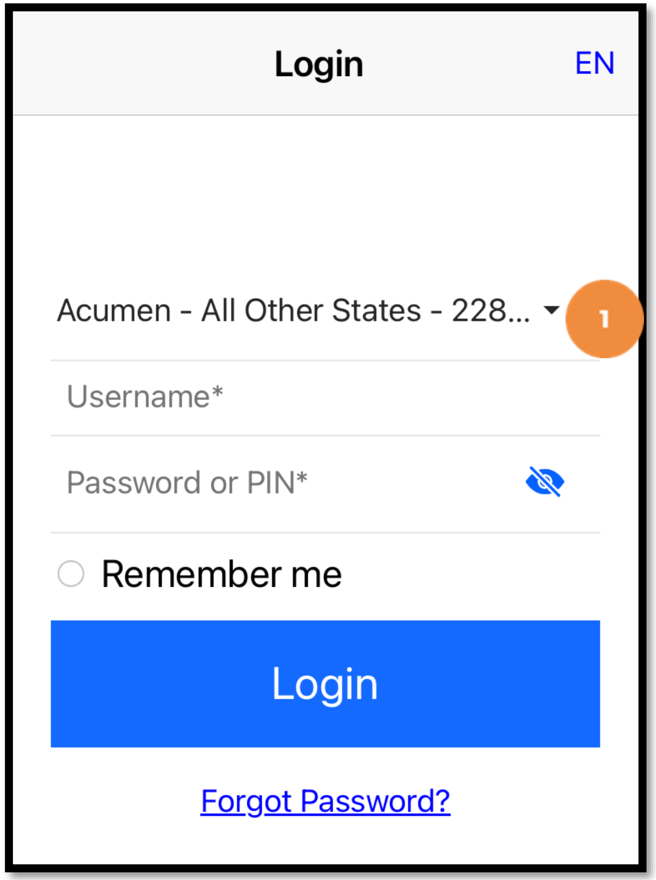


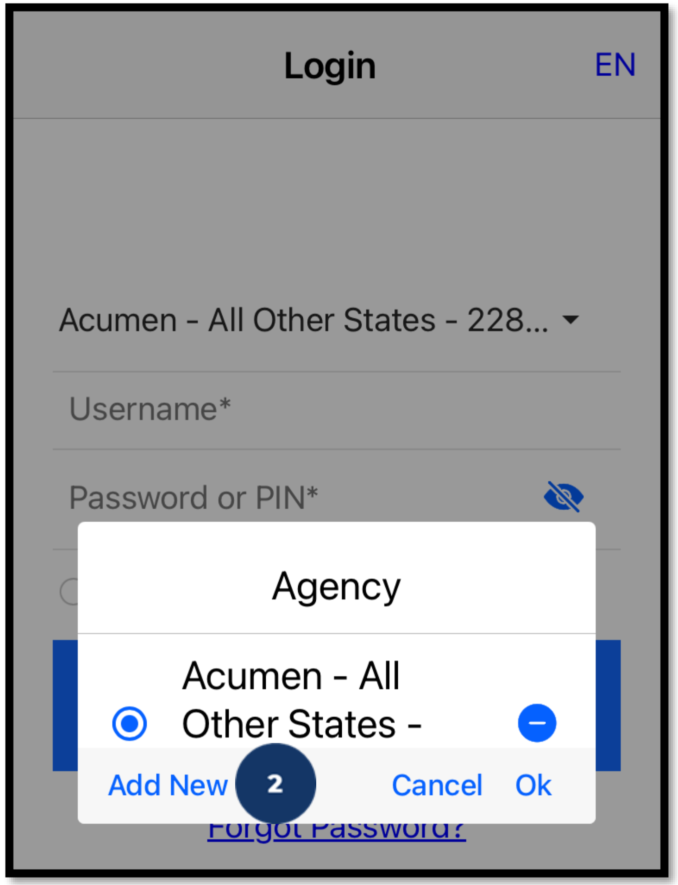




Add More Agencies

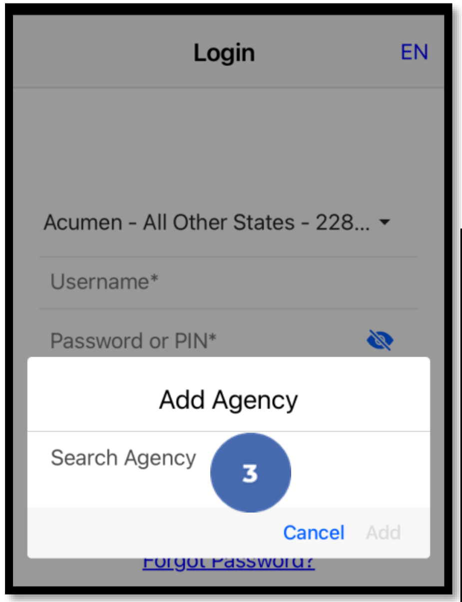
1. To add more agencies, click the **drop-down** on the agency field.
2. If the desired agency is not listed, click **Add New** on the Agency results list.

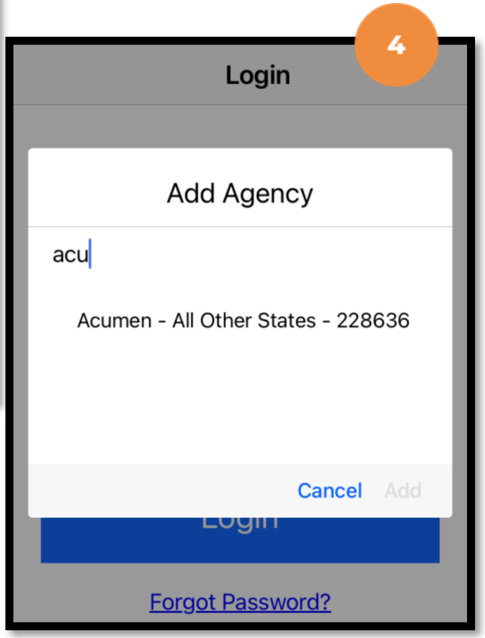


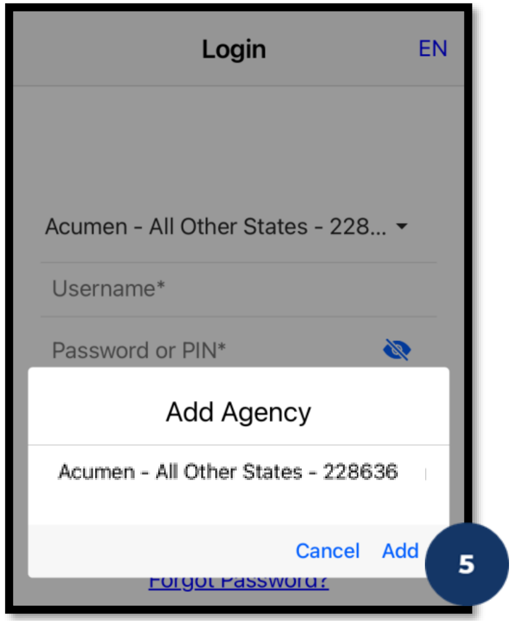


Add More Agencies

3. On the Add Agency window, **type at least three consecutive characters of the agency name OR the system identifier** in the Search Agency field.
   - ❖ The consecutive characters can be located anywhere in the agency name or system identifier
4. **Select the agency** from the list
5. Click **Add**







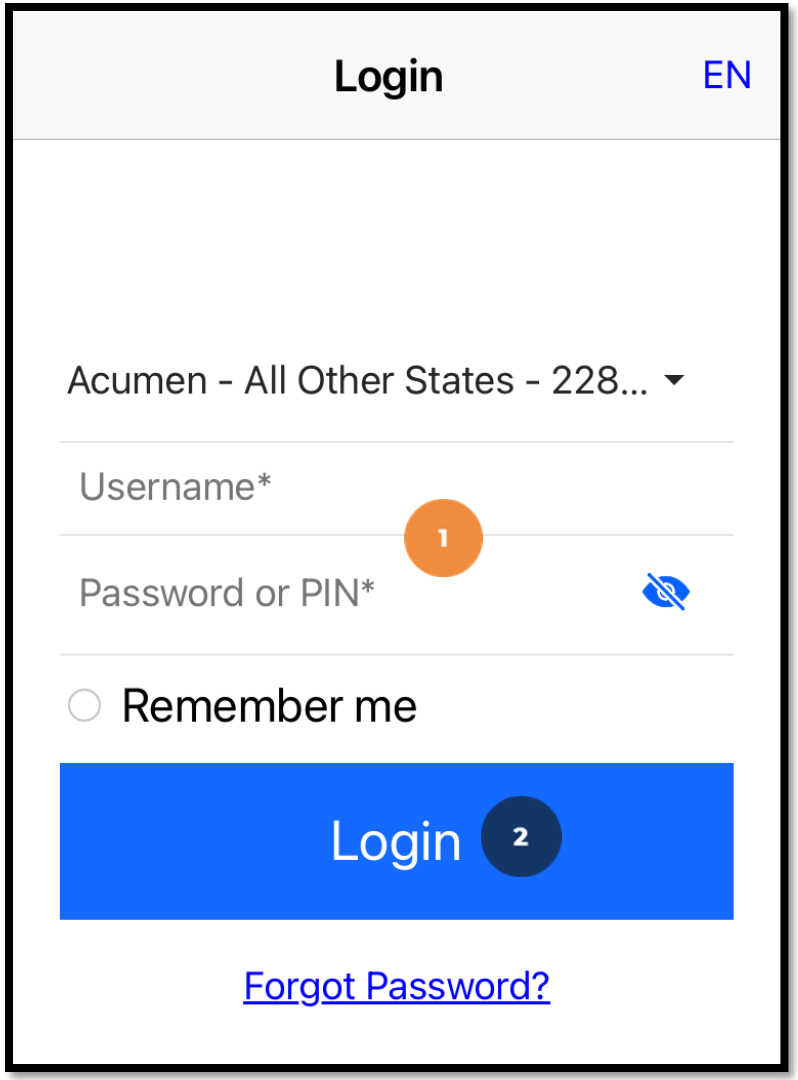
The agency is now added and displays on the agency drop-down menu.
At each log in, select the appropriate agency.

Log into the DCI Mobile 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

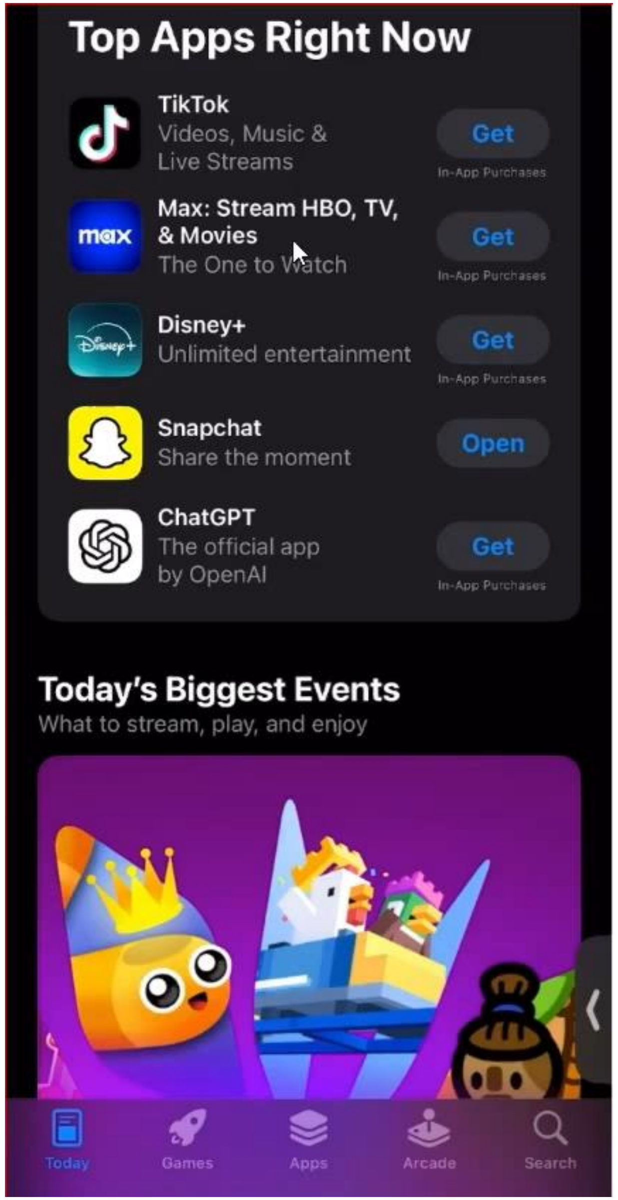
     ***Please note:** Do not use on a shared device
2. Click the blue **Login** button to access the mobile app
   - ✓ The **Forgot Password** link is available if necessary but requires a valid email address to be on file

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



Mobile App Video

Download the DCI Mobile EVV App



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Employee Mobile App

Employee Clock In/Out Process

Overview Mobile App Clock In

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1. Employee Arrives to Begin Shift
2. Open DCI Mobile EVV App on Smartphone or Tablet
3. Log in with Username & Password or PIN
4. Tap the blue "Clock In" button (top of the screen)
5. Select Client Name & Service Code then select the blue "Continue" button
6. Tap the blue "Confirm Clock In" button (time begins for the shift)

Overview Mobile App Clock Out

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End of Shift

Open DCI Mobile EVV App
on Smartphone or Tablet

Log in with Username
& Password or PIN

Tap the blue "Continue to Clock Out" button (top of screen)

Select one EVV Option:

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

Ensure Verification Confirmation

- Alert will appear on screen

Optionally Add Notes or/and Attachments

Tap the blue "Confirm Clock Out" button (time ends for the shift)

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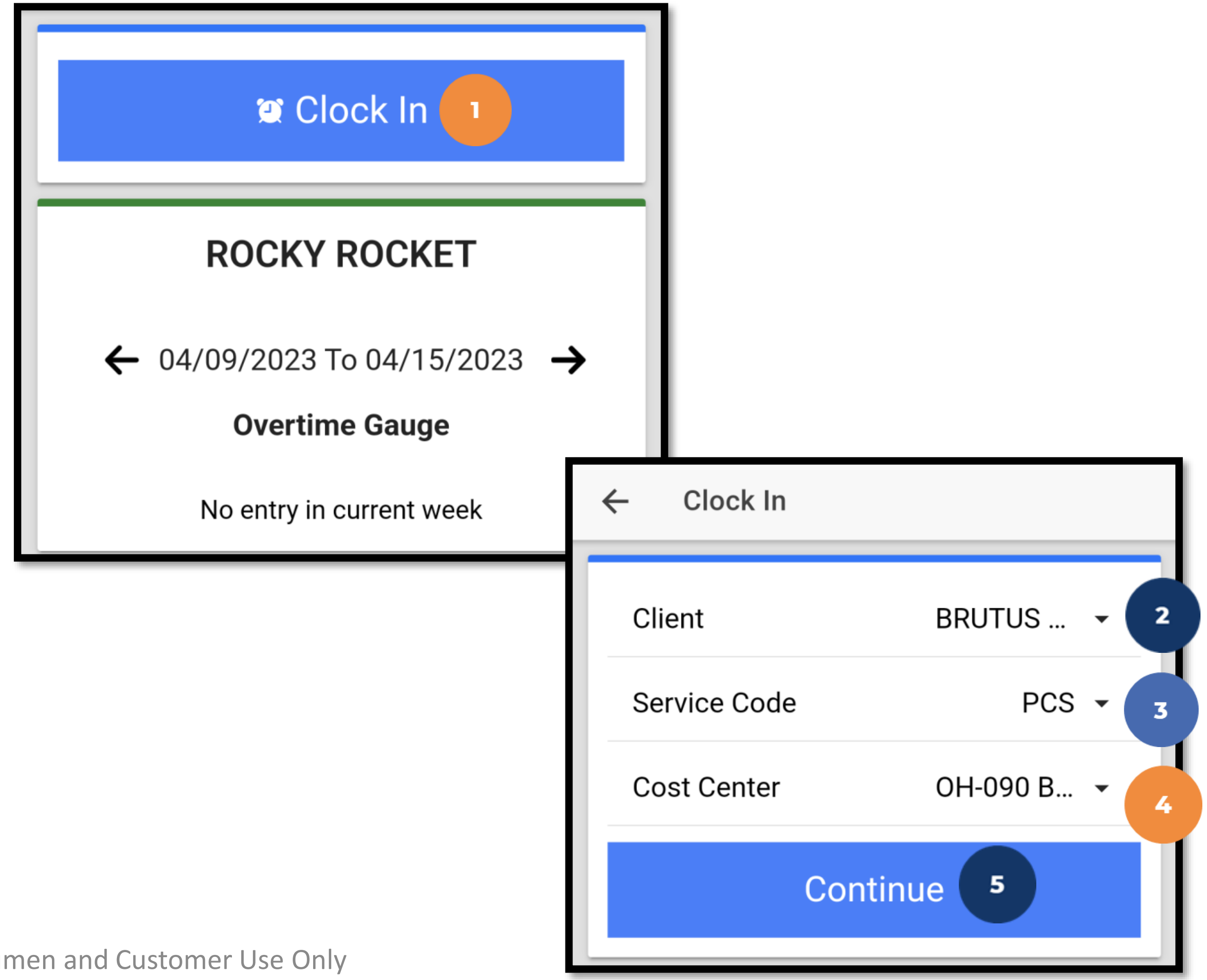
Clock In on Mobile App

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



Clock In on Mobile App (cont.)

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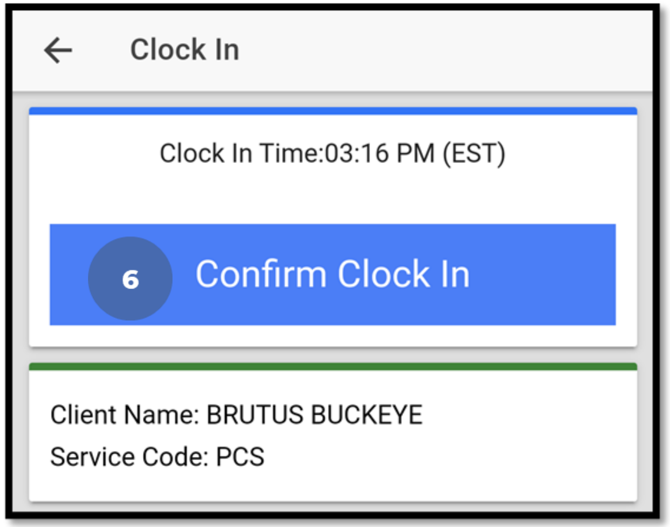
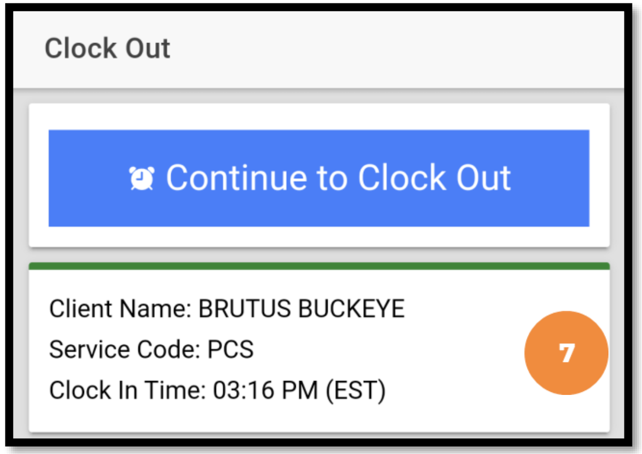
6. Select Confirm Clock In
    * *This will start the time for the shift*

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.

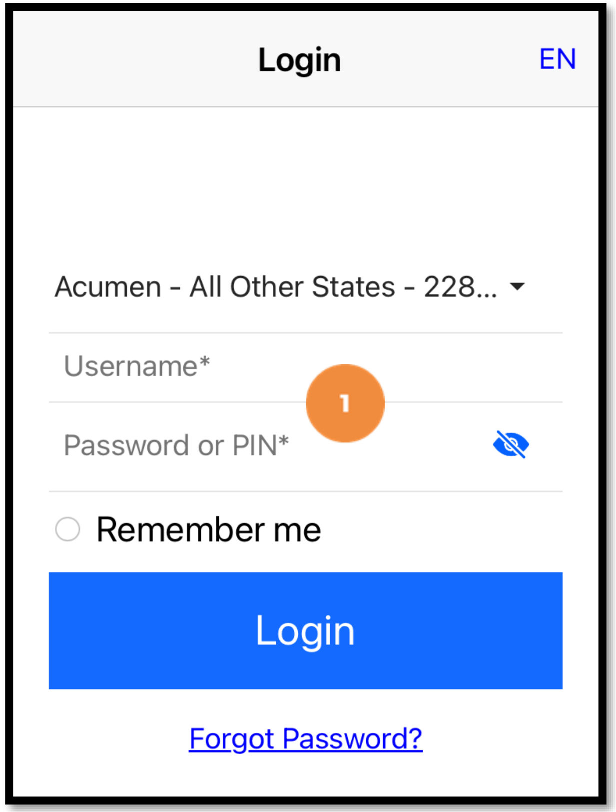


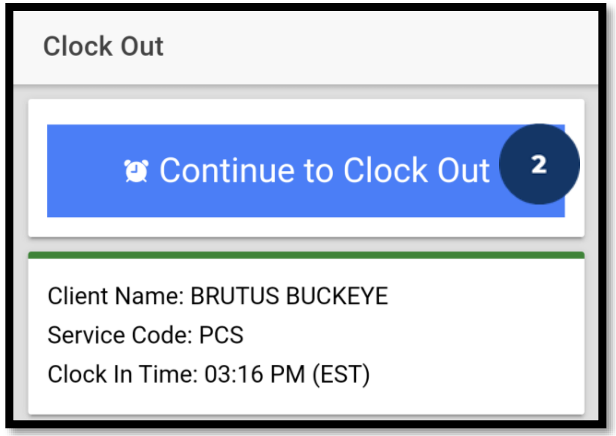


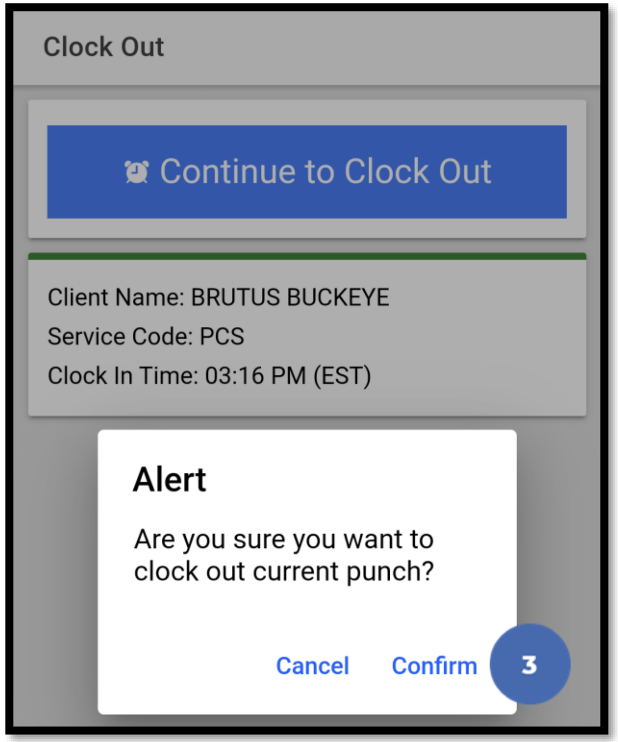
Initial Clock Out Process

***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



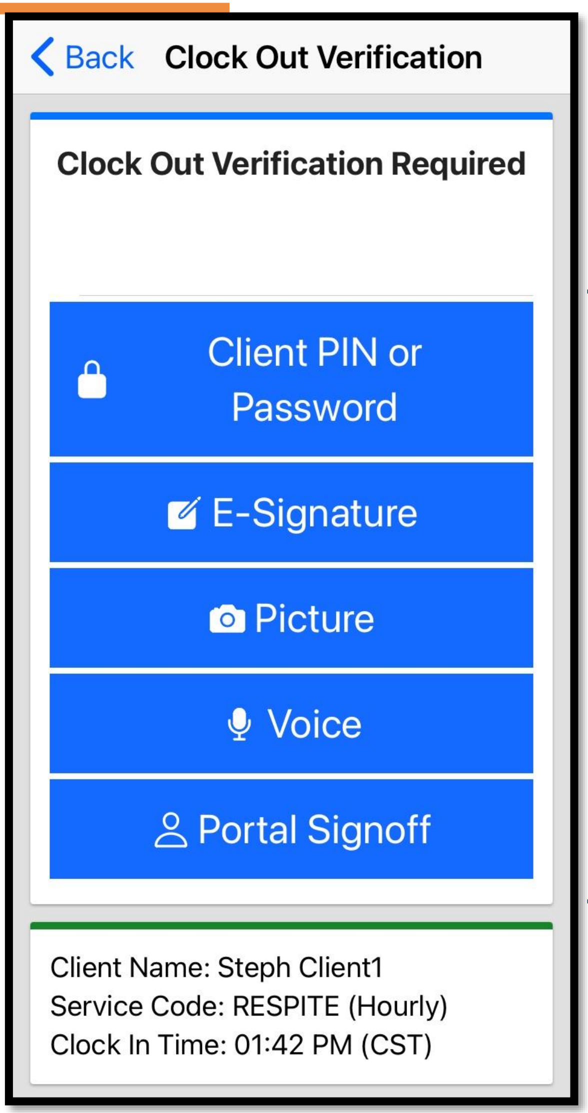




Mobile App – EVV Options (Client/Employer Attestation)

- 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:** <u>The employer must still review and may need to approve punch entries in their Pending Entries tab each pay period.</u>



Choose <u>one</u> at clock out

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

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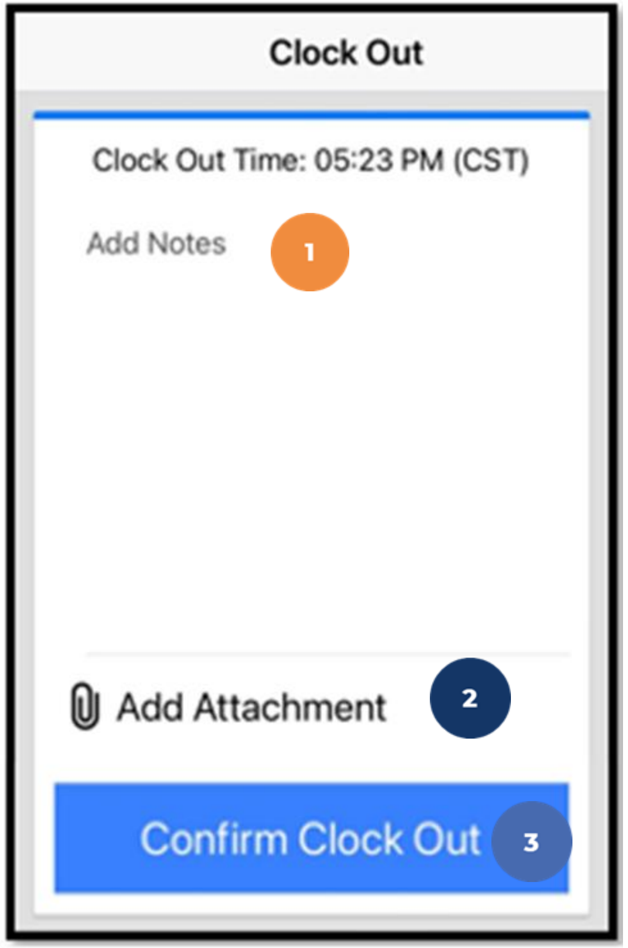
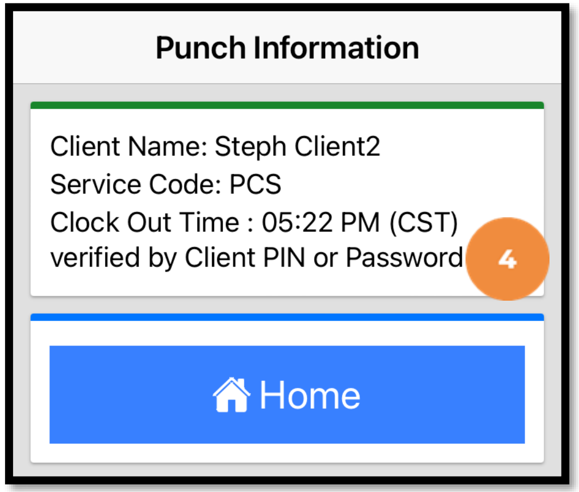
The employee:

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.





EVV or Client Attestation Options

***There are five options.**

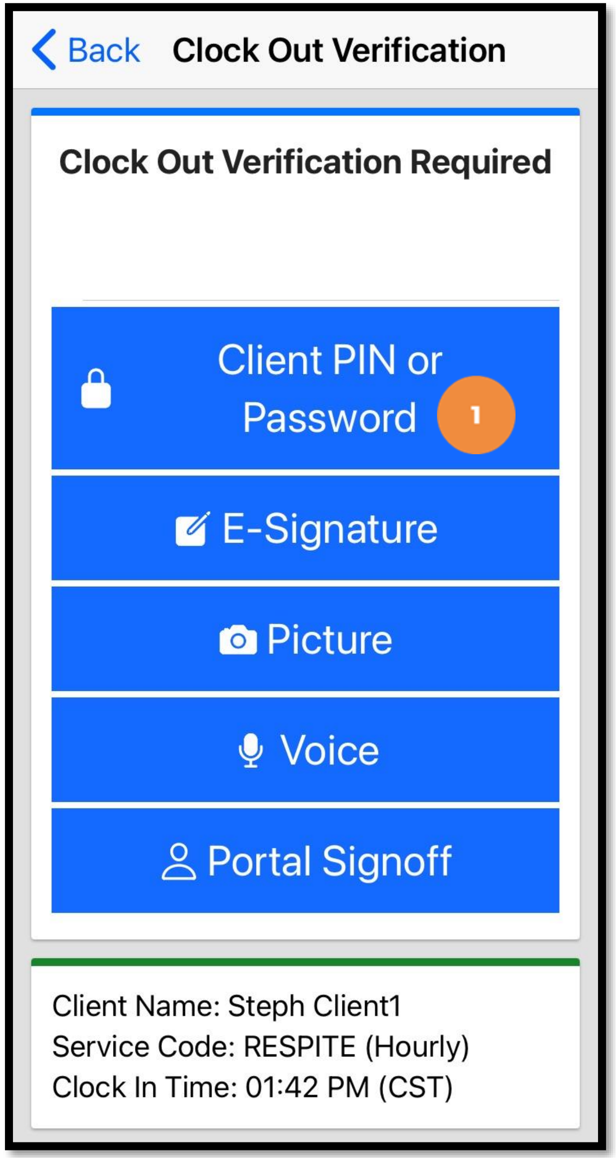
Choose only one at clock out:

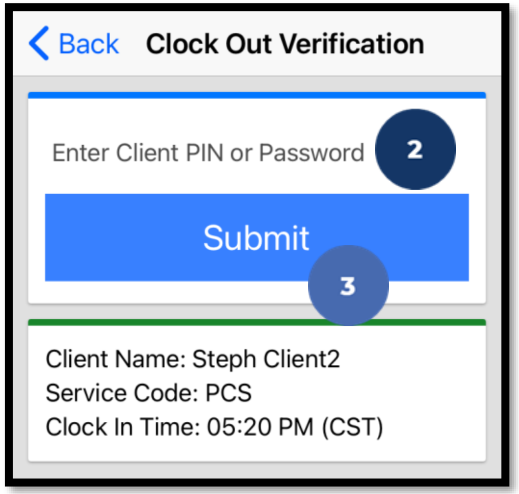
- **Client PIN**
- **E-Signature**
- **Picture**
- **Voice**
- **Portal Signoff**

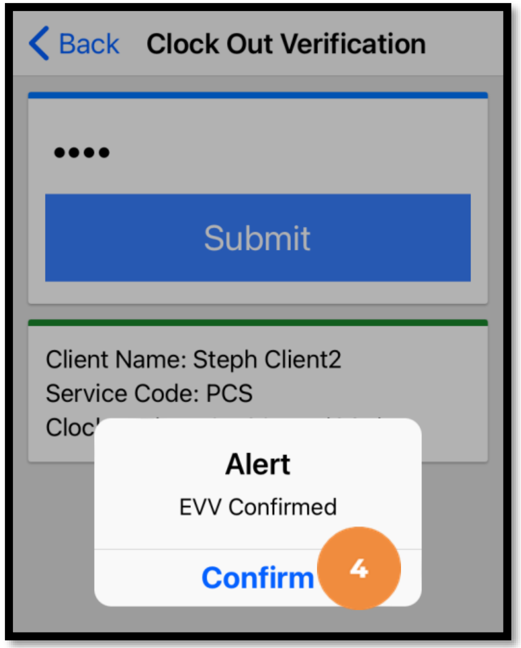
Clock Out - EVV Option #1

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

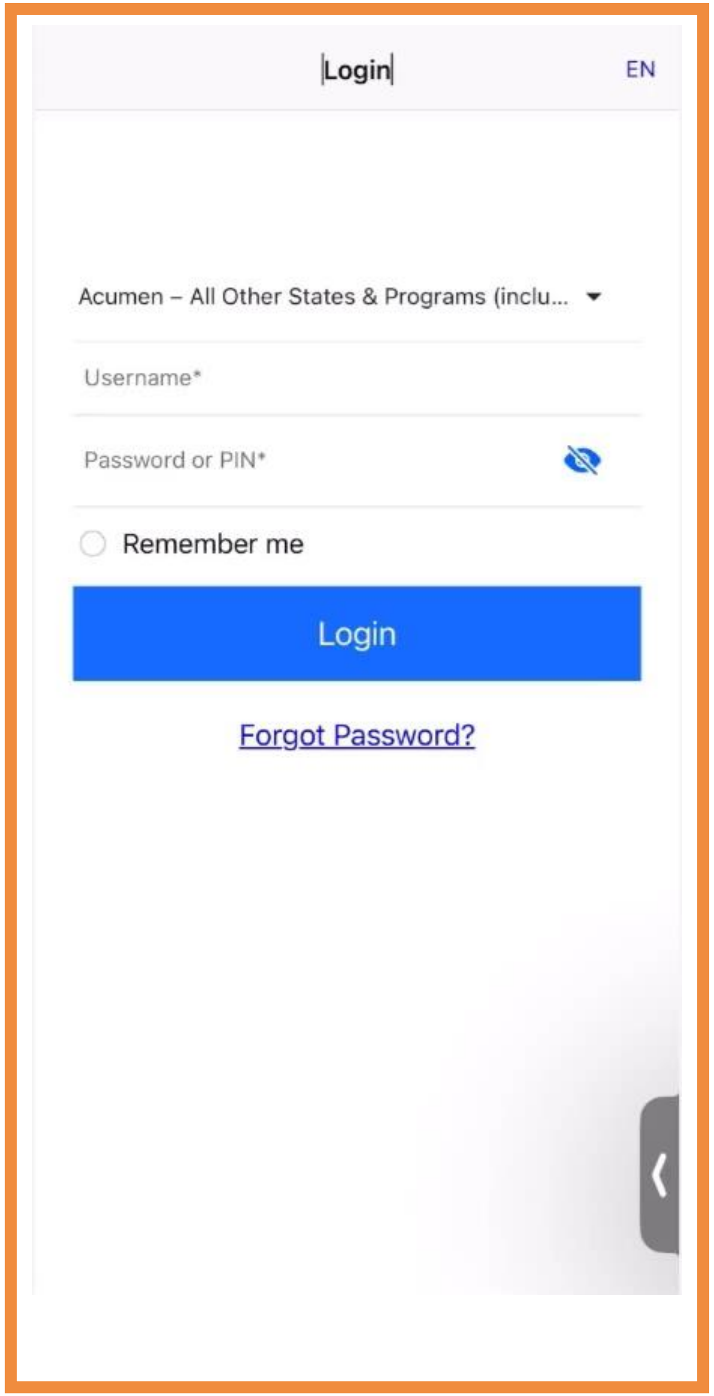






Mobile App Video

Clock in and Out Using Client PIN Option



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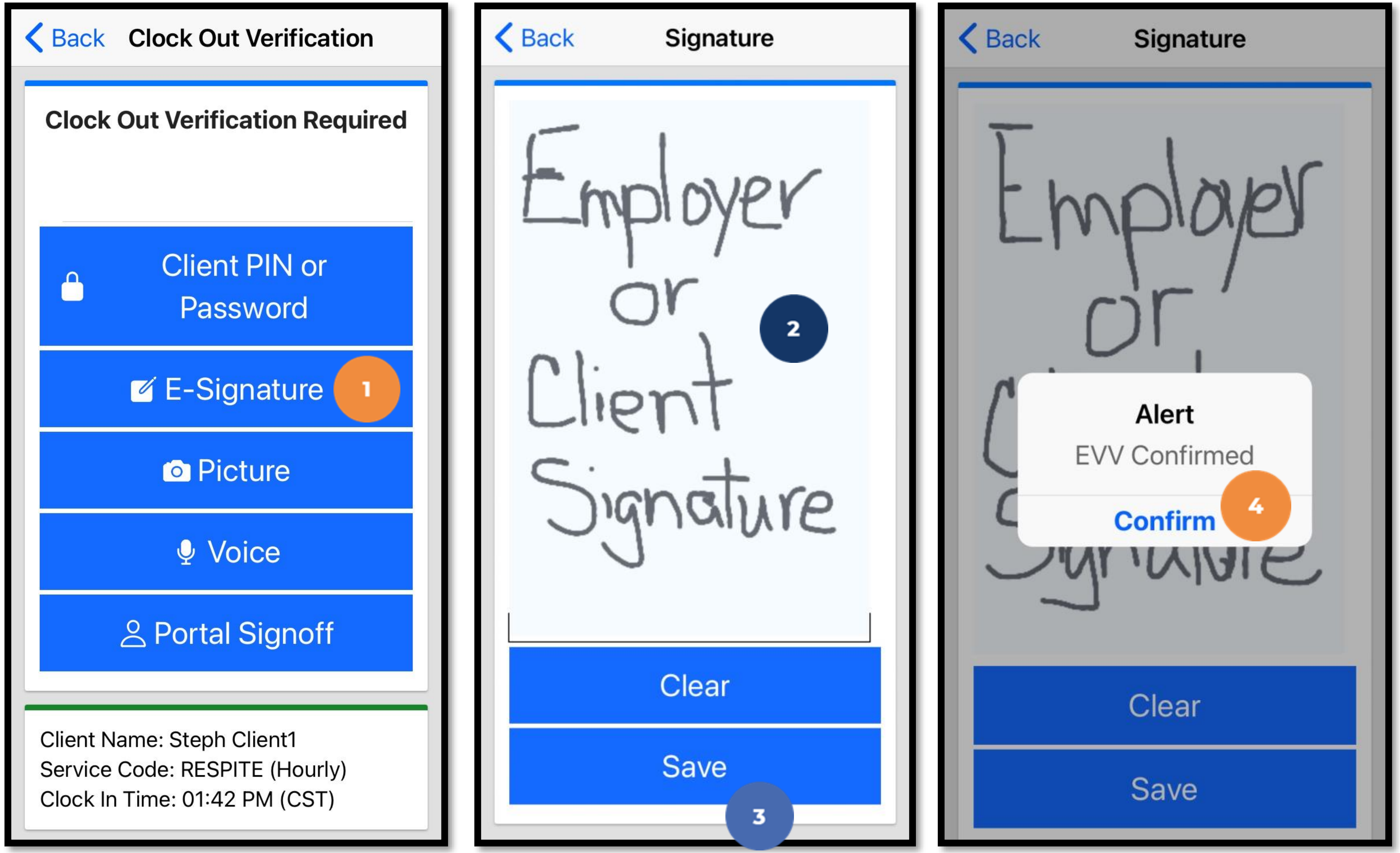
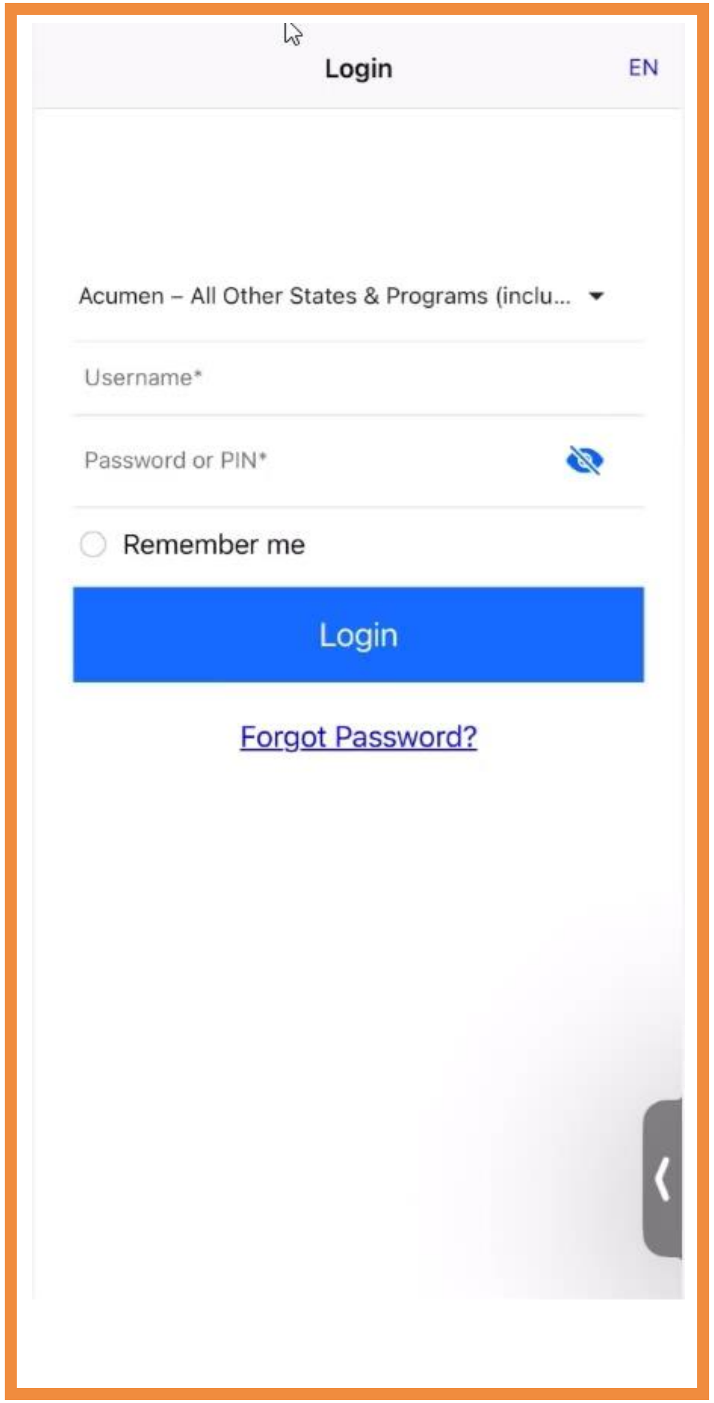
Clock Out - EVV Option #2

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



Mobile App Video Clock in and Out Using E-Signature Option



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Clock Out - EVV Option #3

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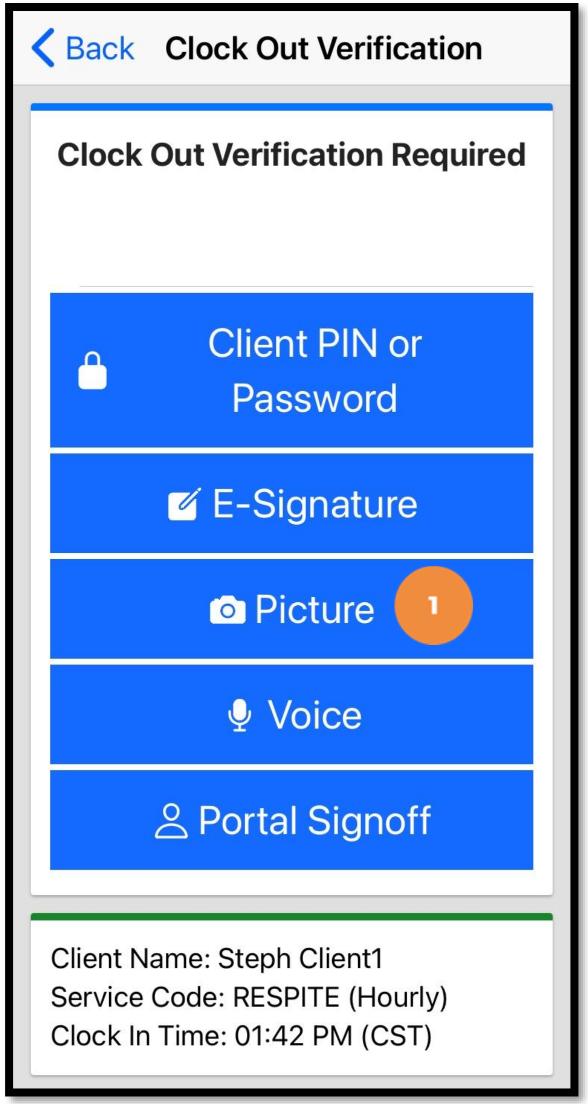
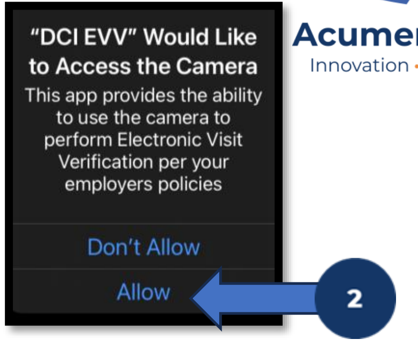
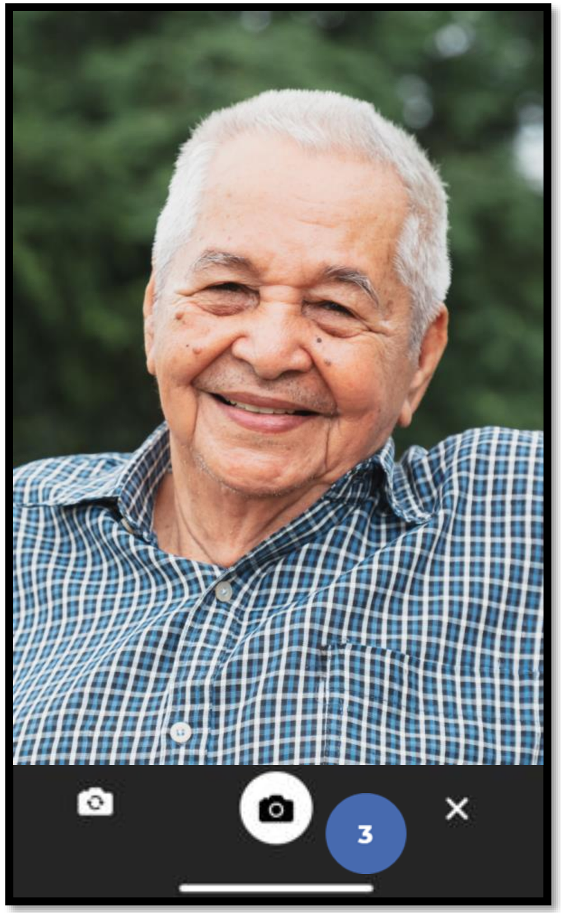
Picture

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





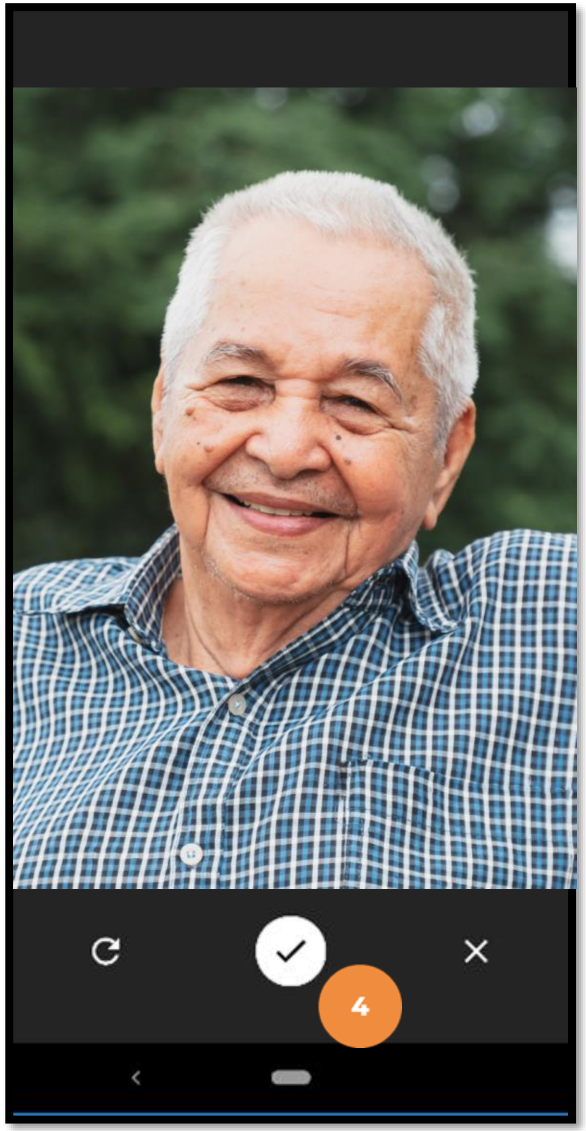


Clock Out - EVV Option #3

Picture

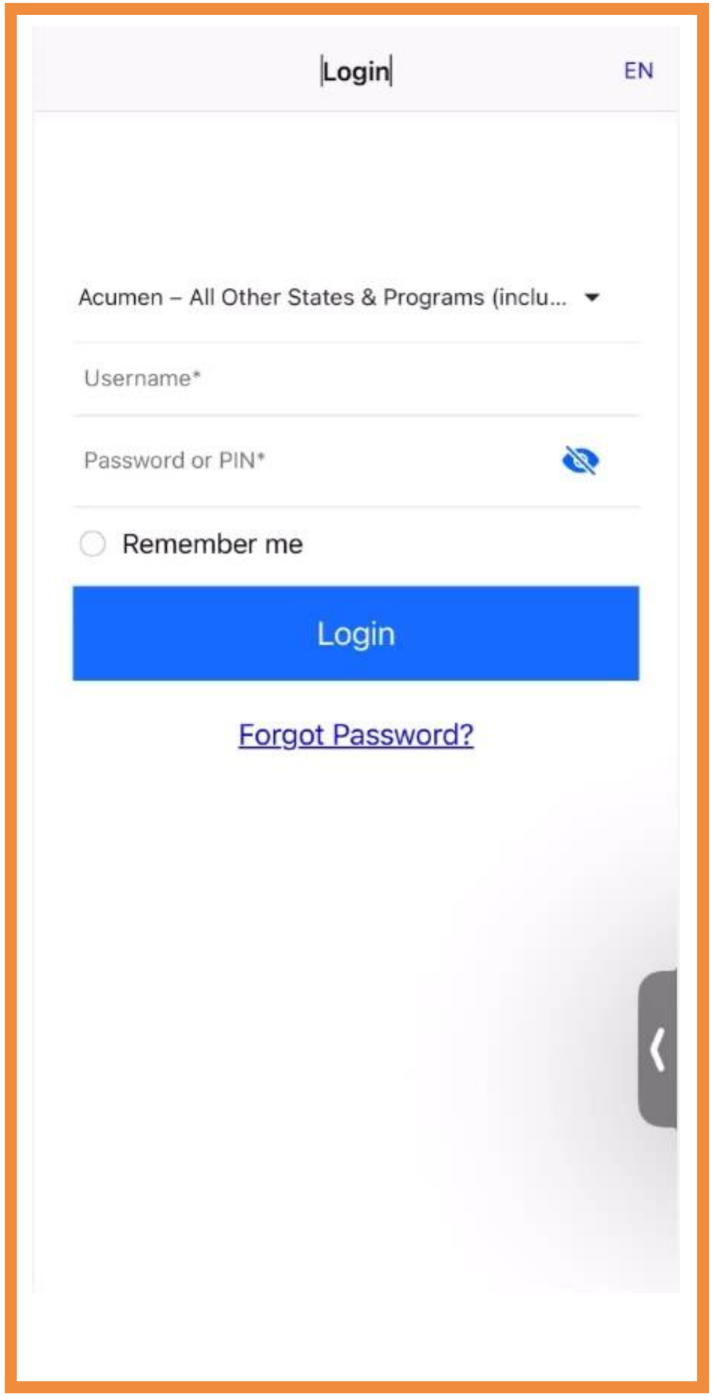
4. Click the **checkmark** to accept the picture, the X to cancel, or the circular arrow to retake the picture.
5. Click **Confirm** in the alert pop-up box to confirm the punch

***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 **<u>Picture</u>** Option



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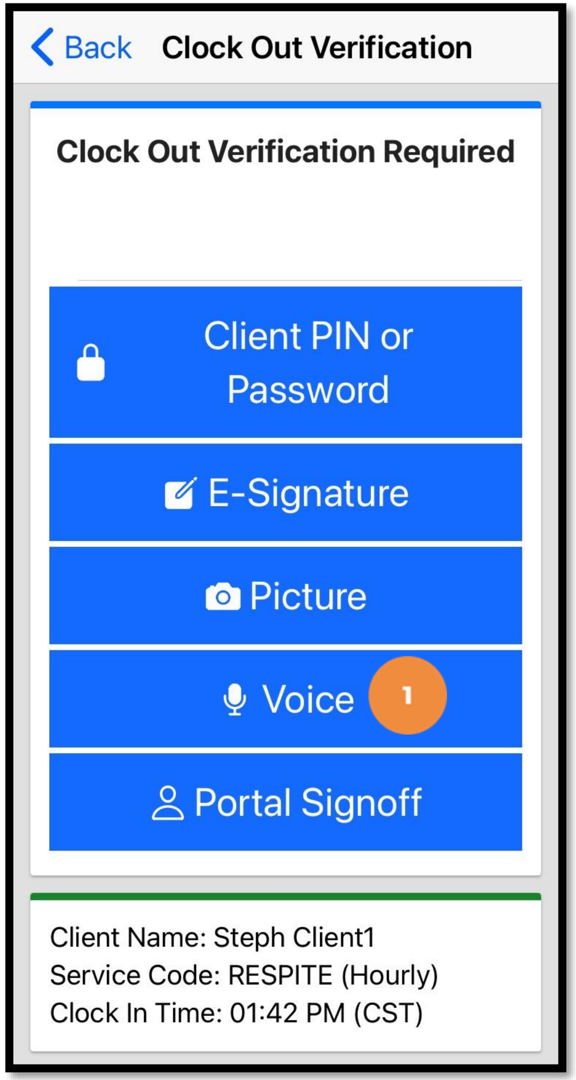
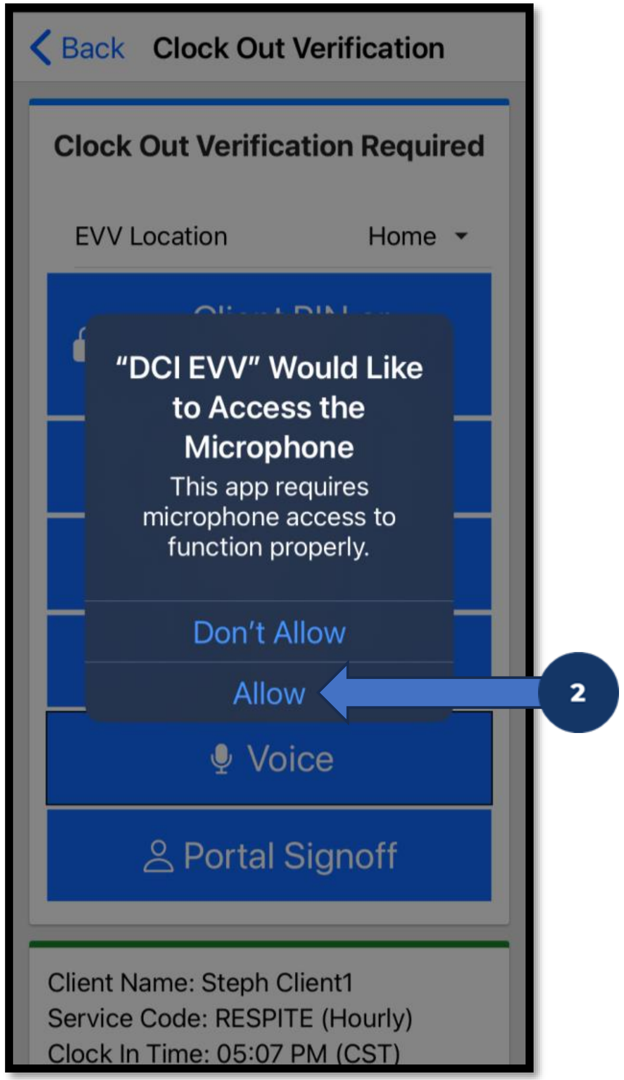
Clock Out - EVV Option #4

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**.





Clock Out - EVV Option #4

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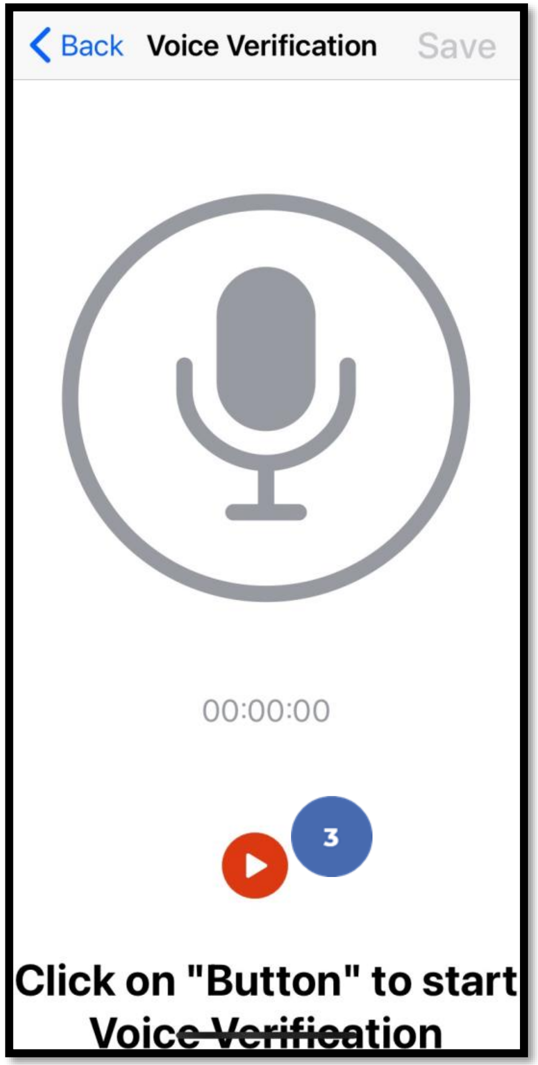
Voice

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

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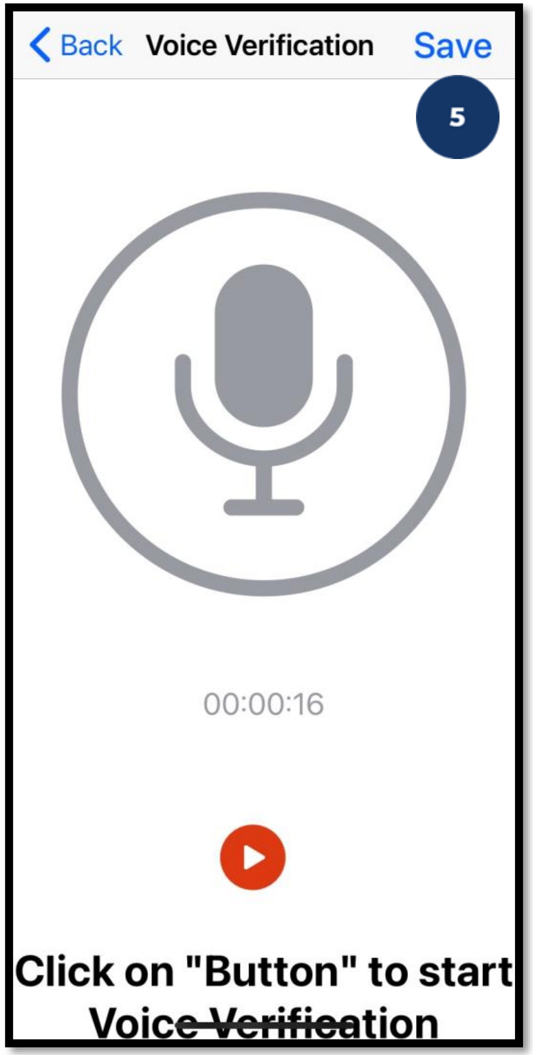
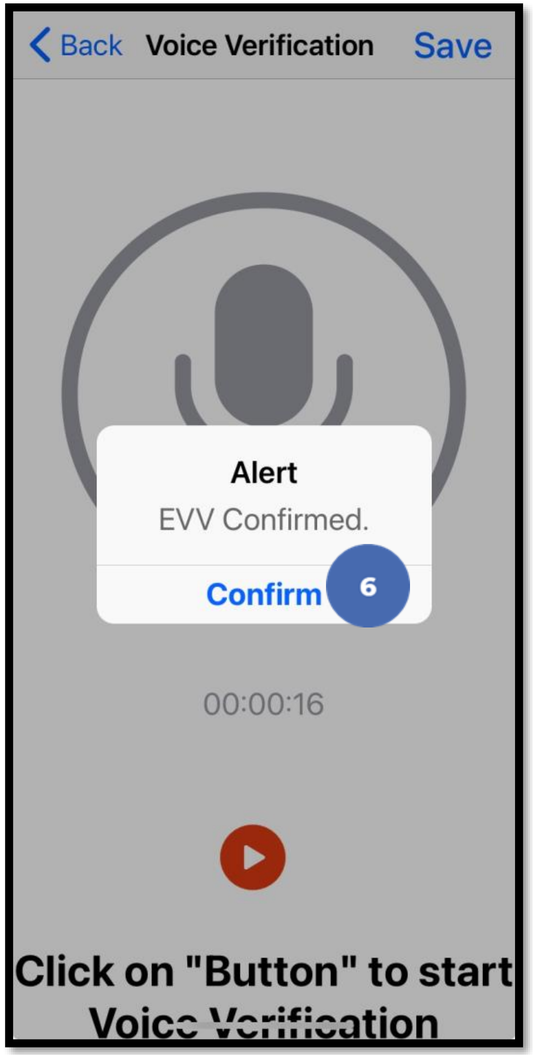
Voice

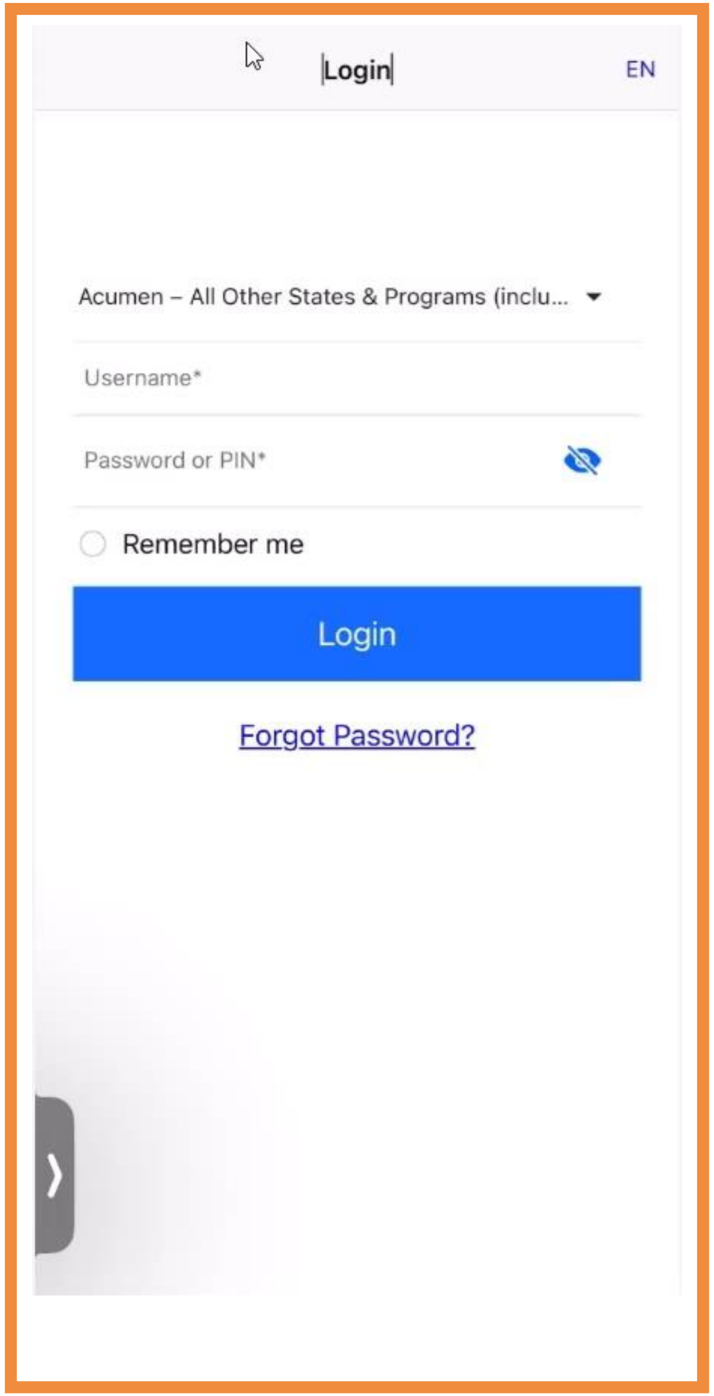
5. The client or employer clicks the blue **Save** button in the upper right corner to accept the voice verification, or the blue **<Back** button in the upper left corner to re-record it.
6. The client or employer clicks **Confirm** to validate the voice recording and hands the mobile device back to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





Mobile App Video

Clock in and Out Using Voice Option



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Clock Out - EVV Option #5

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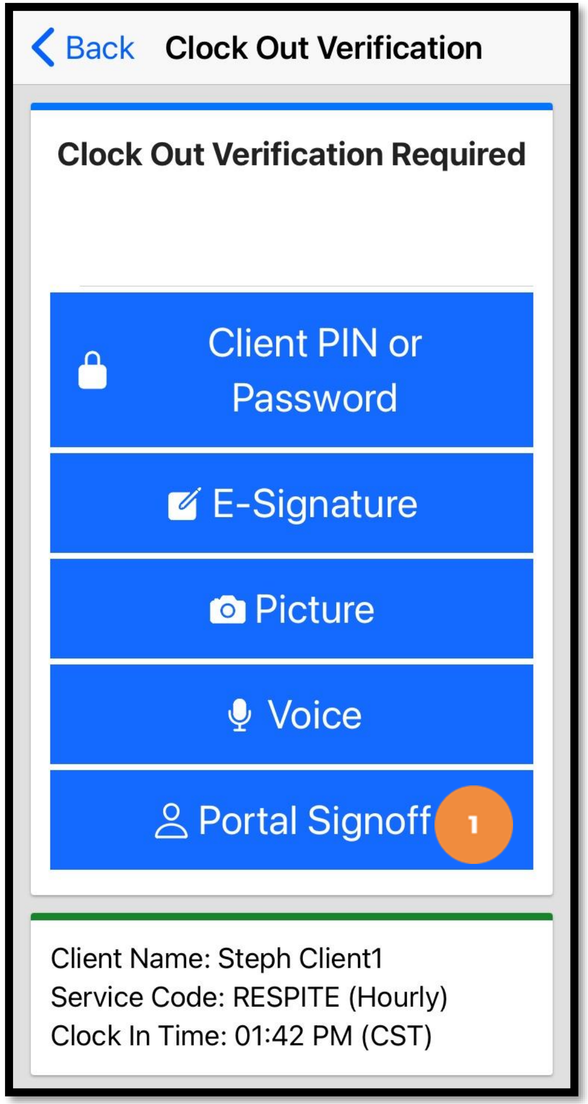
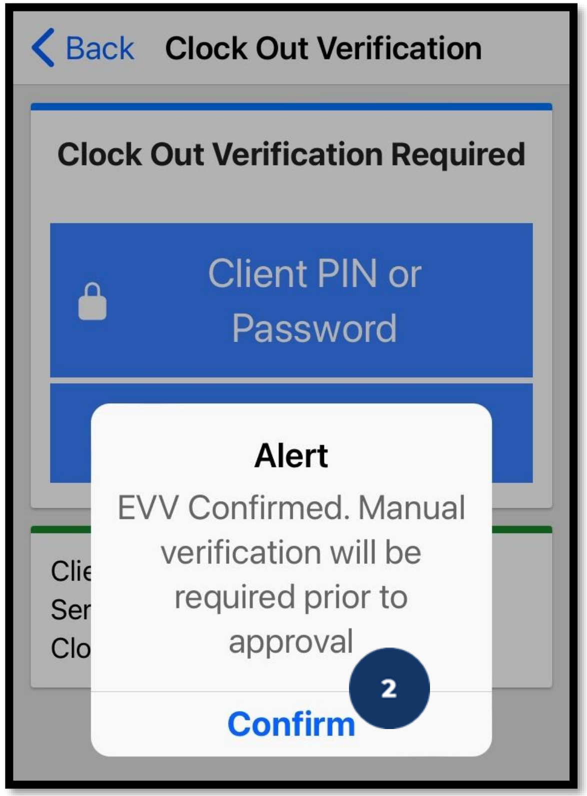
Portal Signoff

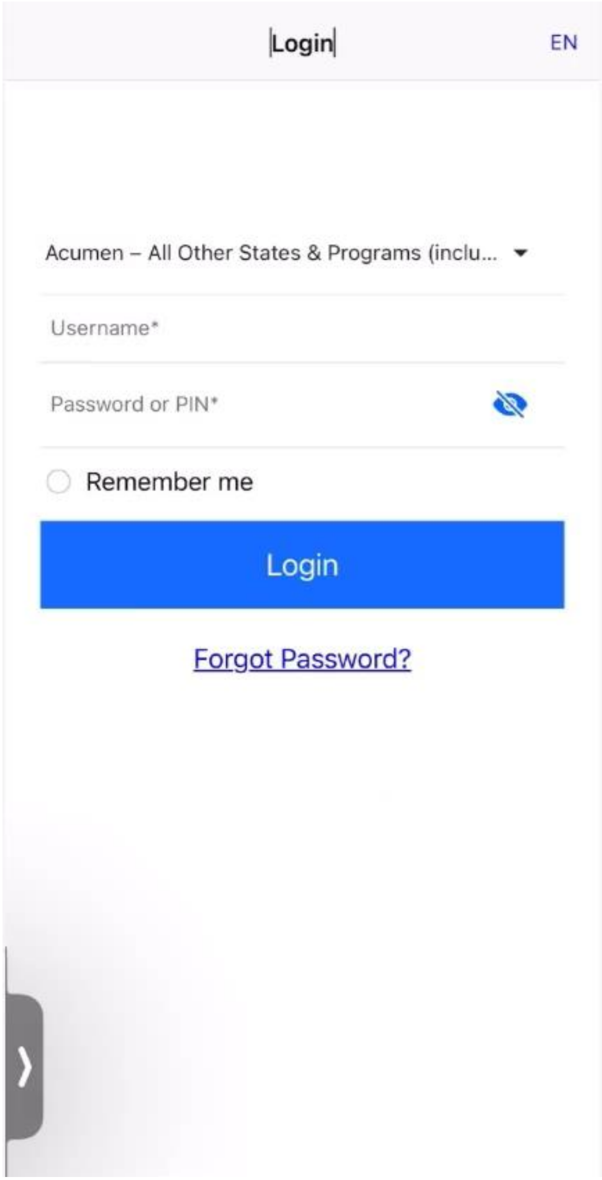
1. Select the clock out verification type:
   ✓ Portal Signoff
2. An alert will appear stating that EVV is confirmed, but manual verification will be required prior to approval. Click **Confirm.**





Mobile App Video

Clock in and Out Using Portal Signoff Option



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Mobile App Offline Mode

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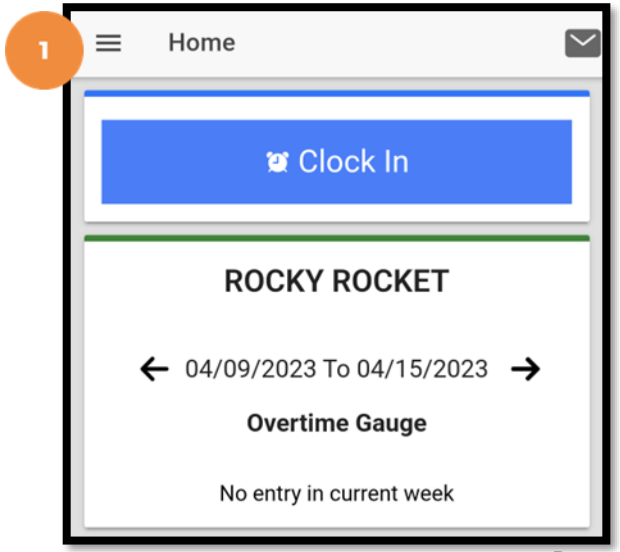
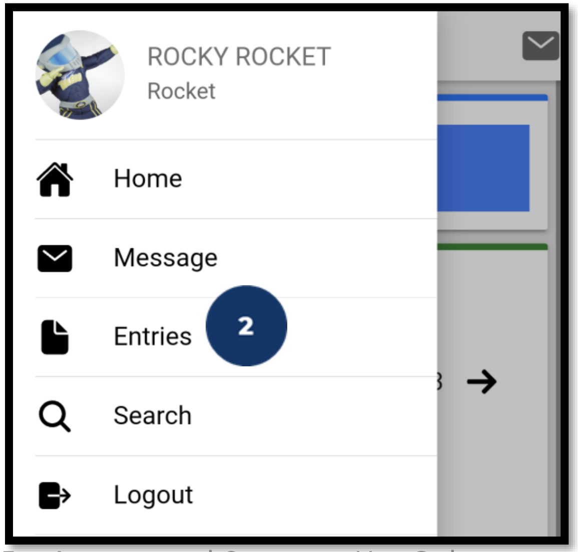
- Offline mode allows the employee to use the mobile app on a **registered device** when the device is not connected to the internet or loses connection while the app is in use
  - ✓ **Please note:** A device is registered automatically the first time the user logs into the mobile app while connected 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.

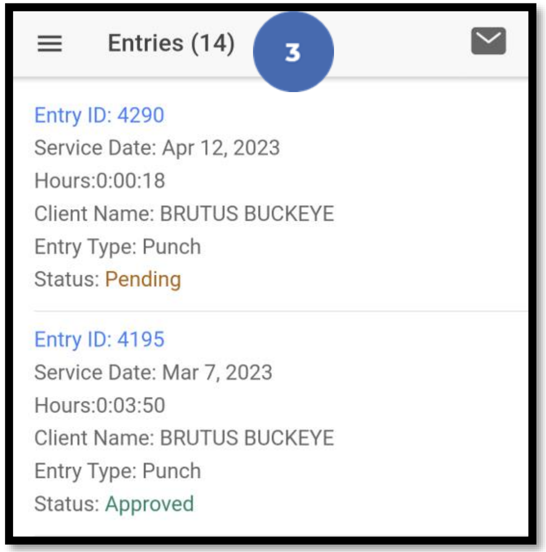
Review Entries

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.







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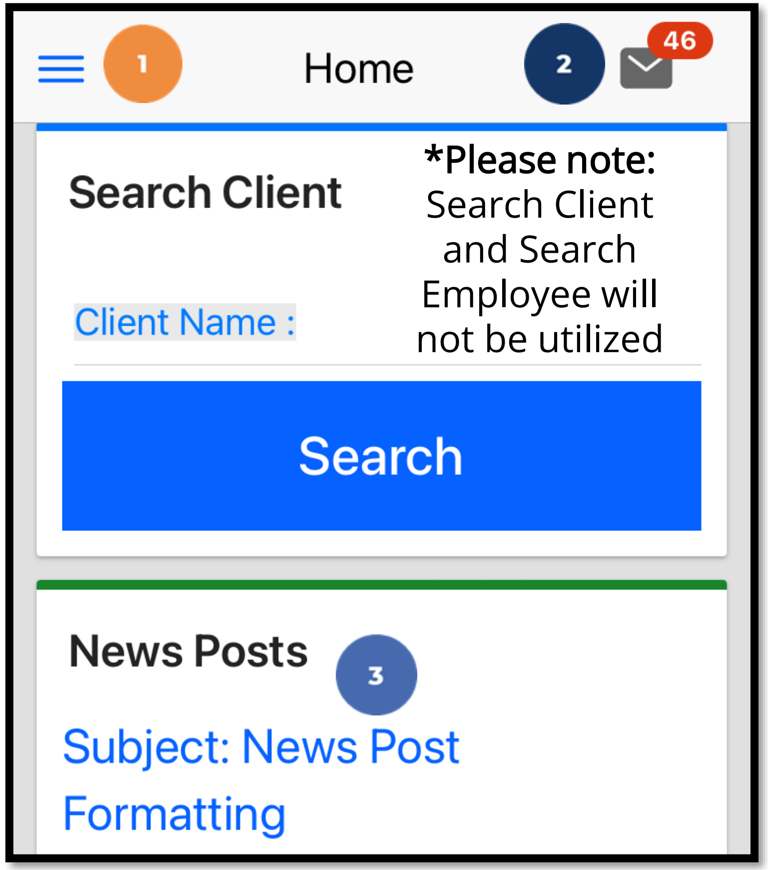
Employer Mobile App

Dashboard

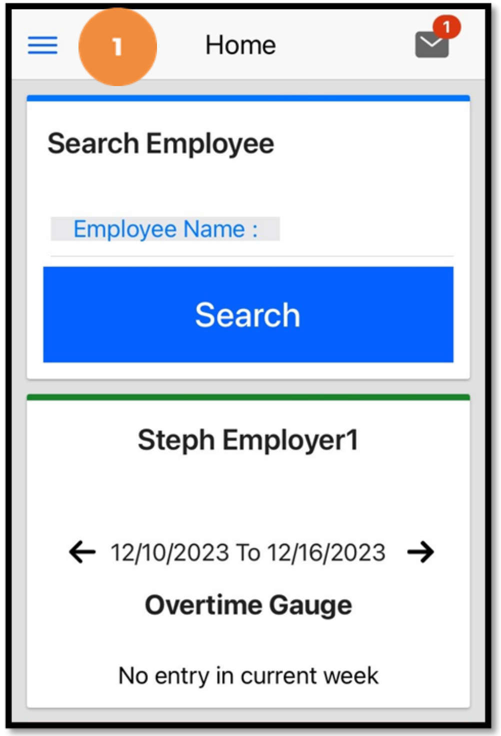
After logging in, the Dashboard or home page, displays.

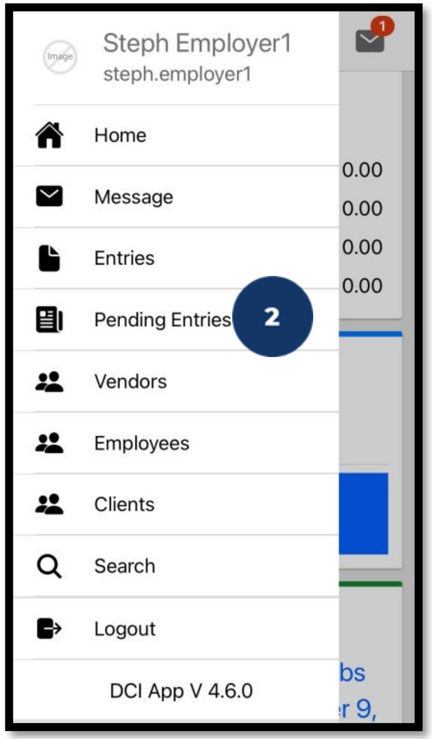
1. Click the **Menu** in the top left corner of the screen to access all available submenu items
2. Click the envelope icon to access the messaging module
   - ✓ View and send secure messages within DCI
3. Scroll down to view News Posts
   - ✓ Important information from the program
   - ✓ News Posts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

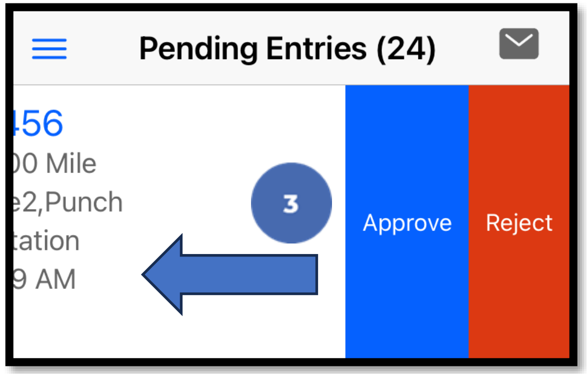


Review & Approve Entries

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.)

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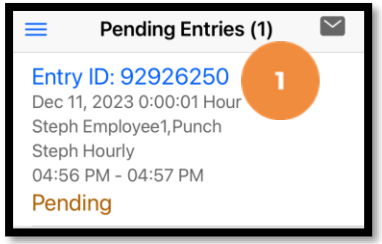
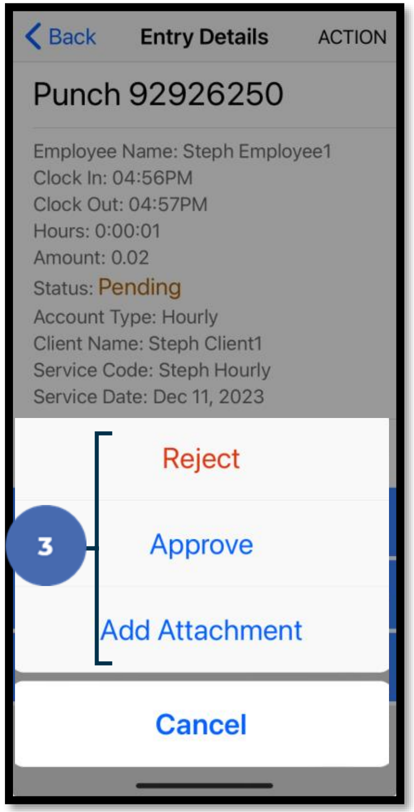
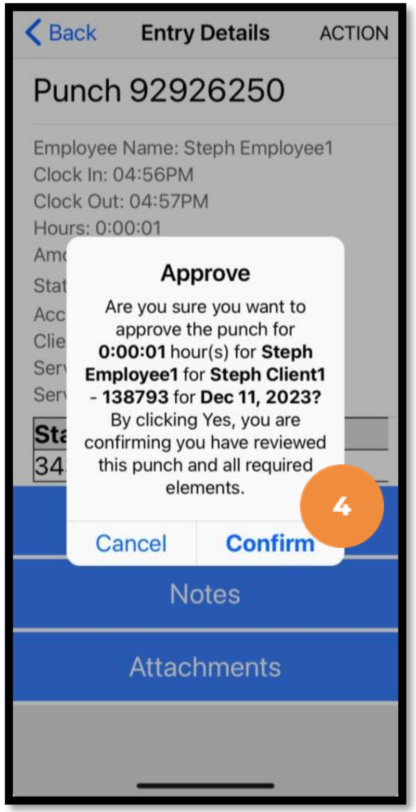
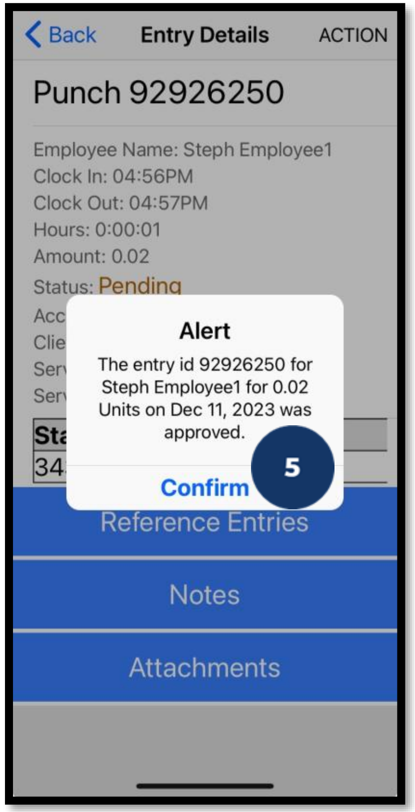
1. Alternatively, click the blue **entry ID** hyperlink to open the entry details.
2. Click **ACTION** in the top right corner
3. Select **Reject**, **Approve**, or **Add Attachment**.
4. On the pop-up alert window, view the punch details and click **Confirm** to initiate the confirmation process.
5.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









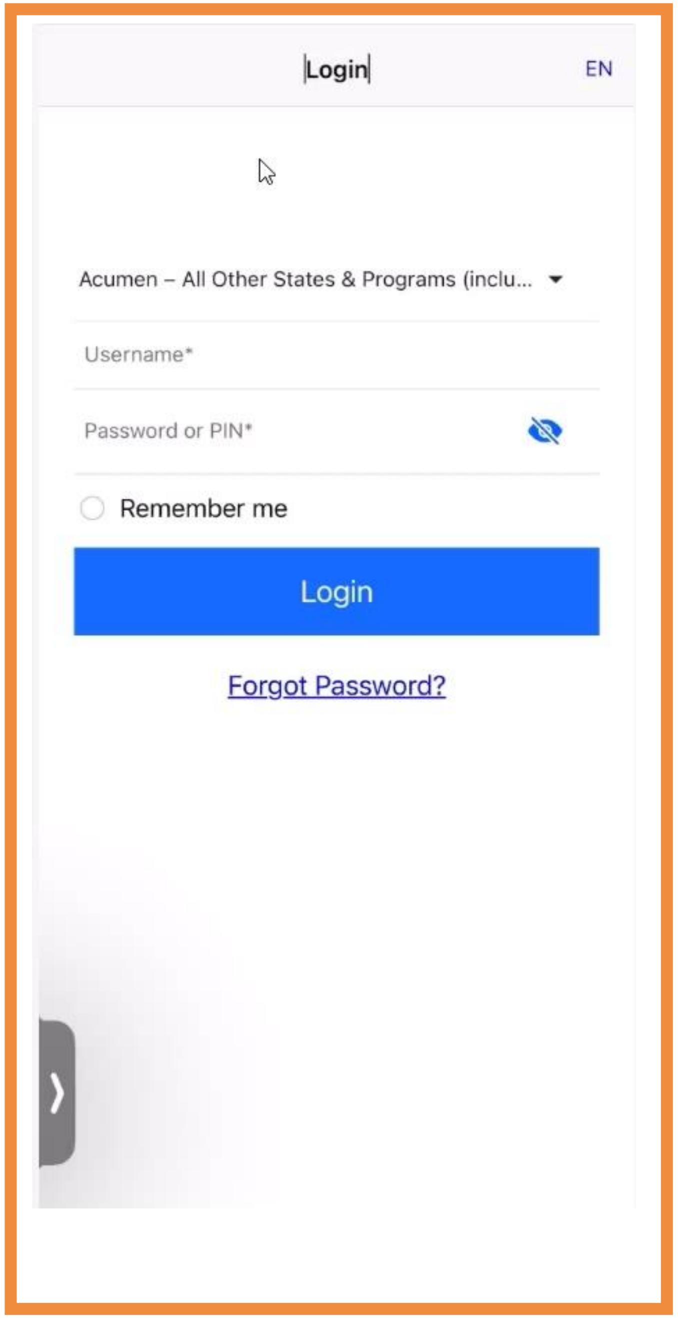
***Please note:**
If the action taken was to approve the entry, the status changes to Approved and the entry will be processed for payment.

***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



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DCI Web Portal

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

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1. Open an internet browser on a computer or mobile device (Google Chrome is preferred) and navigate to the [DCI Web Portal](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

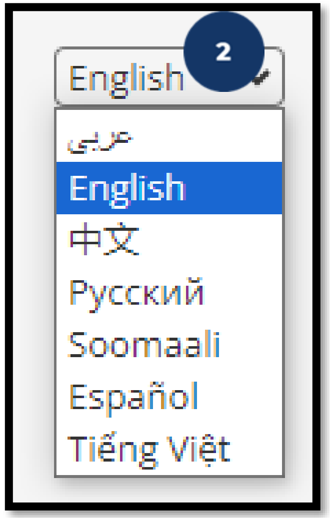
3. Enter **username** and **password**
   - Credentials provided by Acumen

4. Utilize the "**Forgot your password?**" link if needed

5. Click the blue **Sign In** button

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

1 acumen.dcisoftware.com



Profile Settings

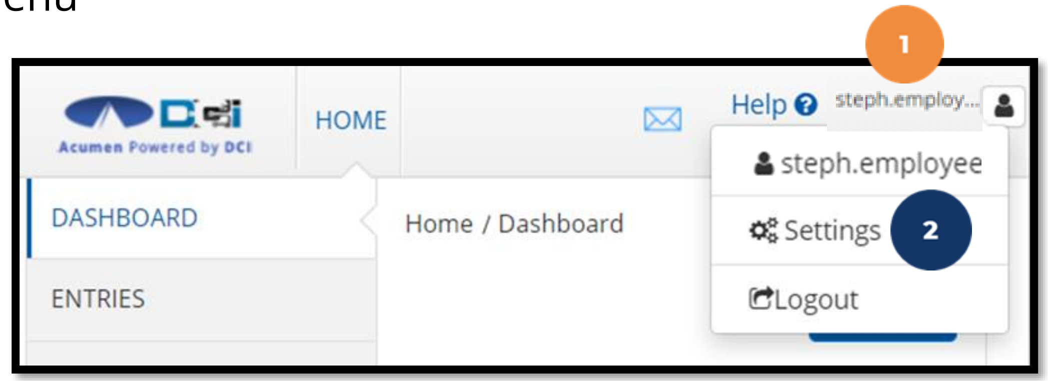
***Please note!** Profile settings are only available on the full site

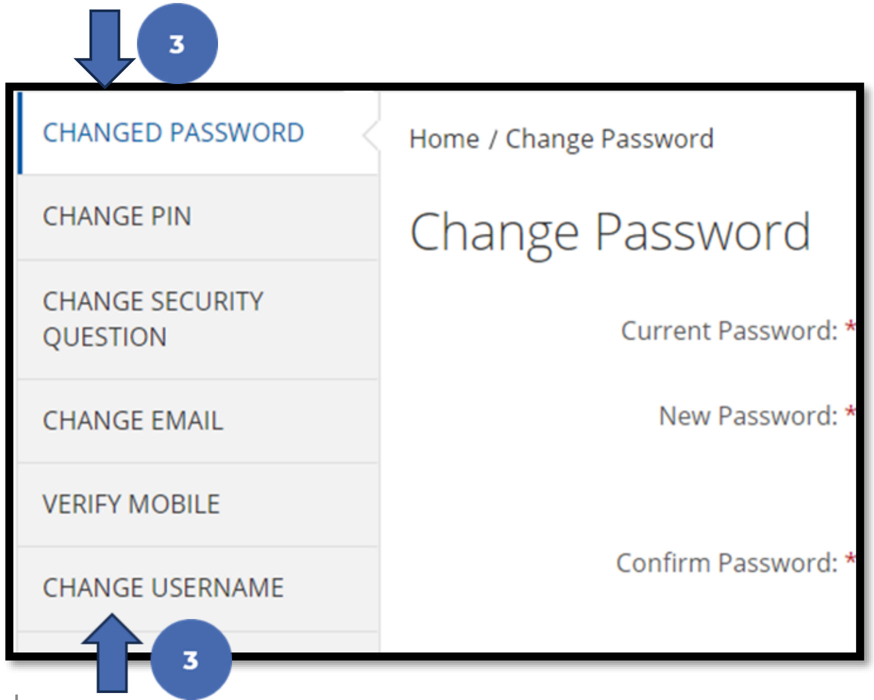
1. Click the **username** in the top right corner of the main menu

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



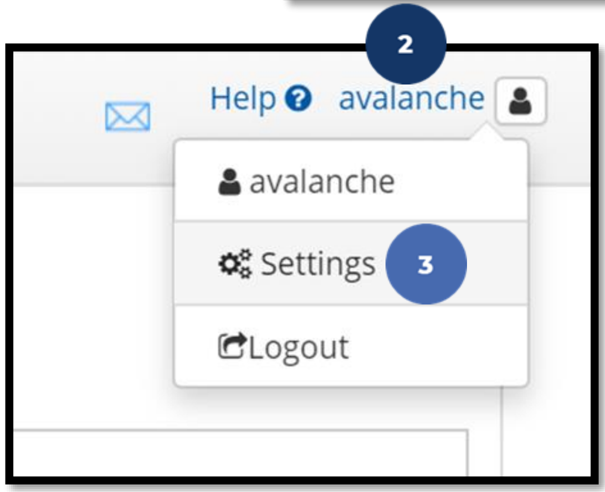


Add / Change PIN

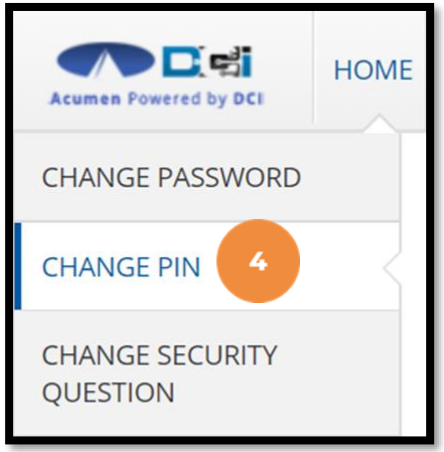
***Please Note!** **The PIN can only be added or changed in the web portal**

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



4. Select **Change PIN** or **Add New PIN**
   - ✓ Add New PIN after a reset
   - ✓ Change PIN anytime



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

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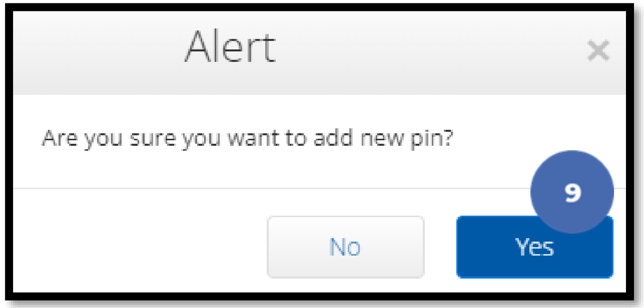
Add / Change PIN (cont.)

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

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



Web Portal Messaging Module

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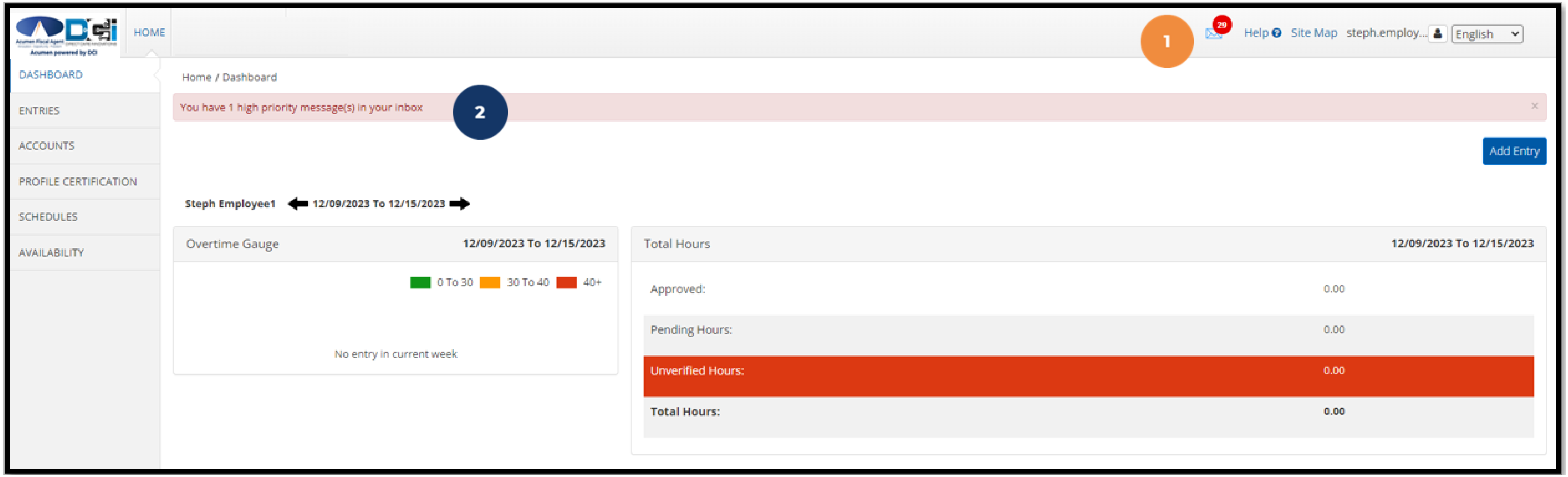
1. Click the **Mail** icon (envelope) in the top right corner of the main menu to access the inbox
2. Alternatively, if the red **high priority message banner** displays, click it to access the inbox.



Web Portal Messaging Module

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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

☐	★	Attachments	From	Subject	Date/Time	Action
☐		📎	DCI Support	Account Statement	07:42 AM	
☐	★		**DCI Support**	**Pin Added**	**06/04/2024 03:28 PM**	
☐	★		DCI Support	User Profile Unlocked	12/05/2023 02:53 PM	
☐	★		DCI Support	User Locked Out	12/05/2023 02:48 PM	

View Paystubs/Statements via Messaging Module

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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

☐	★	Attachments	From	Subject	Date/Time	Action
☐			DCI Support	Account Statement	07:42 AM	

1

Notes | Attachments

2

☐	Date	File Name	File Type	File Size	Added By	Download	Status
☐	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

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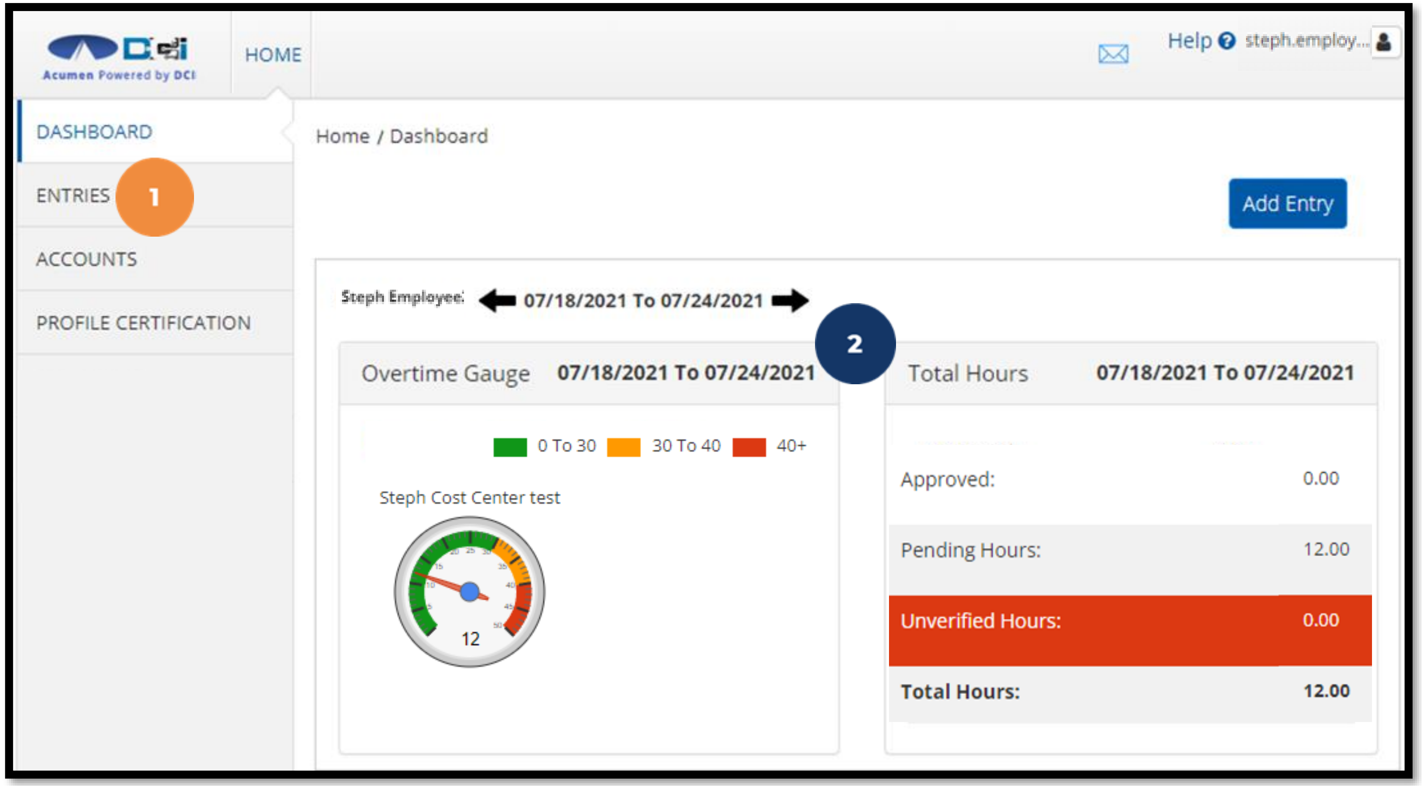
The **Dashboard** is the landing page

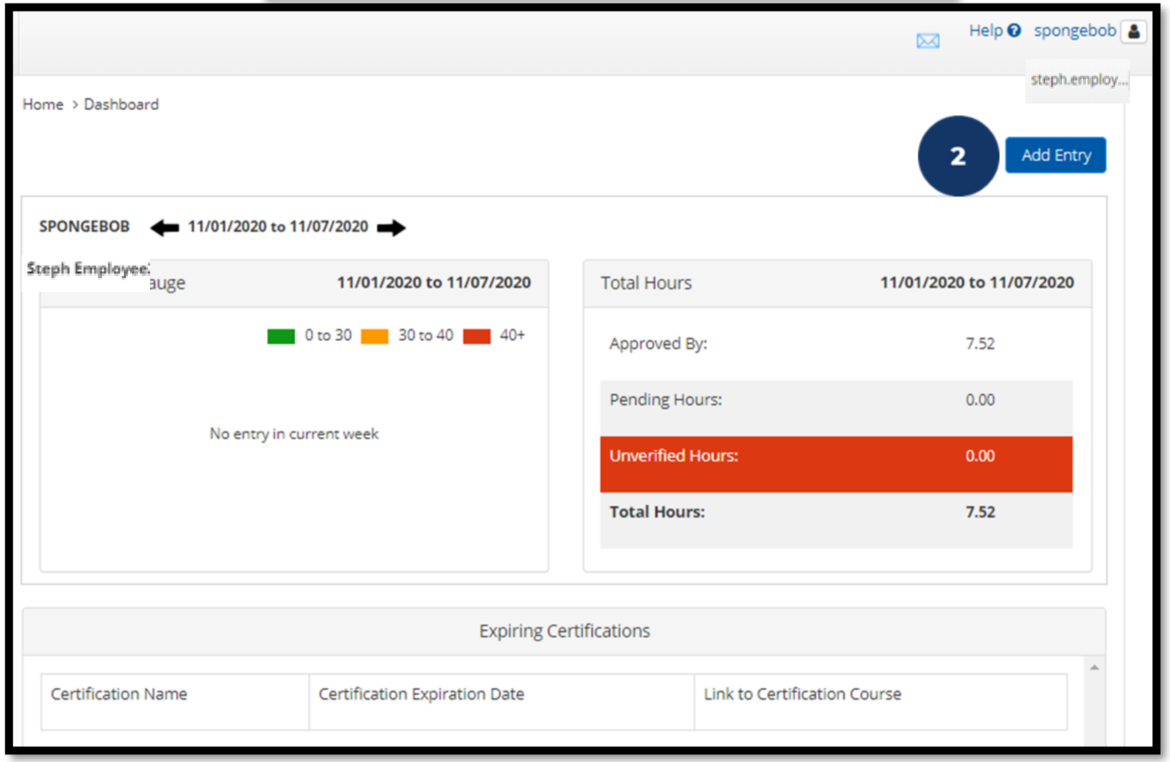
1. Select the **Entries** tab to view a complete list of submitted time entries

2. Overtime Gauge & Total Hours for the current calendar week



Add New Entry

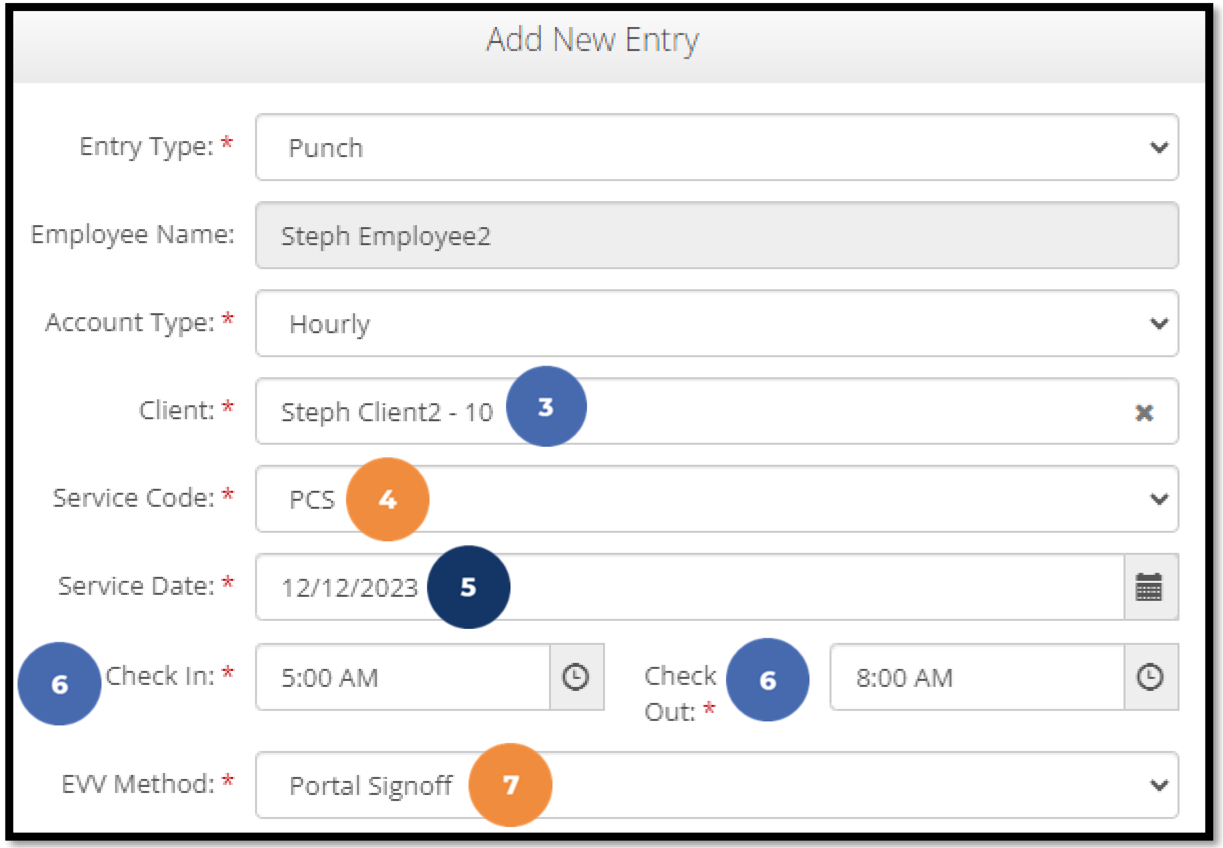
1. Log in to the [DCI Web Portal]
2. Click the blue **Add Entry** button



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

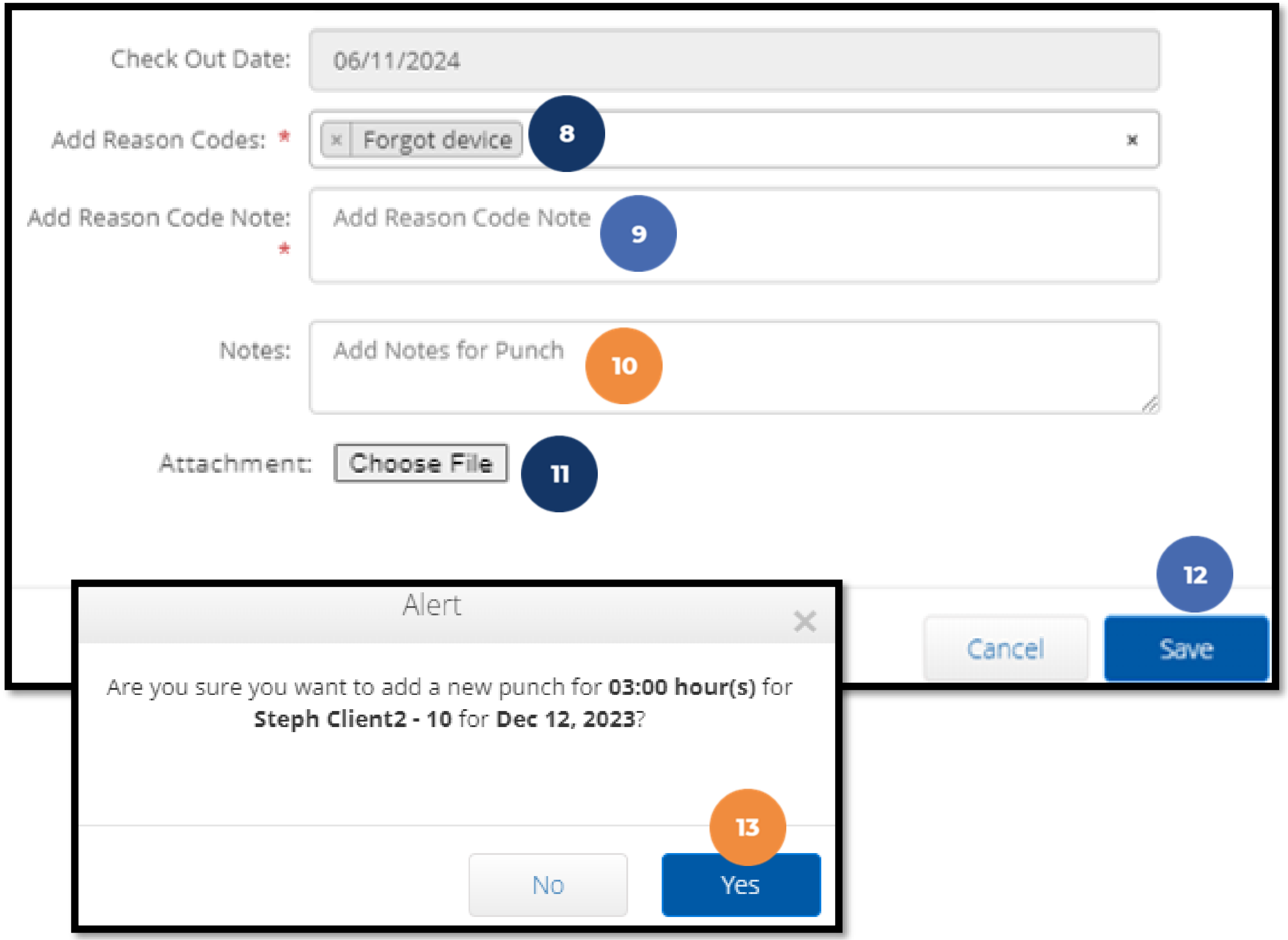
Add New Entry (cont.)

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

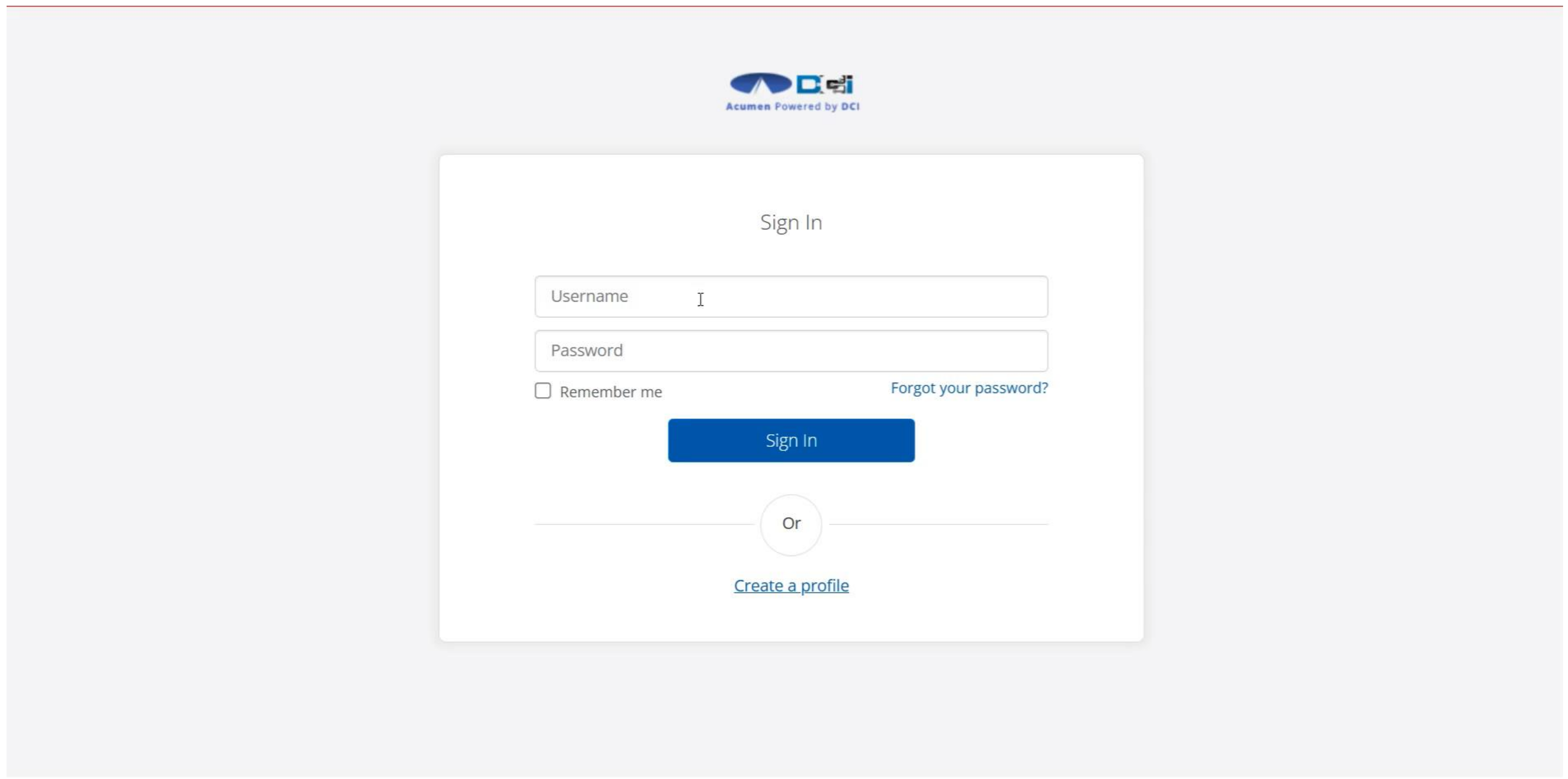


Add New Entry (cont.)

8. Select a Reason Code from the drop-down list
9. Add a Reason Code Note
10. Enter Notes for the punch (optional)
11. Click the **Choose File** button to select and upload Attachments (optional)
12. Click **Save**
13. Click **Yes** to submit



Web Portal Video
Employee Adds (Historical) Entry



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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.

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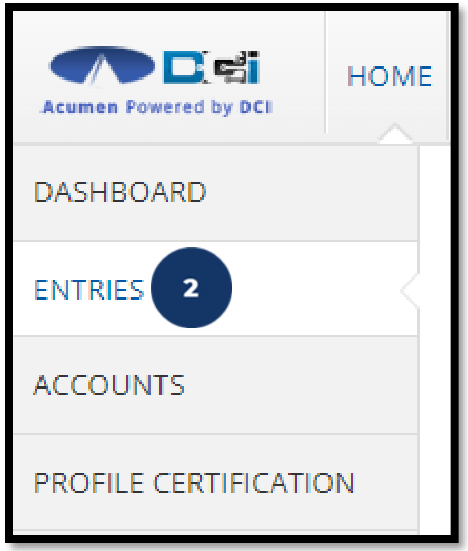
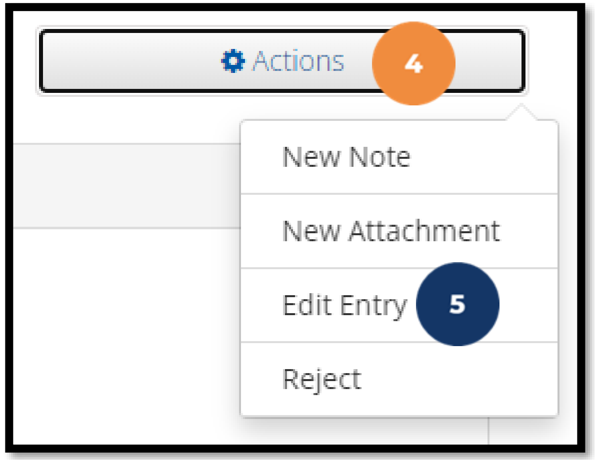
1. Log in to the [DCI Web Portal]
2. Click **Entries** on the submenu
3. Click anywhere on the line of the punch entry to be edited
4. Click the **Actions** button in the top right corner
5. Select **Edit Entry** from the drop-down menu



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 3		Steph Client1	Steph Hourly	0:04:00	Hourly	Pending



Edit Entry (cont.)

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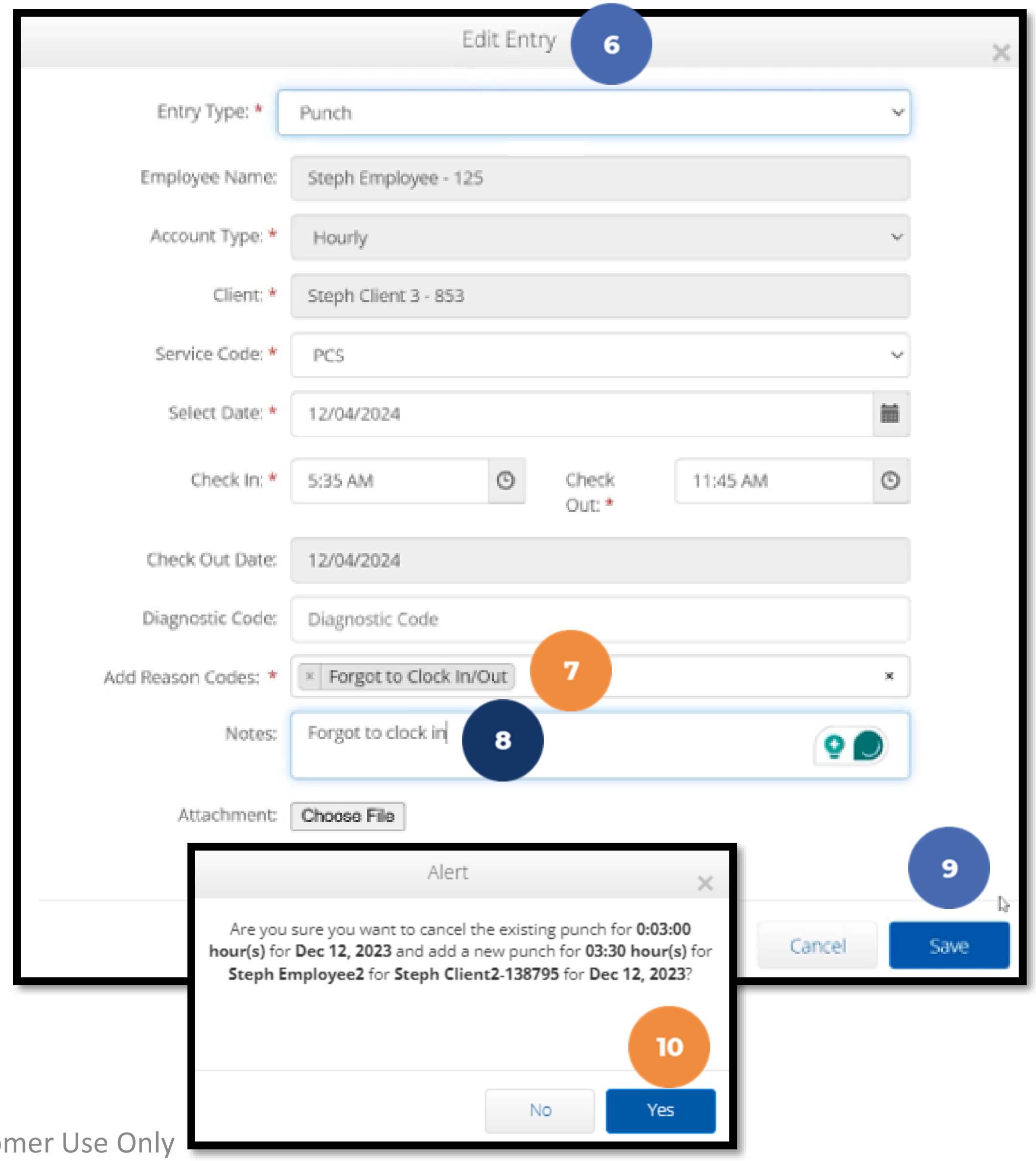
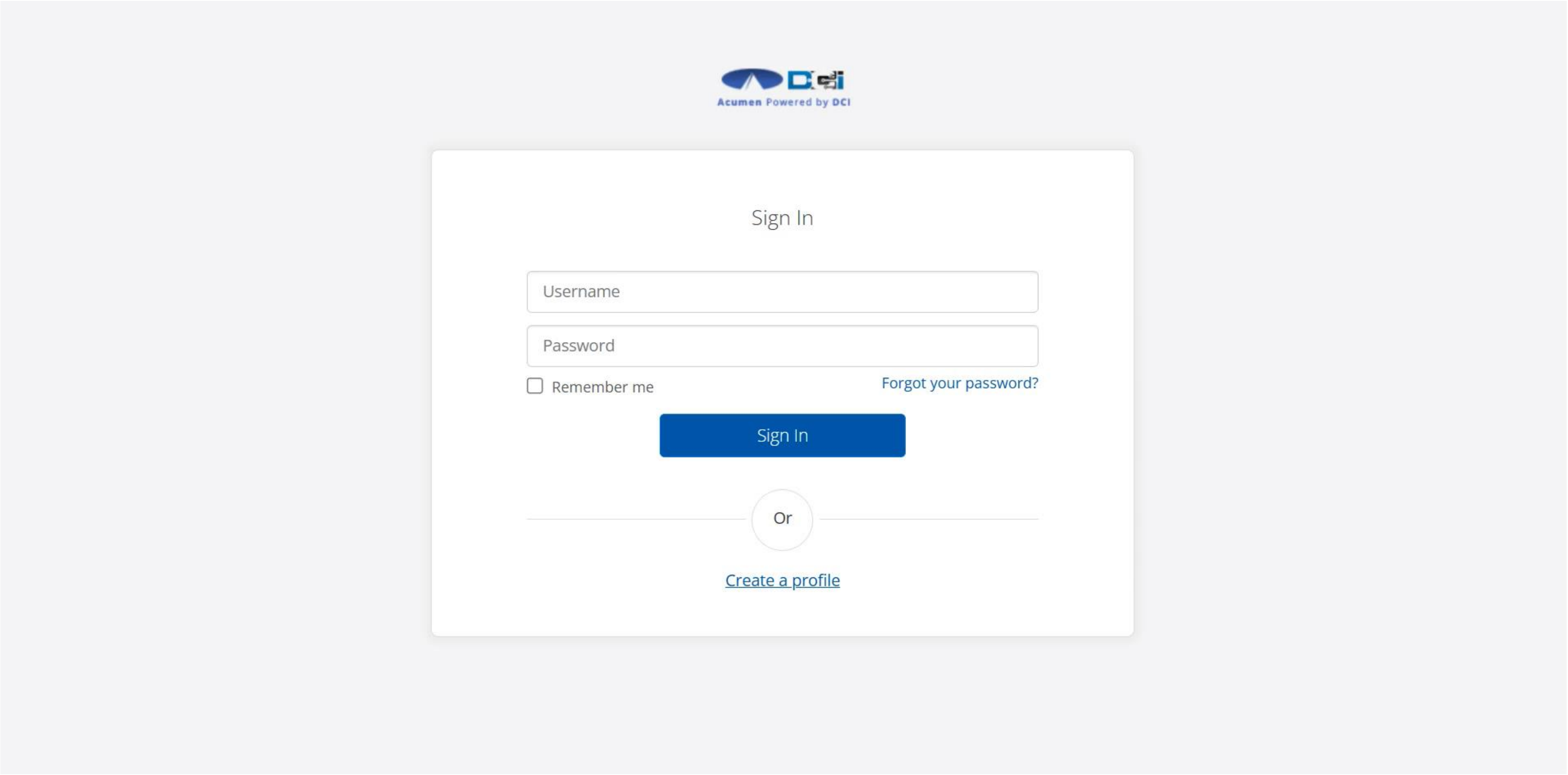
***Please note!** Only entries in a Pending status can be edited by the employee

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.



Web Portal Video
Employee Edits (Historical) Entry



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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.

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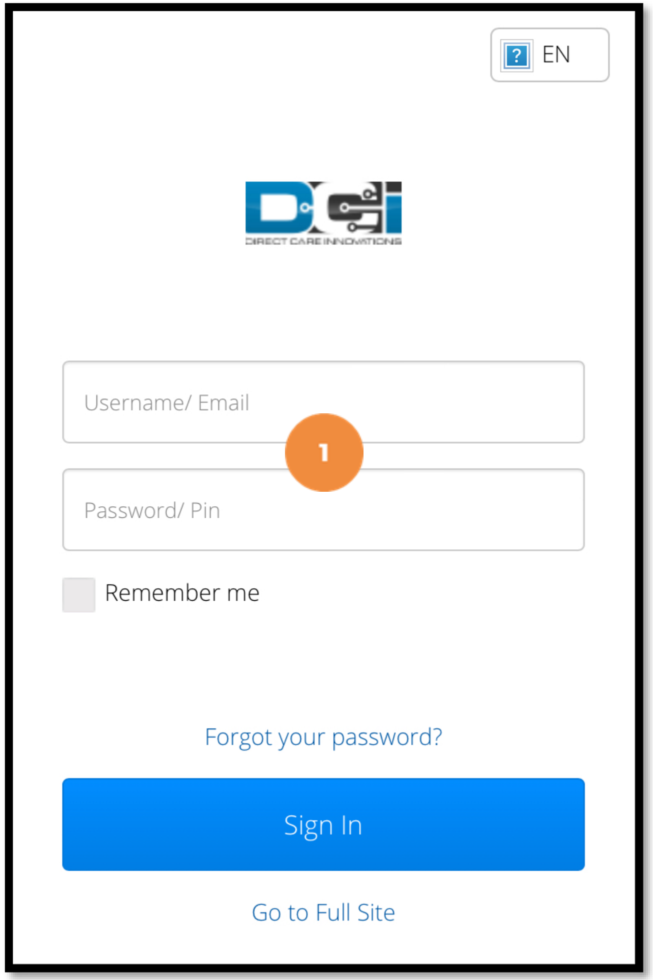
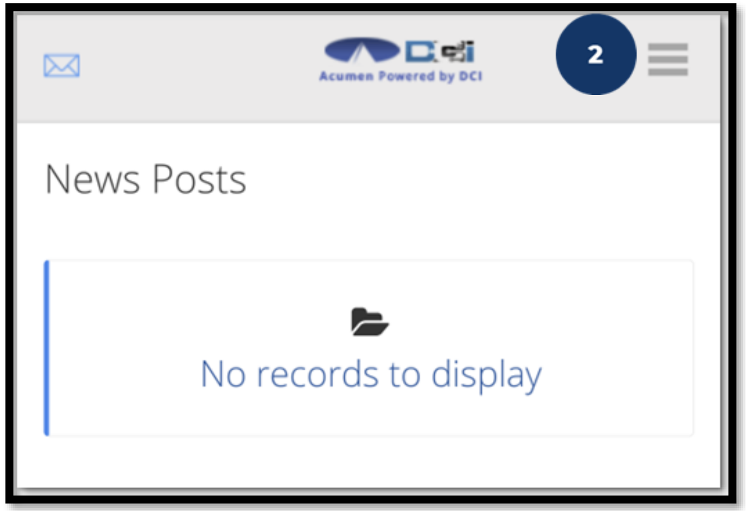
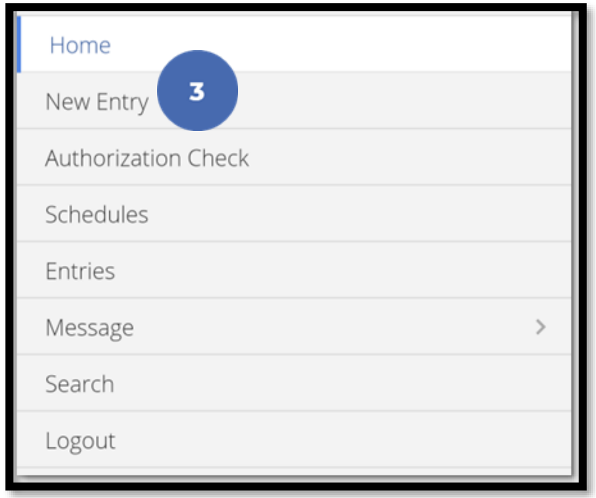
Add New Entry - Mobile Web



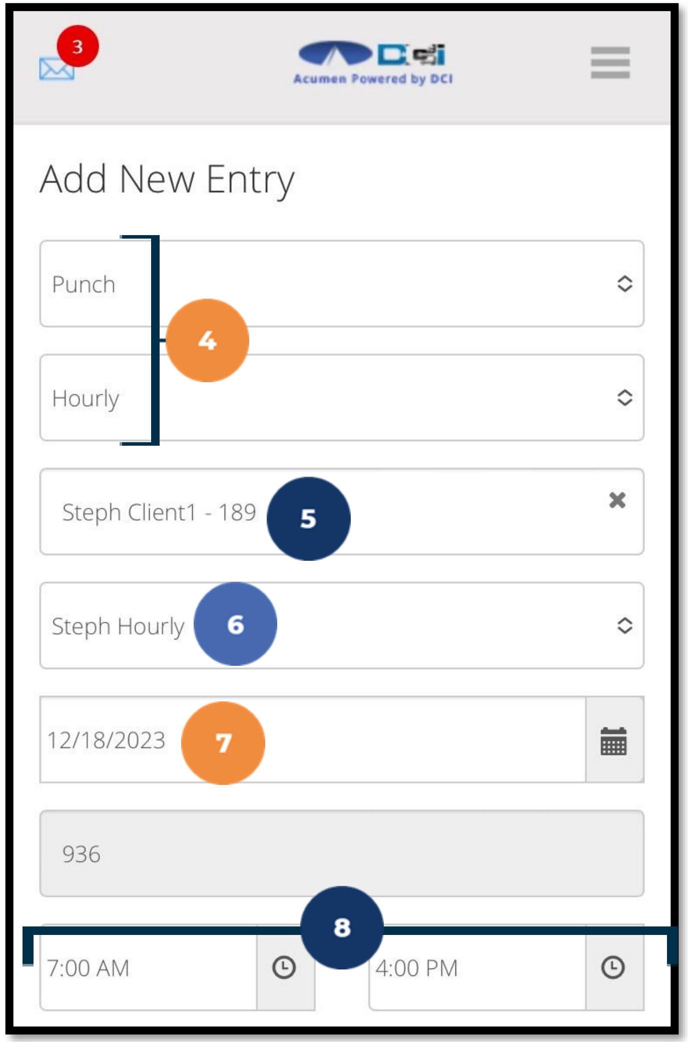
1. Log in to the DCI Web Portal on a mobile device
2. Click the **Menu** in the top right corner of the screen
3. Select the **New Entry** tab from the submenu





Add New Entry - Mobile Web (cont.)

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



Add New Entry - Mobile Web (cont.)

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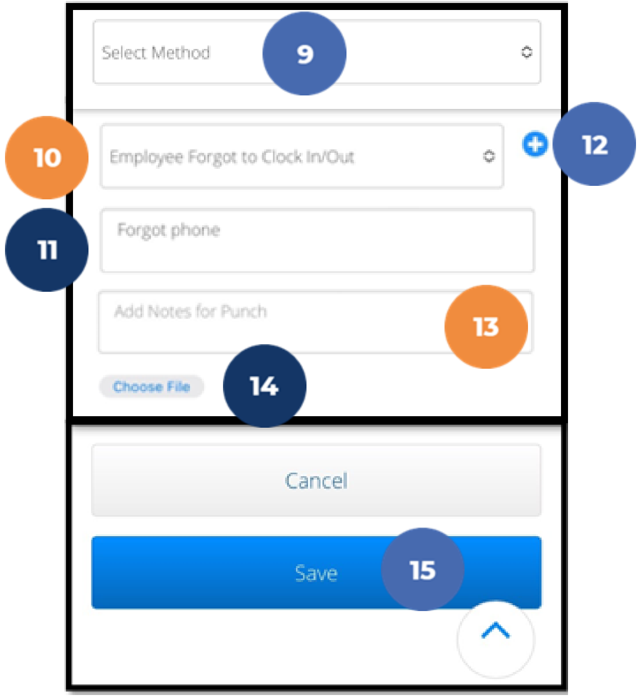
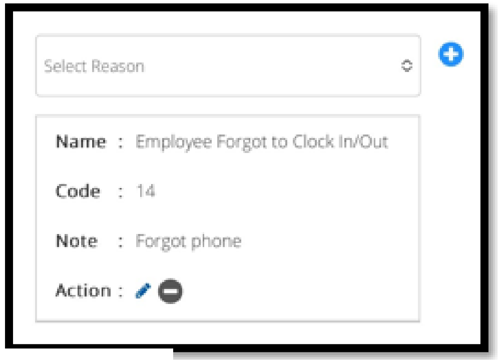
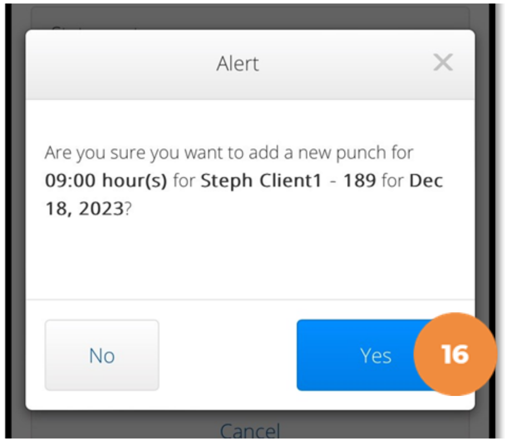
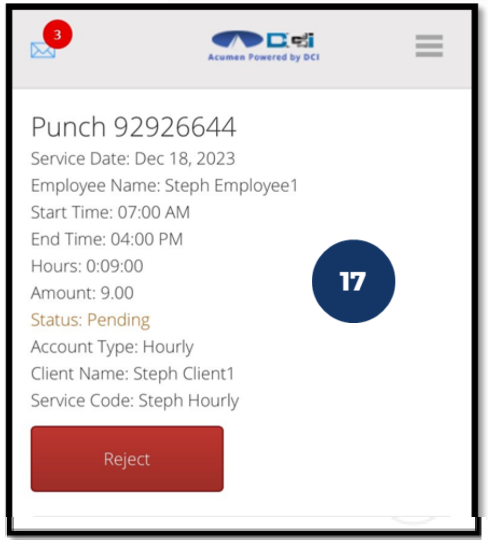
9. Select Portal Signoff as the Method
10. Select a Reason Code from the drop-down list
11. Add a Reason Code Note
12. Click the blue **plus sign (+)** to populate the reason code details
13. Enter Notes for the punch (optional)
14. Click the **Choose File** button to select and upload Attachments (optional)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









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

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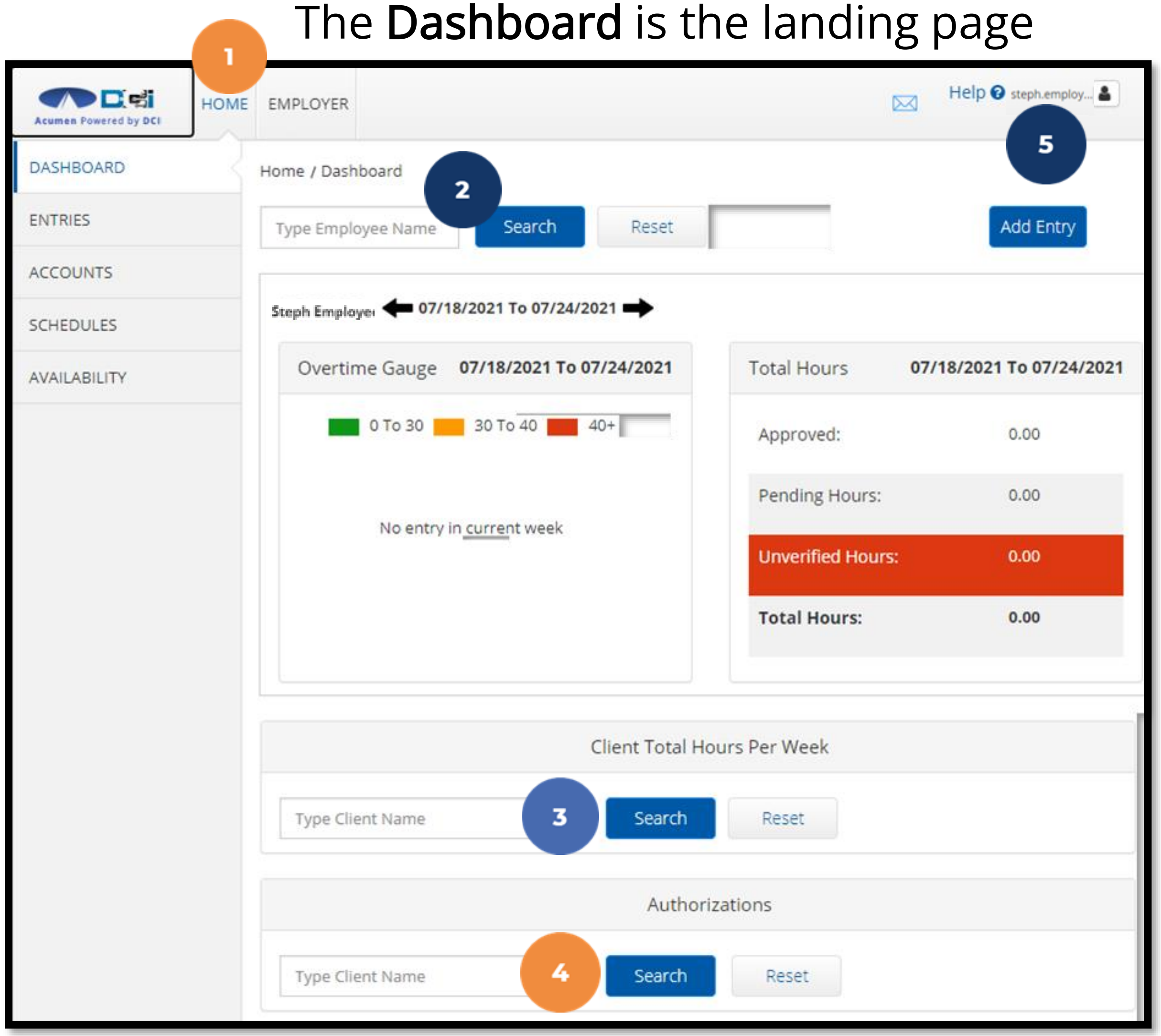
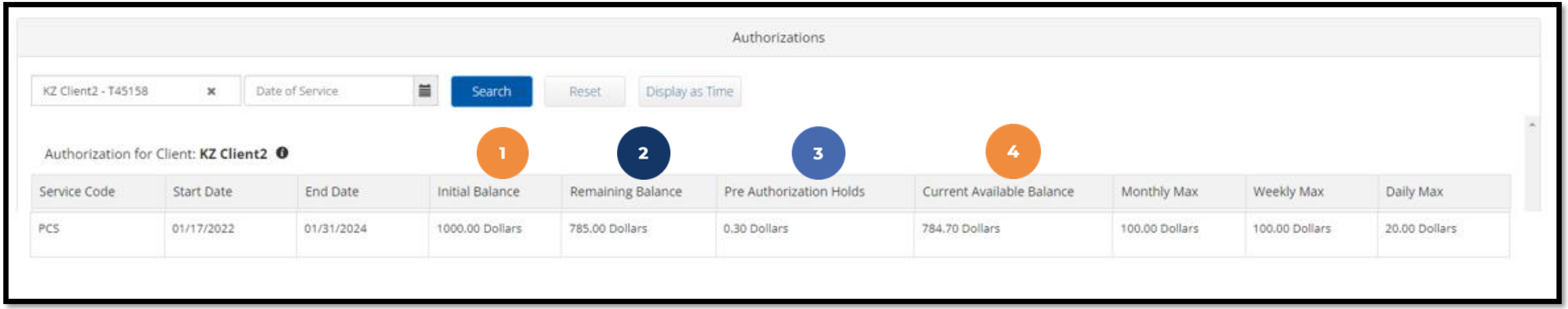
1. Select **Home** on the main menu
2. Enter an **employee name** and click the blue **Search** button to view the information below by week. Use the black arrows to toggle between weeks:
   - ✓ Overtime Gauge
   - ✓ Total Hours breakdown
3. Client Total Hours Per Week Widget
   - ✓ Enter the **client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

The **Dashboard** is the landing page



Authorizations (Budget) Widget

- The authorizations (budget) widget allows the user to search by client (required) or optionally use the date filter to view approved authorizations (budgets) in the past, present, or future.
- As employees clock in and clock out, their time will be deducted from the authorization and placed into a pre-authorization hold.
- Units or dollars in a pre-authorization hold remain in that status until billing and payroll have been processed. After payroll and billing completion, the units and dollars that were previously in a pre-authorization hold status will be deducted from the remaining balance and an updated remaining balance will be displayed.


Authorizations

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

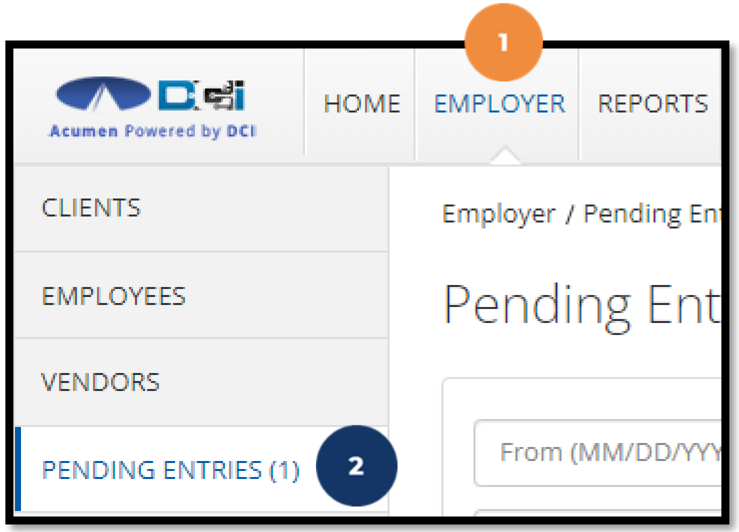
Authorization for Client: **KZ Client2**

Service Code	Start Date	End Date	Initial Balance (1)	Remaining Balance (2)	Pre Authorization Holds (3)	Current Available Balance (4)	Monthly Max	Weekly Max	Daily Max
PCS	01/17/2022	01/31/2024	1000.00 Dollars	785.00 Dollars	0.30 Dollars	784.70 Dollars	100.00 Dollars	100.00 Dollars	20.00 Dollars

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

Navigate to Pending Entries

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



All entries requiring review/action appear in the table

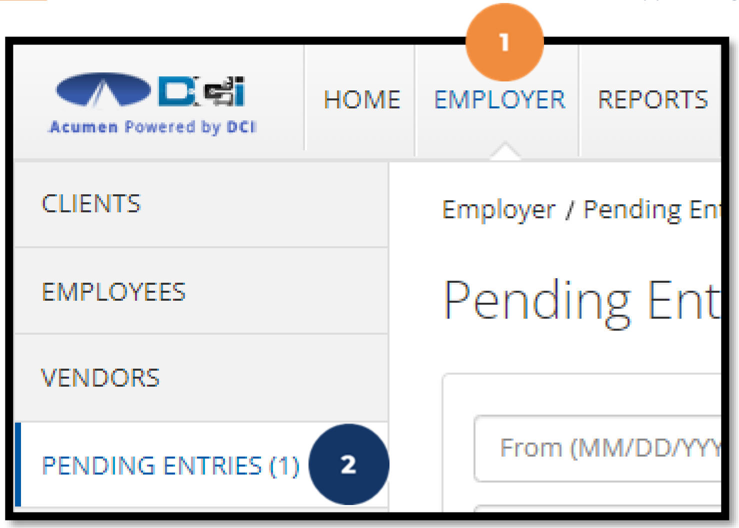
Approve	Punch ID	Service Date	Start Time	End Time	Cost Center	Client/ Program Name	Employee/ Program Name	Service Code/Type	Amount	EVV	Needs Review
A R	68312	Dec 19, 2023	01:06 PM	01:10 PM	JVK Cost Center - JVKCostCenter			EVVRequired	0:00:04	No	
A R	68310	Dec 19, 2023	12:47 PM	12:51 PM	JVK Cost Center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

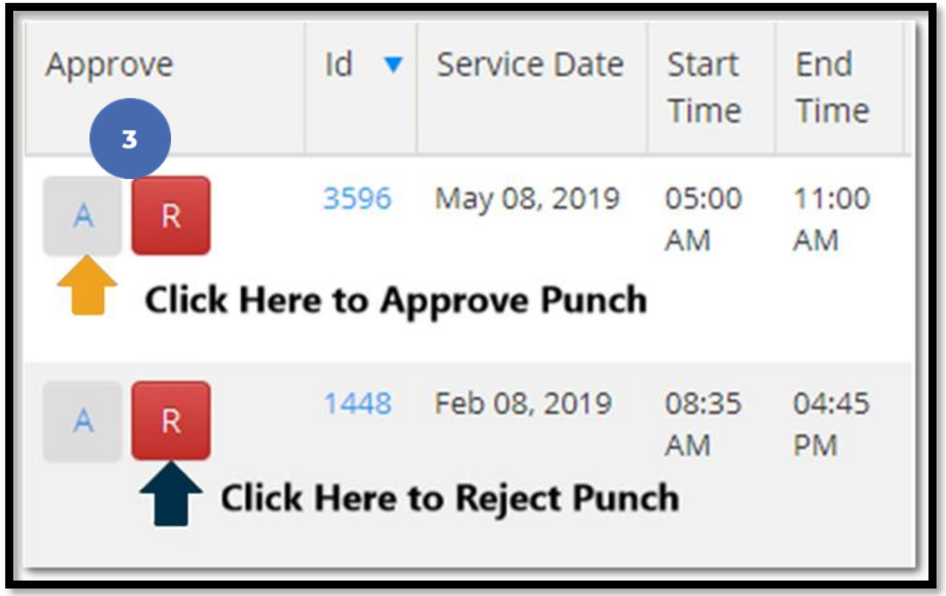
Load More

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

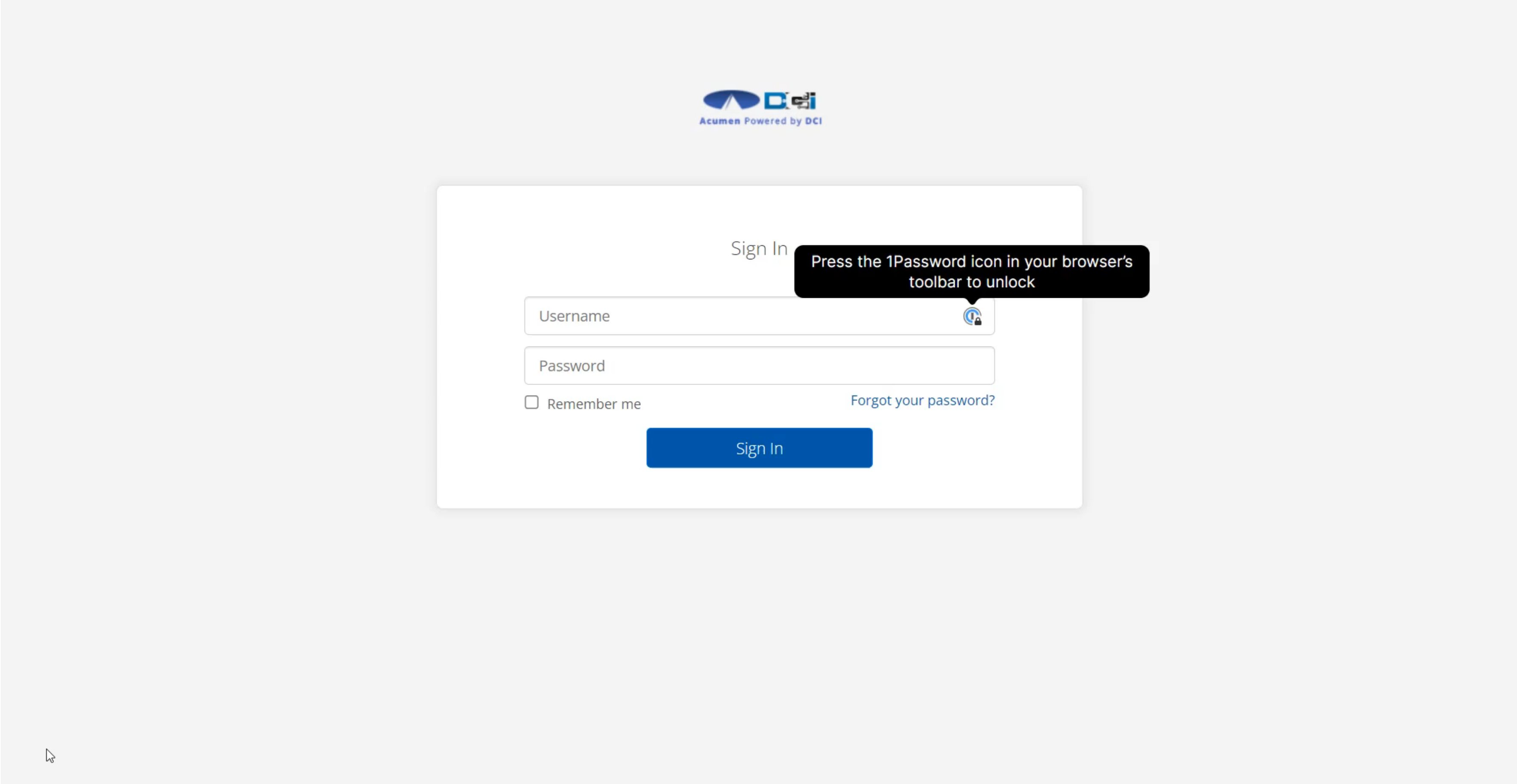
Manage Pending Entries

1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
   - ✓ The number of pending entries displays in parenthesis on the submenu
3. Any punch that requires approval is listed here
   - ✓ Review each entry
     - ➢ Click on the entry to view all details
   - ✓ Approve or reject
     - ➢ Click the **A** on the entry line to approve
       - ❖ **Entries must be approved within 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.





Employer Web Portal Video
Manage Entries



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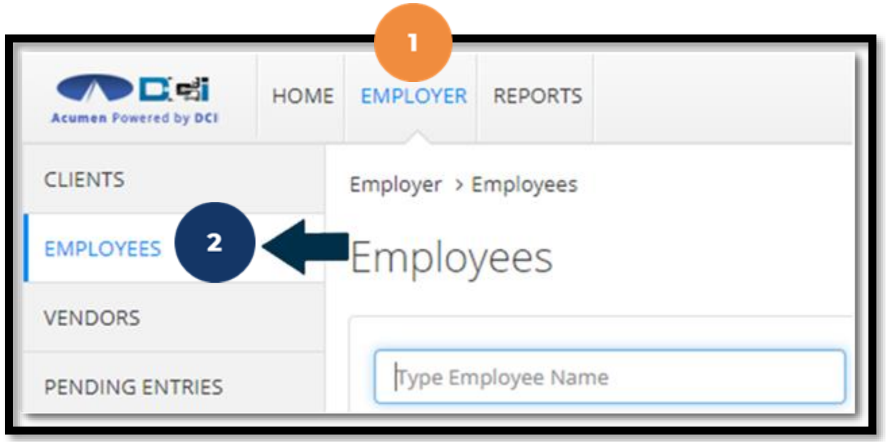
Using the Employees Page

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



3

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

Using the Employees Page (cont.)

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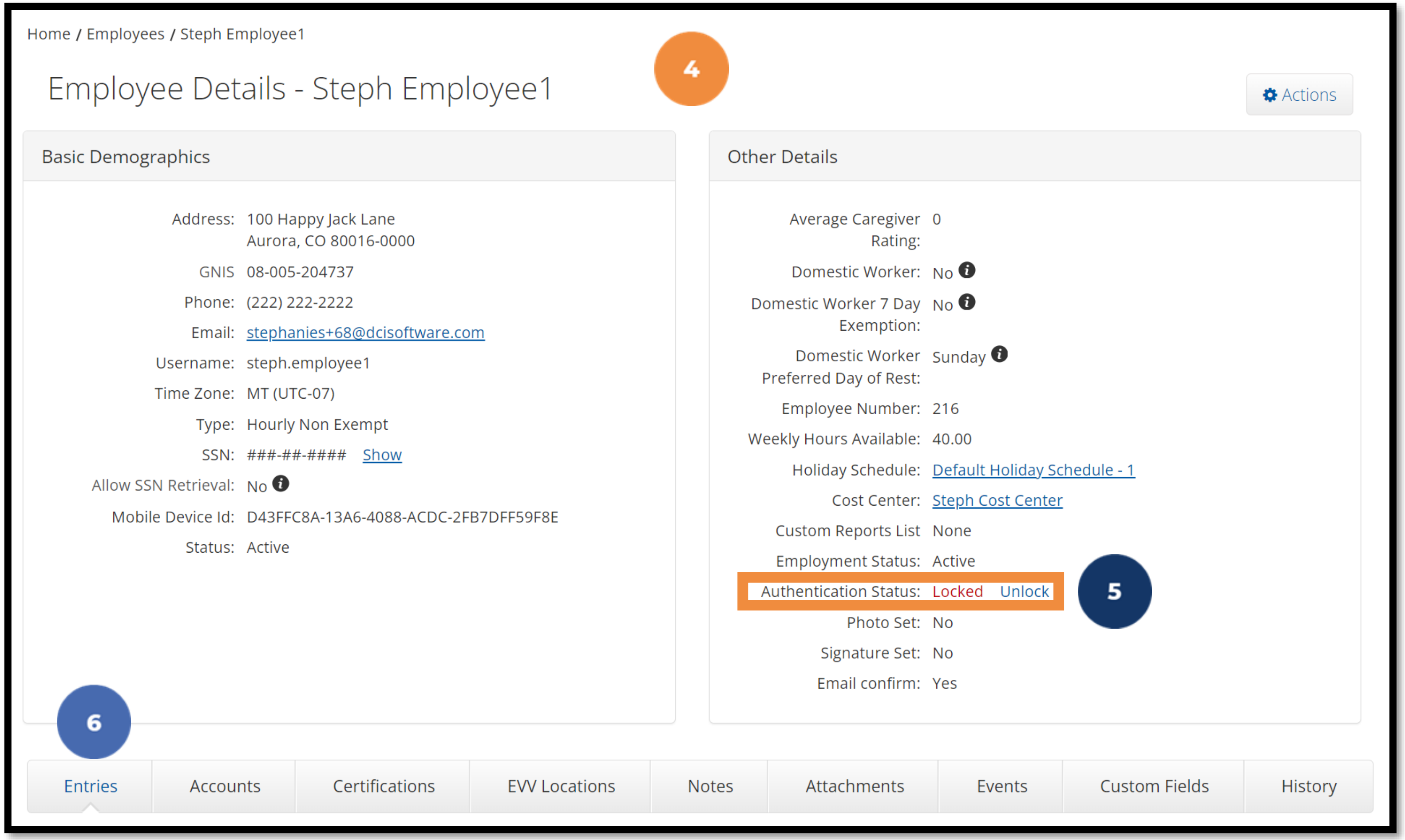
4. View the employee details page

5. Unlock Employee Profile if needed

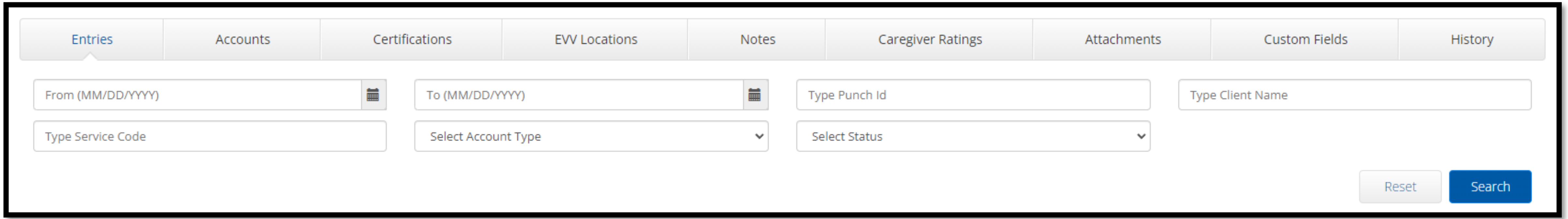
6. Scroll down to the Entries tab



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



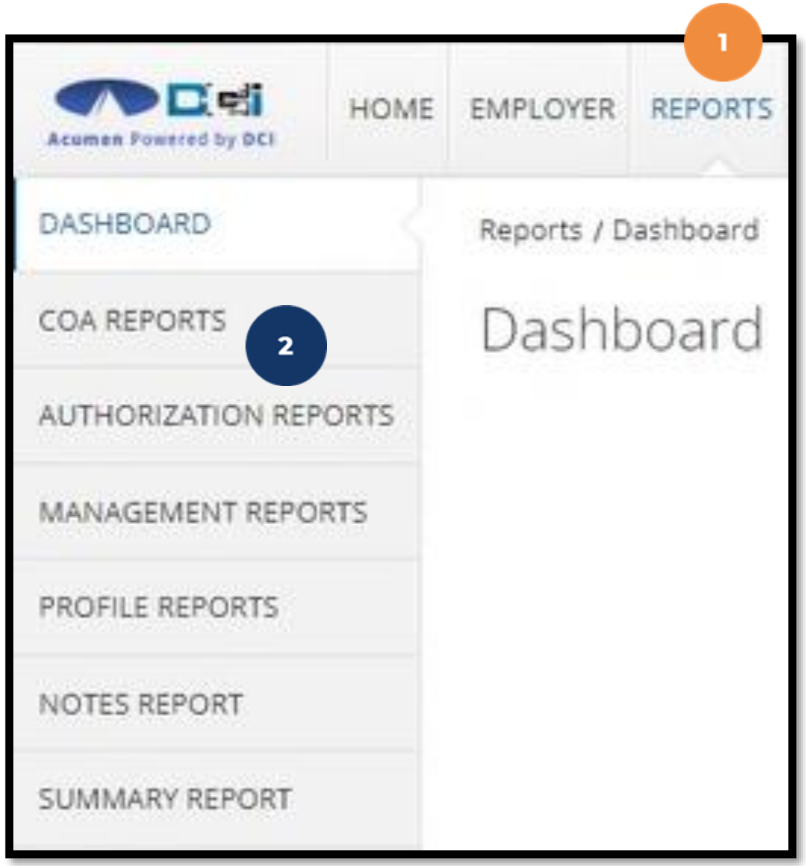
Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
1897873	Jul 12, 2023			Client Transportation	1897872	Steph Cost Center - 75	Steph Client1	Client Transportation	0.00	Approved
1894616	Jun 07, 2023	05:00 AM	08:00 AM	Hourly		Steph Cost Center - 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

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Phone EVV Basics

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- **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

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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

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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 <u>must</u> 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

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- **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

OSL CS Payment Schedule

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

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

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

MONTH	Payment Period End Date	Submissions Due NO Later Than	Direct Deposit/Check Date
SEPTEMBER	09/30/24	Tue, 10/01/24	Tue, 10/08/24
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

"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.

"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.

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

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DIRECT CARE INNOVATIONS
Acumen powered by DCI

Vendor Payments & New Vendor Requests

*The employer is responsible for creating these for their vendors

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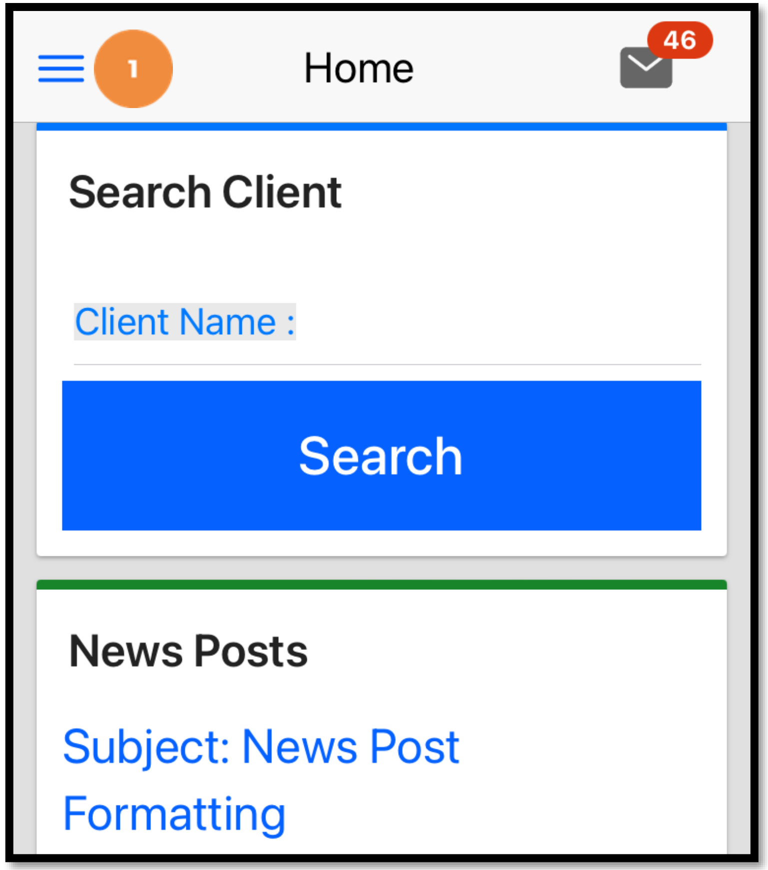
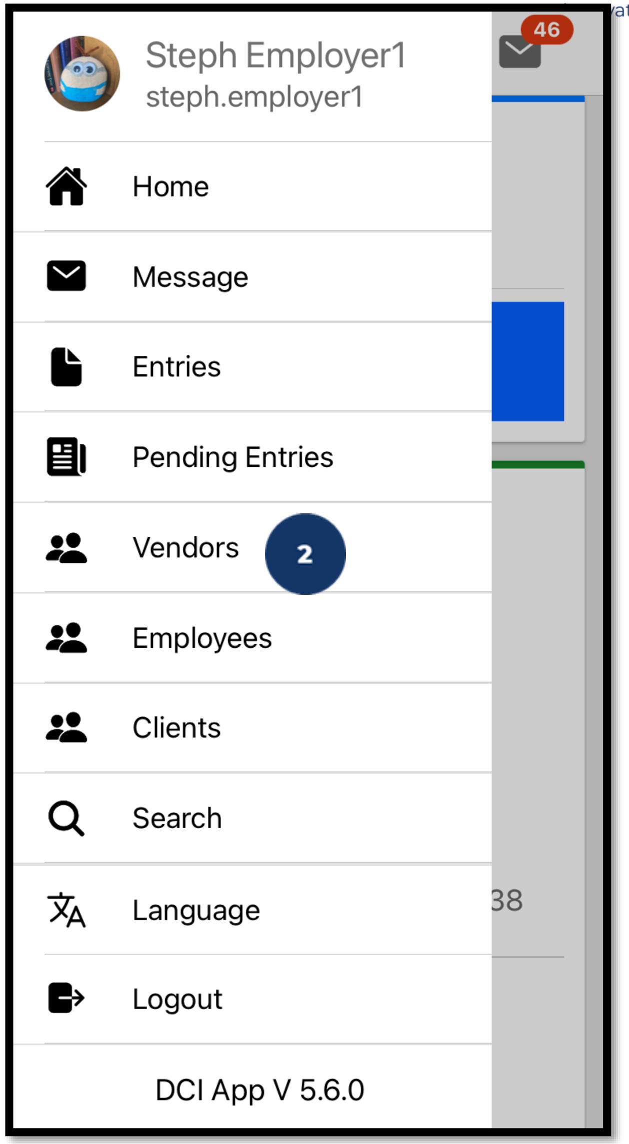
Vendor Payment Entry

Mobile App

Vendor Payment

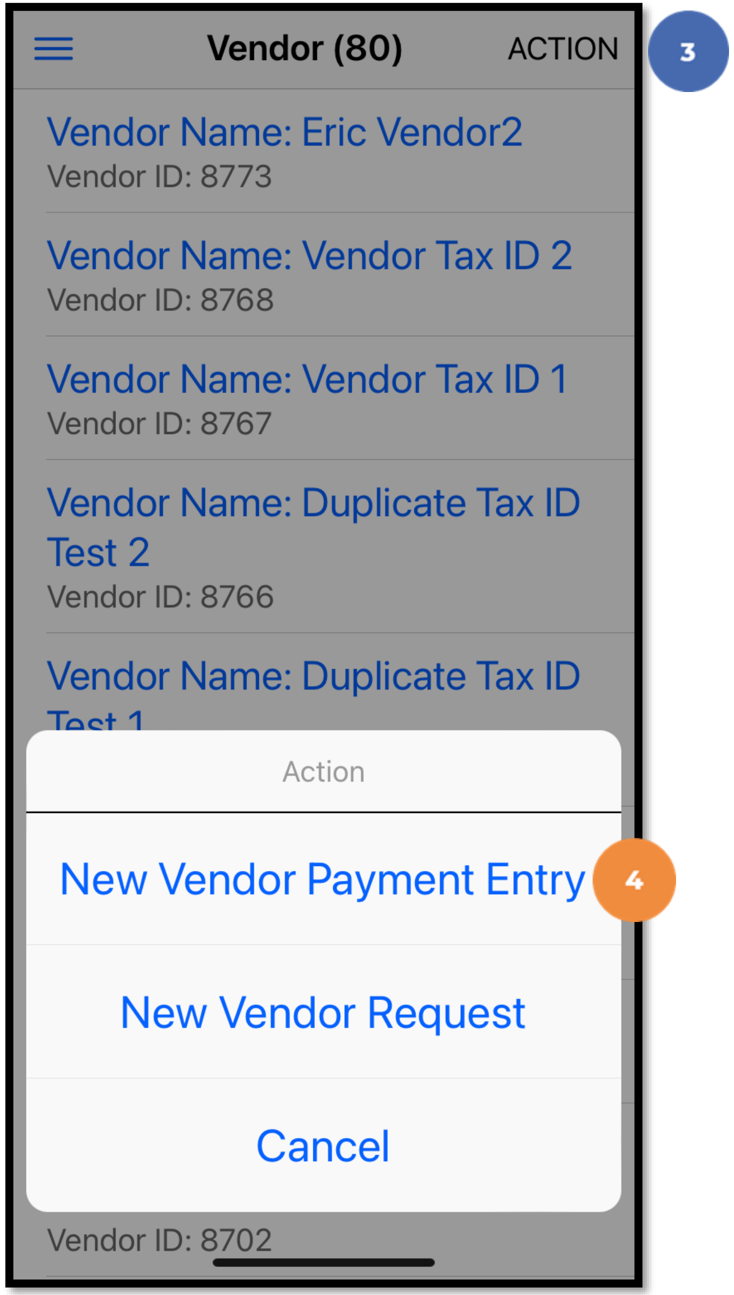
1. Click the **Menu** in the top left corner of the screen
2. Select **Vendors** on the submenu





Vendor Payment

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



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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.

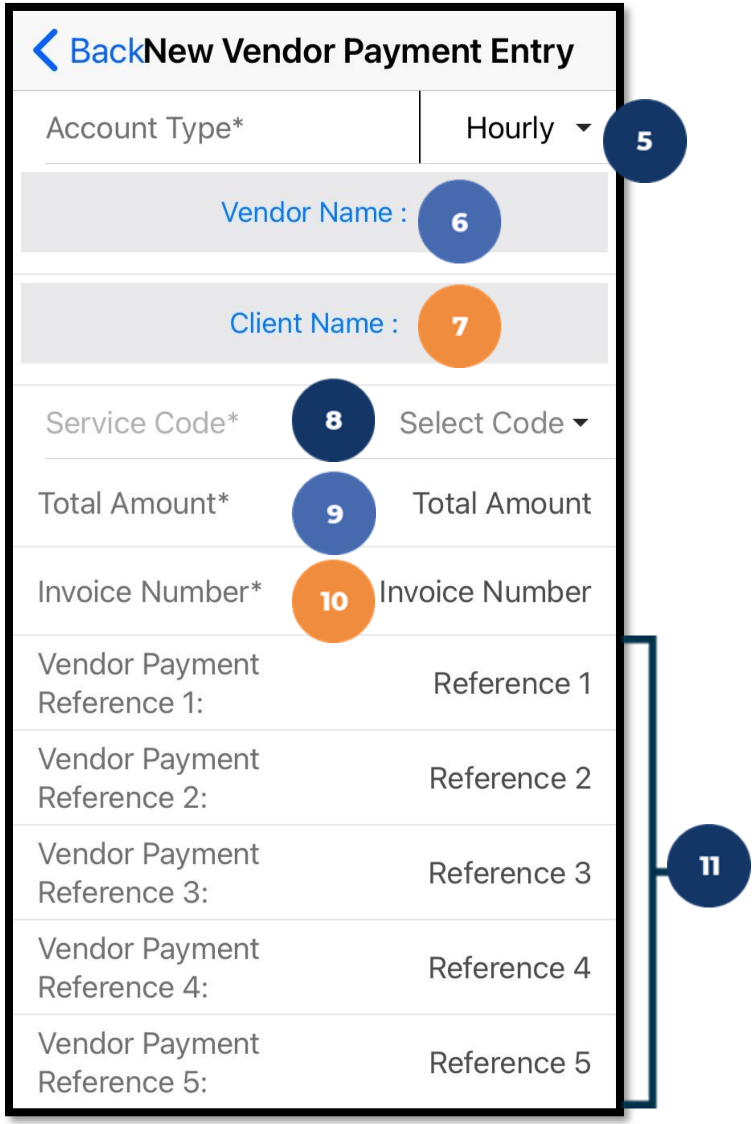
7. Click **Client Name** to type and select the client

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

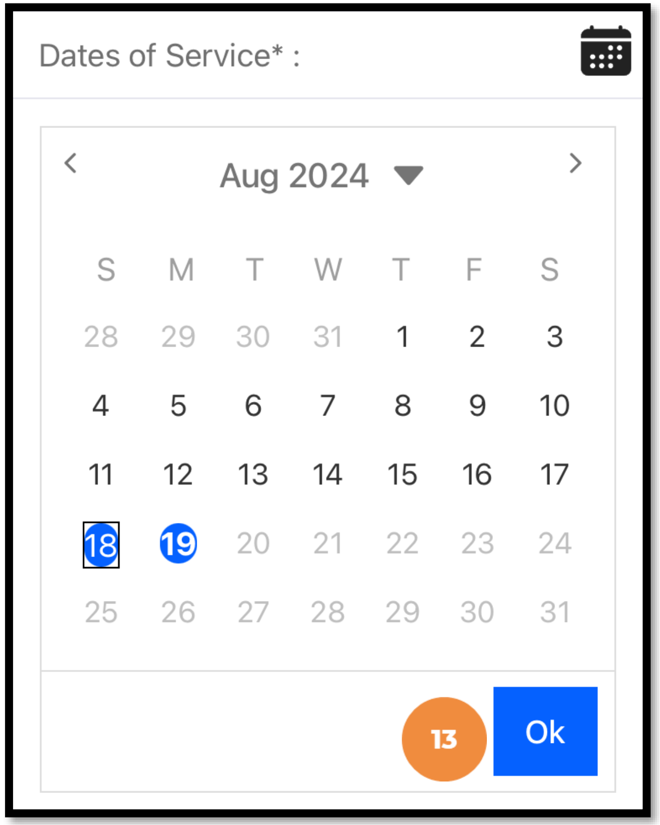


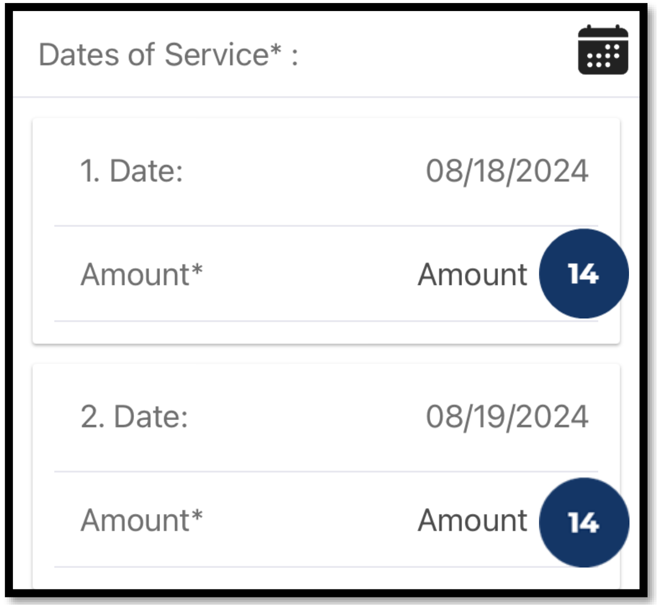
Vendor Payment

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)

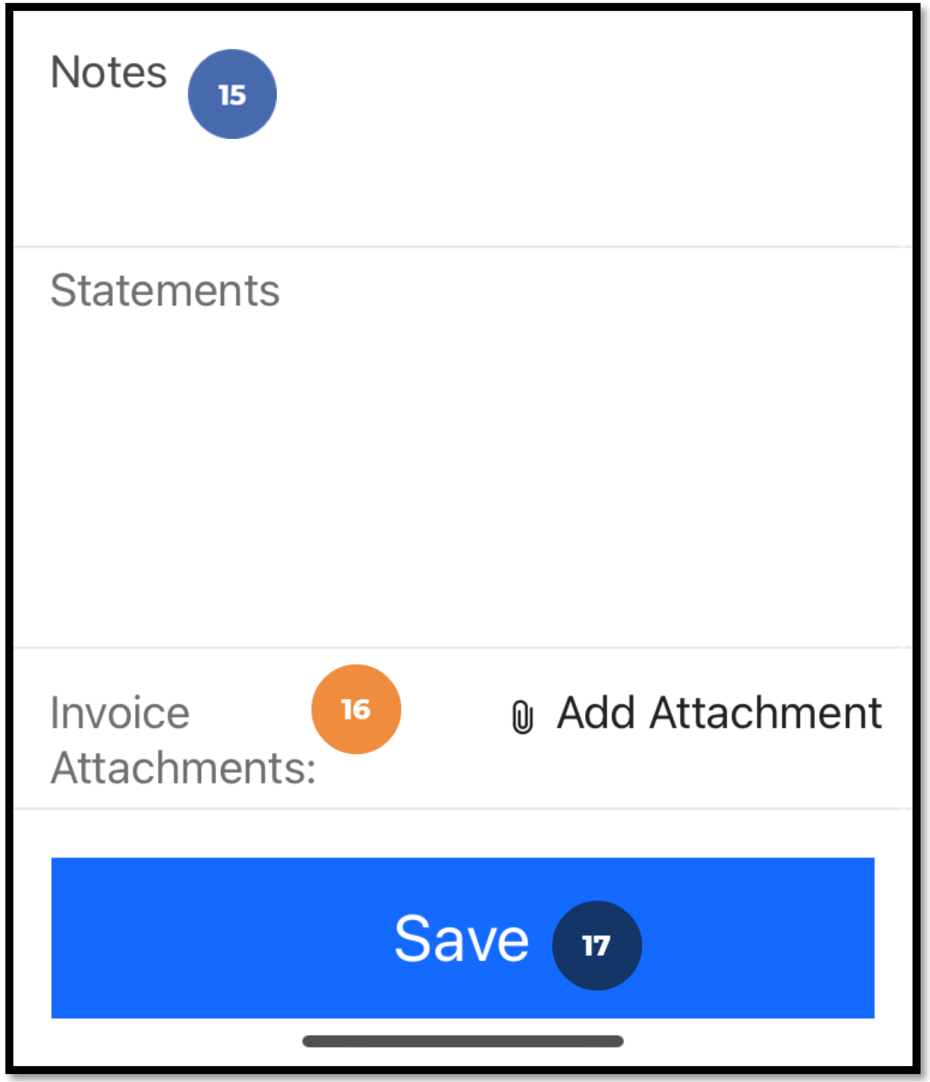
14. If multiple dates are selected, enter the amount for each date.
    - ❖ Please note: The sum of the individual amounts must match the Total Amount of the payment (step 9)





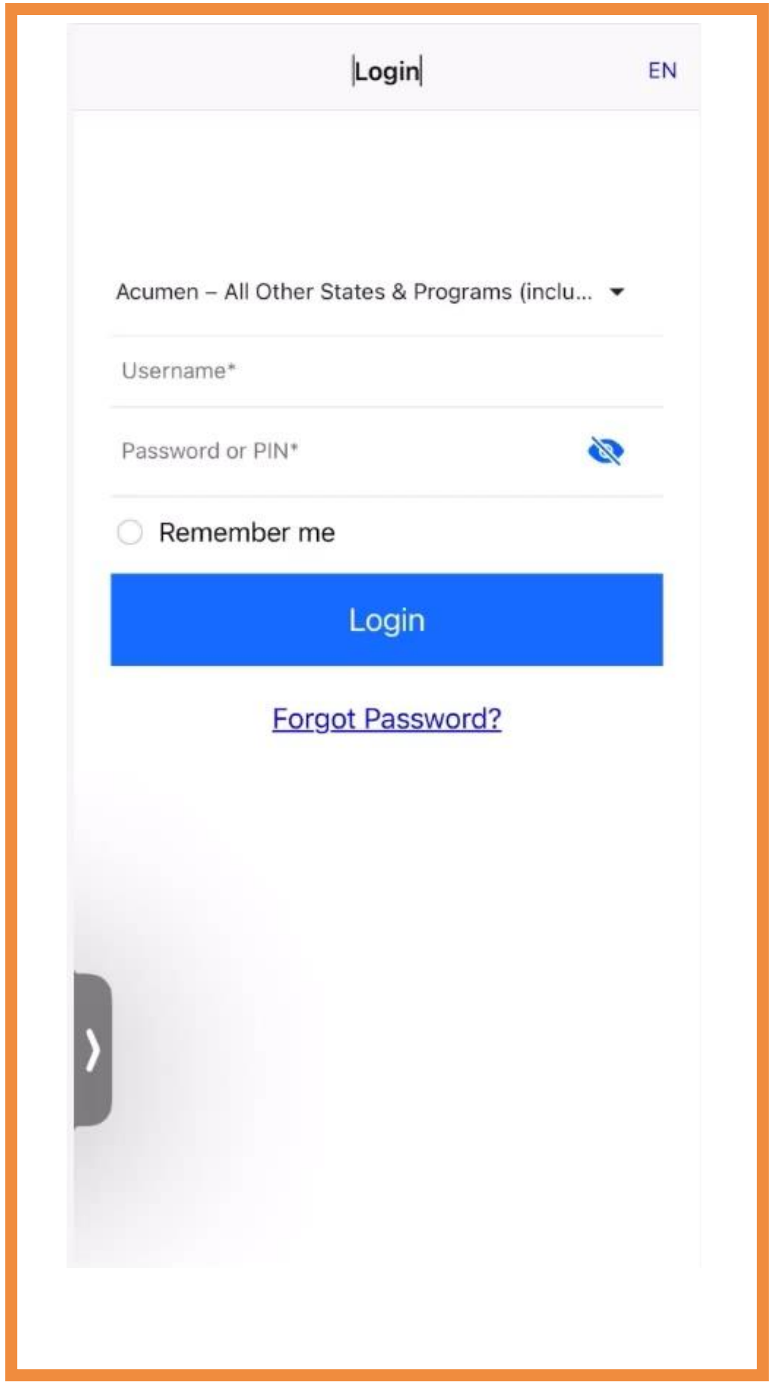
Vendor Payment

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



Employer Mobile App Video

Create a Vendor Payment Entry



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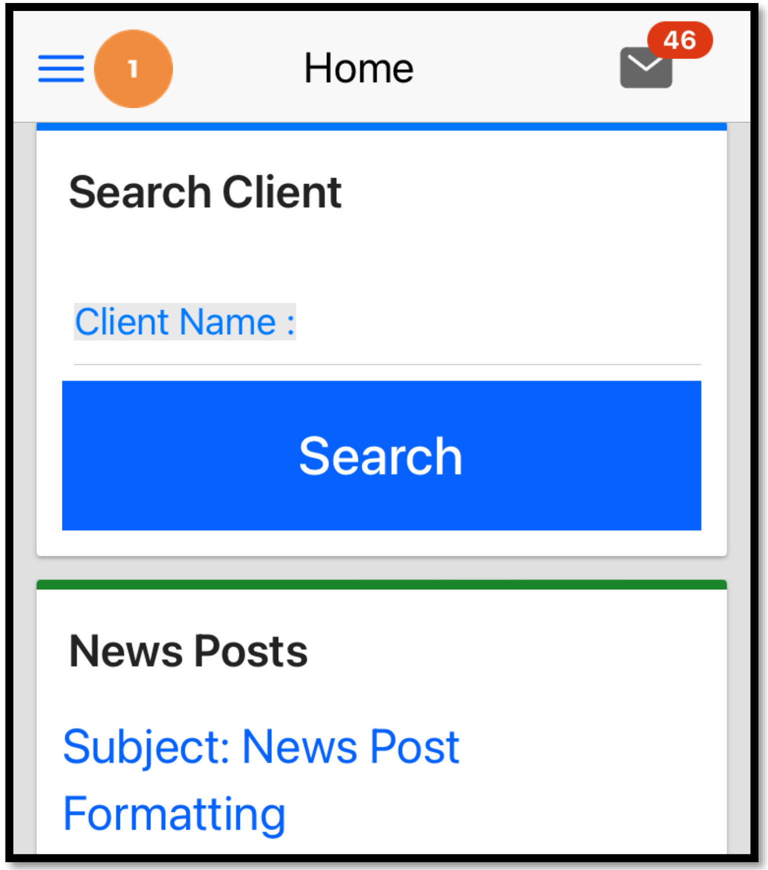
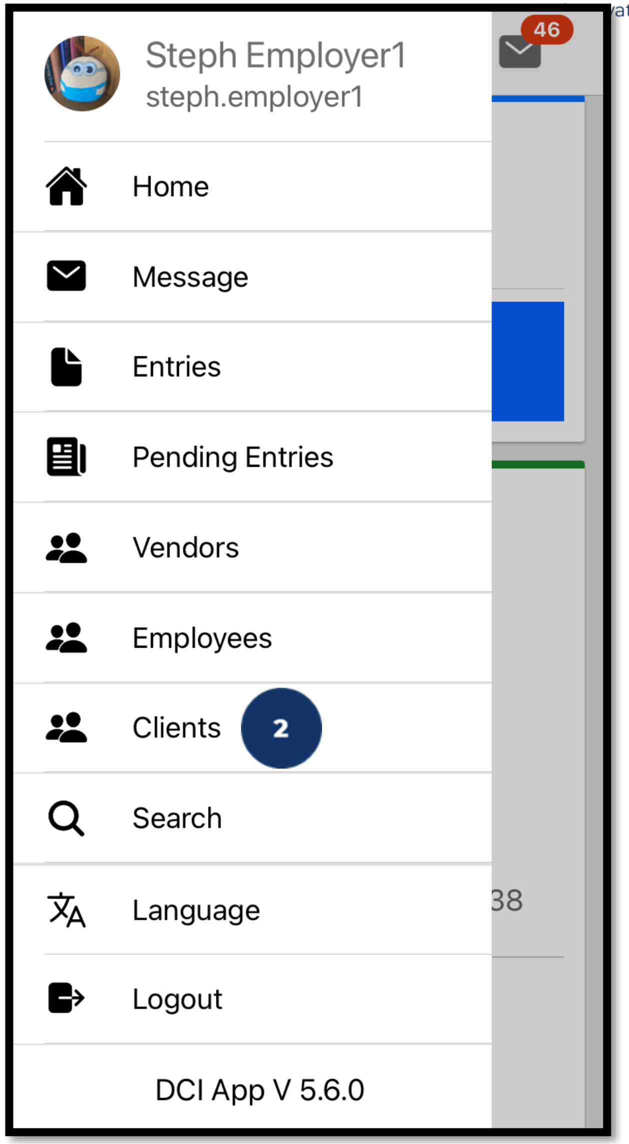
View Vendor Payment Entries

View By Client

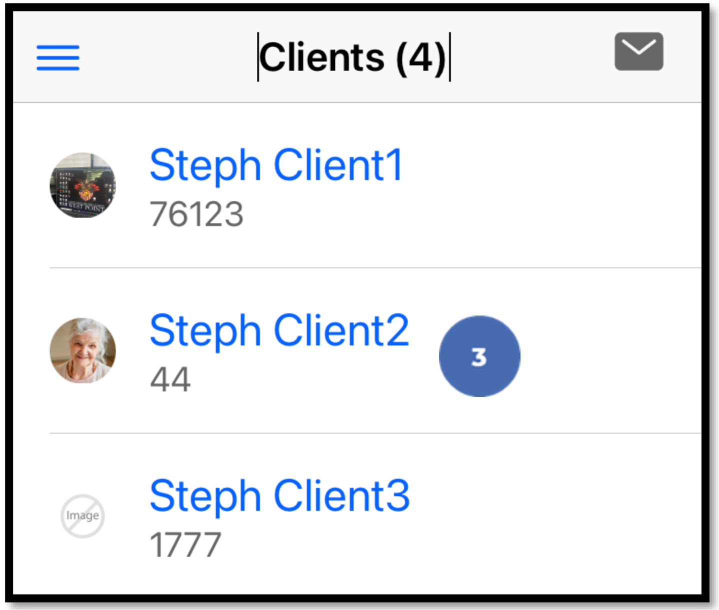
1. Click the **Menu** in the top left corner of the screen
2. Select **Clients** on the submenu

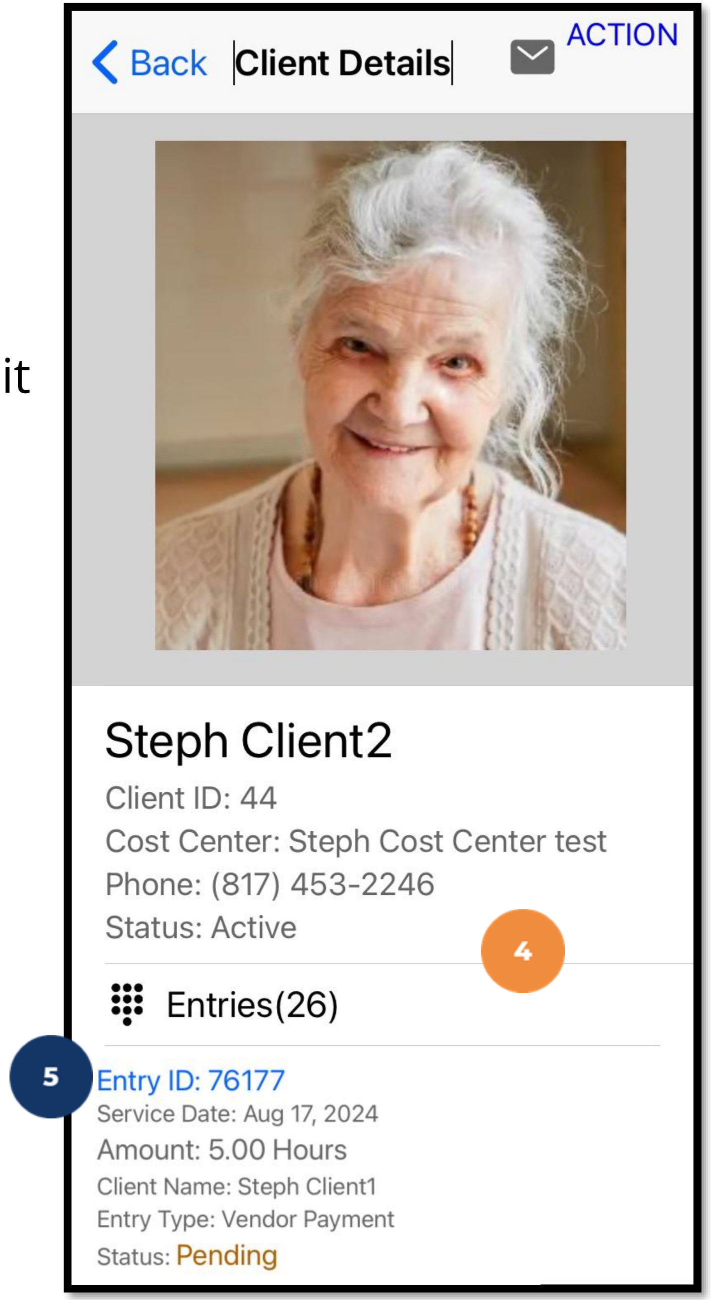




View By Client

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





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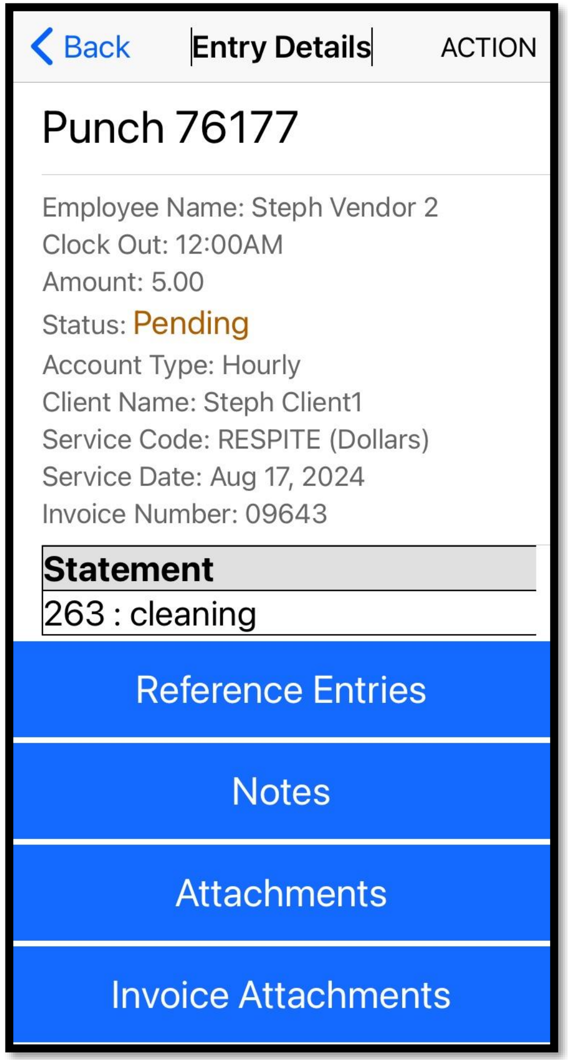

View By Vendor

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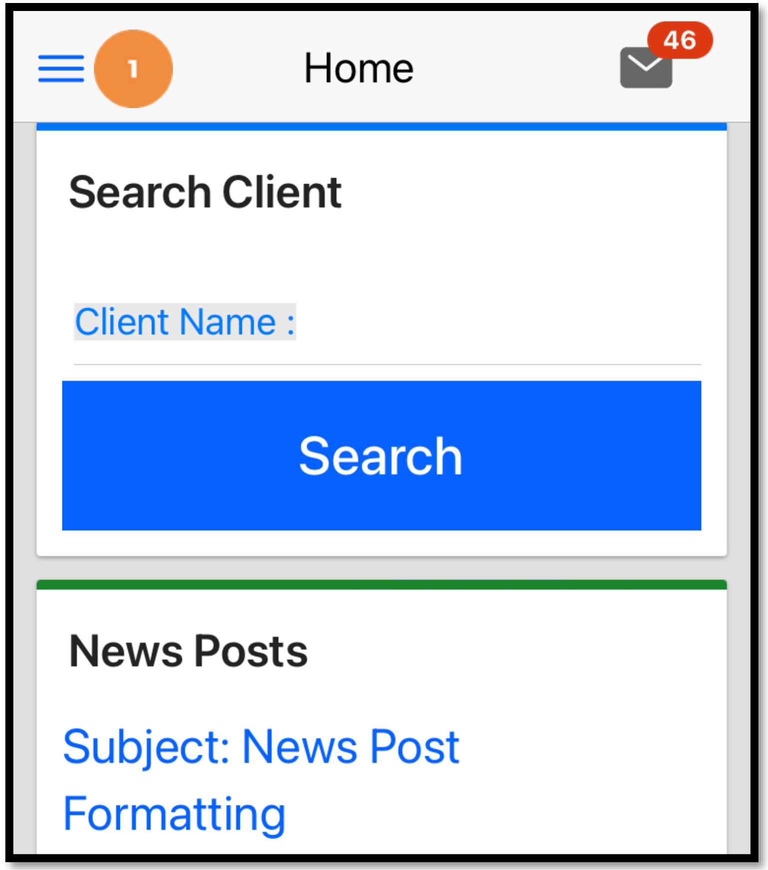
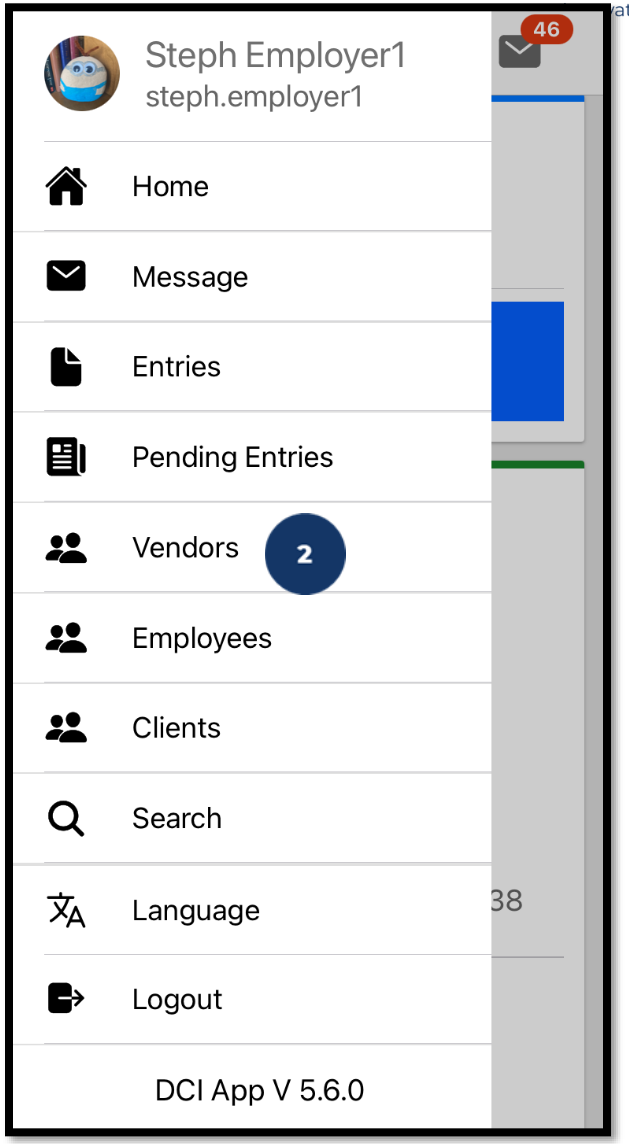
To check the status of the vendor payment entry:

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





View By Vendor

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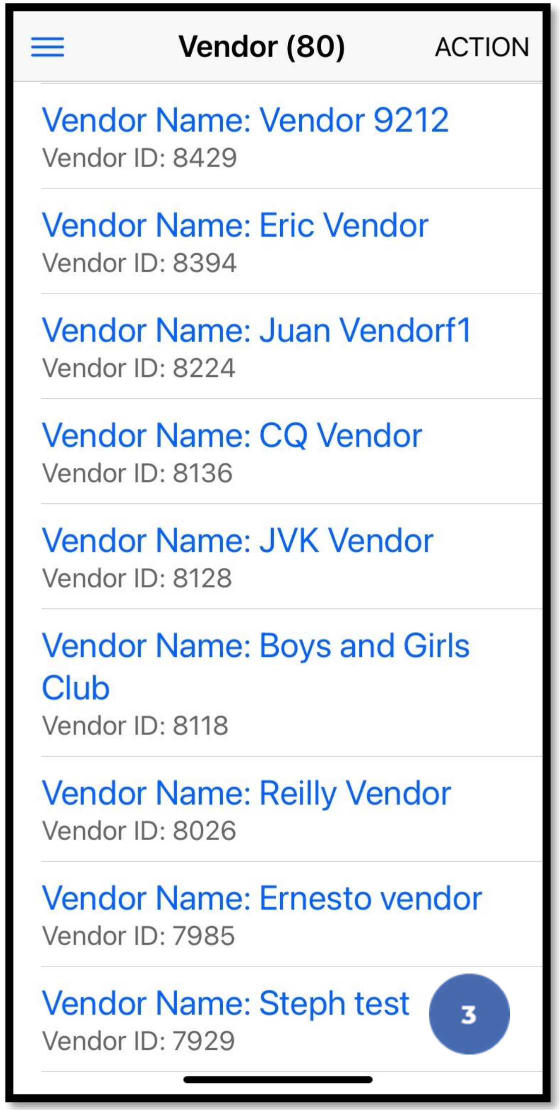
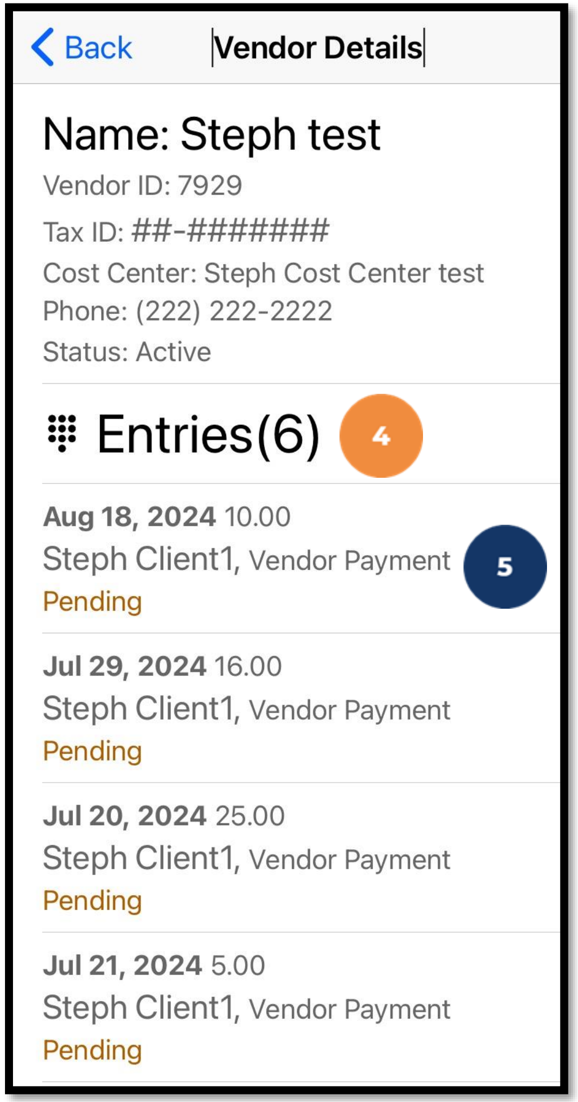
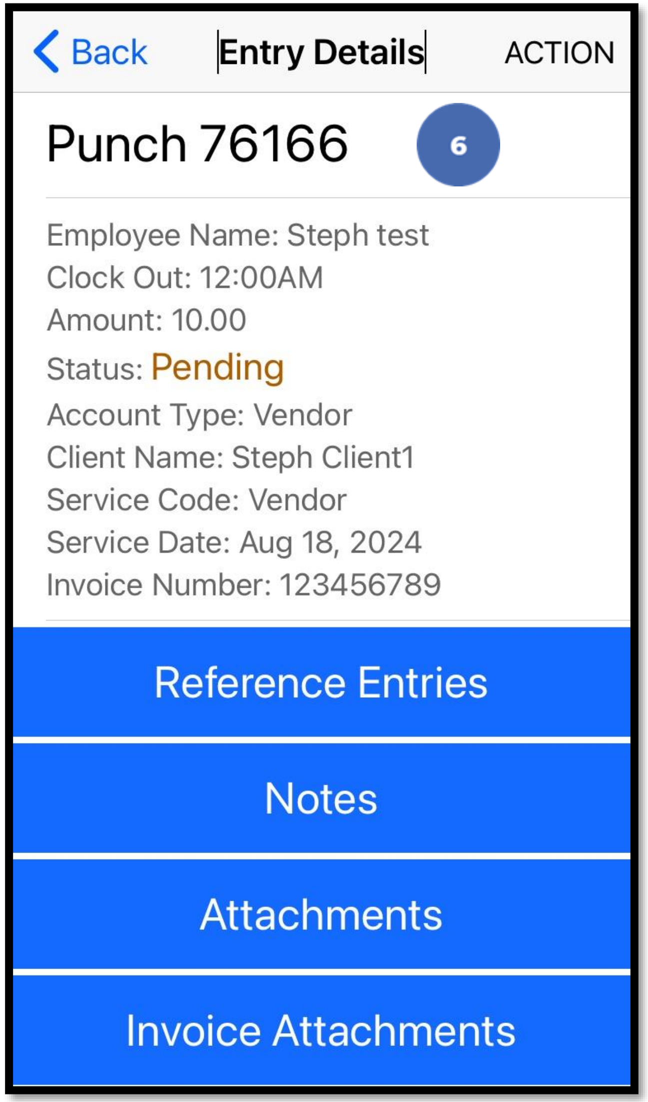
3. Click on the vendor's name (blue hyperlink) to select it
4. View the list of entries for that vendor
5. Click on an entry to select it
6. View the Entry Details page

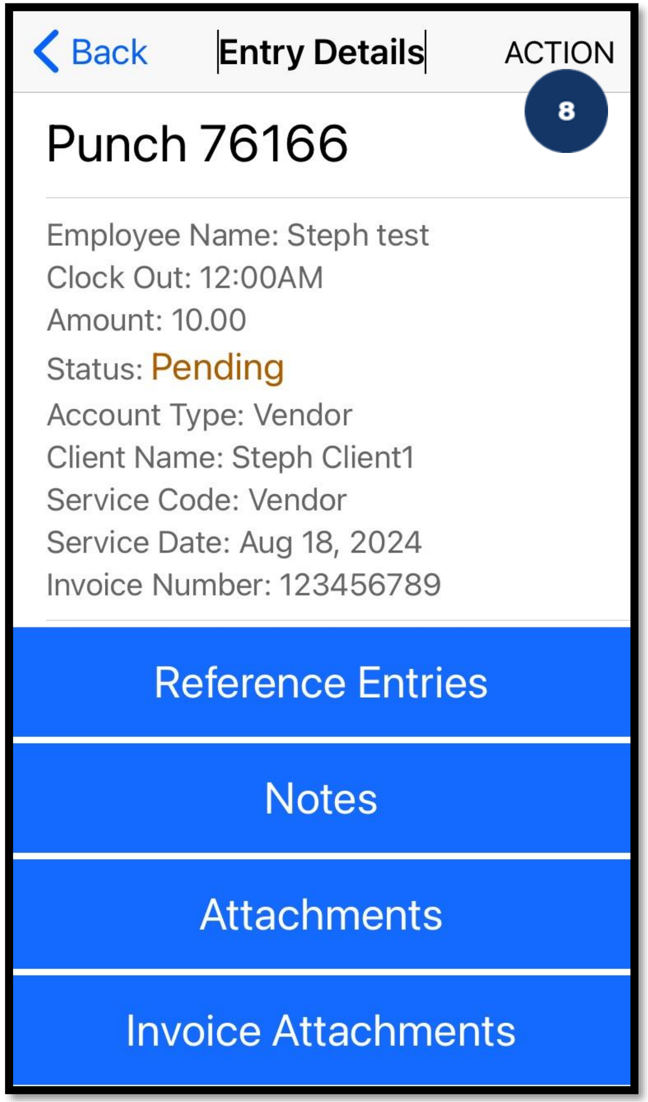


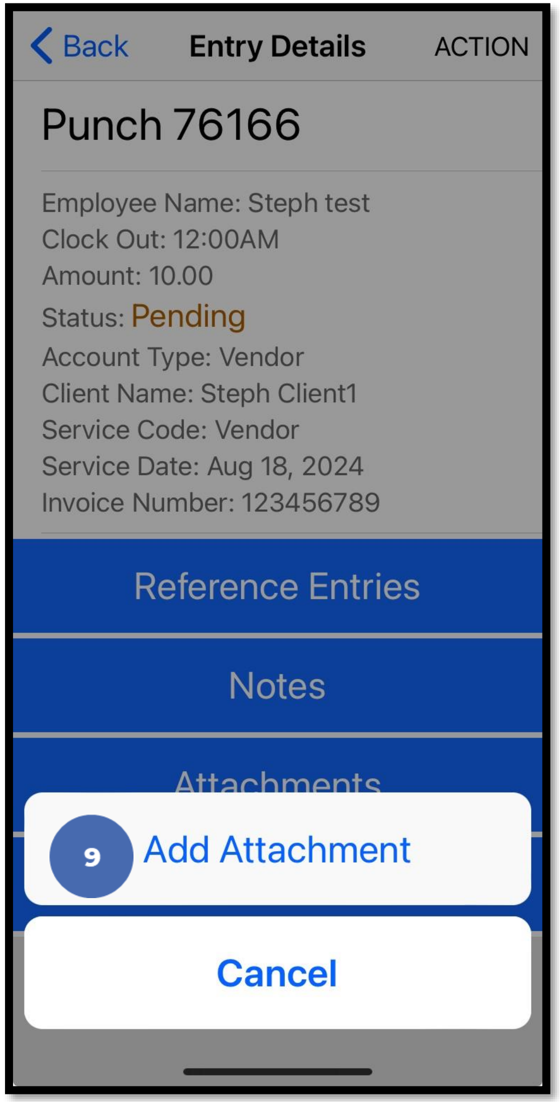




View By Vendor

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





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New Vendor Request

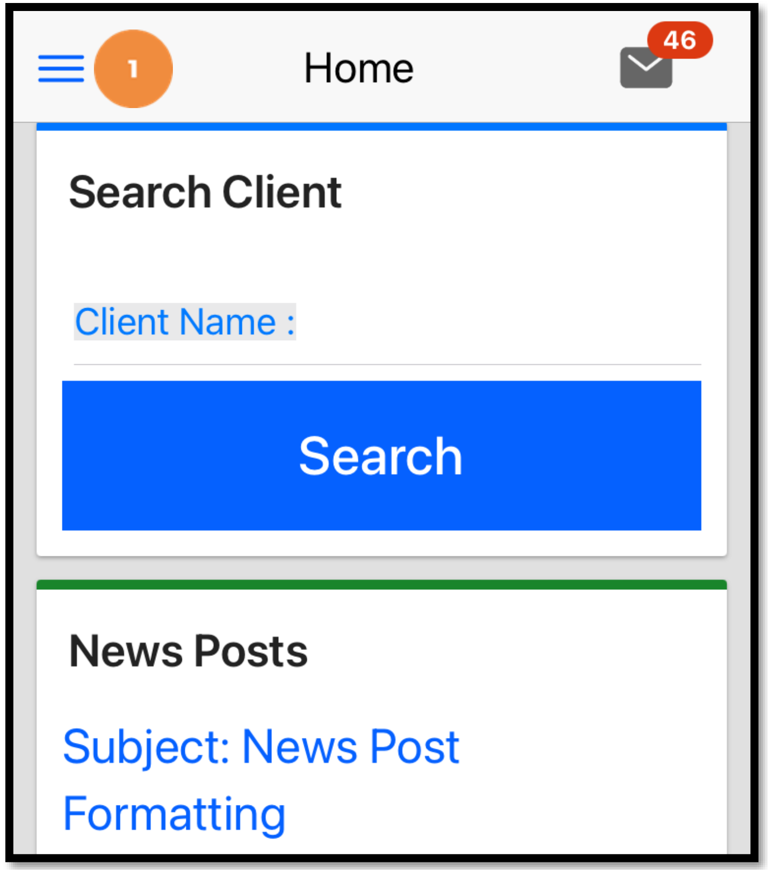
Mobile App

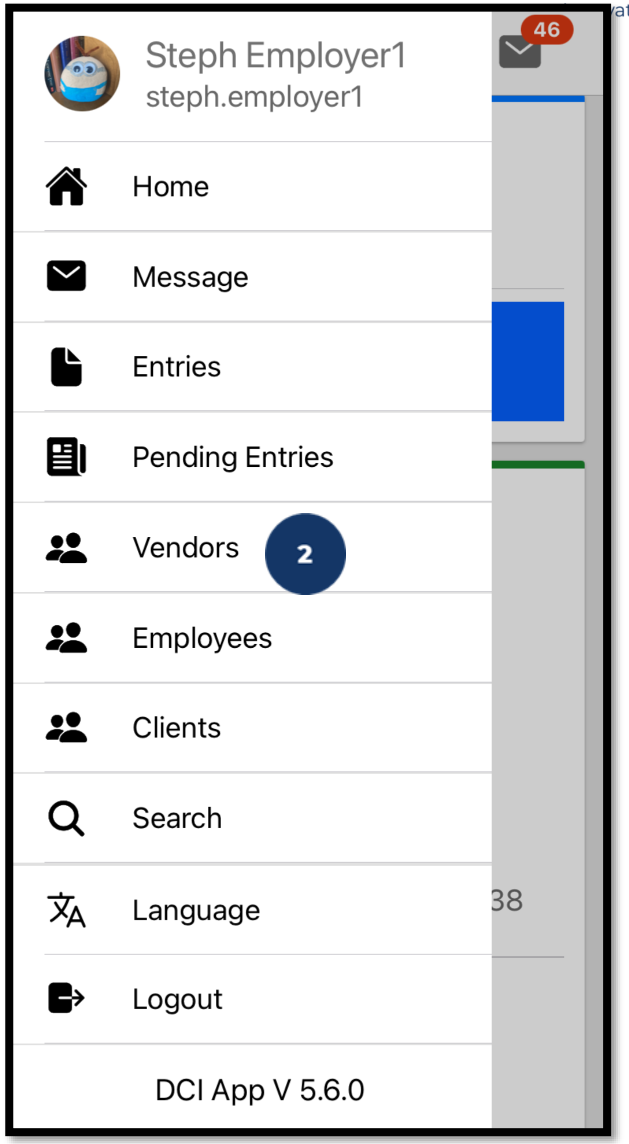
- If unable to locate the vendor when attempting to create a vendor payment, complete a New Vendor Request.
- A W9 is required. If the vendor does not wish to share the W9 with the employer, they may email it to vendor-nv@acumen2.net.
- <u>The online vendor request will only be processed if all required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

New Vendor Request

Acumen Fiscal Agent

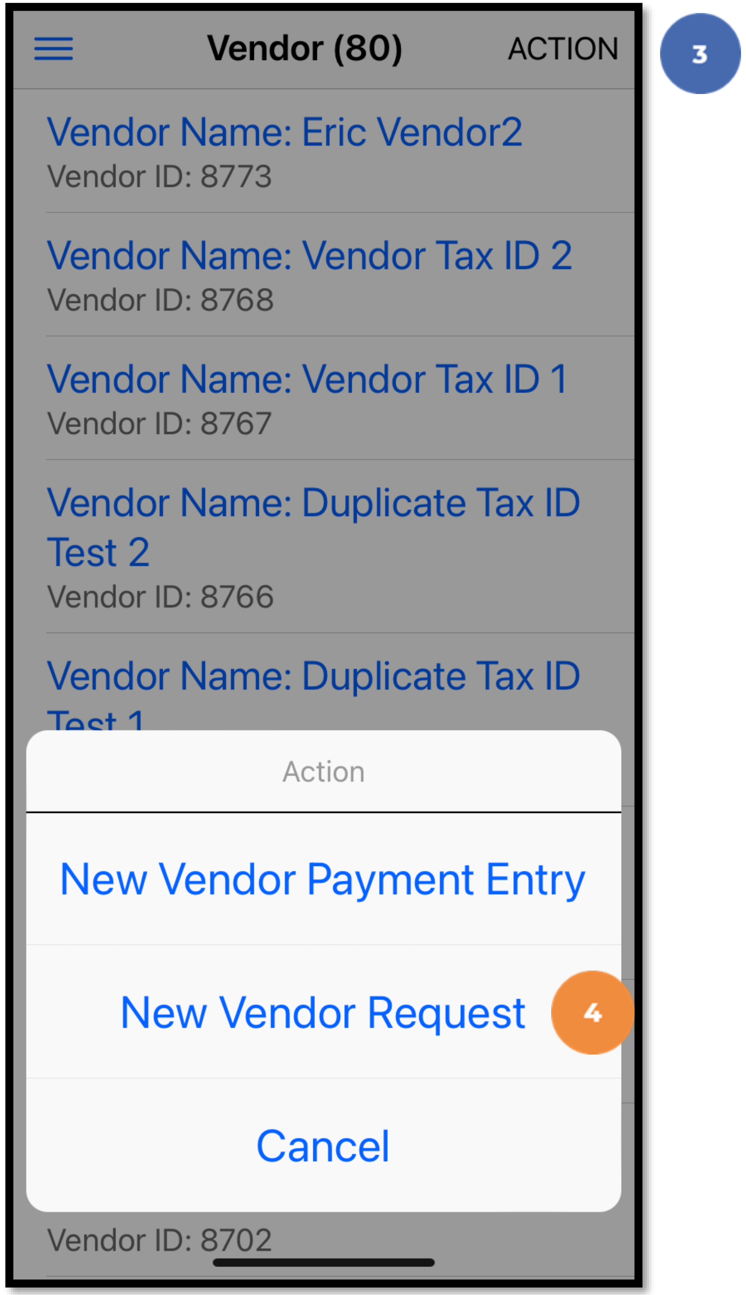
1. Click the **Menu** in the top left corner of the screen
2. Select **Vendors** on the submenu





New Vendor Request

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



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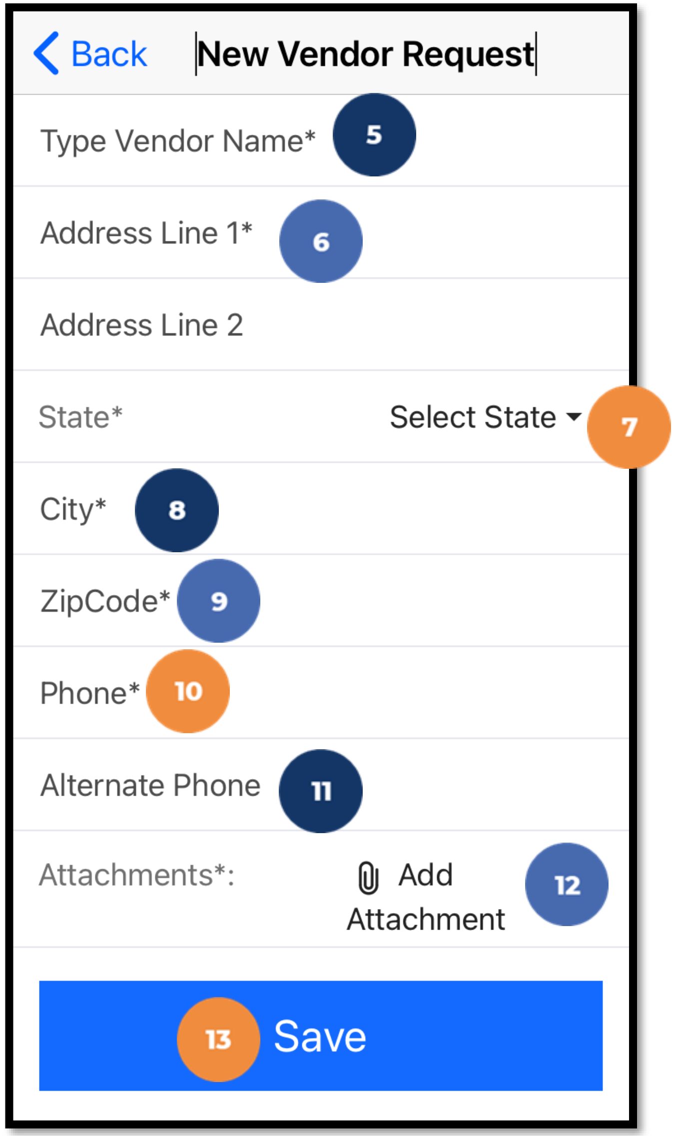
New Vendor Request

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



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

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Vendor Payment Entry

Web Portal

Vendor Payment

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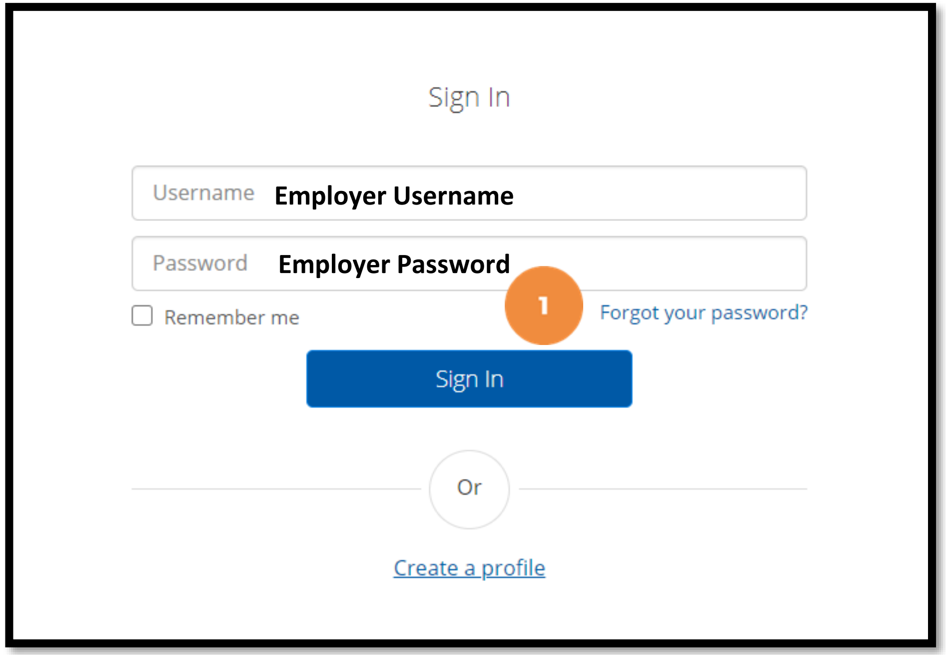
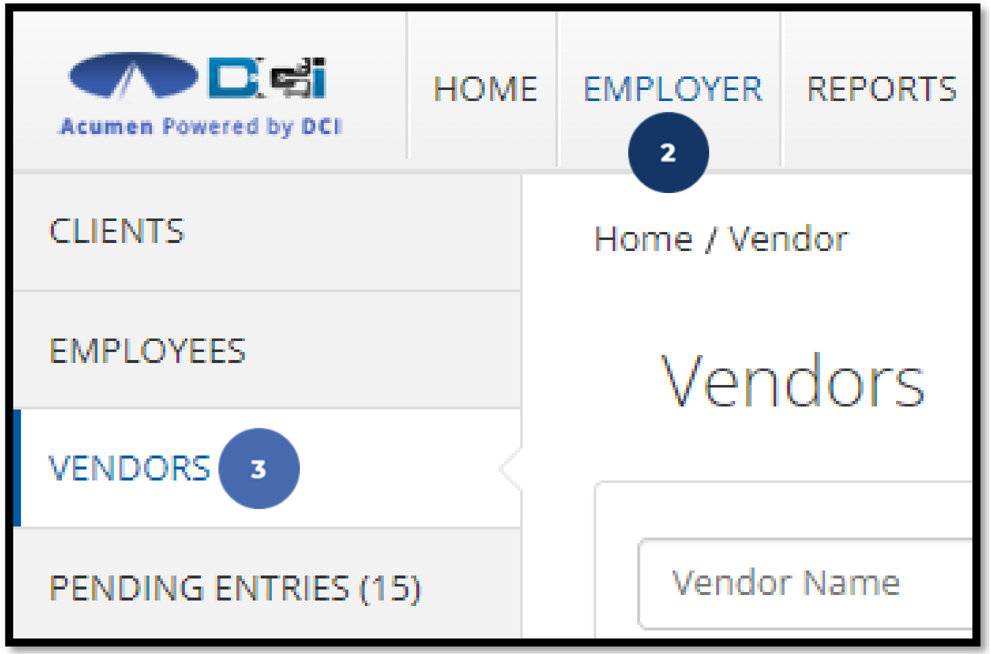
***Please note!** The Employer is responsible for creating the vendor payment entry for their vendor(s)

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

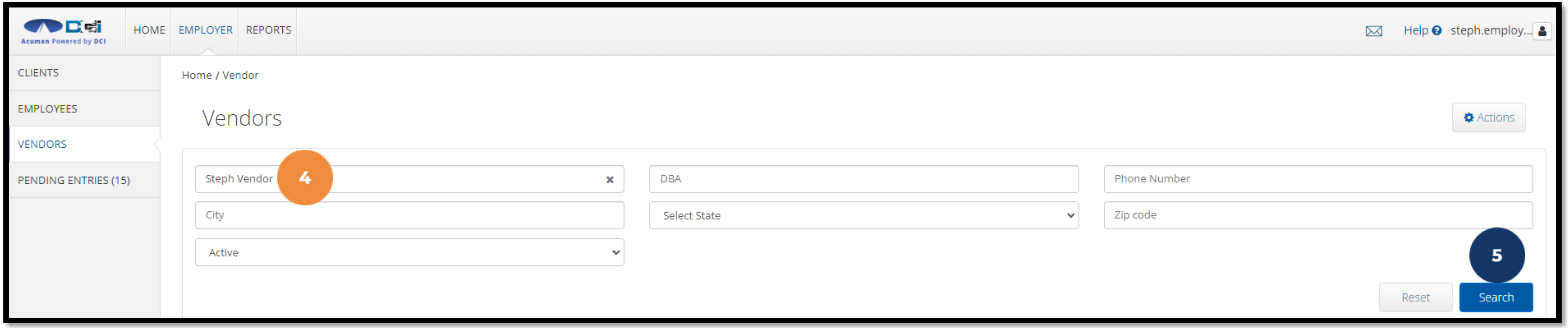


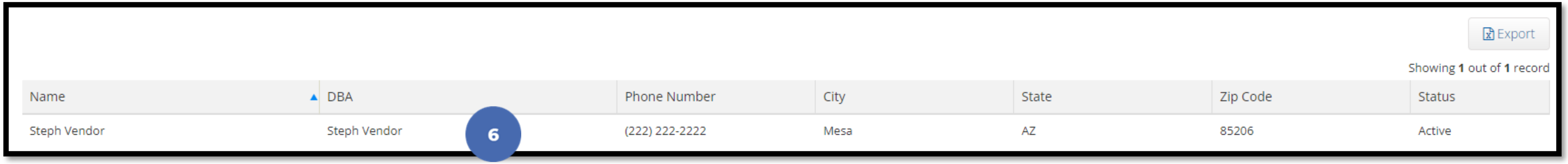
2. Click **Employer** on the main menu
3. Click **Vendors** on the submenu



Vendor Payment

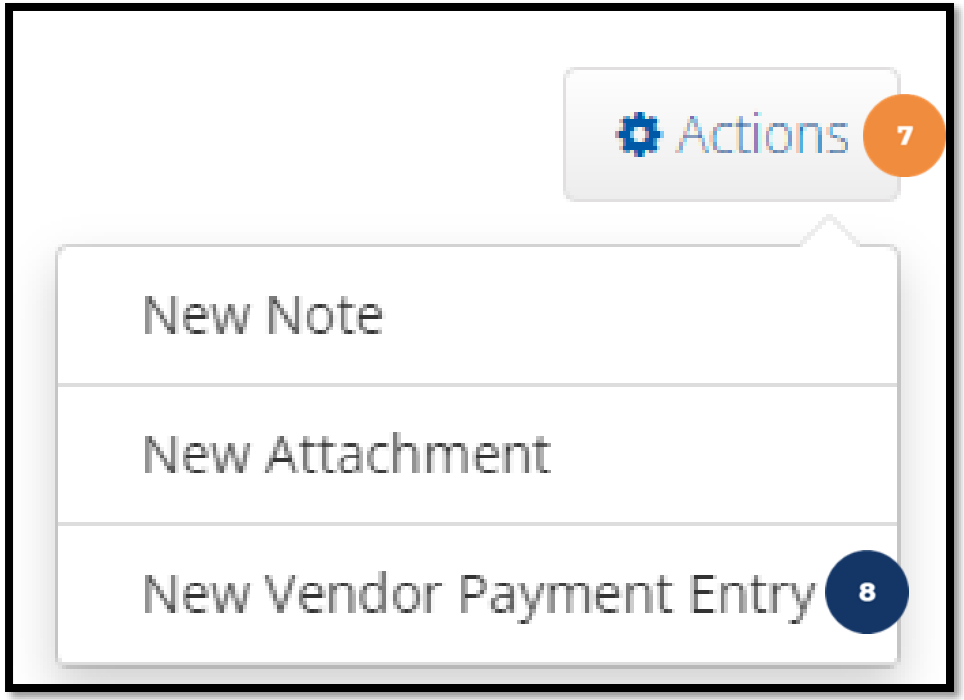
4. Type and select the Vendor Name in the filter
5. Click the blue **Search** button
6. **Click anywhere in the vendor row** to open the details page





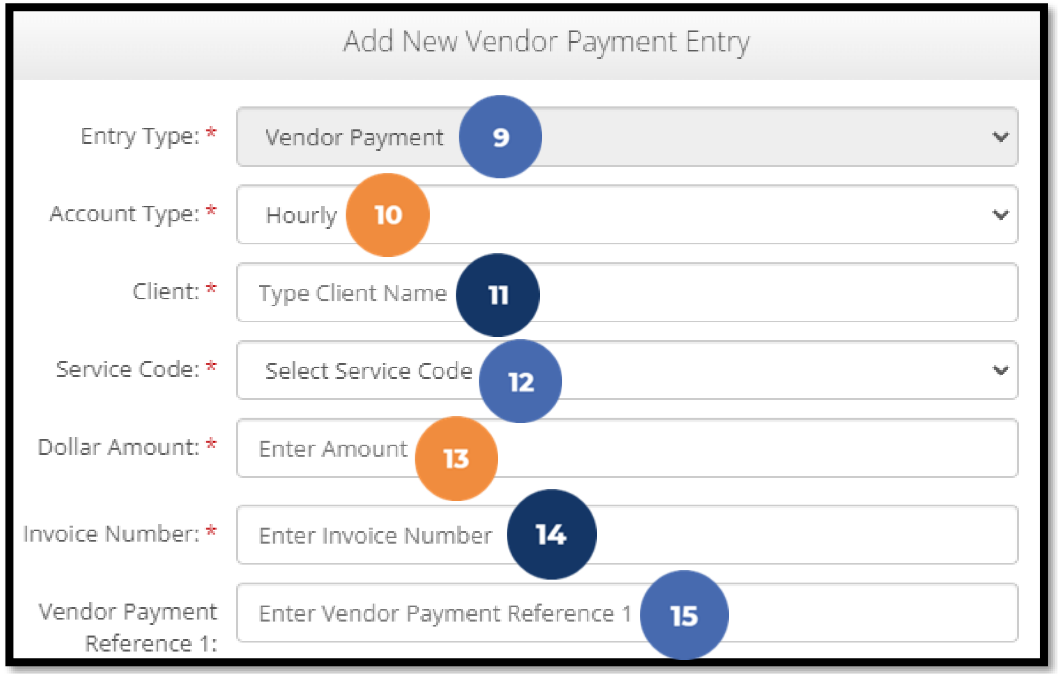
Vendor Payment

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



Vendor Payment

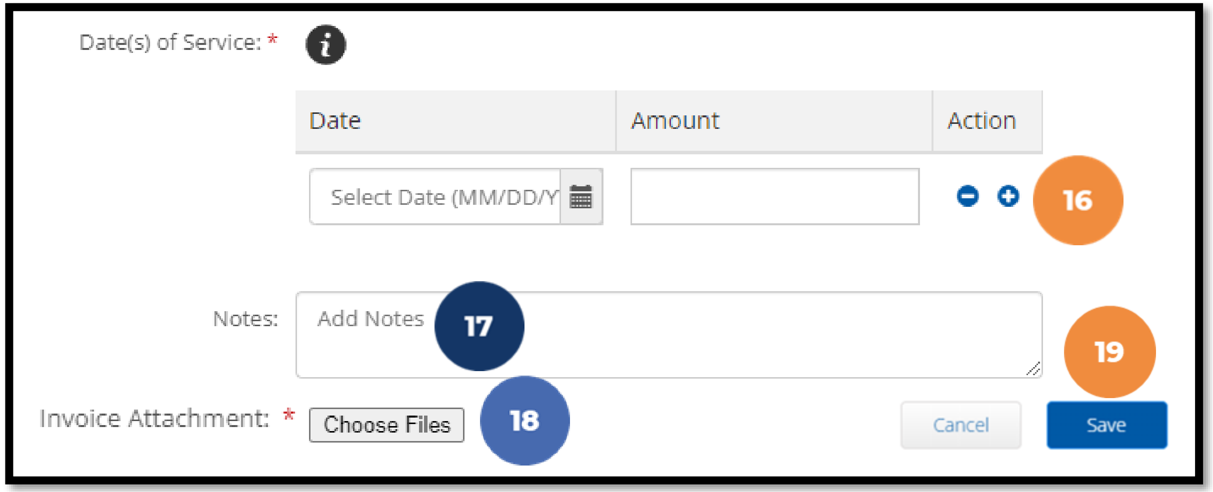
Complete the **Add New Vendor Payment Entry** form wizard:

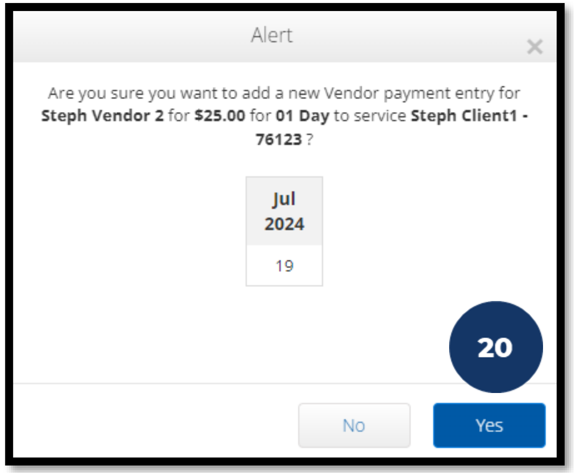


9. Entry Type: Auto-populates
10. Account Type: Select Hourly
11. Client: Type & select from the drop-down
12. Service Code: Select from the drop-down
    - If the appropriate service code is not available in the drop-down menu, please contact your local office or service coordinator.
13. Dollar Amount: 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

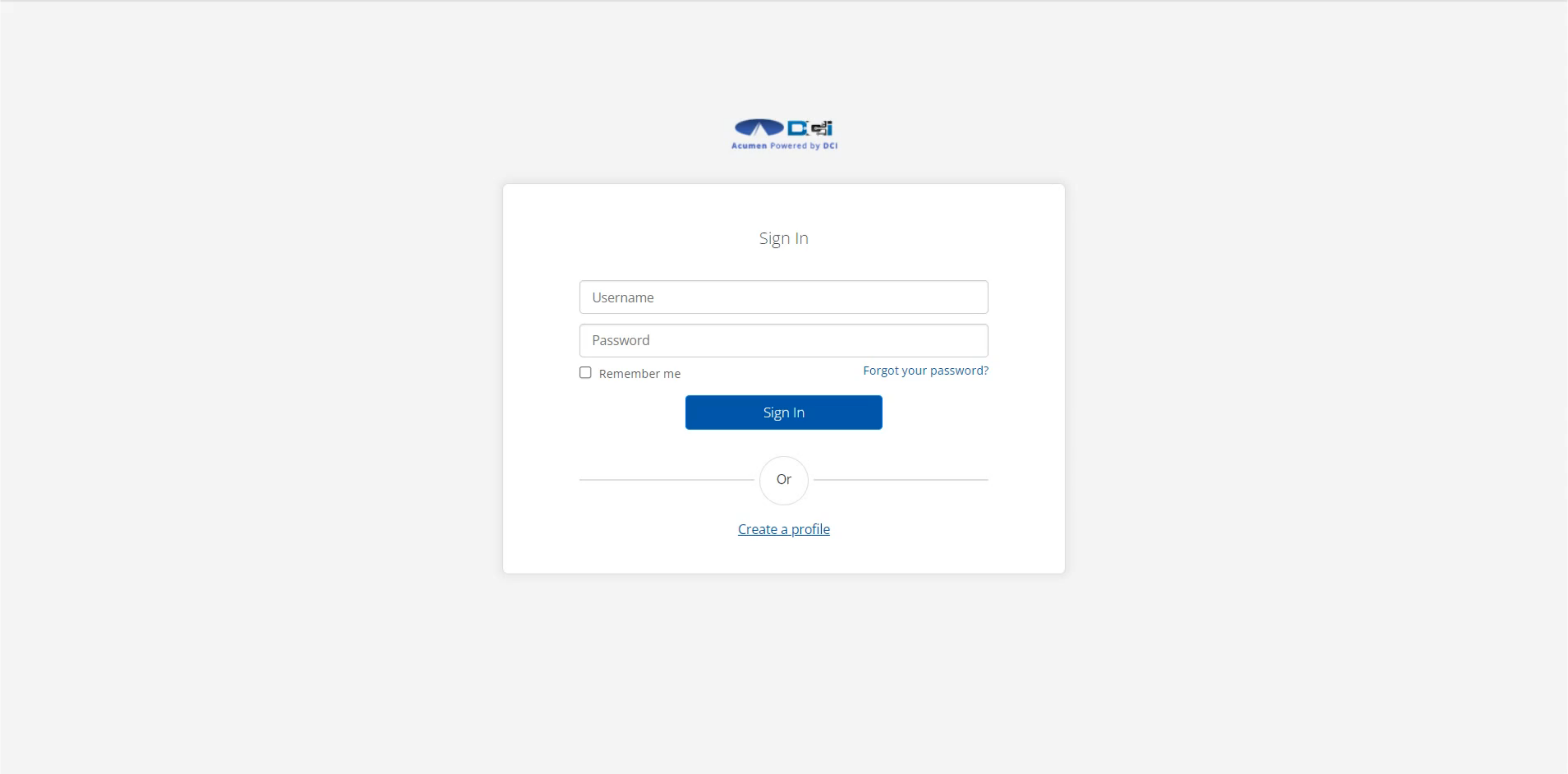
Add New Vendor Payment Entry form wizard continued:





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



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View Clients & Submitted Entries

View Clients

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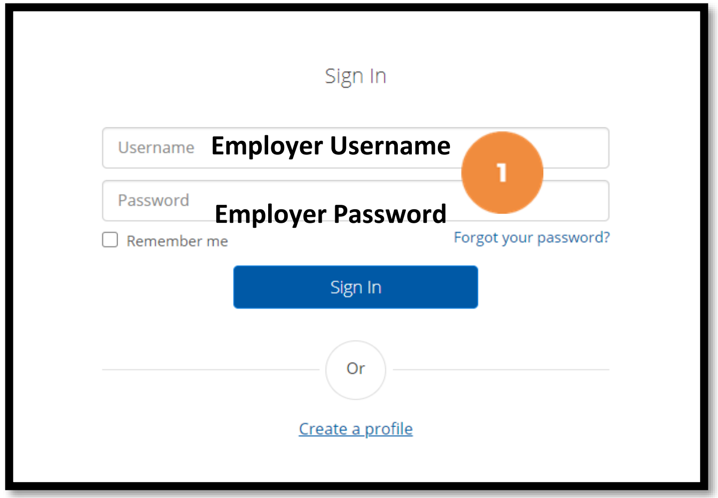
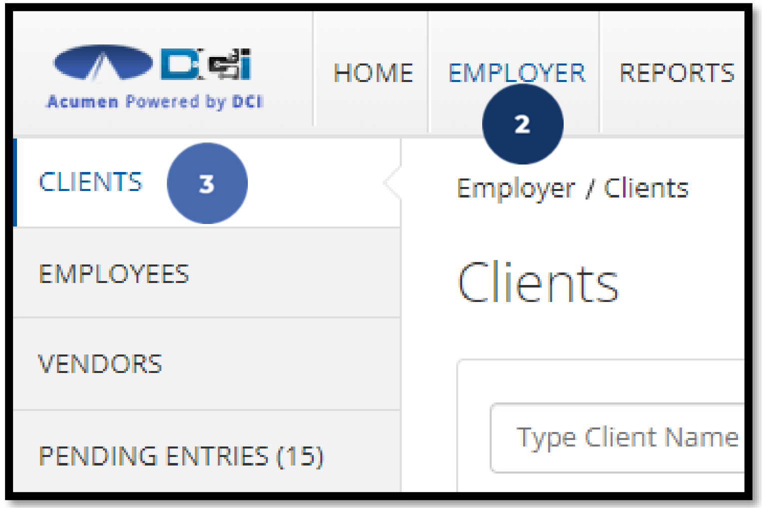
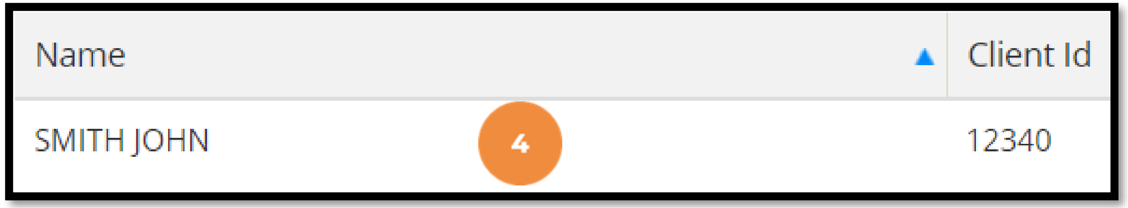
1. Navigate to acumen.dcisoftware.com and log into the **Employer Profile**



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



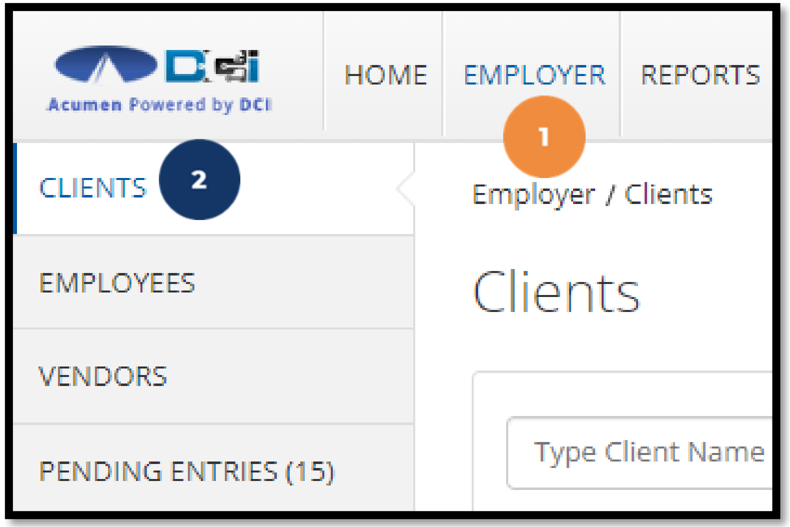
4. **Click anywhere in the client row** to open the details page

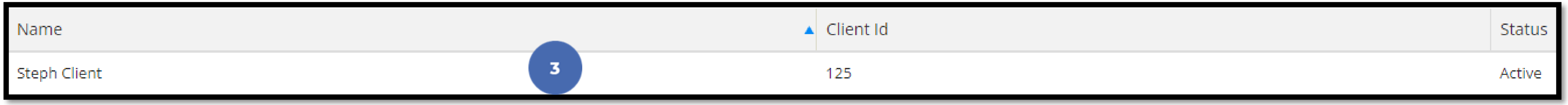


View Submitted Entry

To check the status of the vendor payment entry:

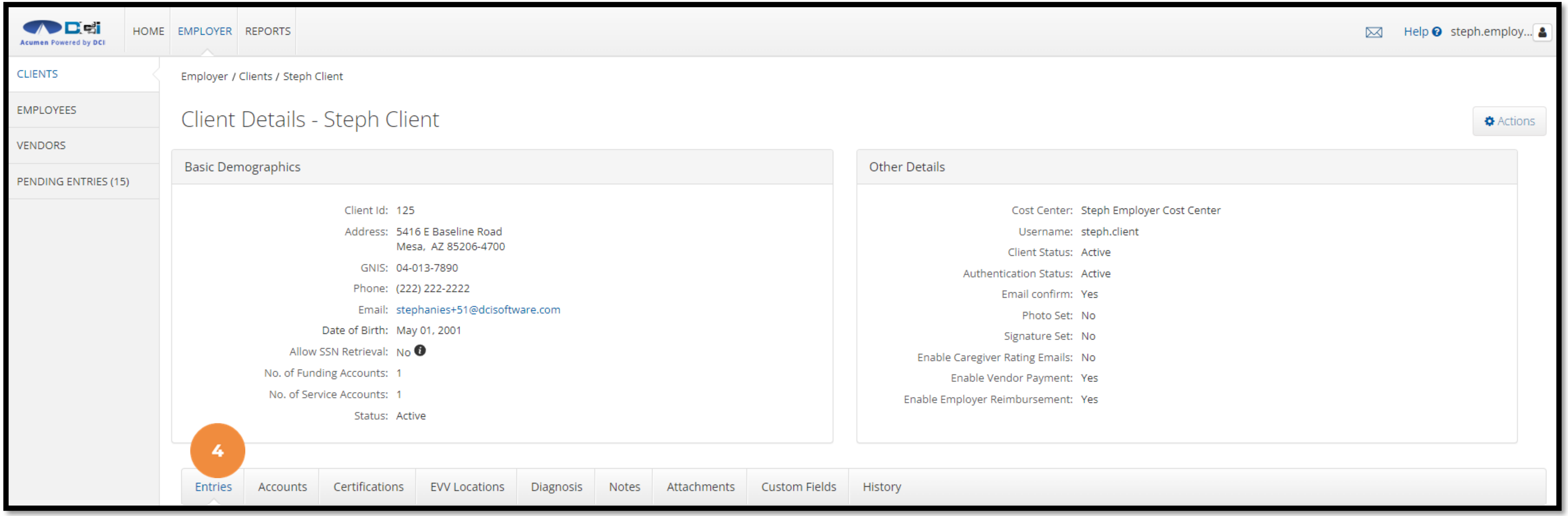
1. Click **Employer** on the main menu
2. Select the **Clients** tab from the submenu
3. Click anywhere on the **client row**





View Submitted Entry

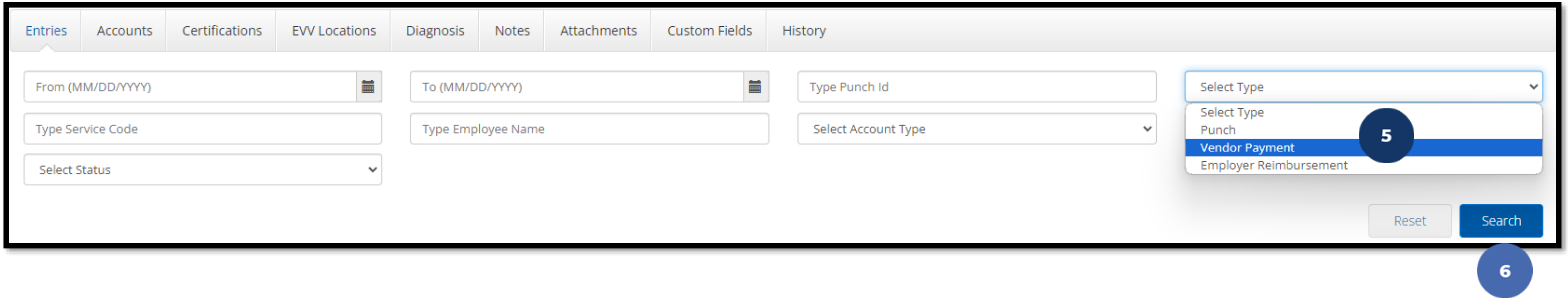
4. From the Client Details page, scroll down to select the **Entries** tab.



View Submitted Entry

5. Select **Vendor Payment** from the Select Type filter

6. Click the blue **Search** button to return results



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

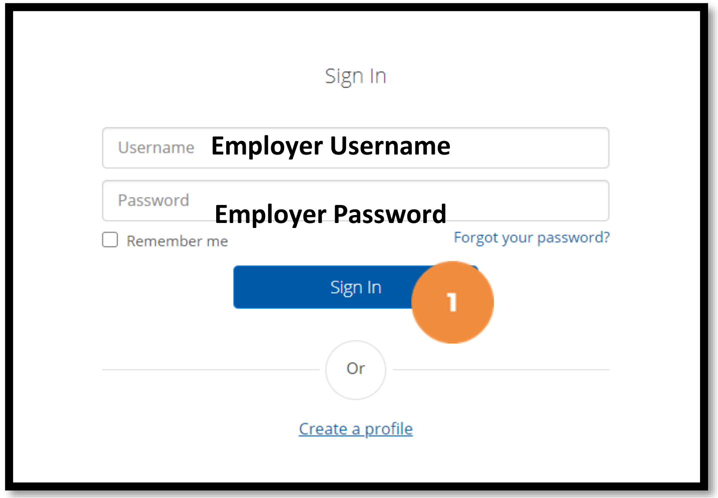
Web Portal

- 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

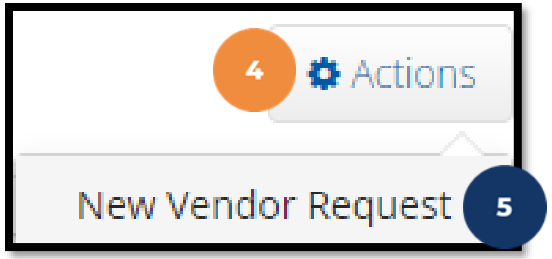
***Please note!** The Employer is responsible for requesting the new vendor

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



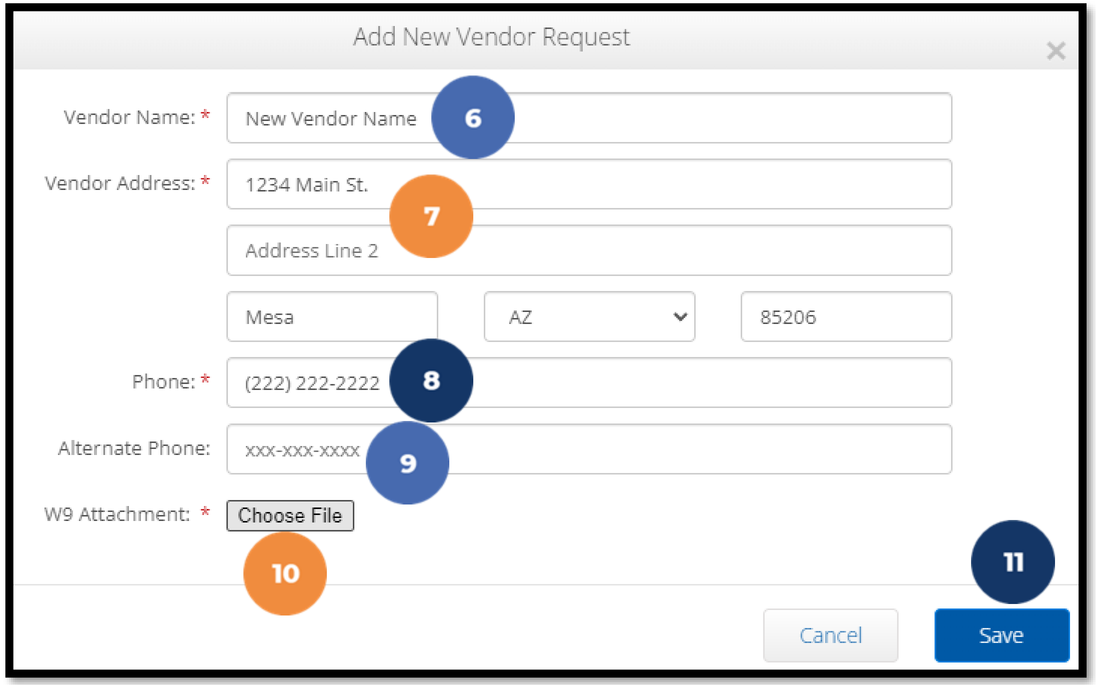
2. Click **Employer** on the main menu
3. Click **Vendors** on the submenu

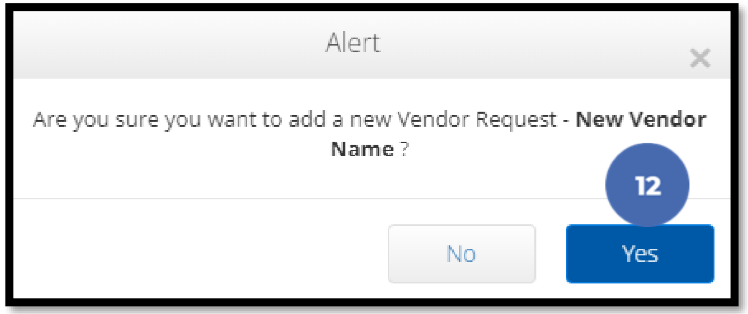
4. Click **Actions**
5. Select **New Vendor Request** from the drop-down menu



New Vendor Request

Complete the **Add New Vendor Request** form wizard:





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

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- 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

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THANK YOU!

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