Mobile App Vendor Entry & New Vendor Request

Acumen Fiscal Agent
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Suggested Resource:
- Mobile App Vendor Entry & New Vendor Request – Quick Reference

<u>Vendor Entry – Mobile App</u>

1. Log in to the DCI Mobile EVV App
2. Click the **Menu** in the top left corner of the screen
3. Select **Vendors** on the submenu
4. Click **ACTION** in the top right corner
5. Select **New Vendor Payment Entry**
6. Complete the **New Vendor Payment Entry** screen
    a. Click the **Account Type** drop-down to select Hourly (**NJ Only**: select **Vendor**)
    b. Click **Vendor Name** to type and select the vendor
        1. Can't find the vendor? View the New Vendor Request section in this training document.
    c. Click **Client Name** to type and select the client (Please note: The vendor's name will display at this time)
    d. Click the Select Code drop-down to select the service code
        1. If the appropriate code is not available on the drop-down menu, please contact your local office or support coordinator.
    e. Enter the **Total Amount** for the invoice for all dates of service
    f. Enter the **Invoice Number** *along with the client's name*
    g. Optionally enter any additional information in Vendor Payment Reference fields 1-5
    h. Click the calendar icon to select the **Date(s) of Service**
        1. **Please note:** Multiple dates may be selected. Click the date again to unselect it.
    i. Click the blue **Ok** button to confirm the selected date(s)
    j. If multiple dates are selected, enter the amount for each date.
        1. **Please note:** The sum of the individual amounts must match the Total Amount of the payment
    k. Optionally add Notes for the payment
    l. If options appear in the Statements section, select the Statement(s) (tasks) that were completed during the service.
        1. Please note: At least one statement must be selected if listed
    m. Click **Add Attachment** to access the device camera to take a picture of the invoice
7. Click the blue **Save** button when all fields are complete

<u>New Vendor Request – Mobile App</u>

1. Log in to the DCI Mobile EVV App
2. Click the **Menu** in the top left corner of the screen
3. Select **Vendors** on the submenu
4. Click **ACTION** in the top right corner
5. Select **New Vendor Request**
6. Complete the **New Vendor Request** screen
    a. Enter the name and DBA (Doing Business As) of the new vendor
    b. Enter the vendor's street address
    c. Click the Select State drop-down menu and select the vendor's state
    d. Enter the vendor's city
    e. Enter the vendor's zip code
    f. Enter the vendor's main company phone number
    g. Optionally enter an alternate phone number for the vendor
    h. Click Add Attachment to access the device camera to take a picture of the W-9 completed by the vendor
7. 7. Click the blue **Save** button when all fields are complete