DCI Employer Portal Guide

Presented By: Acumen Fiscal Agent

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OUR MISSION

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

Agenda

- Ways to Enter Time
- DCI Mobile App
- Employer Web Portal
- Phone EVV
- Profile Settings
- DCI Tips and Tricks

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Ways to Enter Time

Ways to Enter Time

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

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Mobile App

OR

Phone EVV

OR

Web Portal

Mobile App

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

Phone EVV

- Landline
- Real Time Entry – **EVV compliant**
- Historical Entry – Non-EVV compliant
- Option when access to a mobile device or computer is limited

Web Portal

- **Only used for service interruptions**
- Time Management
- Historical Entry & Corrections – Non-EVV compliant
- Manual Time Approval
- Profile Settings
- ***Includes Mobile Web Portal –** Mobile-friendly web portal version accessed via smartphone or tablet

DCI Mobile App

Mobile App Basics

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- The DCI Mobile App is used for real-time entries
- Preferred, EVV-compliant method
- Can be downloaded on a mobile device or tablet
- Use for clocking in & out
- Quick & easy
- View all entries including status & details

Overview Mobile App Clock In

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Employee Arrives to Begin Shift

Open DCI Mobile EVV App on Smartphone or Tablet

Log in with Username & Password or PIN

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

Select Client Name & Service Code

Confirm Clock In (time begins for the shift)

Overview Mobile App Clock Out

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End of Shift

Open DCI Mobile EVV App
on Smartphone or Tablet

Log in with Username
& Password or PIN

Tap the blue “Clock Out” button (top of screen)

Select EVV Option

- Pin/Password
- Client Portal Signoff
- Picture

Ensure Verification Confirmation
- Alert will appear on screen

Optionally Add Notes or/and Attachments

Select the Task(s)/Statement(s) that was completed during the shift (required)

Confirm Clock Out (time ends for the shift)

Facial Recognition Setup

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1. Take a picture of the client (participant). Photos must comply with the requirements below:
   - Participant is the only individual in the photo
   - Participant is facing the camera directly with a full face in view
   - Participant is not wearing sunglasses, hat, or any other accessory that alters the Participant's appearance.
   - Photos are taken with a solid color background
   - Photo size is 2MB or less
   - JPG format
2. Email the picture to Acumen Customer Service at customerservice@acumen2.net
   - ***Please note!** A valid email must be on file for the employer/client (participant) to set up facial recognition. The photo must be sent from the email on file.
   - Type "Photo - Facial Recognition Setup" in the email subject line
   - Enter the client's name, state, and program (ADSS) in the body of the email
   - Acumen will send notification when setup is complete
     - ✓ Your employee will now be able to use Picture as an EVV option at clock out when using the mobile app

How does facial recognition work?
Facial recognition is the process of identifying or verifying a person's identity by comparing their face to a collection of pictures of them. It "learns" over time and becomes more accurate with each submission. Acumen will collect, but not share photos. Photos are stored in a secure business cloud and are only used by our facial recognition technology to verify that the client was present for the employee's visit.

Phone EVV

Phone EVV Basics

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

    ***Please note!** If calling from a number not associated with the client, the employee will receive an error message.
- **Employee - Will be asked to validate the following information:**
  - ✓ Last four digits of their social security number
  - ✓ PIN (their employee pin)
  - ✓ MMDD of their birthday
  - ✓ Client Name & Service Code for the shift
- **Client or Employer – Need client PIN for historical (non-EVV-compliant) phone entries**
  - ✓ Client PIN is on the Employer Good To Go letter

Employer Web Portal

Accessing the DCI Web Portal

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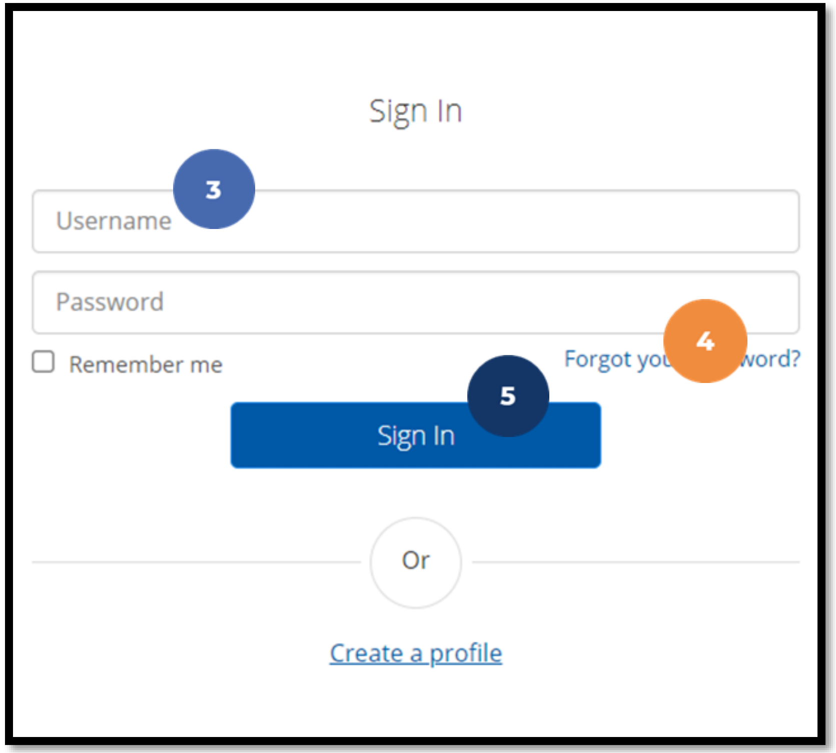
1. Open an internet browser on a computer or mobile device (Google Chrome is preferred) and navigate to the DCI Web Portal.
    1. All states **except** NC Cap (including KS Helpers): acumen.dcisoftware.com
    2. NC Cap **Only**: outreach.dcisoftware.com
2. Use the language drop-down in the top right 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

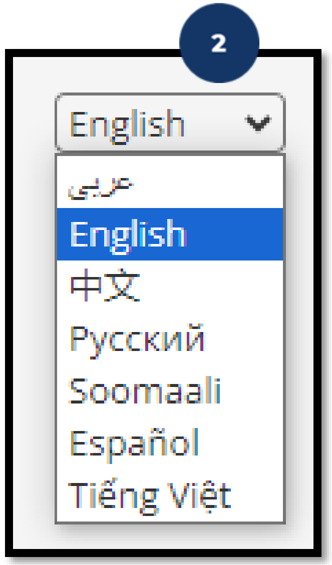
***Please note:** Contact Acumen with login issues

acumen.dcisoftware.com

1

outreach.dcisoftware.com

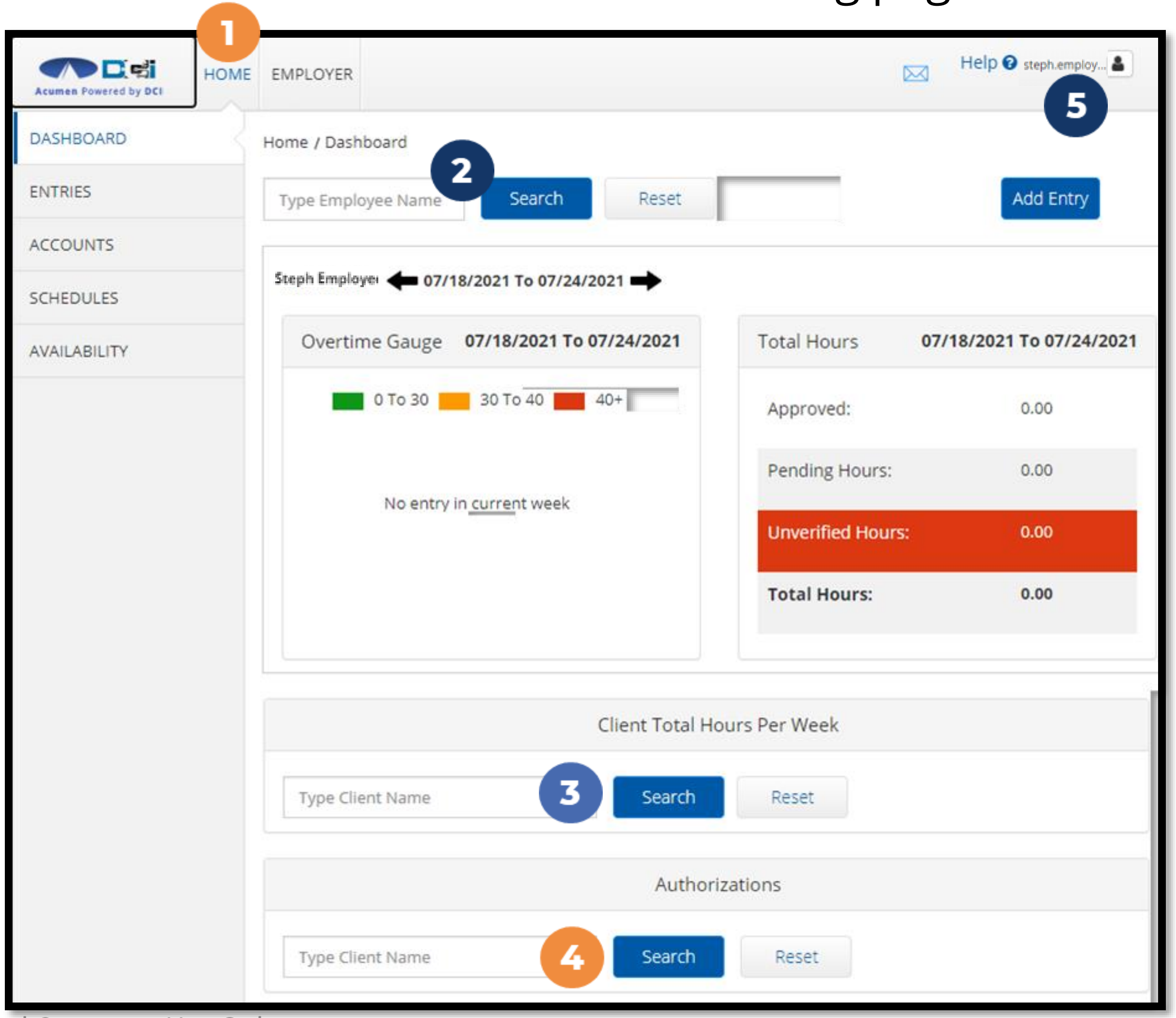




Home Tab Details

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



Manage Pending Entries

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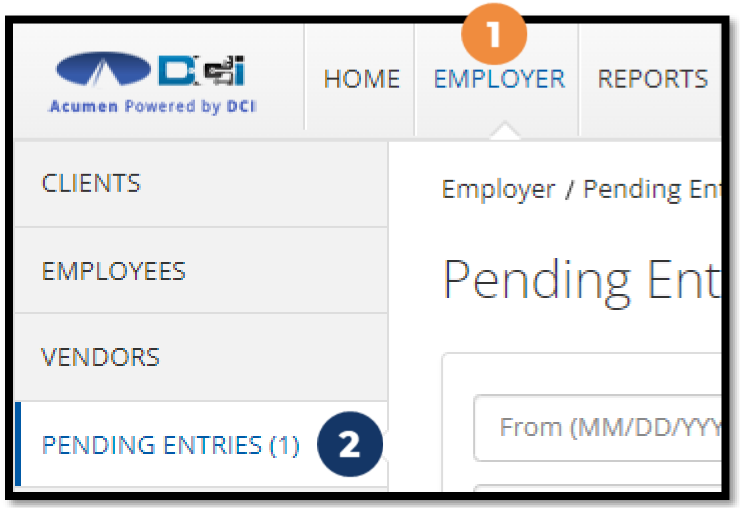
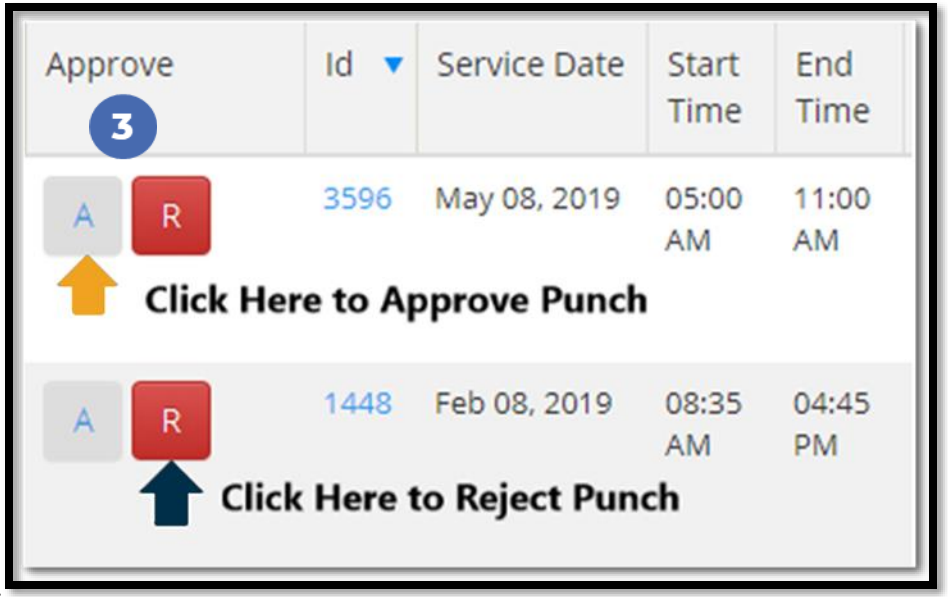
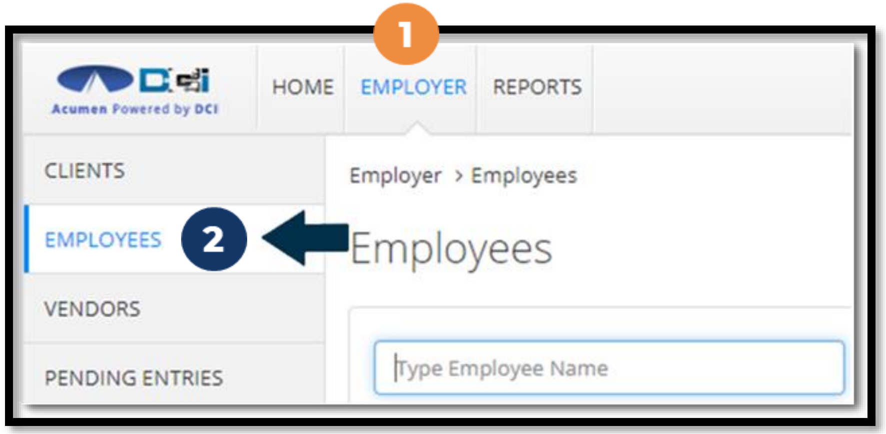
1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
   - ✓ The number of pending entries displays in parenthesis on the submenu
3. Any punch that requires approval is listed here
   - ✓ Review each entry
     - ➢ Click on the entry to view all details
   - ✓ Approve or reject
     - ➢ Click the **A** on the entry line to approve
       - ❖ **Entries must be approved within 60 days of the date of service**
       - ❖ **After 60 days the approval will be prohibited as it will violate the timely filing business rule**
     - ➢ Click the red **R** on the entry line to reject
       - ❖ If an entry is rejected, ask the employee to re-enter the time correctly in the DCI web portal.





Using the Employees Page

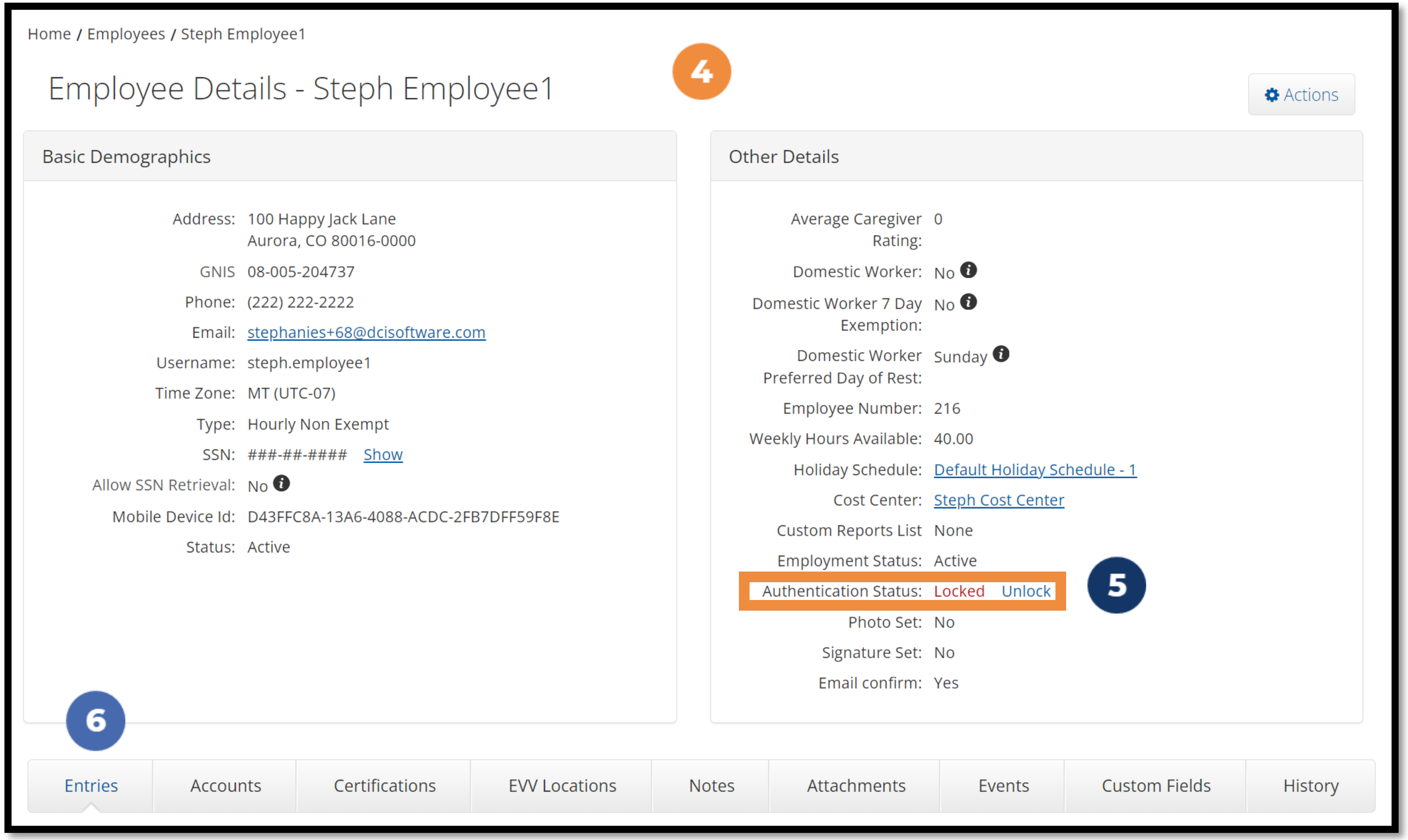
1. Click **Employer** on the main menu
2. Select the **Employees** tab from the submenu
3. Click anywhere on the selected employee’s line



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

Using the Employees Page (cont.)

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 <u>entered</u> and <u>approved</u> before the submission due date

Entries 7

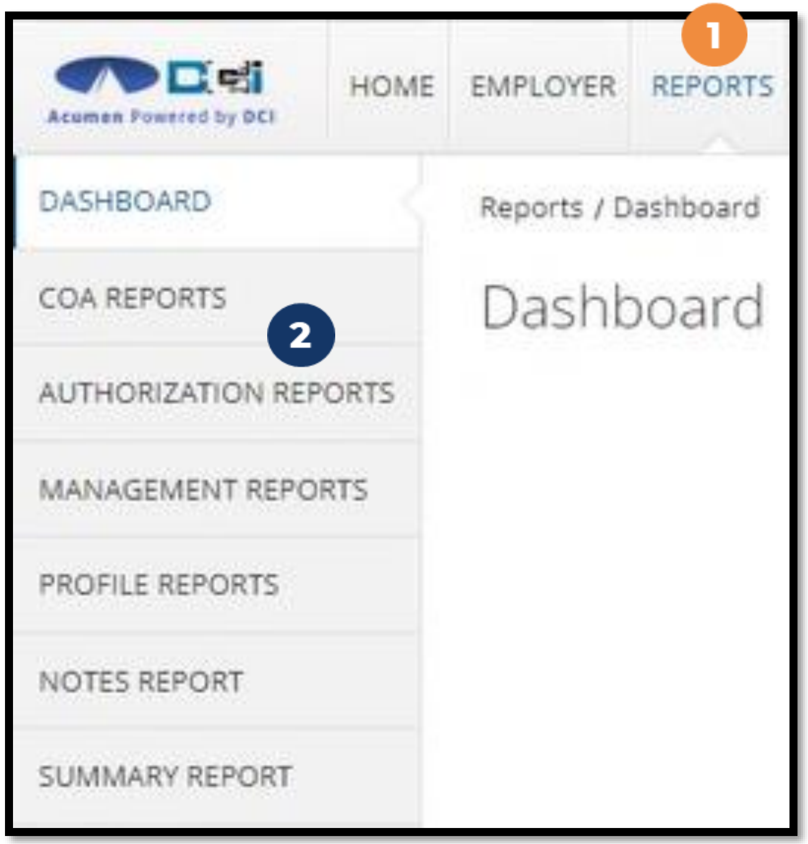
Export

Showing **13** out of **13** records

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
1897873	Jul 12, 2023			Client Transportation	1897872	Steph Cost Center - 75	Steph Client1	Client Transportation	0.00	Approved
1894616	Jun 07, 2023	05:00 AM	08:00 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:03:00	Approved
1894612	Jun 04, 2023	04:00 PM	05:00 PM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:01:00	Approved 8
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
1894609	Jun 22, 2023	02:55 PM	02:56 PM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:00:01	Pending
1894607	Jun 22, 2023	02:51 PM		Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0.00	Rejected

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

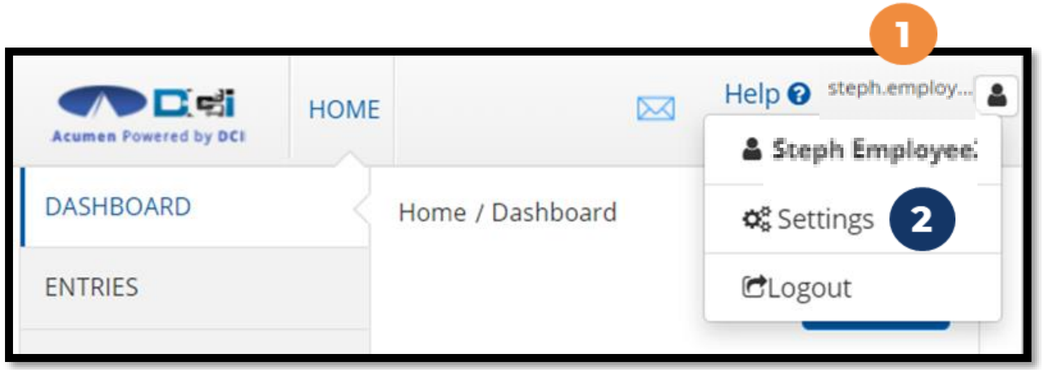


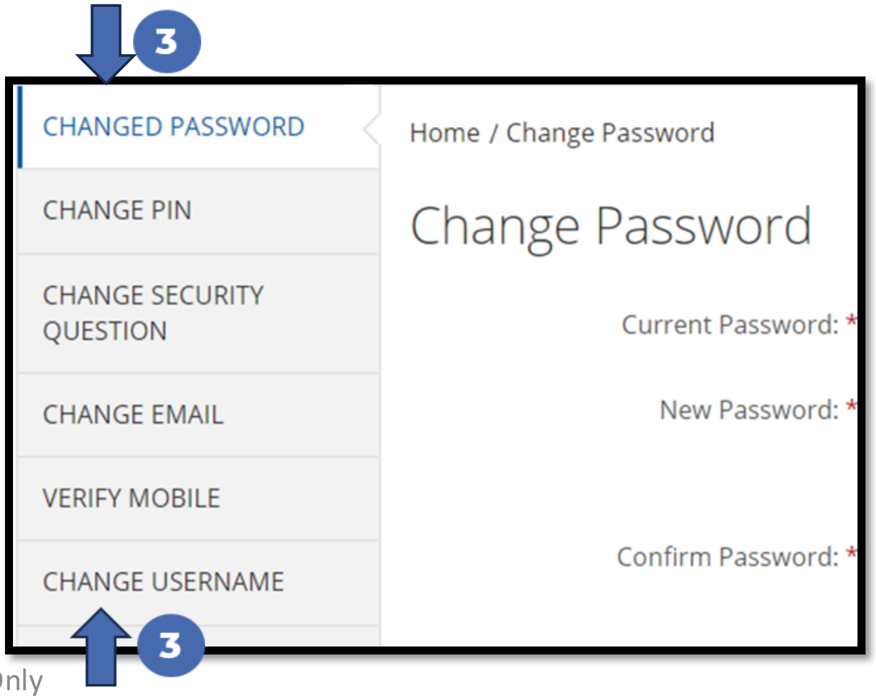
Profile Settings

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.*
   - Change Security Question
   - Change Email – A valid and correct email address is required for password recovery
   - Verify Mobile
   - Change Username – Used for login

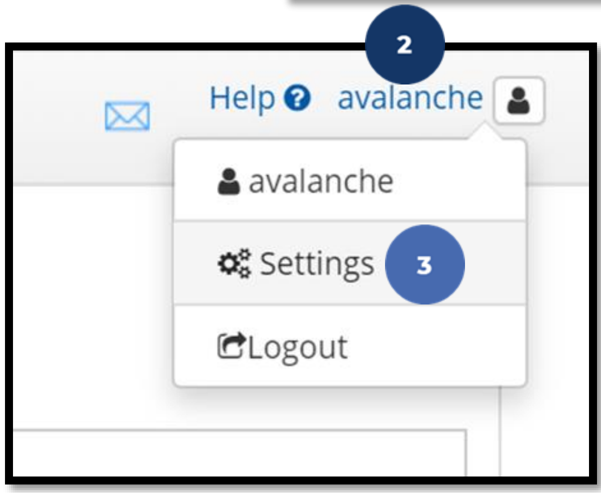


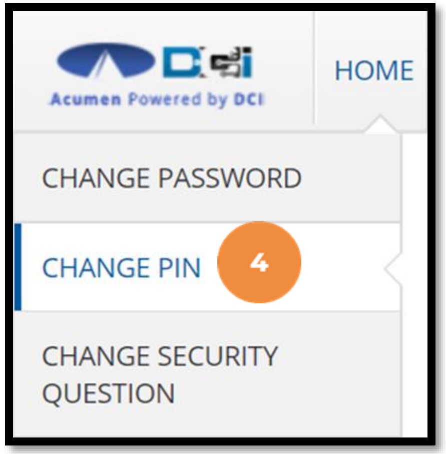


Add / Change PIN

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

1. Log in to the DCI web portal
    1. All states except NC Cap (including KS Helpers): acumen.dcisoftware.com
    2. NC Cap Only: outreach.dcisoftware.com
2. Click the username in the top right corner of the main menu
3. Click **Settings** from the drop-down menu
4. Select **Change PIN** or **Add New PIN**
    - ✓ Add New PIN after a reset
    - ✓ Change PIN anytime
5. Enter password
6. Click the blue **Verify** button

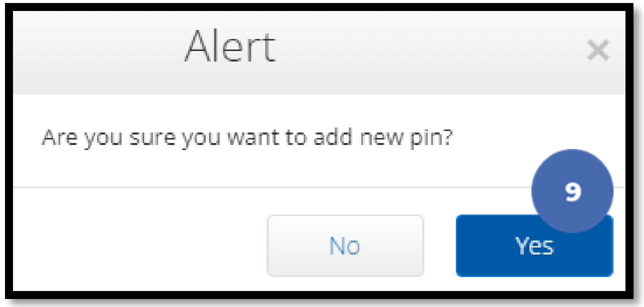




Add / Change PIN (cont.)

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

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



DCI Tips and Tricks

DCI Tips and Tricks

1. All Employers and Employees must have a unique valid email address in DCI
2. Login and take action as often as possible to become familiar with DCI and the tasks
3. Users are locked out after 3 bad attempts
   - Contact Acumen Customer Service for help
4. Employees will use the Mobile app
   - Employers vest practice is to use the DCI Web Portal
5. Employees will always enter their own time
   - Employers will Approve or Reject

Questions?

Thank you!

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