

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



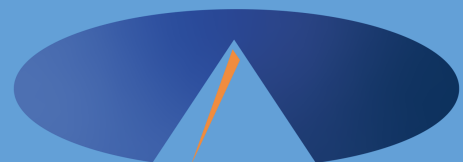
Phone EVV



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)

Mobile App



- ***Preferred Method**
- Real Time Entry – EVV compliant
- Quick & Easy
- [Mobile App Guide](#)

OR

Phone EVV



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

OR

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



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DCI Mobile App

Mobile App Basics

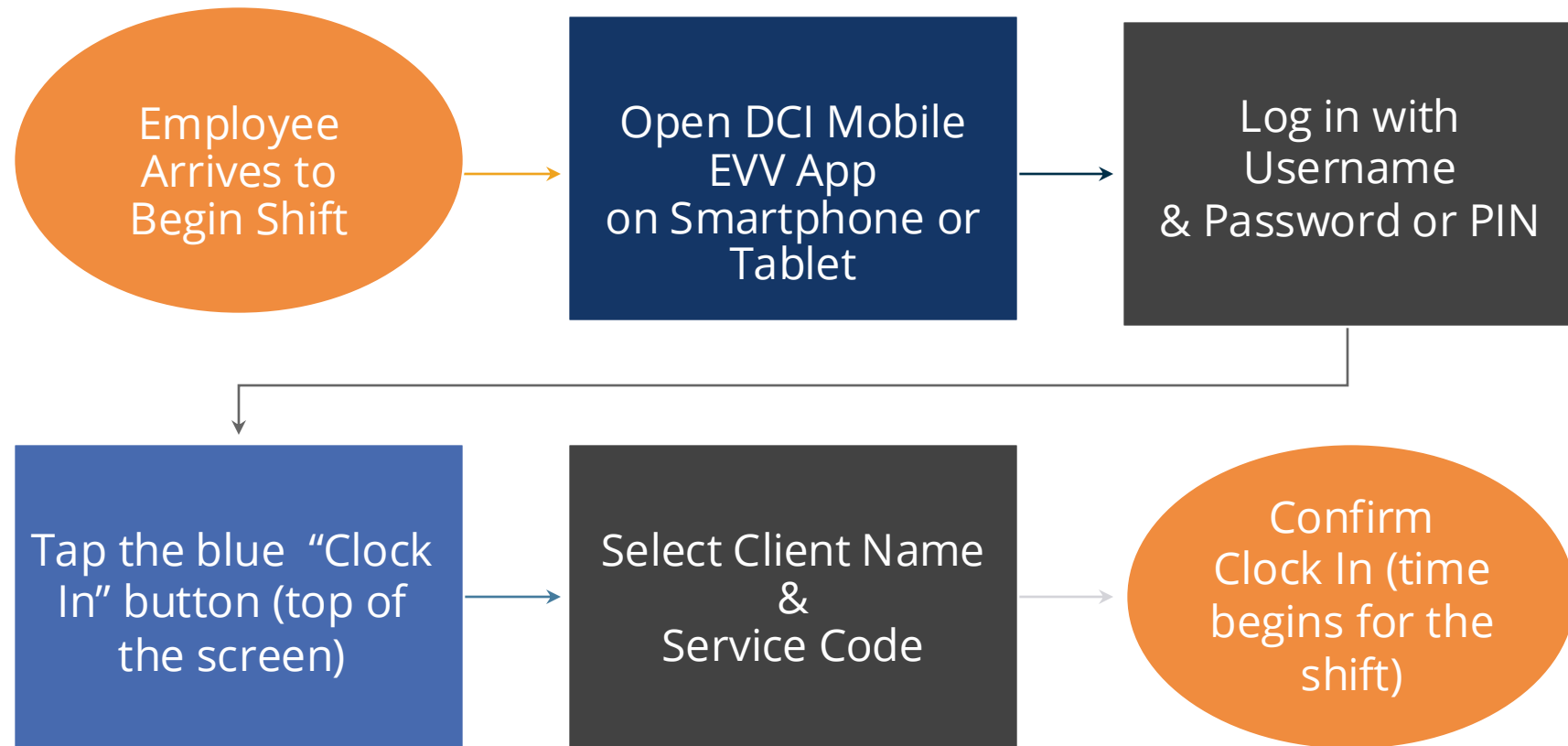
- The DCI Mobile App is used for real-time entries
- Preferred, EVV-compliant method
- Can be downloaded on a mobile device or tablet
- Use for clocking in & out
- Quick & easy
- View all entries including status & details





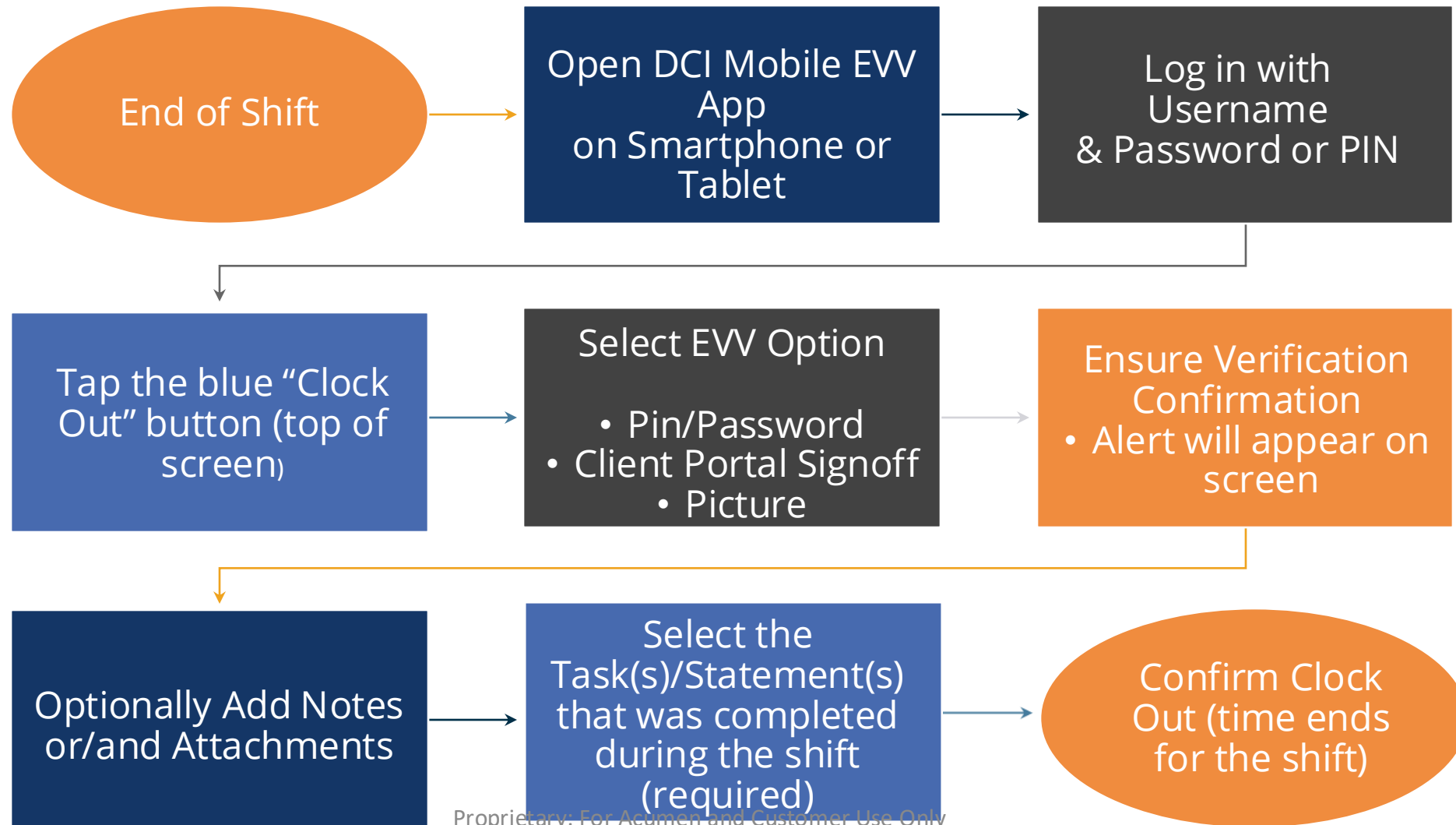
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Overview Mobile App Clock In





Overview Mobile App Clock Out



Facial Recognition Setup

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.



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Phone EVV

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 (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





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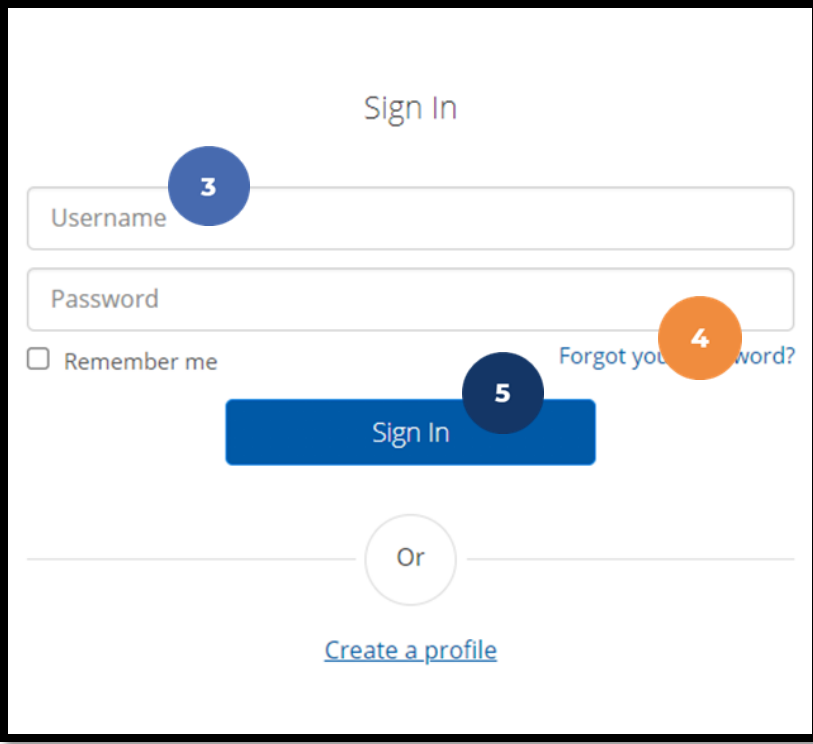
Employer Web Portal

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.
 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

acumen.dcisoftware.com

outreach.dcisoftware.com



Sign In

Username **3**

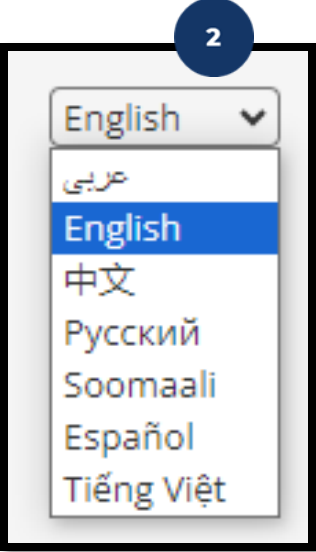
Password

Remember me **4** [Forgot your password?](#)

5 Sign In

Or

[Create a profile](#)



2

English ▼

عربي

English

中文

Русский

Soomaali

Español

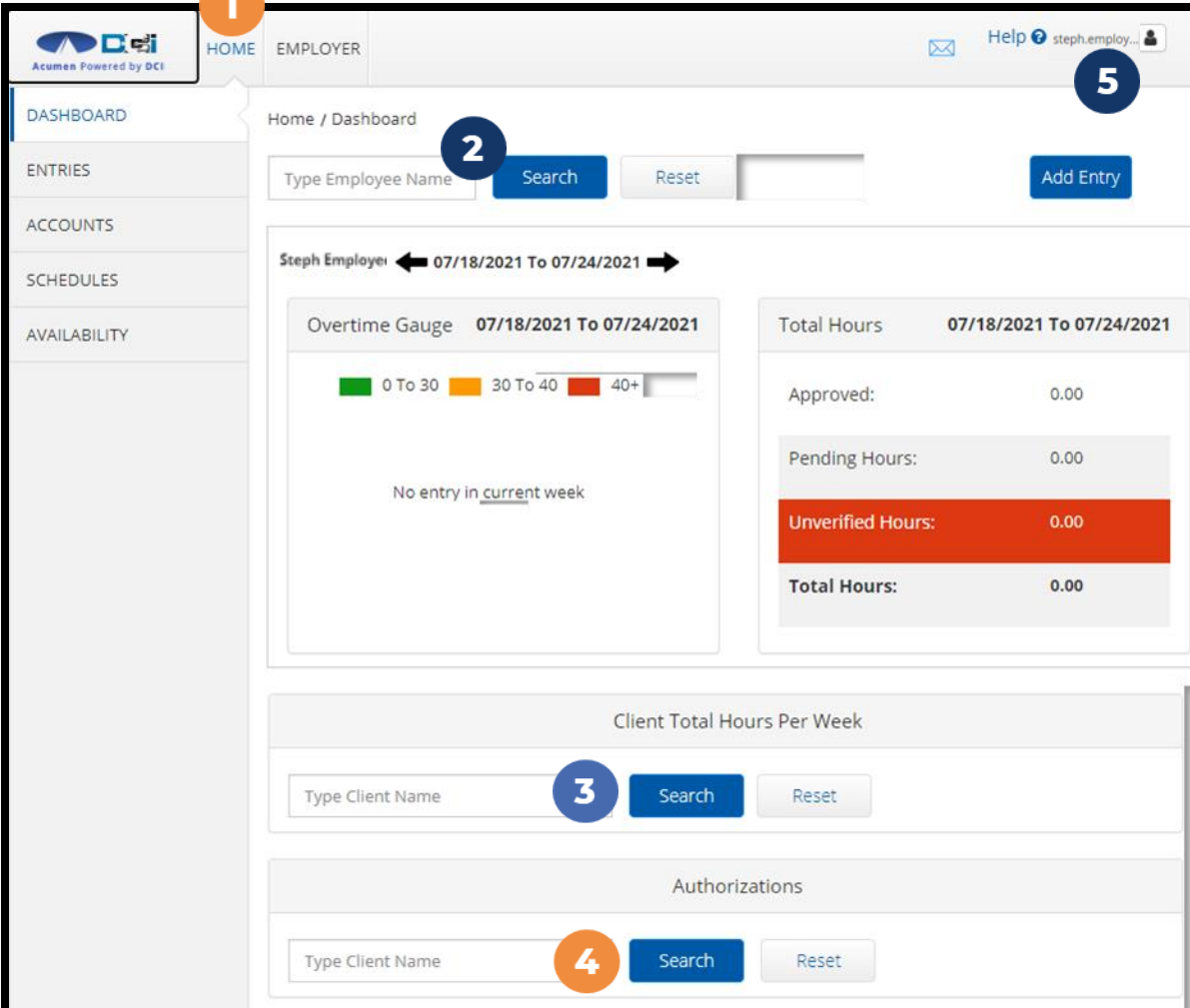
Tiếng Việt

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

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 dashboard interface with the following elements and callouts:

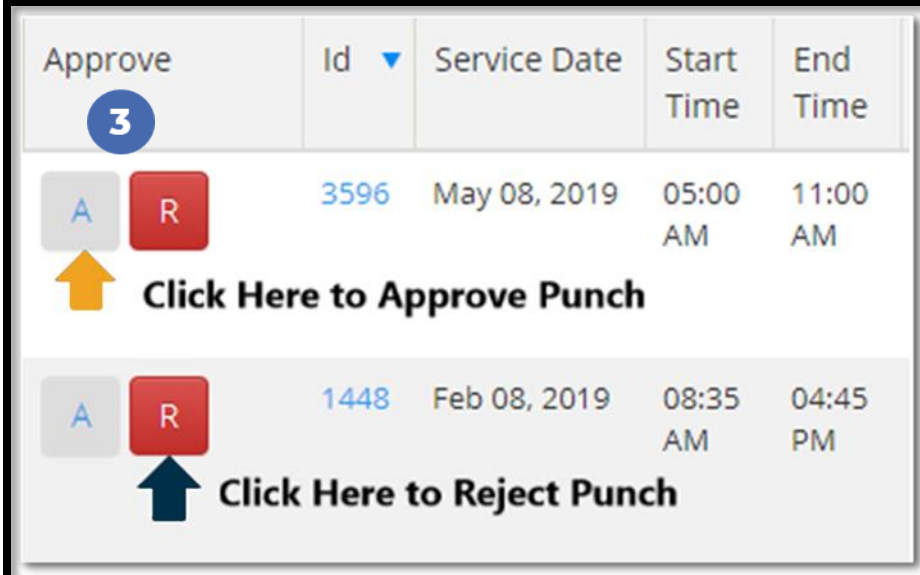
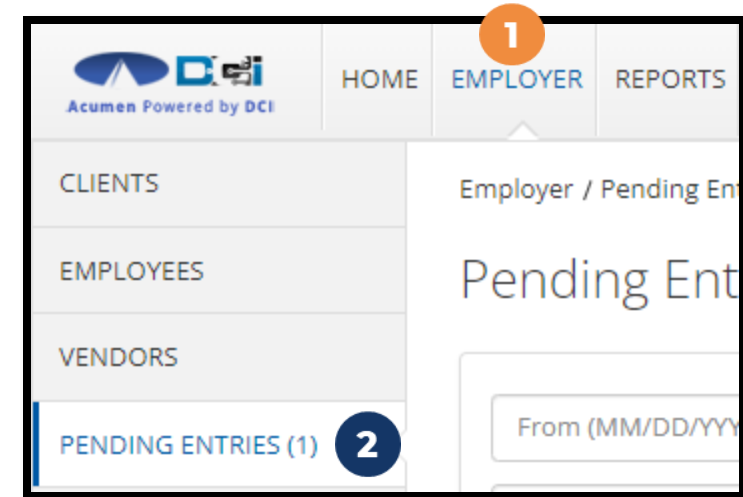
- 1**: Points to the 'HOME' button in the top navigation bar.
- 2**: Points to the 'Search' button in the 'Type Employee Name' search field.
- 3**: Points to the 'Search' button in the 'Type Client Name' search field for the 'Client Total Hours Per Week' widget.
- 4**: Points to the 'Search' button in the 'Type Client Name' search field for the 'Authorizations' widget.
- 5**: Points to the user profile icon in the top right corner.

The dashboard content includes:

- Navigation menu: DASHBOARD, ENTRIES, ACCOUNTS, SCHEDULES, AVAILABILITY.
- Employee search: 'Type Employee Name' field with 'Search' and 'Reset' buttons, and an 'Add Entry' button.
- Employee selection: 'Steph Employee' with left and right arrows for week navigation.
- Overtime Gauge: A gauge for '07/18/2021 To 07/24/2021' with categories '0 To 30', '30 To 40', and '40+'. It shows 'No entry in current week'.
- Total Hours breakdown: A table for '07/18/2021 To 07/24/2021' showing 'Approved: 0.00', 'Pending Hours: 0.00', 'Unverified Hours: 0.00', and 'Total Hours: 0.00'.
- Client Total Hours Per Week: A search field for 'Type Client Name' with 'Search' and 'Reset' buttons.
- Authorizations: A search field for 'Type Client Name' with 'Search' and 'Reset' buttons.

Manage Pending Entries

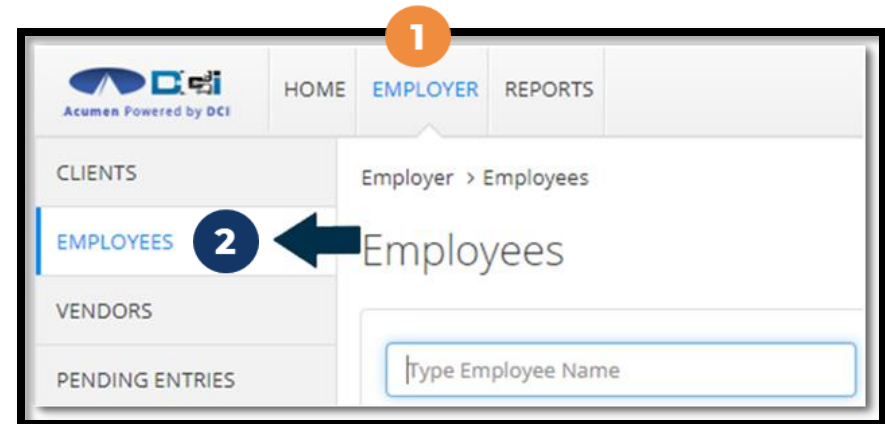
1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
 - ✓ The number of pending entries displays in parenthesis on the submenu
3. Any punch that requires approval is listed here
 - ✓ Review each entry
 - Click on the entry to view all details
 - ✓ Approve or reject
 - Click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



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

Using the Employees Page

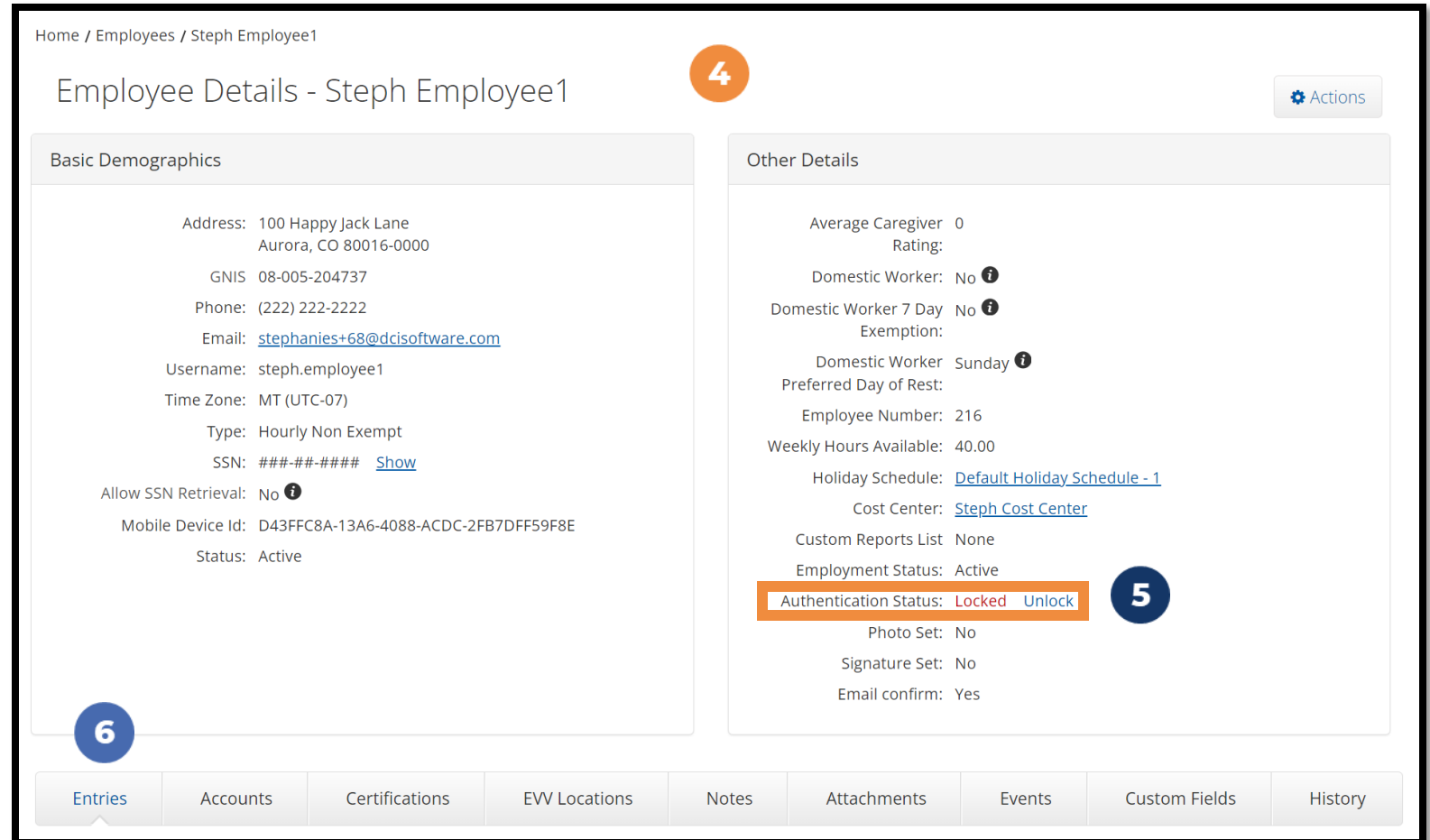
1. Click **Employer** on the main menu
2. Select the **Employees** tab from the submenu
3. Click anywhere on the selected employee's line



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 **i**

Mobile Device Id: D43FFC8A-13A6-4088-ACDC-2FB7DFF59F8E

Status: Active

Other Details

Average Caregiver Rating: 0

Domestic Worker: No **i**

Domestic Worker 7 Day Exemption: No **i**

Domestic Worker Preferred Day of Rest: Sunday **i**

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](#) **5**

Photo Set: No

Signature Set: No

Email confirm: Yes

6

4

Entries Accounts Certifications EVW Locations Notes Attachments Events Custom Fields History

Using the Employees Page (cont.)



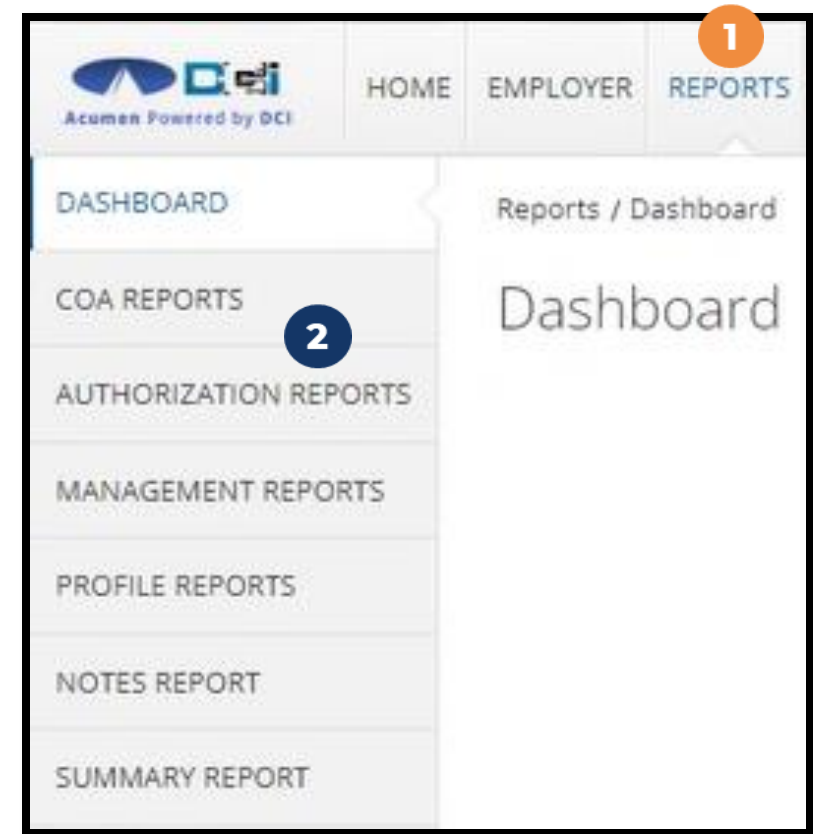
- 7. View the punch entries for the employee
- 8. Ensure all time for the pay period is entered and approved before the submission due date

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





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Profile Settings

Profile Settings

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

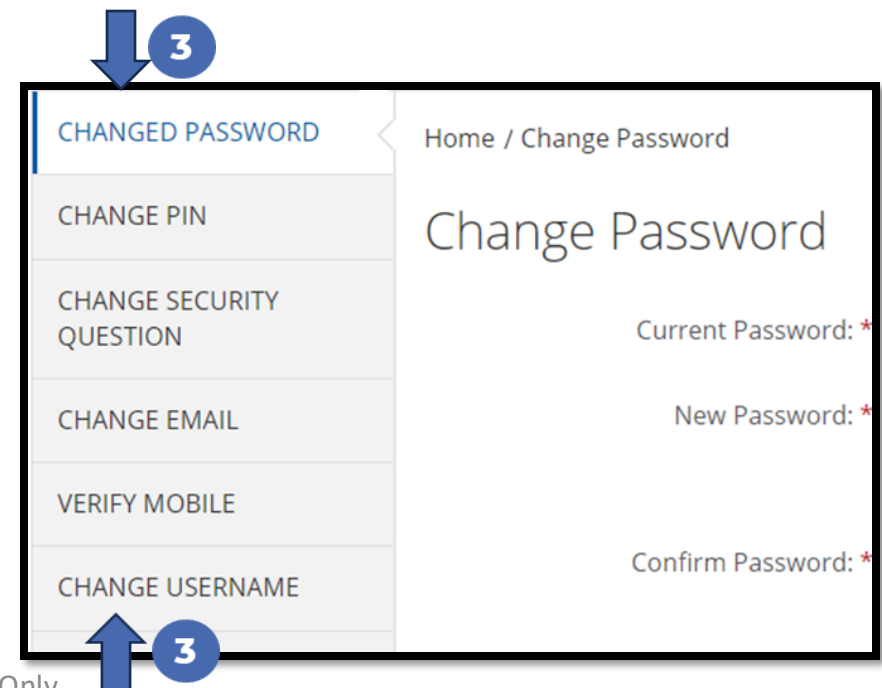
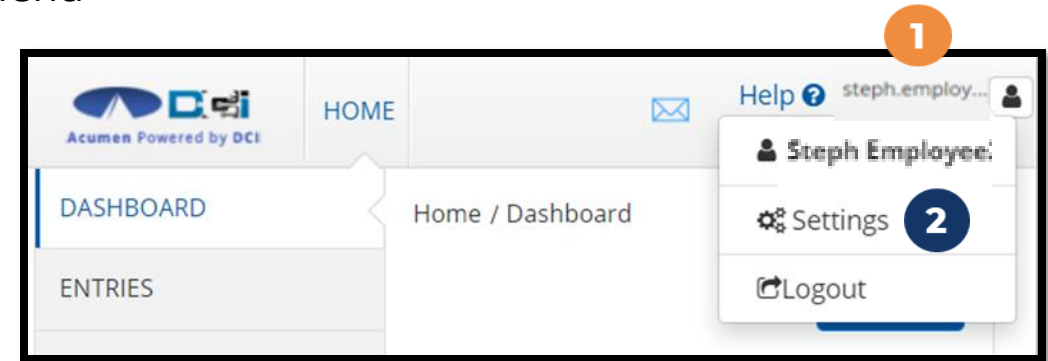


1. Click the **username** in the top right corner of the main menu

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



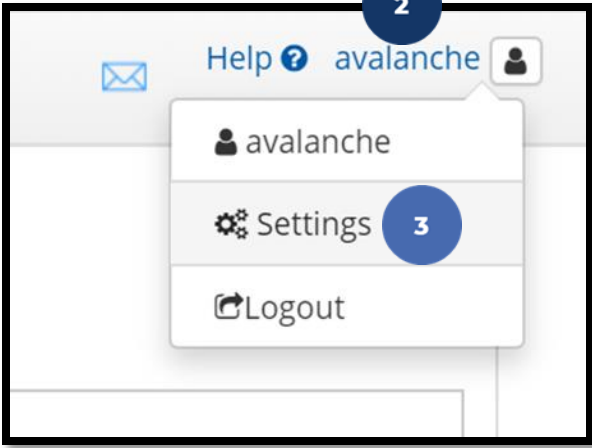
Sign In

Username **1**

Password **1**

Remember me [Forgot your password?](#)

Sign In

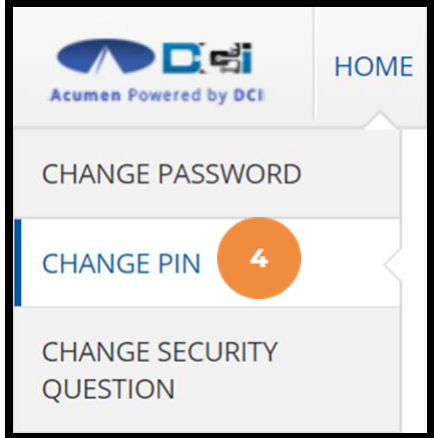


Help ? avalanche **2**

avalanche

Settings **3**

Logout



HOME

CHANGE PASSWORD

CHANGE PIN **4**

CHANGE SECURITY QUESTION



Password: * Please enter password **5**

Cancel Verify **6**

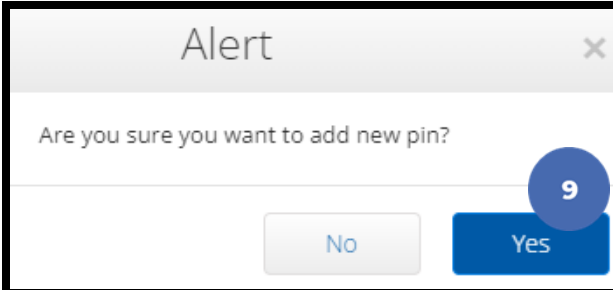
Add / Change PIN (cont.)

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



The screenshot shows a form with two input fields: "New Pin: *" and "Confirm Pin: *". Both fields contain the placeholder text "Please enter New Pin" and "Please Confirm Pin" respectively. A blue 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 dialog box titled "Alert" with a close button (X) in the top right corner. The text inside the dialog reads "Are you sure you want to add new pin?". At the bottom of the dialog 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.





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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 best 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