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

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

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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

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

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

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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

- **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

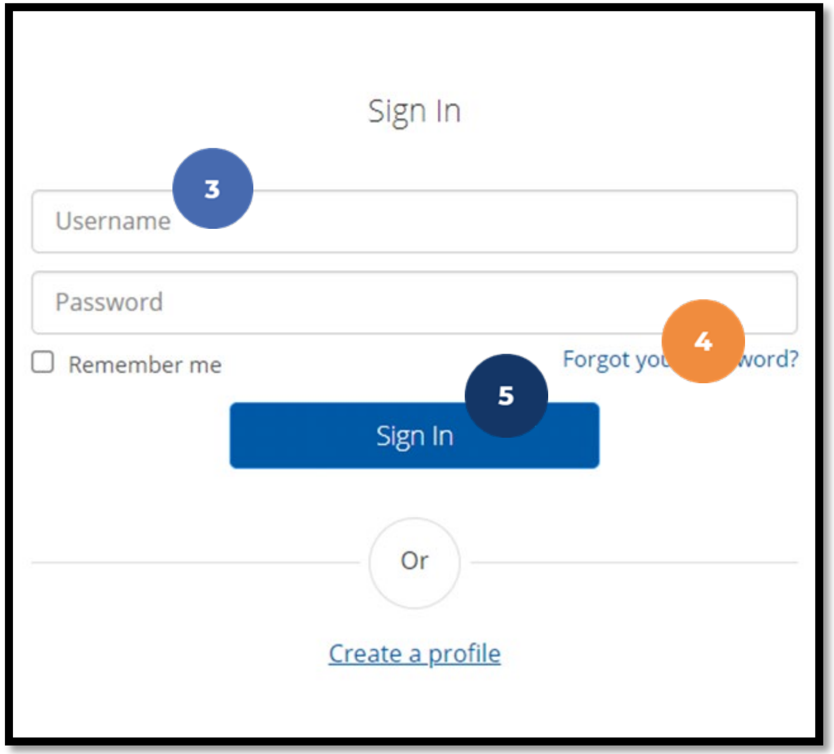
Employer Web Portal

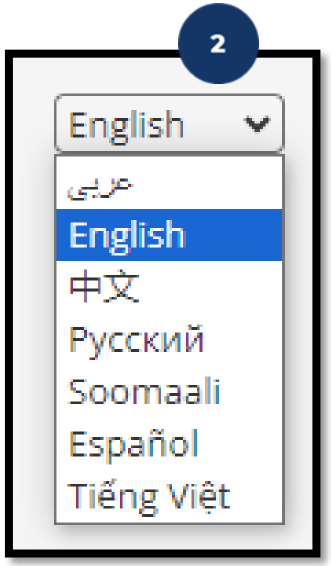
Accessing the DCI Web Portal

acumen.dcisoftware.com

outreach.dcisoftware.com

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** WI, NC Cap (including KS Helpers): acumen.dcisoftware.com
   2. WI, 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



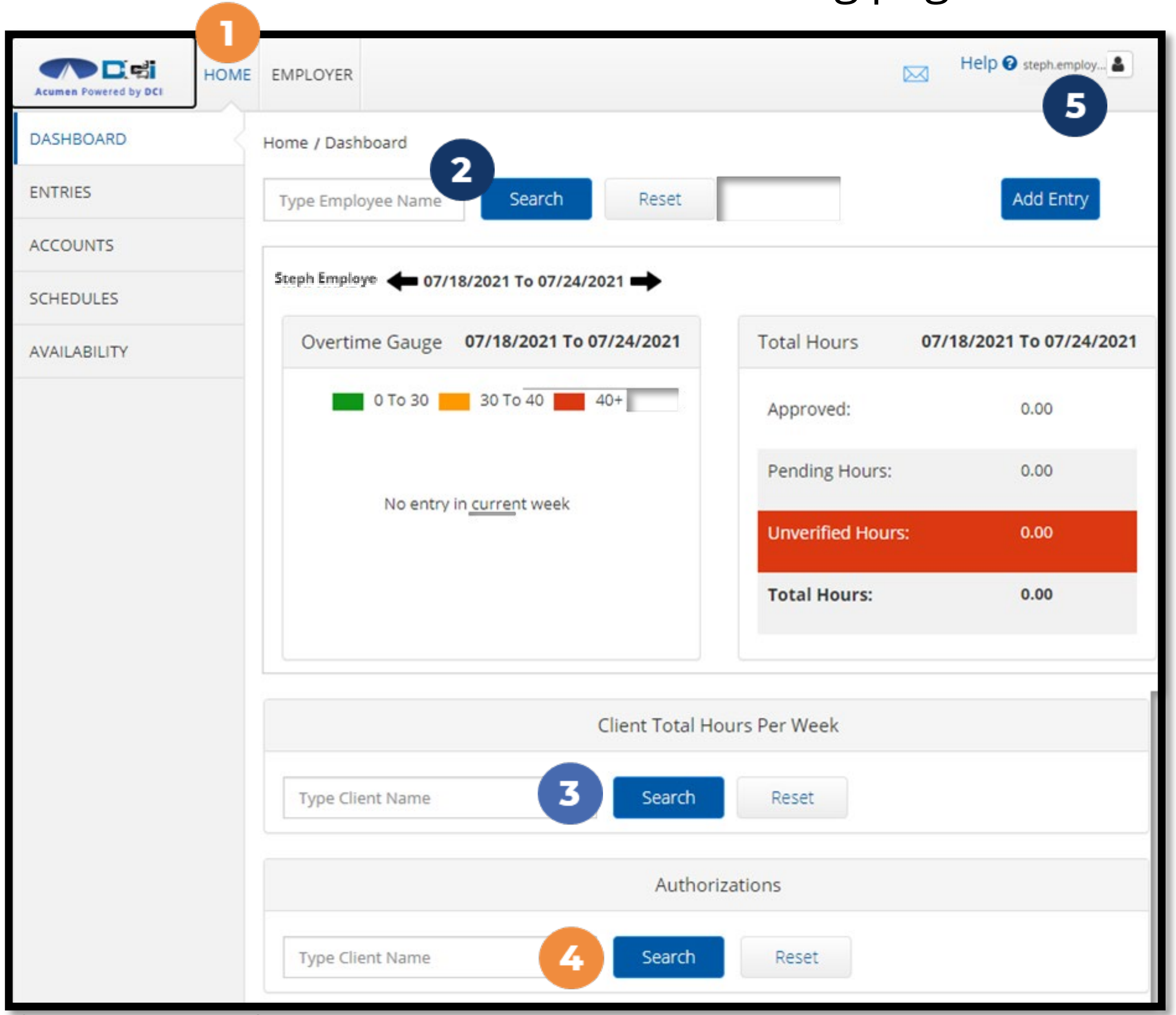


***Please note:** Contact Acumen with login issues

Home Tab Details

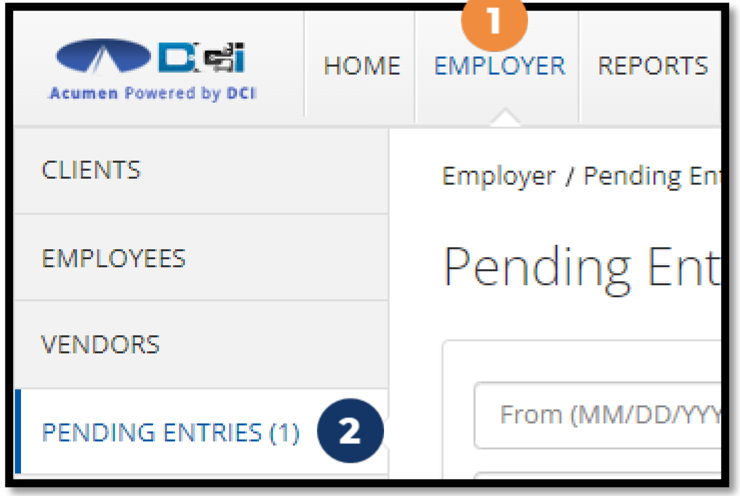
1. Select **Home** on the main menu
2. Enter an **employee name** and click the blue **Search** button to view the information below by week. Use the black arrows to toggle between weeks:
   - ✓ Overtime Gauge
   - ✓ Total Hours breakdown
3. Client Total Hours Per Week Widget
   - ✓ Enter the **client 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

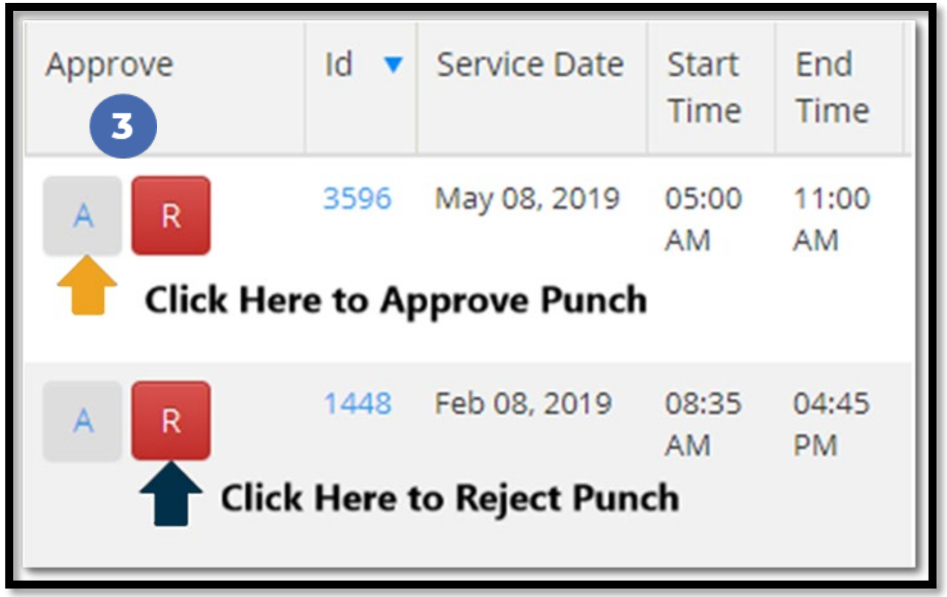
The **Dashboard** is the landing page



Manage Pending Entries

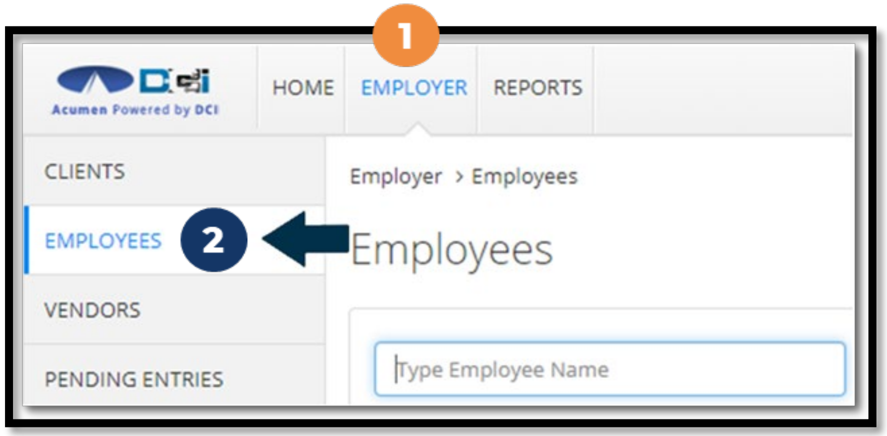
1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
   - ✓ The number of pending entries displays in parenthesis on the submenu
3. Any punch that requires approval is listed here
   - ✓ Review each entry
     - ➢ Click on the entry to view all details
   - ✓ Approve or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

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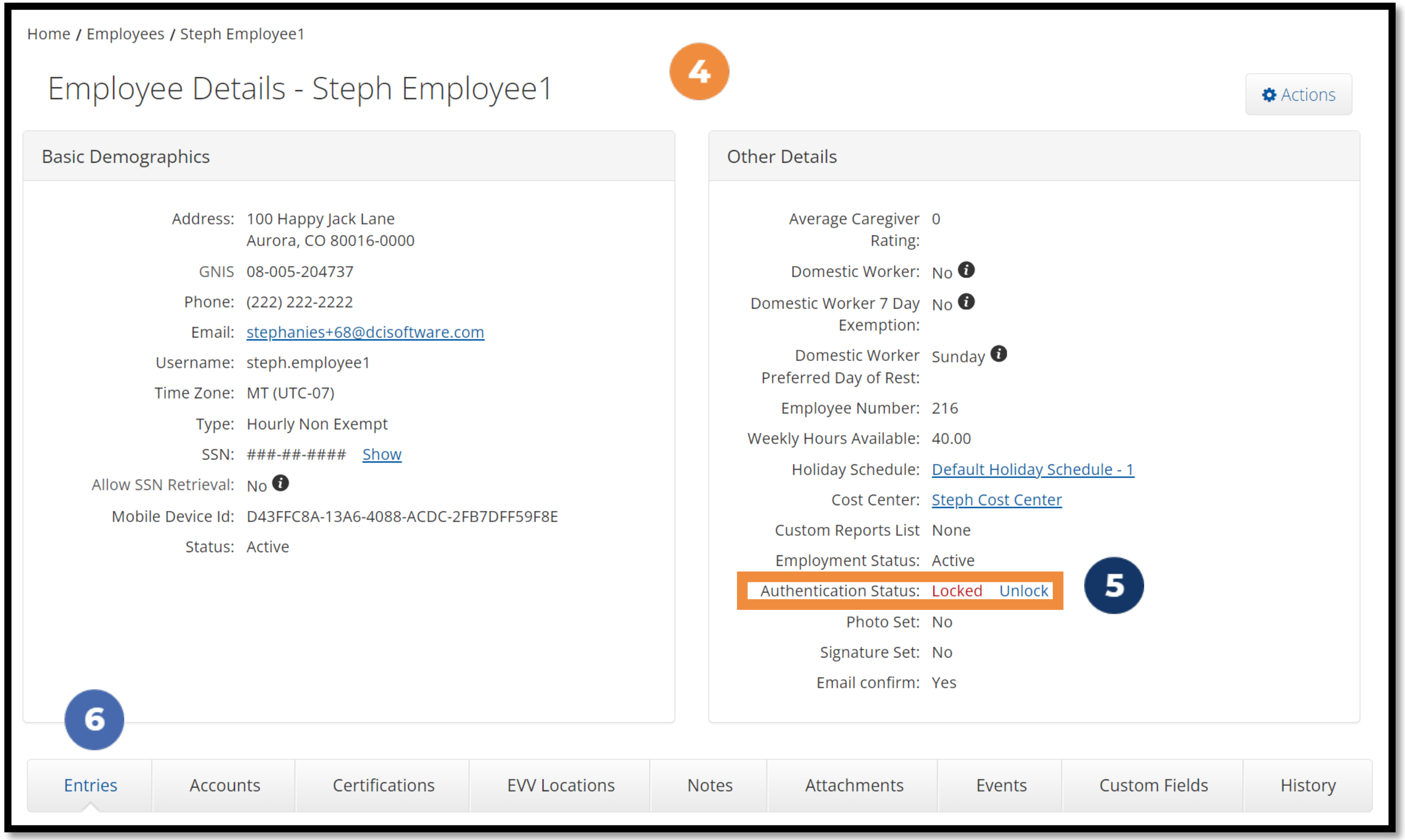
4. View the employee details page

5. Unlock Employee Profile if needed

6. Scroll down to the Entries tab



Using the Employees Page (cont.)

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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

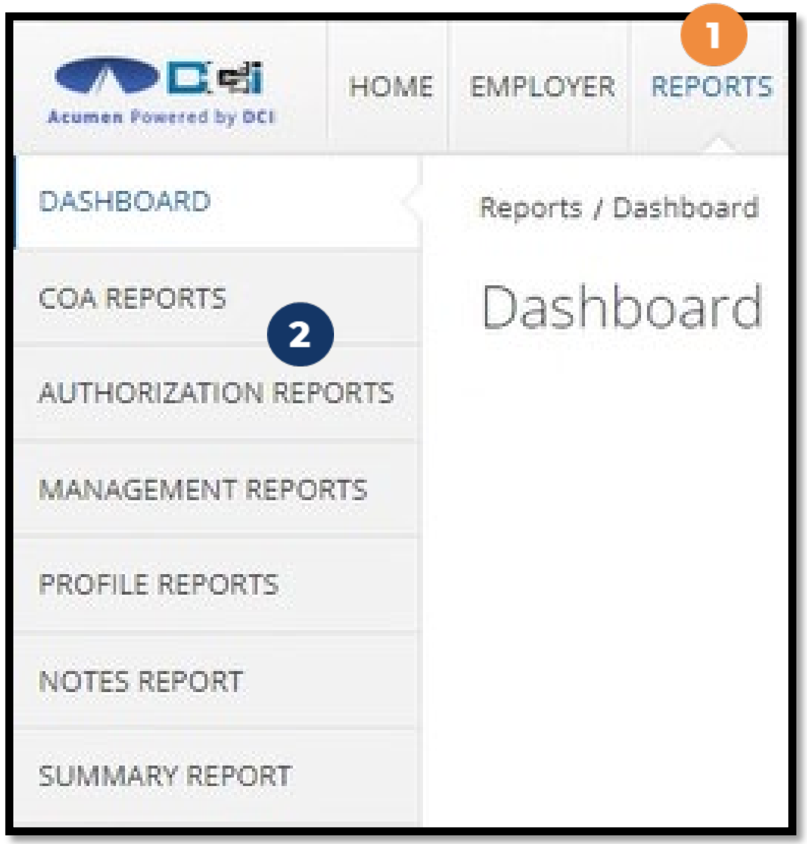
Export

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*

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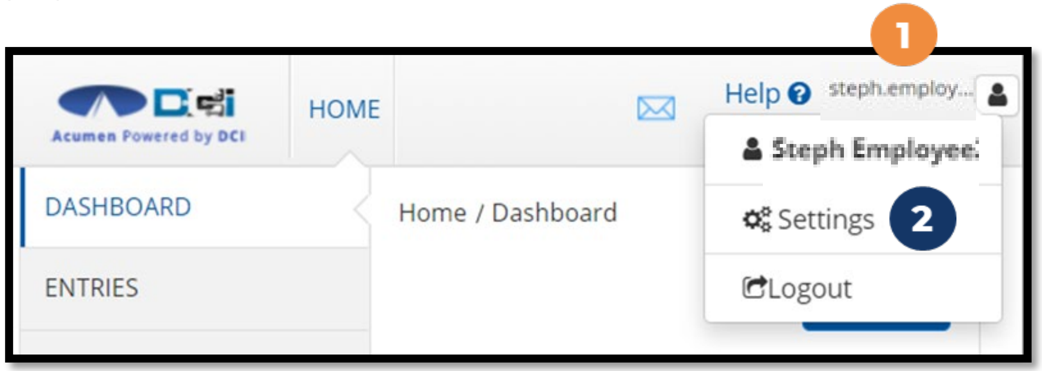
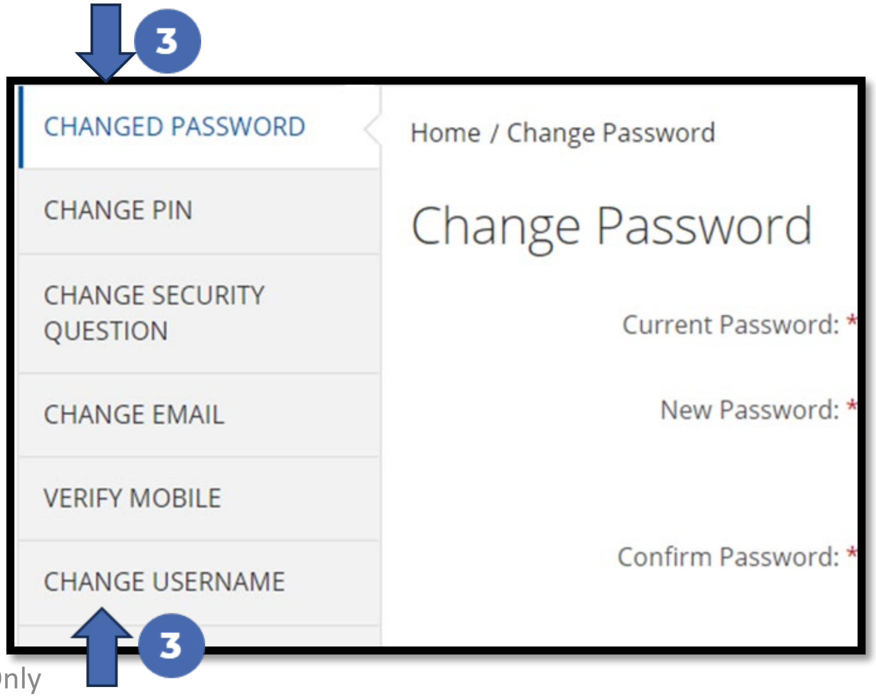
1. Click the **username** in the top right corner of the main menu



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

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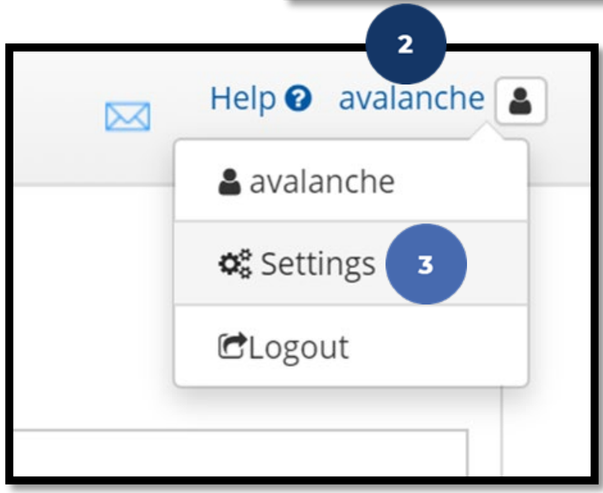
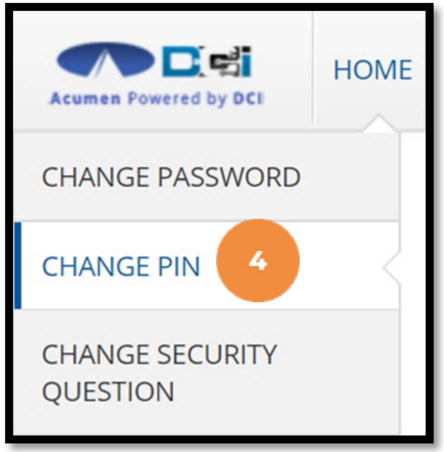
***Please Note!** **The PIN can only be added or changed in the web portal**

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





Add / Change PIN (cont.)

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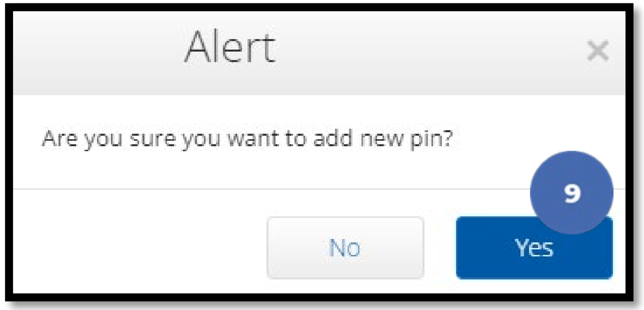
7. Complete the New Pin field and retype the pin in the Confirm Pin field

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

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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