

National Time Entry Training for Employees – Web Portal

Welcome to Acumen!
Thank you for joining the Acumen Family!



Helping create a positive, long-lasting
impact on people's lives.

Agenda



Acumen Fiscal Agent
Innovation • Opportunity • Freedom



Overview



**Navigation, Profile Settings,
Messaging & Dashboard**



Authorization Check



Add Entry



Edit or Reject Entry



Review Entries



Troubleshooting

Quick Resources

- Short step-by-step resource documents have been added to the [National Time Entry & Time Management Training](#) page providing instructions for the punch entry and approval process.
- **Employee Specific Resources:**
 - ✓ Employee Web Portal Entries
 - ✓ Employee Mobile Web Entries
 - ✓ Employee Mobile App 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
 - ✓ Business Rule Alerts



Proprietary: For Acumen and Customer Use Only

Overview

What is EVV?

- The 21st Century Cures Act, signed into law December 13th, 2016, by President Obama, requires state agencies to use a system of **electronic visit verification (EVV)** for all Medicaid personal care services (PCS) and home health care services (HHCS) that require an in-home visit by a provider.
- EVV uses electronic devices to verify a provider's visit
- The following data is collected for each visit:
 - ✓ The date of the service
 - ✓ The location of the service delivery
 - ✓ The time the service begins and ends
 - ✓ The individual receiving the service
 - ✓ The individual providing the service
 - ✓ The type of service performed



Why DCI & EVV (Electronic Visit Verification)?

- DCI increases compliance with the 21st Century Cures Act by capturing real-time punch entries at Clock In/Out at the Start/End of the shift
- Greater accuracy in service tracking, reporting, and billing for in-home care workers.
- Reduction of manual work needed with paper processes
- Faster corrections of pay issues ensuring timely payment



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

DCI Requirements

Devices & Operating Systems (OS)

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.



Web Browsers

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

Navigation, Profile Settings, Messaging & Dashboard

**Full Site – Most compatible when
accessed via desktop or laptop**



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Web Portal Basics

- The employer reviews and manages time
- Employees correct punches and/or enter historical time
- Users may update profile settings



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](#)
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
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



The screenshot shows the login page for acumen.dcisoftware.com. It features a 'Sign In' header, a 'Username' field (callout 3), a 'Password' field (callout 3), a 'Remember me' checkbox, a 'Forgot your password?' link (callout 4), and a blue 'Sign In' button (callout 5). Below the button is an 'Or' separator and a 'Create a profile' link. On the right side, a language drop-down menu (callout 2) is open, showing options: English (selected), العربية, 中文, Русский, Soomaali, Español, and Tiếng Việt. A callout 1 points to the URL 'acumen.dcisoftware.com' at the top.

Profile Settings

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

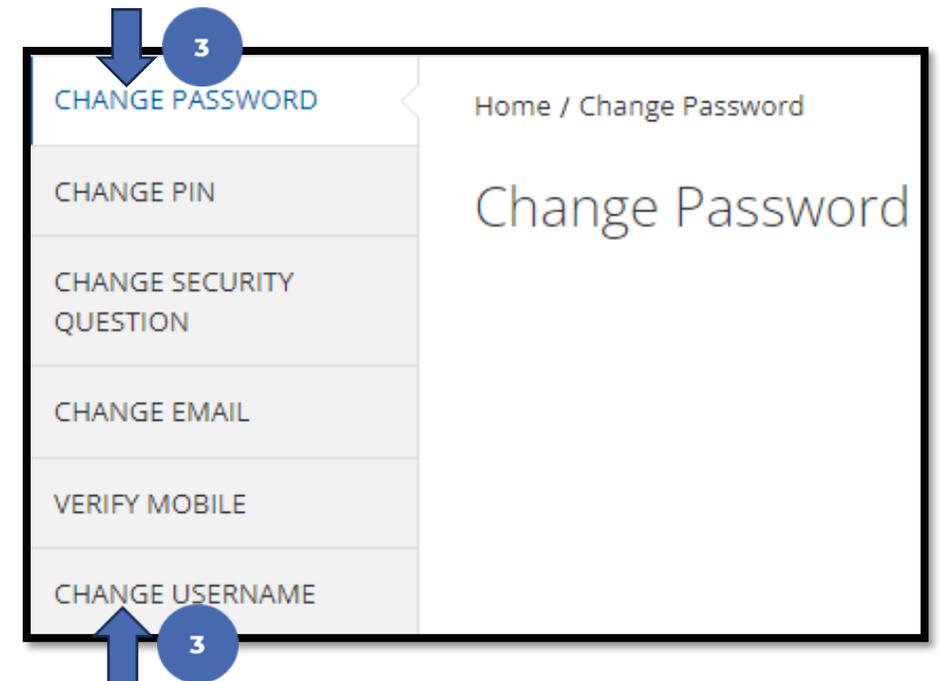
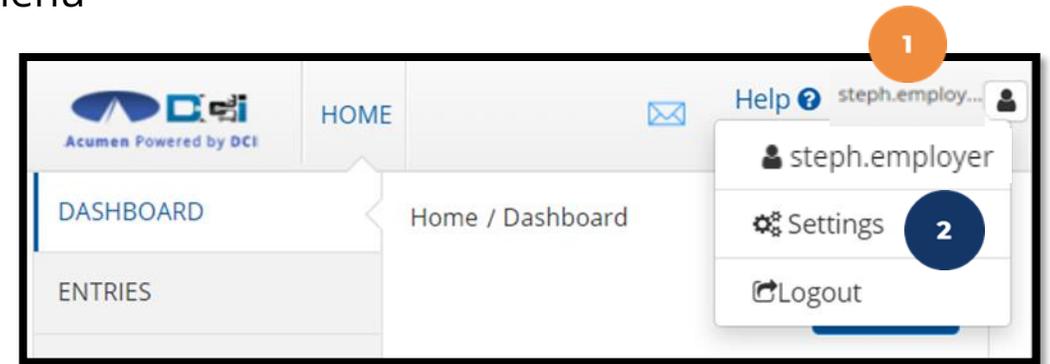


1. Click the **username** in the top right corner of the main menu

2. Click **Settings**

3. Select a submenu tab to update:

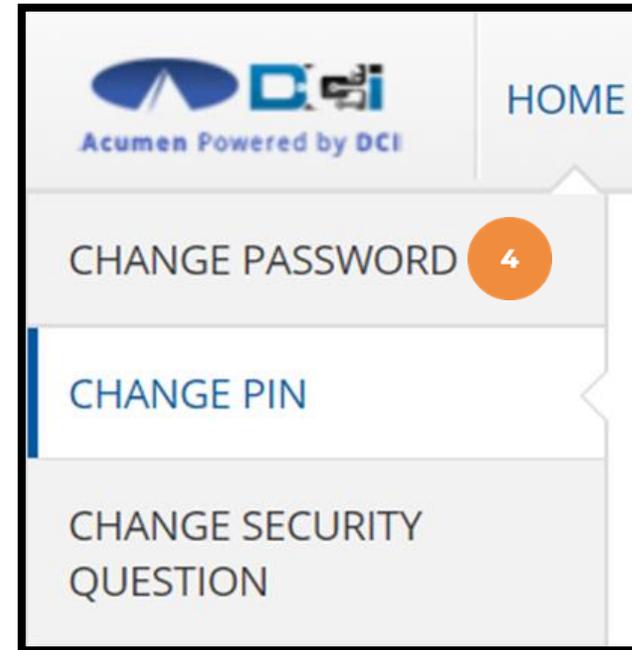
- Change Password – Used for login
- Change PIN – A number that can be used instead of a password when logging into the mobile app. *Required for employees if using Phone EVV.*
- Change Security Question
- Change Email – A valid and correct email address is required for password recovery
- Verify Mobile
- Change Username – Used for login



Add / Change PIN

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

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



A screenshot of the password verification form. The form is a long, light gray horizontal box. On the left side, there is a label "Password: *" followed by a text input field containing the placeholder text "Please enter password". A blue circle with the number "5" is positioned to the right of the input field. On the right side of the form, there is a "Cancel" button and a blue "Verify" button. A blue circle with the number "6" is positioned above the "Verify" button.

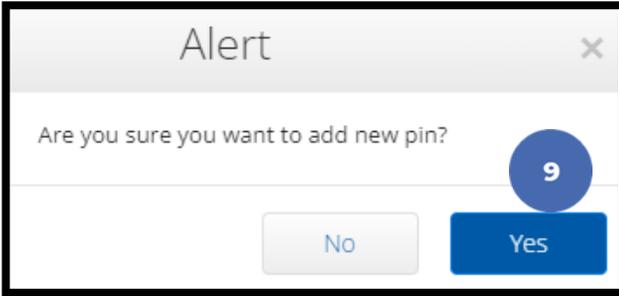
Add / Change PIN (cont.)

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



The screenshot shows a form with two input fields. The first field is labeled "New Pin: *" and contains the placeholder text "Please enter New Pin". The second field is labeled "Confirm Pin: *" and contains the placeholder text "Please Confirm Pin". To the right of the form are two buttons: a grey "Cancel" button and a blue "Change Pin" button. An orange circle with the number "7" is positioned over the "New Pin" field, and 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



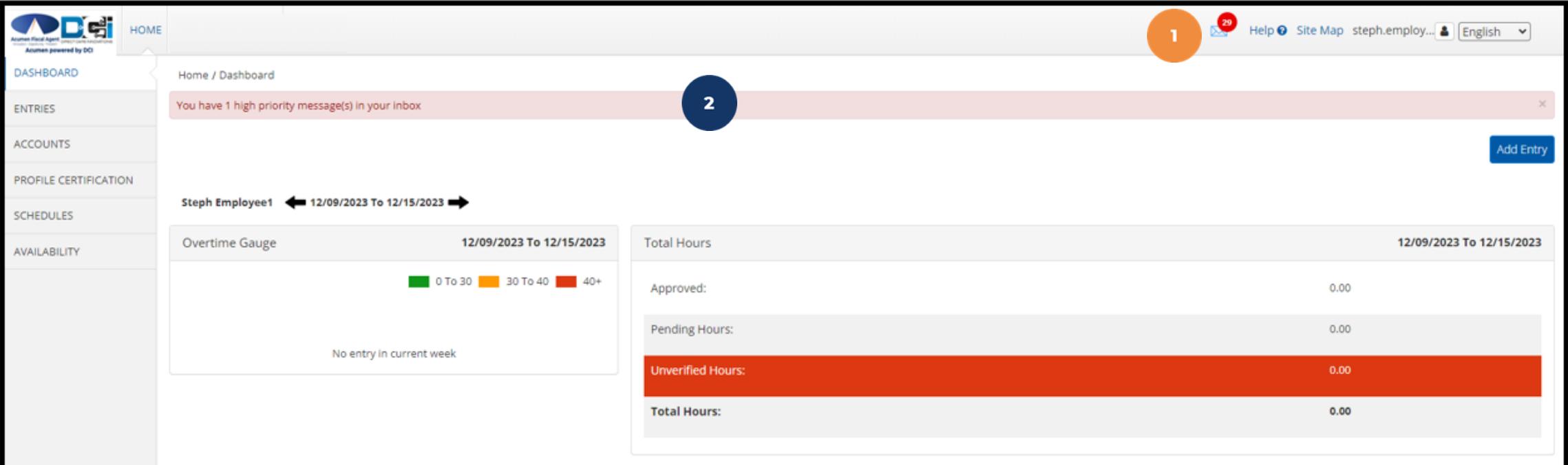
The screenshot shows a dialog box titled "Alert" with a close button (X) in the top right corner. The main text of the dialog is "Are you sure you want to add new pin?". At the bottom of the dialog are two buttons: a grey "No" button and a blue "Yes" button. A blue circle with the number "9" is positioned over the "Yes" button.



The screenshot shows a green horizontal bar with a black border. The text inside the bar is "Pin Changed Successfully!". To the right of the text is an orange circle with the number "10".

Web Portal Messaging Module

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.



The screenshot shows the Acumen Fiscal Agent web portal dashboard. In the top right corner, there is a mail icon with a red notification bubble containing the number '1'. Below the navigation bar, a red banner displays the message: "You have 1 high priority message(s) in your Inbox". A blue circle with the number '2' is overlaid on this banner. The main content area shows the user's name "Steph Employee1" and the date range "12/09/2023 To 12/15/2023". Below this, there is an "Overtime Gauge" section with a legend: 0 To 30 (green), 30 To 40 (yellow), and 40+ (red). The gauge shows "No entry in current week". To the right, there is a "Total Hours" table for the period "12/09/2023 To 12/15/2023".

Total Hours	12/09/2023 To 12/15/2023
Approved:	0.00
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	0.00

Web Portal Messaging Module

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 30 out of 72 records

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>	★		DCI Support	Paystub for check date XX/XX/XXXX	11/02/2023 02:00 AM	
<input type="checkbox"/>	★		Kristen Ziegler	hello there	12/08/2023 05:19 PM	
<input type="checkbox"/>	★		Steph Client1	Checking on the status	11/02/2023 11:50 AM	
<input type="checkbox"/>	★		DCI Support	Punch Rejected	10/12/2023 08:33 AM	

View Paystubs via Messaging Module

1. Locate the paystub 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

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>	★		DCI Support	Paystub for check date XX/XX/XXXX	07:13 PM	 

Notes	Attachments 2
-------	----------------------

<input type="checkbox"/>	Date	File Name	File Type	File Size	Added By	Download	Status
<input type="checkbox"/>	Dec 08, 2023	Paystub.pdf		2554.02 KB	Kristen Ziegler	 	Active

3



Dashboard

1. View Overtime Gauge & Total Hours for the current calendar week. Use the black arrows to toggle between weeks.

❖ **Please note!** Unverified hours must be resolved to move to Pending status

2. Click **Add Entry** to enter a historical time punch

❖ Historical entries are non-EVV-compliant so should only be used if a service interruption occurred that prevented a real-time entry

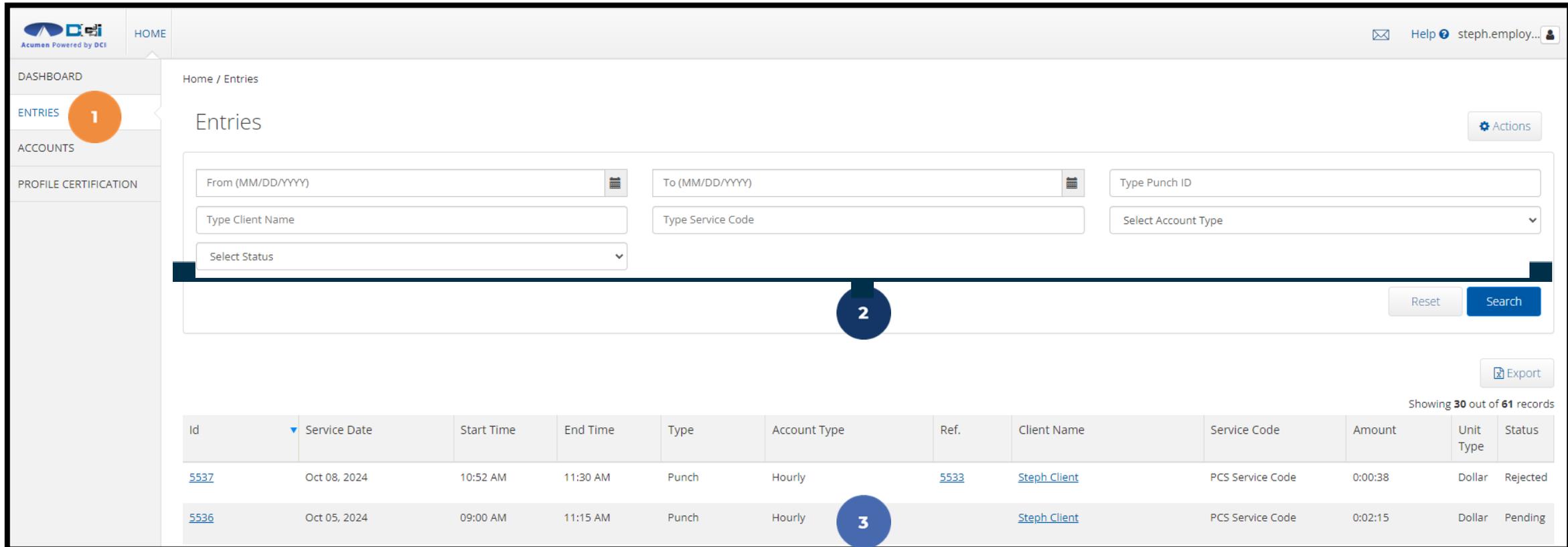
The Dashboard is the landing page

The screenshot shows the Acumen Fiscal Agent dashboard for a user named Steph Employee. The dashboard includes a navigation menu on the left with options for Dashboard, Entries, Accounts, and Profile Certification. The main content area displays an Overtime Gauge for the week of 10/06/2024 to 10/12/2024, showing 123 Step Employer hours and a gauge reading of 0.37. A Total Hours summary table shows 0.00 Approved, 0.37 Pending Hours, 0.00 Unverified Hours, and a Total of 0.37. Below this is a section for Expiring Certifications with a table containing columns for Certification Name, Certification Expiration Date, and Link to Certification Course.

Certification Name	Certification Expiration Date	Link to Certification Course

Entries

1. The Entries tab on the submenu displays all your entries. Work with your employer to ensure all entries are approved before the payroll and timely filing (if applicable) deadlines.
2. Use the filters to narrow the results if needed
3. Click anywhere on the entry row to view the punch details



Home / Entries

Entries

From (MM/DD/YYYY) To (MM/DD/YYYY) Type Punch ID

Type Client Name Type Service Code Select Account Type

Select Status

Reset Search

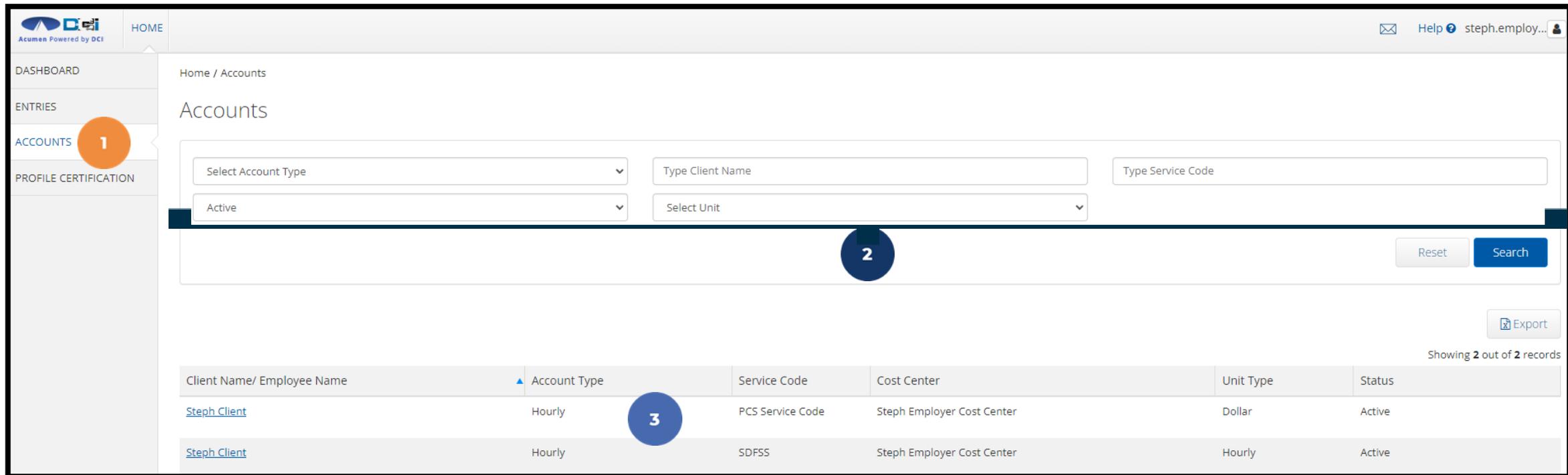
Export

Showing 30 out of 61 records

Id	Service Date	Start Time	End Time	Type	Account Type	Ref.	Client Name	Service Code	Amount	Unit Type	Status
5537	Oct 08, 2024	10:52 AM	11:30 AM	Punch	Hourly	5533	Steph Client	PCS Service Code	0:00:38	Dollar	Rejected
5536	Oct 05, 2024	09:00 AM	11:15 AM	Punch	Hourly		Steph Client	PCS Service Code	0:02:15	Dollar	Pending

Accounts

1. The Accounts tab on the submenu displays all your accounts (connections) and is useful for troubleshooting
2. Use the filters to narrow the results if needed
3. Click anywhere on the account row to view the details, including associated entries.



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HOME

Help steph.employ...

DASHBOARD

ENTRIES

ACCOUNTS 1

PROFILE CERTIFICATION

Home / Accounts

Accounts

Select Account Type

Type Client Name

Type Service Code

Active

Select Unit

2

Reset Search

Export

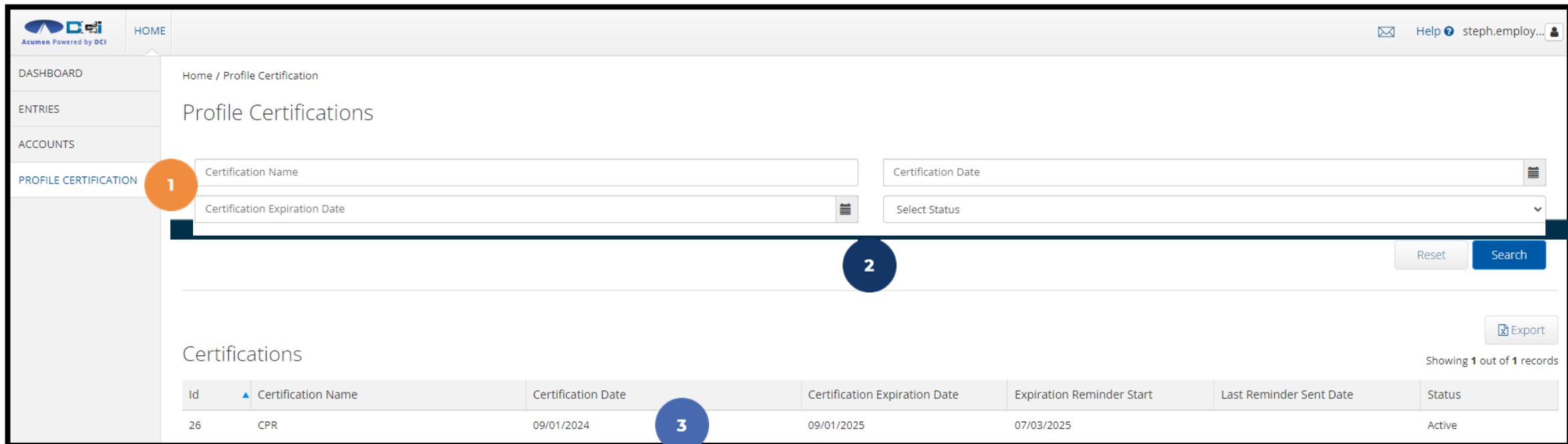
Showing 2 out of 2 records

Client Name/ Employee Name	Account Type	Service Code	Cost Center	Unit Type	Status
Steph Client	Hourly	PCS Service Code	Steph Employer Cost Center	Dollar	Active
Steph Client	Hourly	SDFSS	Steph Employer Cost Center	Hourly	Active

3

Profile Certification

1. The Profile Certification tab on the submenu displays all of your certifications
2. Use the filters to narrow the results if needed
3. Click anywhere on the certification row to view the details, including notes and attachments.



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HOME

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DASHBOARD

ENTRIES

ACCOUNTS

PROFILE CERTIFICATION

Home / Profile Certification

Profile Certifications

Certification Name

Certification Date

Certification Expiration Date

Select Status

Reset

Search

Export

Certifications

Showing 1 out of 1 records

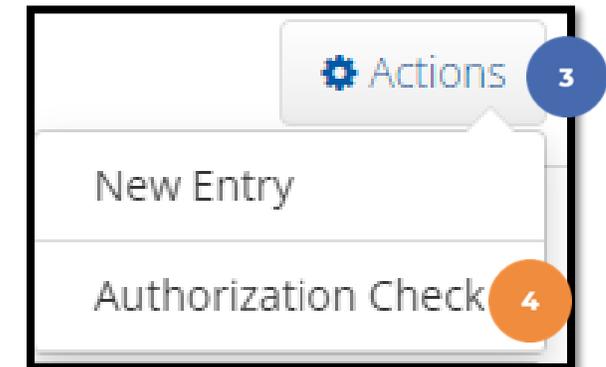
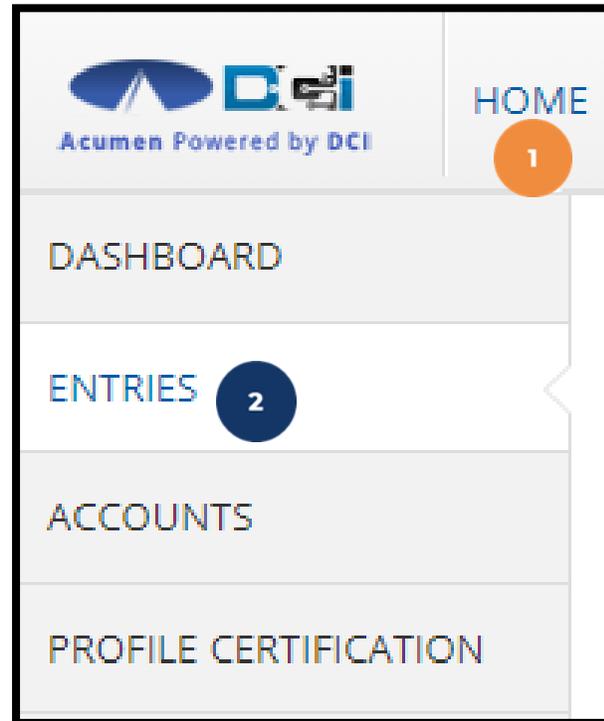
Id	Certification Name	Certification Date	Certification Expiration Date	Expiration Reminder Start	Last Reminder Sent Date	Status
26	CPR	09/01/2024	09/01/2025	07/03/2025		Active

Authorization Check

Optionally verify authorization or budget units or dollars for current or future service dates to ensure there is enough budget to cover the proposed shift

Authorization Check

1. Click **Home** on the main menu
2. Select **Entries** on the submenu
3. Click the **Actions** button
4. Select **Authorization Check** from the drop-down menu



Authorization Check



5. Select the Account Type
6. Type at least three characters of the client's name and select it from the drop-down
7. Select the Service Code
8. Enter the current date or a future date for the Authorization Check
 - Cannot be a past date
9. Enter the Check In and Check Out times
 - If the current date was selected, the Check In and Check Out times must be in the future.
10. Click the blue **Verify** button

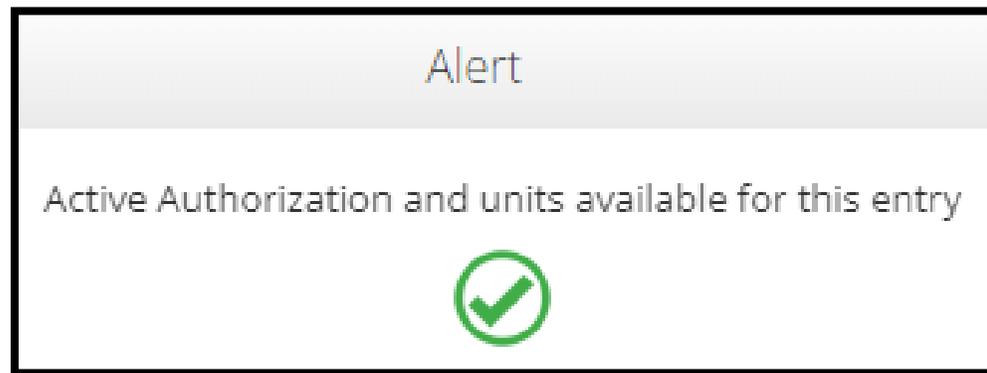
Complete the Authorization Check form wizard

A screenshot of a web-based form titled "Authorization Check". The form contains several input fields: "Account Type" (a dropdown menu with "Hourly" selected), "Client" (a text input field with "Type Client Name"), "Service Code" (a dropdown menu with "Select Service Code"), "Day" (a date input field with "MM/DD/YYYY" and a calendar icon), "Check In" (a time input field with "HH:MM AM" and a clock icon), and "Check Out" (a time input field with "HH:MM PM" and a clock icon). At the bottom right, there are two buttons: a grey "Cancel" button and a blue "Verify" button.

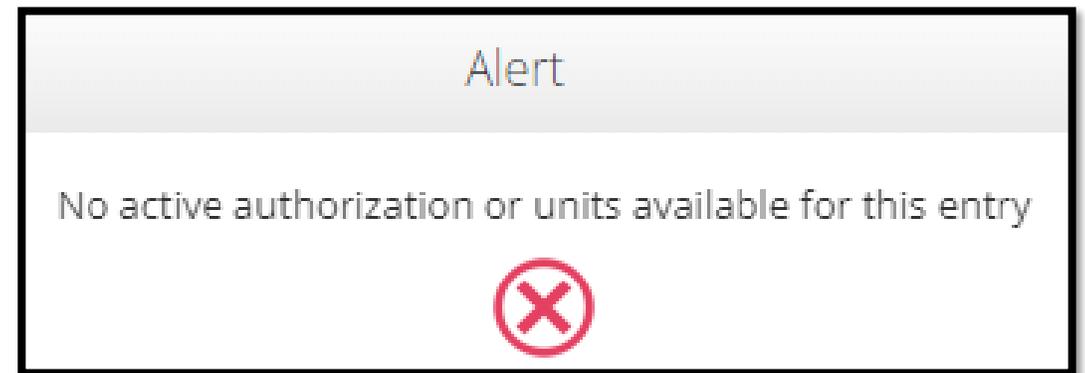
Authorization Check Results



- The system will alert the employee if the shift:
 - ✓ Results in overtime
 - ✓ Exceeds the authorization balance
 - ✓ Is outside of the authorization dates
- If the shift passes all rules listed above, the user receives a green check mark.
- If the shift violates any rules, the user receives a red X.



OR



Add Entry

***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.

***Important!** Please check to see if your program has a timely filing rule, meaning entries must be both entered AND approved within a certain number of days from the date of service

Add New Entry

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



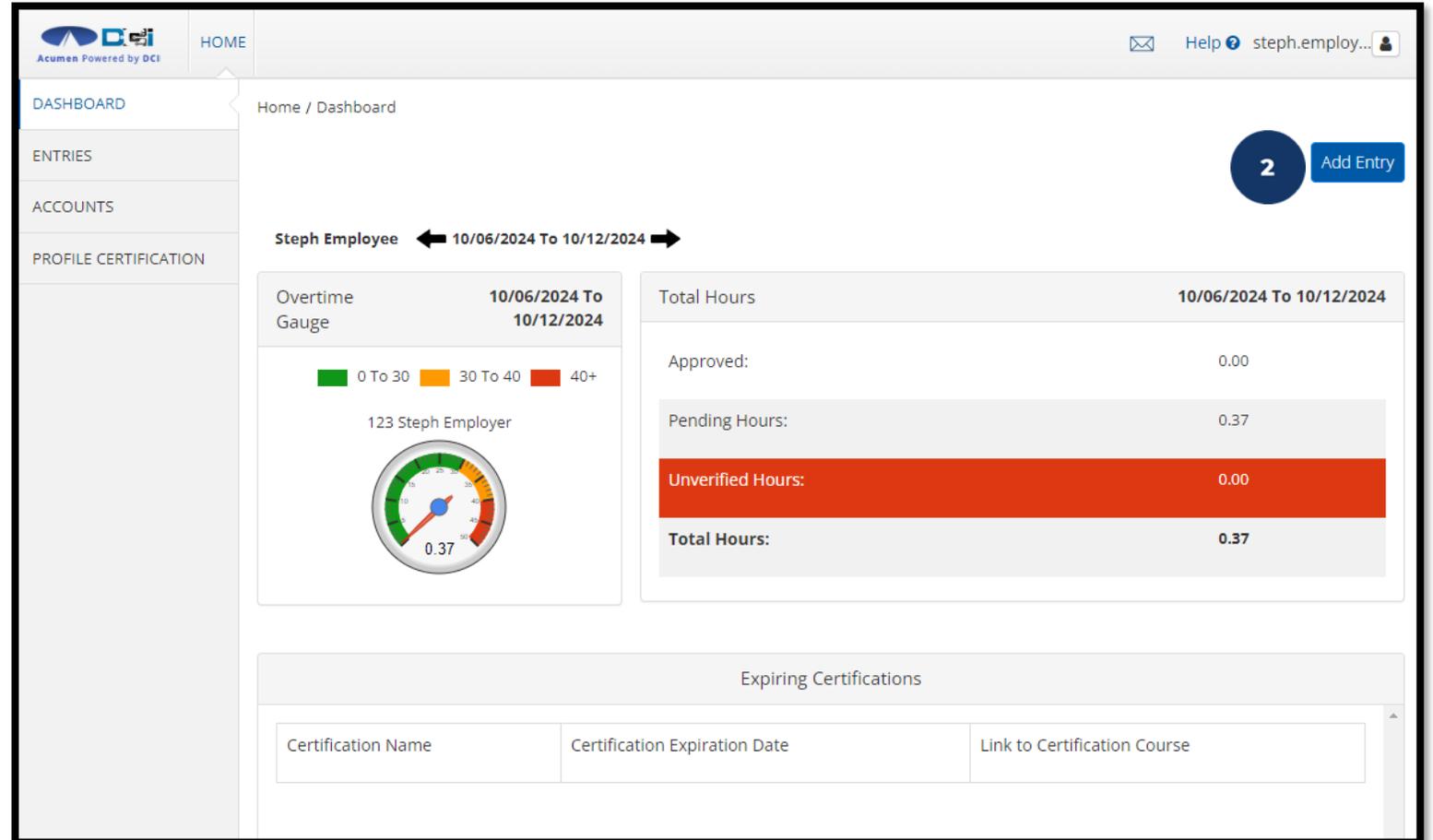
Sign In

Username 1

Password

Remember me [Forgot your password?](#)

Sign In



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DASHBOARD Home / Dashboard

ENTRIES

ACCOUNTS

PROFILE CERTIFICATION

Steph Employee ← 10/06/2024 To 10/12/2024 →

Overtime Gauge 10/06/2024 To 10/12/2024

0 To 30 30 To 40 40+

123 Steph Employer

0.37

Total Hours 10/06/2024 To 10/12/2024

Approved:	0.00
Pending Hours:	0.37
Unverified Hours:	0.00
Total Hours:	0.37

Expiring Certifications

Certification Name	Certification Expiration Date	Link to Certification Course
--------------------	-------------------------------	------------------------------

Add New Entry – Portal Signoff



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. If applicable to the program, select the Pay Rate Name from the drop-down.
8. Select Portal Signoff as the EVV Method
9. If required by the program, select Clock In and Out EVV Location.
10. Check Out Date will auto-populate based on the Service Date entered

The screenshot shows the 'Add New Entry' form with the following fields and values:

- Entry Type: * Punch
- Employee Name: Steph Employee
- Account Type: * Hourly
- Client: * Steph Client - 125
- Service Code: * PCS Service Code
- Service Date: * 10/03/2024
- Check In: * 7:00 AM
- Check Out: * 7:30 AM
- Pay Rate Name: * Standard
- EVV Method: * Portal Signoff
- Clock In EVV Location: Home
- Clock Out EVV Location: Home
- Check Out Date: 10/03/2024

Numbered callouts (3-10) are placed over the following fields:

- 3: Client field
- 4: Service Code field
- 5: Service Date field
- 6: Check In and Check Out time fields
- 7: Pay Rate Name field
- 8: EVV Method field
- 9: Clock In and Clock Out EVV Location fields
- 10: Check Out Date field

Add New Entry – Portal Signoff



11. If required by the program, select a Reason Code from the drop-down list.
12. If required by the program, add a Reason Code Note.
13. If required by the program, add a Diagnostic Code.
14. Enter Notes for the punch (optional)
15. Click the **Choose File** button to select and upload Attachments (optional)
16. If required by the program, select the task(s)/statement(s) that was completed during the shift for the client.
 - ✓ Tasks/statements are a quick way to document the duties completed with/for the participant
 - ✓ The entry cannot be saved without a selection
17. Click **Save**
18. Click **Yes** to submit

The screenshot shows a web form for adding a new entry. It includes fields for Reason Codes, Reason Code Notes, Diagnostic Codes, and Notes. There is a 'Choose File' button for attachments and a 'Statements' section with checkboxes for Bathing, Shopping, Appointments, and Cleaning. A 'Save' button is at the bottom right. An 'Alert' dialog box is overlaid on the form, asking for confirmation to add a new punch for 00:30 hour(s) for Steph Client - 125 on Oct 03, 2024. The dialog has 'No' and 'Yes' buttons.

Web Portal Video

Employee Adds (Historical) Entry – Portal Signoff

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Sign In

Username

Password

Remember me [Forgot your password?](#)

Sign In

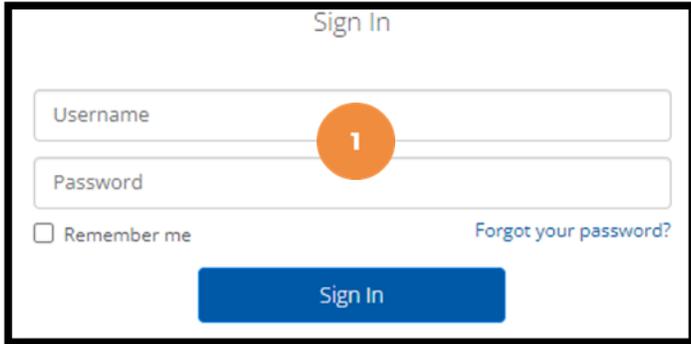
Or

[Create a profile](#)

Add New Entry – Secure FOB

***Please note!** Not all states or programs will utilize Secure FOB as an entry option

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



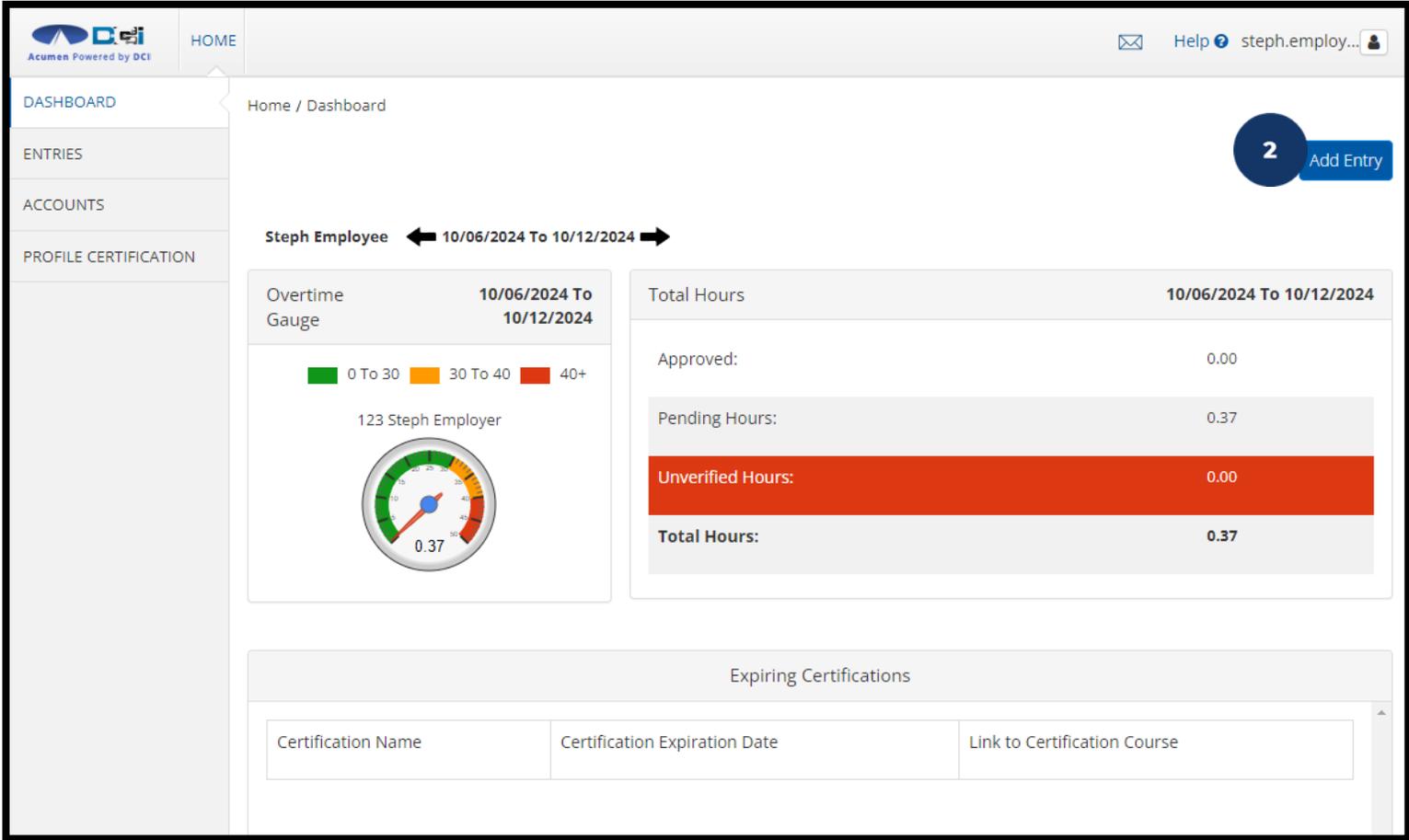
Sign In

Username 1

Password

Remember me [Forgot your password?](#)

Sign In



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DASHBOARD Home / Dashboard

ENTRIES

ACCOUNTS

PROFILE CERTIFICATION

Steph Employee ← 10/06/2024 To 10/12/2024 →

Overtime Gauge 10/06/2024 To 10/12/2024

0 To 30 30 To 40 40+

123 Steph Employer

0.37

Total Hours 10/06/2024 To 10/12/2024

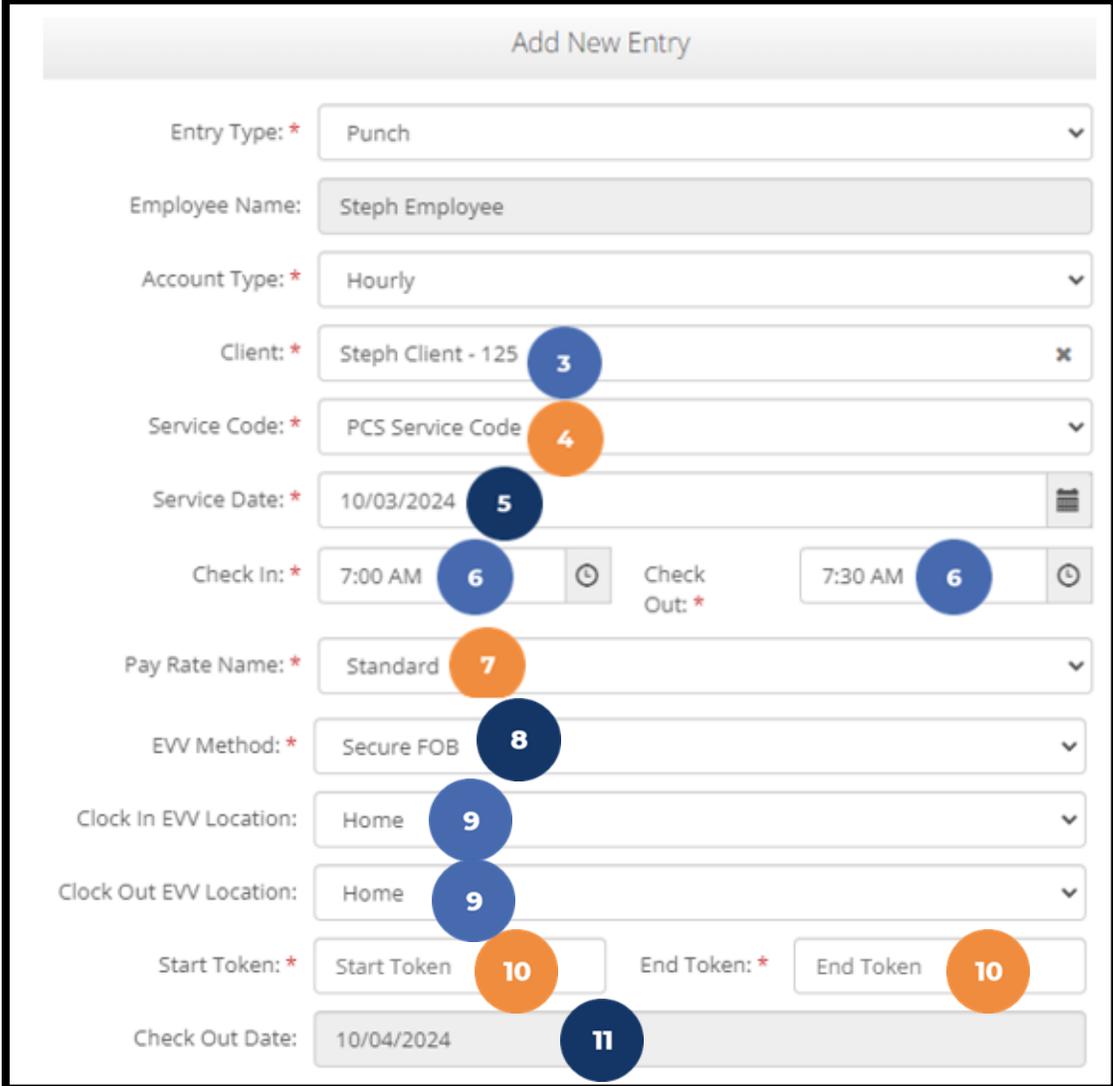
Approved:	0.00
Pending Hours:	0.37
Unverified Hours:	0.00
Total Hours:	0.37

Expiring Certifications

Certification Name	Certification Expiration Date	Link to Certification Course
--------------------	-------------------------------	------------------------------

Add New Entry – Secure FOB

- Type a minimum of three characters to generate results and select the Client's name from the list
- Select the Service Code from the drop-down
- Select the Service Date
- Enter the Check In (start) and Check Out (end) times
- If applicable to the program, select the Pay Rate Name from the drop-down.
- Select Secure FOB as the EVV Method
- If required by the program, select Clock In and Out EVV Location.
- Enter the Start and End Tokens (6-digit codes) from the FOB that were generated during the shift and previously recorded
- Check Out Date will auto-populate based on the Service Date entered



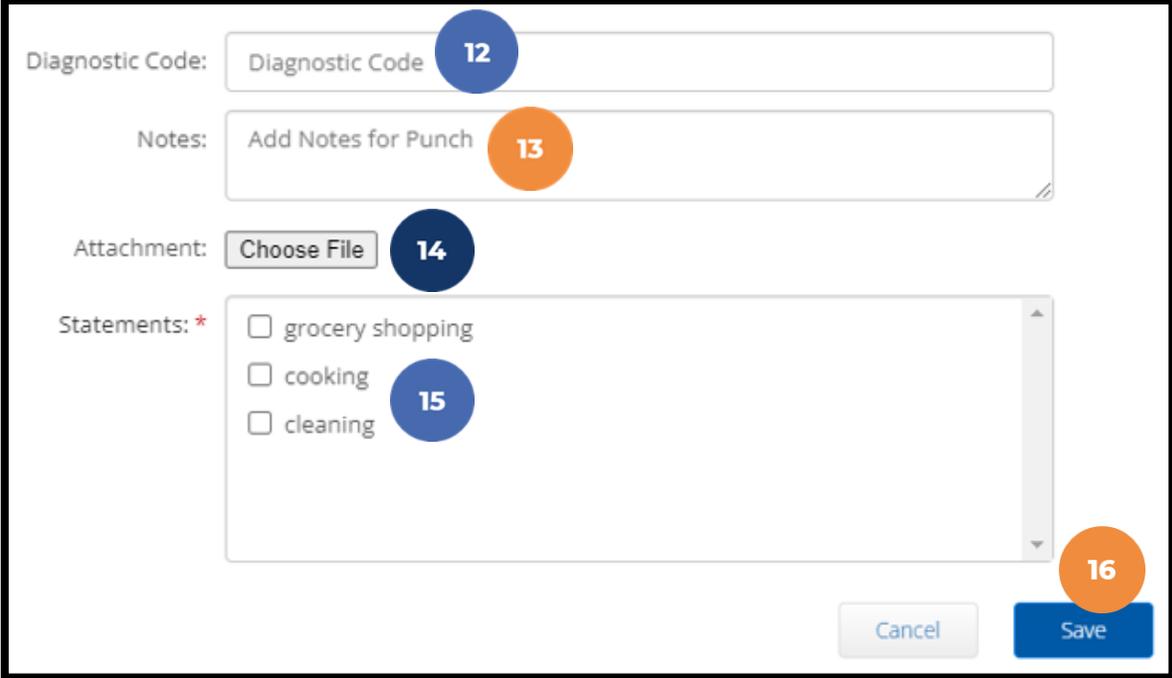
The screenshot shows the 'Add New Entry' form with the following fields and values:

- Entry Type: * Punch
- Employee Name: Steph Employee
- Account Type: * Hourly
- Client: * Steph Client - 125
- Service Code: * PCS Service Code
- Service Date: * 10/03/2024
- Check In: * 7:00 AM
- Check Out: * 7:30 AM
- Pay Rate Name: * Standard
- EVV Method: * Secure FOB
- Clock In EVV Location: Home
- Clock Out EVV Location: Home
- Start Token: * Start Token
- End Token: * End Token
- Check Out Date: 10/04/2024

Numbered callouts (3-11) are placed over the Client, Service Code, Service Date, Check In, Check Out, Pay Rate Name, EVV Method, Clock In EVV Location, Clock Out EVV Location, Start Token, End Token, and Check Out Date fields respectively.

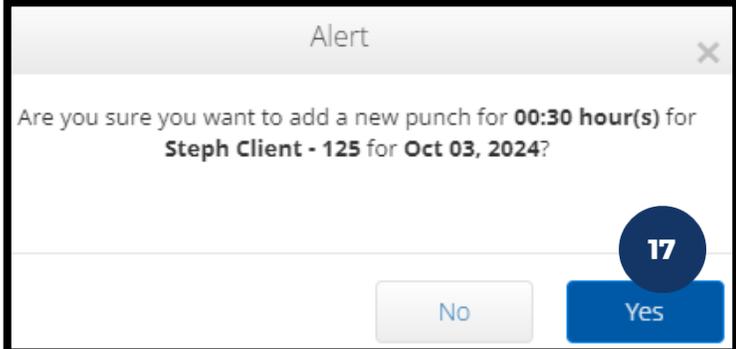
Add New Entry – Secure FOB

12. If required by the program, add a Diagnostic Code.
13. Enter Notes for the punch (optional)
14. Click the **Choose File** button to select and upload Attachments (optional)
15. If required by the program, select the task(s)/statement(s) that was completed during the shift for the client.
 - ✓ Tasks/statements are a quick way to document the duties completed with/for the participant
 - ✓ The entry cannot be saved without a selection
16. Click **Save**
17. Click **Yes** to submit



The screenshot shows a form with the following fields and buttons:

- Diagnostic Code:** A text input field with a blue circle containing the number 12 next to it.
- Notes:** A text area with a placeholder "Add Notes for Punch" and a blue circle containing the number 13 next to it.
- Attachment:** A button labeled "Choose File" with a blue circle containing the number 14 next to it.
- Statements: *** A list of checkboxes with labels: "grocery shopping", "cooking", and "cleaning". A blue circle containing the number 15 is next to the "cooking" checkbox.
- Buttons:** "Cancel" and "Save" buttons at the bottom right. A blue circle containing the number 16 is next to the "Save" button.



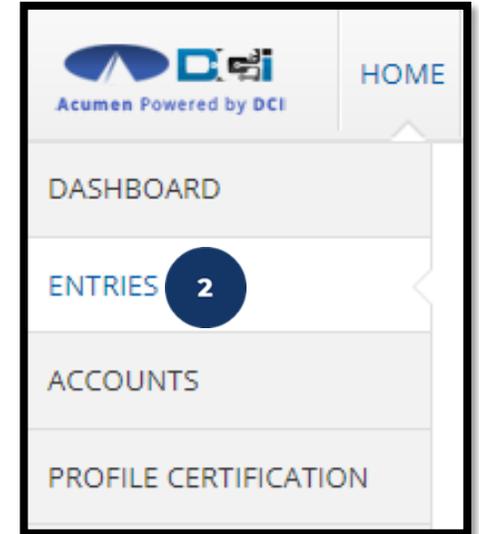
The screenshot shows an "Alert" dialog box with the following content:

- Title:** Alert
- Message:** "Are you sure you want to add a new punch for **00:30 hour(s)** for **Steph Client - 125** for **Oct 03, 2024**?"
- Buttons:** "No" and "Yes" buttons at the bottom. A blue circle containing the number 17 is next to the "Yes" button.

Edit or Reject Entry

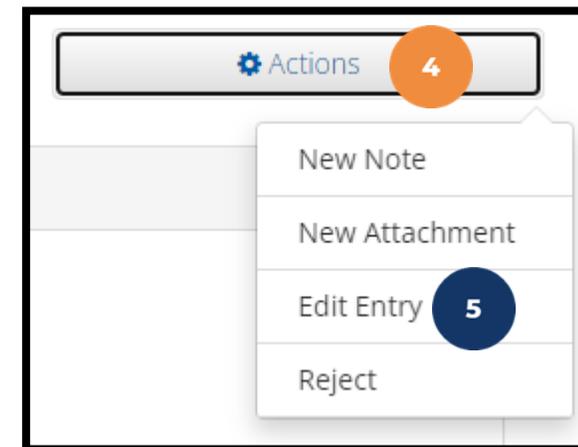
Edit or Reject Entry

***Please note!** Only entries in a Pending status can be edited by the employee. Contact Acumen for assistance if in any other status.



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		Steph_Client1	Steph Hourly	0:04:00	Hourly	Pending



***Please note!** To reject an entry, select **Reject** from the drop-down menu. Click **Yes** to confirm rejecting the entry.

Edit Entry

***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. If required by the program, select a Reason Code from the drop-down list.
8. If required by the program, add a 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.

6

Entry Type: * Punch

Employee Name: Steph Employee - 125

Account Type: * Hourly

Client: * Steph Client - 550

Service Code: * PCS Service Code

Select Date: * 10/03/2024

Check In: * 12:06 PM Check Out: * 12:10 PM

Pay Rate Name: Standard

Check Out Date: 10/03/2024

EVV Method: * Portal Signoff

Clock In EVV Location: Home

Clock Out EVV Location: Home

Diagnostic Code: Diagnostic Code

Add Reason Codes: * Forgot Mobile Device

Add Reason Code Note: * Add Reason Code Note

Notes: Add Notes for Punch

Attachment: Choose File

Statements: Bathing Shopping Appointments Cleaning

Cancel Save



Alert

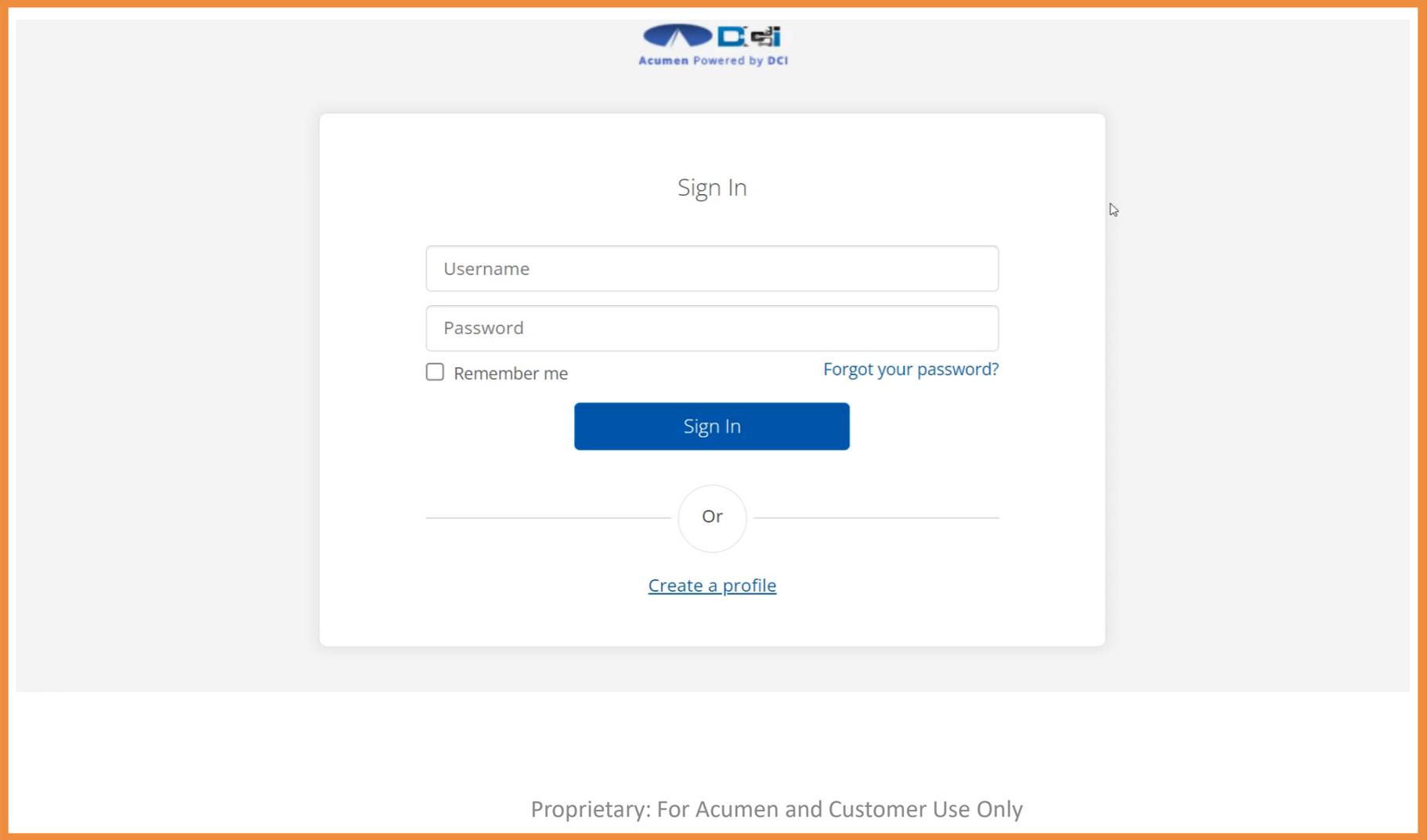
Are you sure you want to cancel the existing punch for 0:00:01 hour(s) for Oct 03, 2024 and add a new punch for 00:04 hour(s) for Steph Employee for Steph Client-550 for Oct 03, 2024?

No Yes

10

Web Portal Video

Employee Edits (Historical) Entry



The screenshot shows a web portal sign-in page for Acumen. At the top center is the Acumen logo with the tagline "Acumen Powered by DCI". Below the logo is a white sign-in card with the following elements:

- Text: "Sign In"
- Form field: "Username"
- Form field: "Password"
- Form field: " Remember me"
- Text: "Forgot your password?"
- Button: "Sign In" (blue)
- Text: "Or" (centered in a circle)
- Text: "[Create a profile](#)"

At the bottom of the page, there is a footer that reads "Proprietary: For Acumen and Customer Use Only".

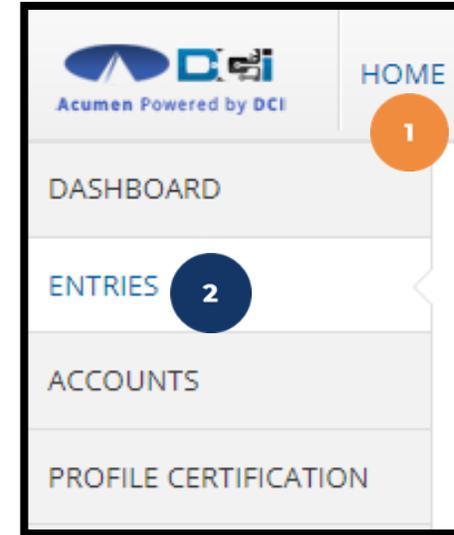


Review Entries

Review Entries



1. Click **Home** on the main menu
2. Select **Entries** on the submenu
3. View the complete list of entries
 - Verify that all time is accurate and submitted
 - The employer reviews and approves or rejects the entries



Id 3	Service Date	Start Time	End Time	Type	Account Type	Ref.	Client Name	Service Code	Amount	Unit Type	Status
77230	Sep 30, 2024	07:00 AM	08:00 AM	Punch	Hourly 4		Steph Client1	RESPITE (Hourly)	0:01:00	Hourly	Pending
77148	Sep 26, 2024	10:28 AM	10:29 AM	Punch	Hourly		Steph Client2	RESPITE (Hourly)	0:00:01	Hourly	Approved
77139	Sep 25, 2024	01:11 PM	01:13 PM	Punch	Hourly		Steph Client2	RESPITE (Hourly)	0:00:02	Hourly	Approved

4. Click anywhere on the entry row, or on the blue entry Id hyperlink, to open the punch detail page.

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

Punch Detail Page



- Widgets contain detailed information on the punch

Employer / Pending Entries / 76561

Punch Detail - 76561

Punch Details	Account Details/ Service Account
Entry Id: 76561	Account Id: 2926
Machine Details: 73.181.17.178	Account Type: Hourly
Service Date: Sep 04, 2024	Client/ Program Time Zone: CST (UTC-6)
Check In: 10:56 AM	Employee: Steph Employee1
Check Out: 10:59 AM	Employee Time Zone: CST (UTC-6)
Hour(s): 0:00:03	Service Code: RESPITE (Hourly)
Amount: 0.05 Hour	Portal Signoff: TRUE
Rounded Amount: 0.05 Hour	Funding Type: Units
Employee Time Zone: CST (UTC-6)	Funding Source: Steph Funding Source
Client/ Program Time Zone : CST (UTC-6)	Cost Center: Steph Cost Center test
Location Code: 48-439-1340898	Unit Type: Hourly
Authorization Entry Id: 57934	Status: Active
Pay Rate Name: Standard	
Pay Rate: 12.00	
Status: Pending	
Created By: Steph Employee1	
Created: Sep 04, 2024	
Input Method Type: Mobile App	

Punch Detail Page



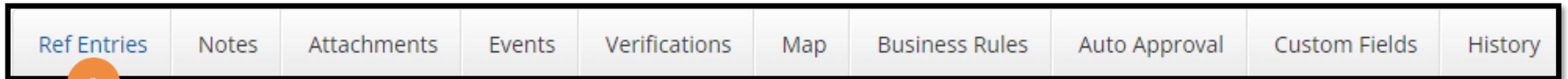
- Additional widgets

EVW Details	Reason Codes
<p>EVW Method: Portal Signoff</p> <p>EVW: No</p> <p>Clock In EVW Location : Home</p> <p>Clock In EVW Address: 835 White House Road Mansfield, TX 76063</p> <p>Clock Out EVW Location : Home</p> <p>Clock Out EVW Address: 835 White House Road Mansfield, TX 76063</p> <p>Employee Fail InHome Validation: No</p> <p>Supervisor Approved Failed InHome Validation: NA</p> <p>EVW Compliant: No ⓘ</p>	<p>Reason Code Name: Forgot device</p> <p>Reason Code: 10</p> <p>Free Text Note: forgot</p>
Statements	
1. bathing	

Punch Detail Page - Tabs



- Beneath the widget boxes are tabs containing even more information on the punch entry



1. Ref Entries tab displays entries associated with the entry being viewed

- ✓ When an entry is edited, a new entry is created.
- ✓ The original entry displays in the Ref. (reference) column
- ✓ The new, edited entry is visible in the Id column.
- ✓ All changes are visible and connected to the original entry

Reference Entries												Showing 1 out of 1 record	
Reject	Id	Service Date	Account Type	Ref.	Type	Cost Center	Client/ Program	Employee/ Program	Service Code	Amount	Unit Type	Status	
	74969	Jul 17, 2024	Employee Service	74963	Punch	Steph Cost Center test - Steph Cost Center test	Steph Client1	Steph Employee1	RESPIRE (Hourly)	0:00:02	Hourly	Pending	

Punch Detail - Tabs



2. **Notes** – View notes on the punch, reason codes, reason code notes, and statements/tasks.
3. **Attachments** – View attachments on the punch
4. **Events** – Log including date/time, subject, description, input type (web portal or mobile app), OS, OS version, app version, and user/system process for all punch activity including EVV method captured, updates, edits, system processes, approvals, rejections, and views.
5. **Verifications** – EVV verification data for the punch (signature or picture) along with the status of the verification (some require approval)

EVV Verifications 5 Showing 1 out of 1 record

Approve	Date	Verification Type	Status	Attachments	Compare	Approved By	Approved Date
	Jul 17, 2024 11:02:51 AM	Picture	Approved	53e8b14b-bfe8-4c62-91bd-fb9e4cbe7392.jpeg	≡	Matthew Chavez	Jul 17, 2024

Punch Detail - Tabs



Acumen Fiscal Agent
Innovation • Opportunity • Freedom

Ref Entries	Notes	Attachments	Events	Verifications	Map	Business Rules	Auto Approval	Custom Fields	History
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6

A screenshot of the mobile application's 'Map' tab. The interface shows a map of the Denver, Colorado area with a red pin marking a location. On the right side, there is a panel displaying the address '2240 Buchtel Blvd S, Denver, CO 80210, USA'. The map includes various geographical features, roads, and city names like Fort Collins, Boulder, and Aurora. The 'Map' and 'Satellite' options are visible at the top left of the map area.

6. **Map** – Visual location of the mobile app punch. Includes clock in and clock out addresses. Zoom in and out. View the map or street view.

Punch Detail Page



7. **Business Rules** – View business rule results for the entry. Business rules are used to validate, by service code, specific requirements mandated by that service.

Ref Entries	Notes	Attachments	Verifications	Map	Business Rules	Auto Approval	Custom Fields	History
7								
Business Rules								
Business Rule Name							Business Rule Result	
Employee service account start date punch entry							Pass	
Authorization Weekly Max							Fail	
Max Hours Per Week Per Client Per Funding Source							Pass	
Authorization Expiration Date							Pass	

Punch Detail Page



8. **Auto Approval** – View auto approval results for the entry. Auto approval is a system process in which the entry is approved if it does not violate business rules.

Run Date	Result	Failure Reason(s)	Schedule Compare Check Attempted	Geo Fencing Check Attempted	EVV Check Attempted	OT Check Attempted	Over Auth Check Attempted
09/22/2024 09:49:43 PM	Approved		No	No	Yes	Yes	Yes
10/09/2024 12:00:46 PM	Not Approved	EVV:There is no approved Electronic Visit Verification for this punch.	No	N/A	Yes	Yes	Yes

9. **Custom Fields** – List of all custom (non-standard) field values for the entry

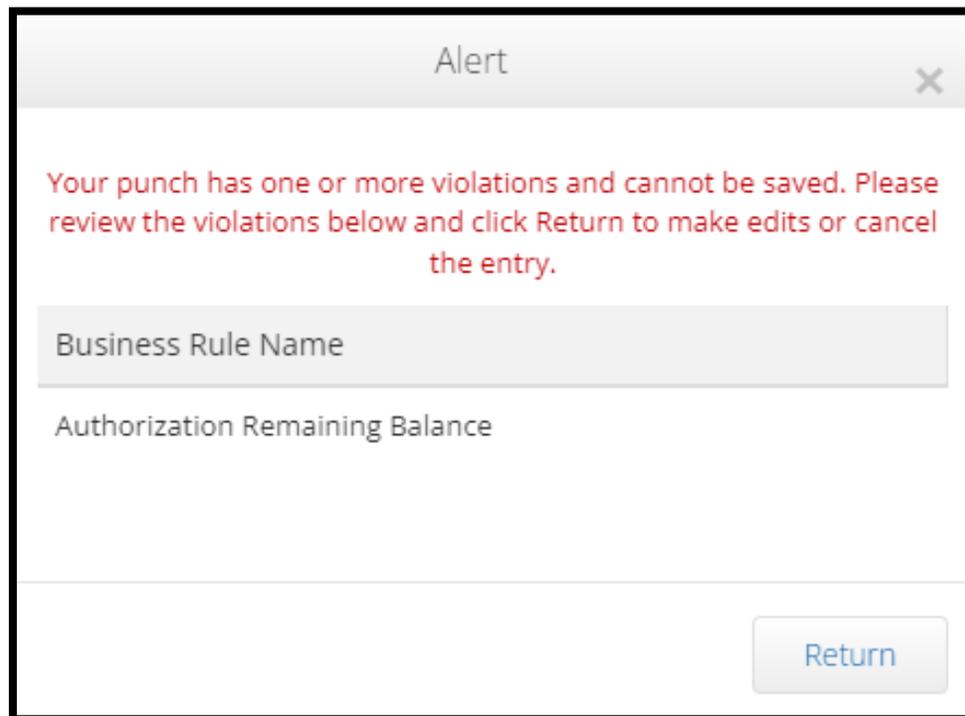
10. **History** – Record of all changes for the entry

Troubleshooting

Alerts

Business rules are a tool used by your organization to validate, by service code, specific requirements mandated by that service. When a punch violates a business rule, you will receive an alert explaining the violation and what action needs to be taken.

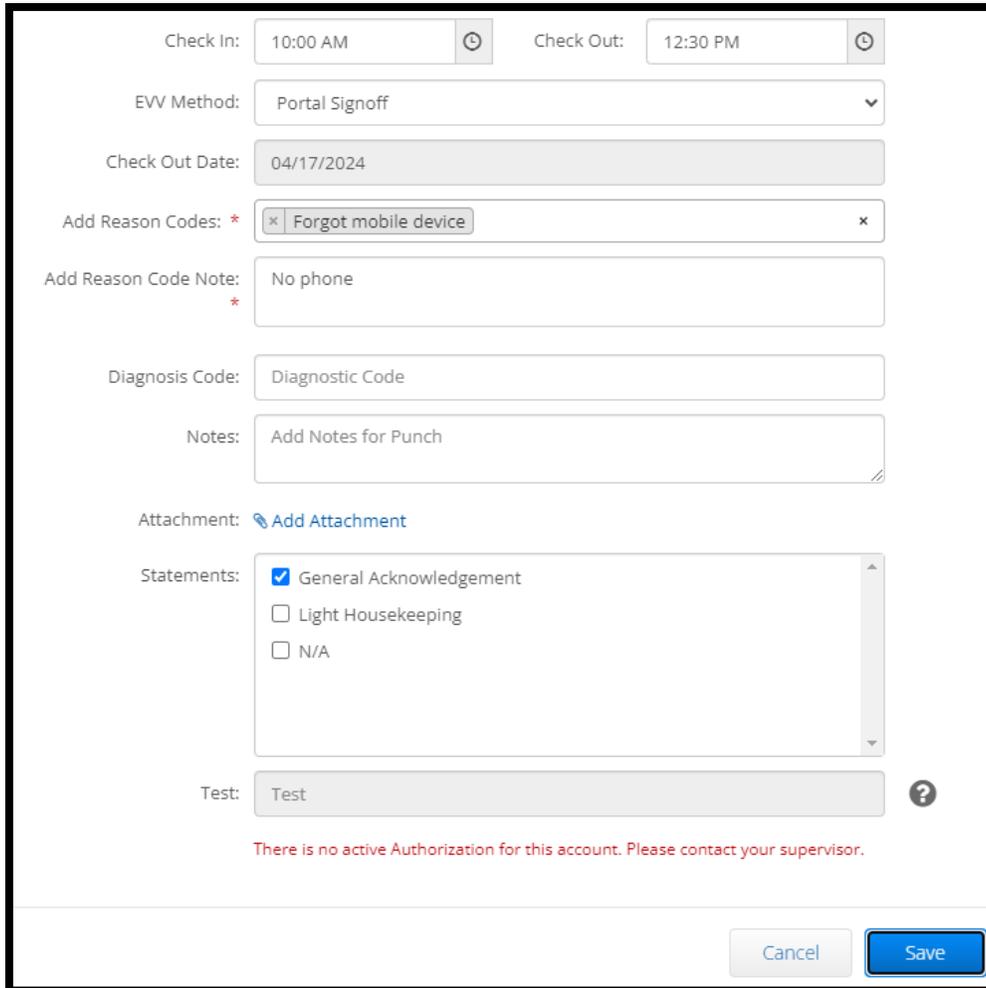
One of the most common business rules is the **Authorization Remaining Balance** rule. This rule checks to see that there are enough funds in the authorization/service plan to cover the punch.



- You will receive this alert and cannot save the punch
- You must edit the punch or cancel the entry
- The employer should review their unit utilization

Alerts

Many other business rules pertain to the authorization/service plan such as the **Authorization Expiration Date** rule.



The screenshot shows a punch card form with the following fields and values:

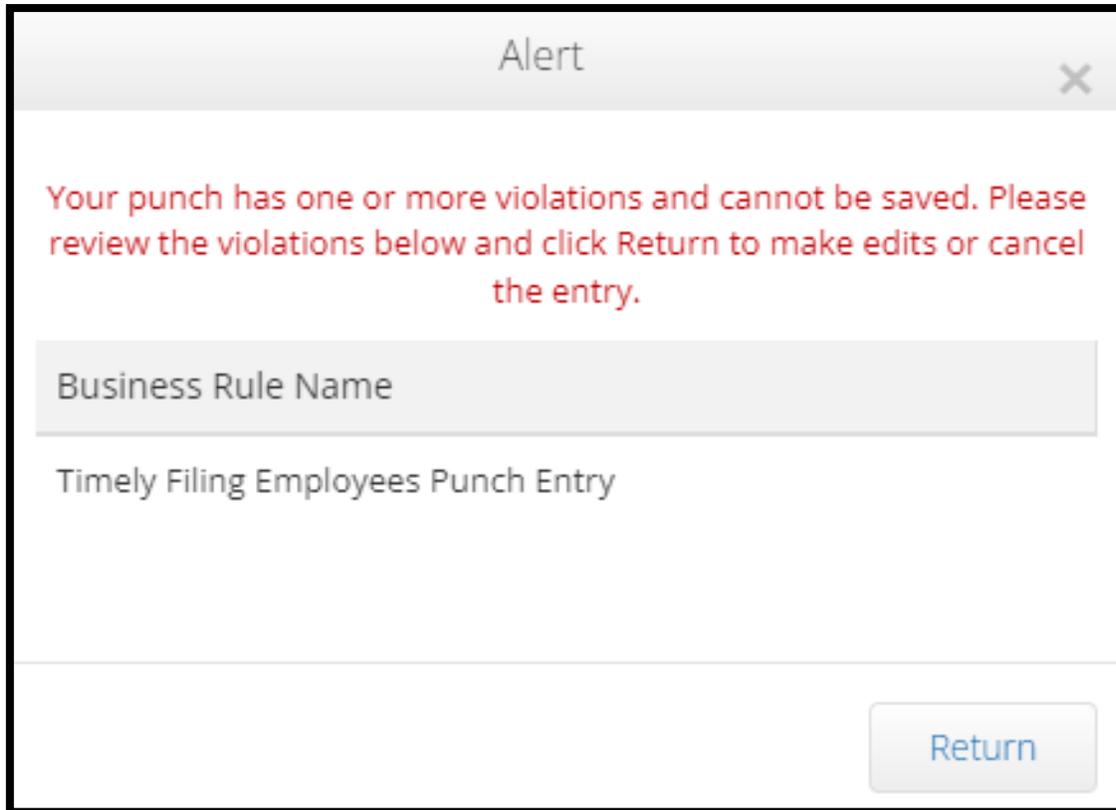
- Check In: 10:00 AM
- Check Out: 12:30 PM
- EVV Method: Portal Signoff
- Check Out Date: 04/17/2024
- Add Reason Codes: * Forgot mobile device
- Add Reason Code Note: * No phone
- Diagnosis Code: Diagnostic Code
- Notes: Add Notes for Punch
- Attachment: Add Attachment
- Statements: General Acknowledgement, Light Housekeeping, N/A
- Test: Test

At the bottom of the form, a red error message reads: "There is no active Authorization for this account. Please contact your supervisor." Below the error message are "Cancel" and "Save" buttons.

- You will receive this alert when attempting to punch for a date after the authorization/service plan has expired
- You cannot save the punch
- Contact your employer
- The employer should verify their authorization data in DCI

Alerts

Punches must be **entered AND approved** within a certain number of days of the date of service (program-determined). After that number of days has passed, the **Timely Filing Employees Punch Entry** or the **Timely Filing Employee Punch Approval** rules will prohibit the punch from being saved.

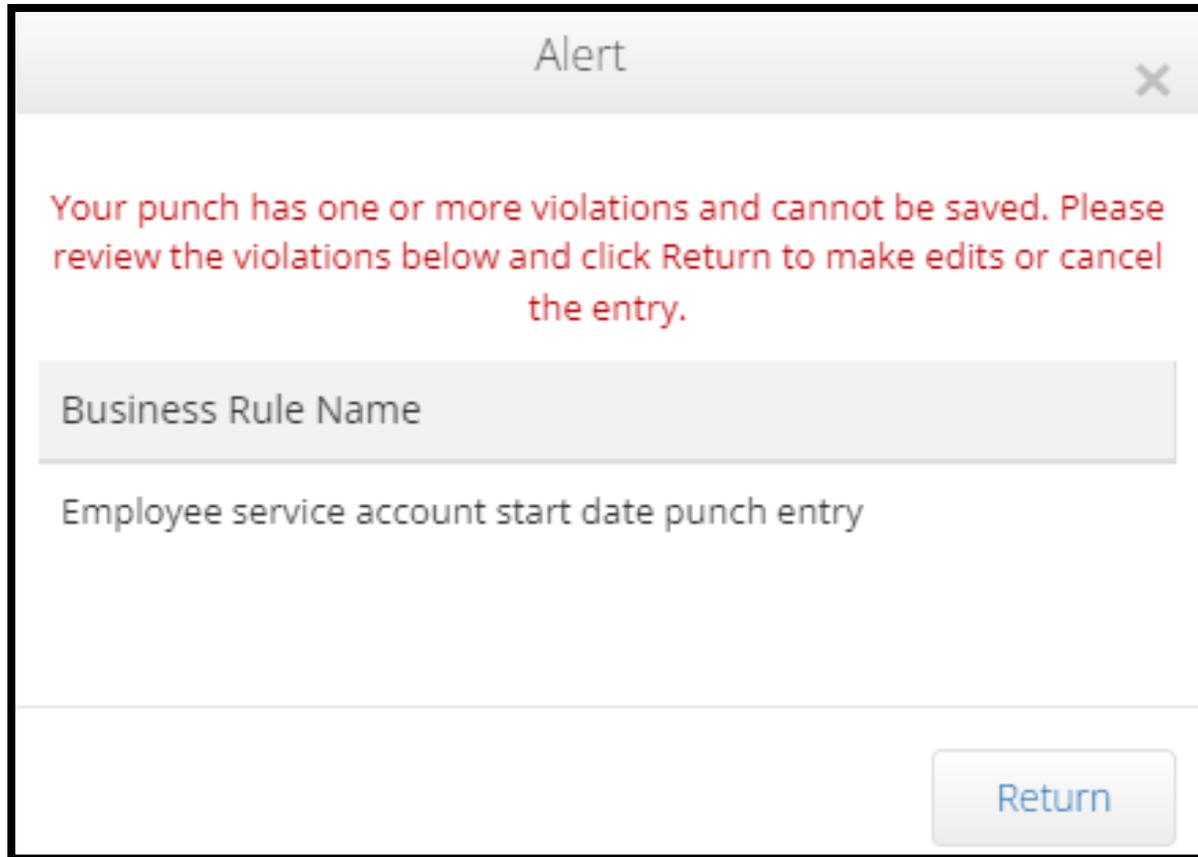


The screenshot shows a dialog box titled "Alert" with a close button (X) in the top right corner. The main text inside the dialog is: "Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry." Below this text is a field labeled "Business Rule Name" containing the text "Timely Filing Employees Punch Entry". At the bottom right of the dialog is a button labeled "Return".

- You will receive this alert when attempting to punch for a date after the deadline
 - The Timely Filing Employee Punch Approval alert would show if the punch was created within the timeframe, but the employer was attempting to APPROVE the punch after the deadline.
- You cannot save the punch
 - Or, in the case of the Timely Filing Employee Punch Approval alert, the employer would be unable to approve the punch.
- No action can be taken

Alerts

Punches may only be entered for an active service account. If you attempt to enter a punch before the start date or after the end date of the service account, you cannot save the punch. This triggers either the **Employee Service Account Start Date Punch Entry** rule or the **Employee Service Account End Date Punch Entry** rule.

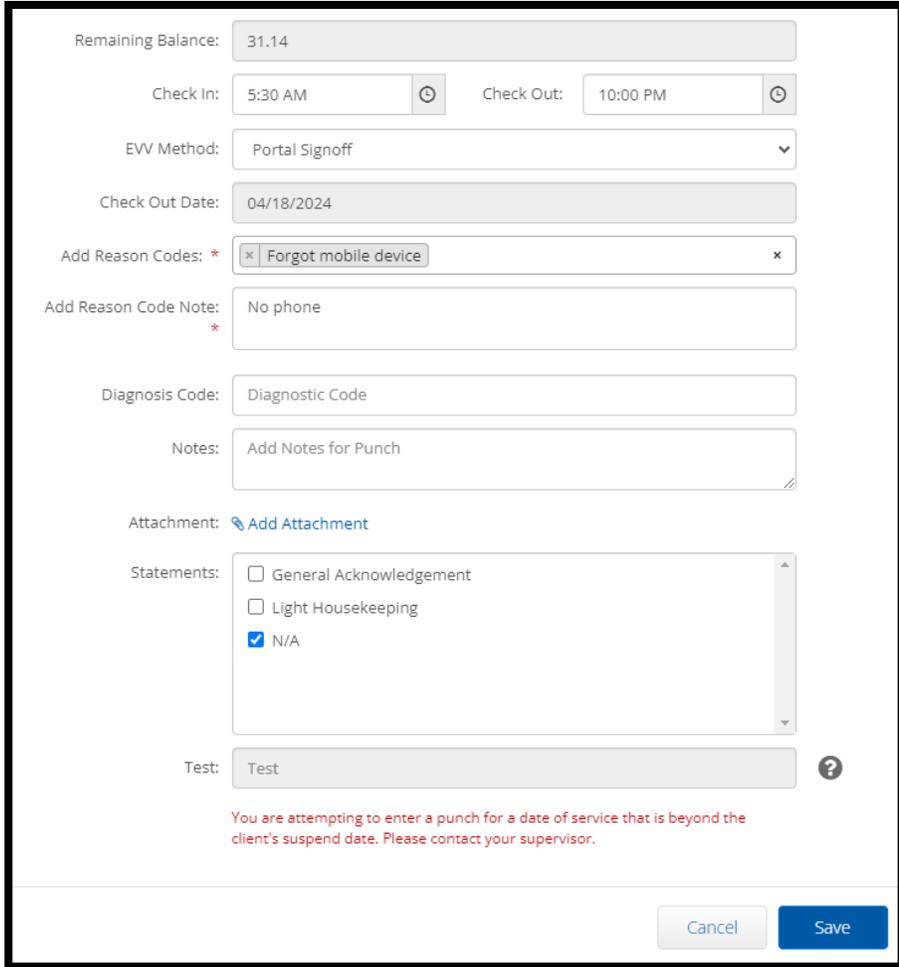


The screenshot shows a dialog box titled "Alert" with a close button (X) in the top right corner. The main text inside the dialog is: "Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry." Below this text is a list box containing one item: "Business Rule Name". Underneath the list box, the text "Employee service account start date punch entry" is displayed. At the bottom right of the dialog is a button labeled "Return".

- You cannot save the punch
- Ensure the correct dates have been entered for the punch
- Contact your employer

Alerts

If enrollment is on hold, or the client cannot receive service, the client profile will be suspended. Punch entries cannot be added after the suspension date.



The screenshot shows a punch entry form with the following fields and values:

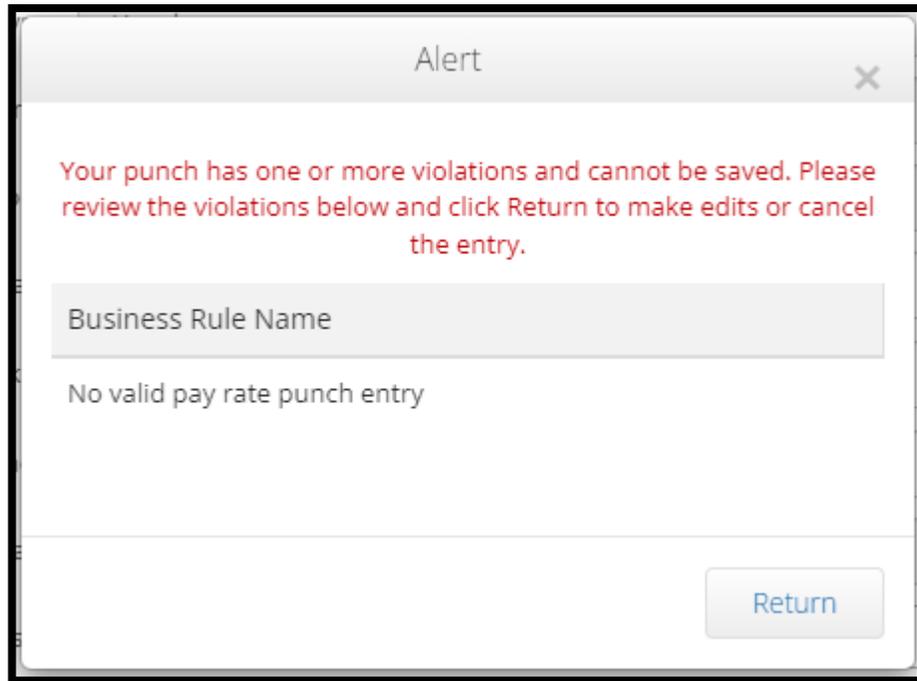
- Remaining Balance: 31.14
- Check In: 5:30 AM
- Check Out: 10:00 PM
- EW Method: Portal Signoff
- Check Out Date: 04/18/2024
- Add Reason Codes: * Forgot mobile device
- Add Reason Code Note: * No phone
- Diagnosis Code: Diagnostic Code
- Notes: Add Notes for Punch
- Attachment: Add Attachment
- Statements: General Acknowledgement, Light Housekeeping, N/A
- Test: Test

A red error message at the bottom of the form reads: "You are attempting to enter a punch for a date of service that is beyond the client's suspend date. Please contact your supervisor." The "Save" button is disabled.

- You cannot save the punch
 - While the system allows you to log in on the mobile app, you cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- Contact your employer

Alerts

If enrollment was on hold, or the client couldn't receive service for a period of time, you will not have a valid pay rate for that date range. The date of service you are attempting to enter a punch entry for has no valid pay rate.



- You cannot save the punch
 - While the system allows you to clock in on the mobile app, you cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- Contact your employer

Check Entries

If a punch entry violates the **Authorization Weekly Max** business rule, it can be saved but is later rejected when the business rule runs. You do not receive an alert but can see that the punch was rejected and that the business rule failed.

Entries Export

Showing 30 out of 380 records

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
39492	Apr 14, 2024	12:00 AM	11:30 PM	Hourly		Steph Cost Center test - Steph Cost Center test	Steph Client1	RESPIRE (Hourly)	0:23:30	Rejected
39491	Apr 15, 2024	12:00 AM	11:30 PM	Hourly		Steph Cost Center test - Steph Cost Center test	Steph Client1	RESPIRE (Hourly)	0:23:30	Rejected

Ref Entries | Notes | Attachments | Verifications | Map | **Business Rules** | Auto Approval | Custom Fields | History

Business Rules

Business Rule Name	Business Rule Result
Employee service account start date punch entry	Pass
Authorization Weekly Max	Fail
Max Hours Per Week Per Client Per Funding Source	Pass
Authorization Expiration Date	Pass

1. Always review your entries and check the status
2. Click on the **punch row** to review the punch details
3. Click the **Business Rules tab** to view the result

Contact your employer

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



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THANK YOU!

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