



Acumen powered by DCI Software

Case Worker Portal Guide

MO SDS

Case Worker Profile Basics

DCI Case Worker Portal

- DCI's Case Worker Portal allows SC's to review budget & entry details for their Caseload
- Only clients who are assigned will be visible in DCI
- All Case Workers will have unique login credentials
- Use Forgot Password link when necessary
- Contact Customer Service with any login issues

How to access



- Go to acumen.dcisoftware.com
- Log into **Case Worker Profile**

A screenshot of the DCI Case Worker Portal login page. The page has a white background with a light gray border. At the top, it says "Sign In". Below that are two input fields: "Username" with the placeholder text "Username" and "Password" with the placeholder text "Password". To the left of the password field is a checkbox labeled "Remember me". To the right is a link that says "Forgot your password?". Below the input fields is a blue button labeled "Sign In". Below the button is a circle containing the word "Or". At the bottom is a link that says "Create a profile".

Case Worker Dashboard

1. Home/Dashboard is the landing page to the Portal
2. Clients Tab will show list of clients. (Case Load)
3. Access to Reporting features
4. Authorization Widget
5. News Posts for Case Managers

The screenshot displays the Case Worker Dashboard interface. At the top, there is a navigation bar with the DCI logo (Acumen Powered by DCI) and tabs for HOME, REPORTS, and CLIENTS. The CLIENTS tab is selected, indicated by a blue highlight and a yellow callout '2'. The main content area is titled 'Dashboard' and features a search widget for 'Authorizations' with a text input field labeled 'Type Client Name', a blue 'Search' button, and a grey 'Reset' button. A yellow callout '4' points to the search input field. Below the search widget is a 'News Posts' section with a yellow callout '5'. The news posts area is currently empty, displaying 'No records to display' with a folder icon.

Client Details

Case Worker - Clients

Once logged into the DCI Portal

1. Click on Clients Tab to view list of Clients in case load
2. Use Search features if needed
3. Click on Client name to view Client Details page

Acumen Powered by DCI

HOME REPORTS

DASHBOARD

CLIENTS ①

Home / Clients

Clients

② Type Client Name Type Client Id

Name	Client Id	State
MAHOMES PATRICK	MO15	MO
TRIBRIANI JOEY	MO3456	MO

③ →

Client Details Page

Once logged into the DCI Portal

1. Client Details Page will show basic demographic info
2. Scroll down to view details on the different tabs*

*We will cover Entries, Authorizations, & Notes tabs

Client Details - MAHOMES PATRICK

Basic Demographics

Client Id: MO15 1
Address: 1 Arrowhead Dr
Kansas City, MO 64129-0000
GNIS: 29-095-748198
Phone: (888) 888-8888
Status: Active
Photo: 

Other Details

Cost Center: ACUMEN FISCAL AGENT
Guardian:
Medicaid No:
Insurance Group No:
Code:
Username: patrick.mahomes
Client Status: Active
Certification Template:
FOB Serial Number:
Fee:
Primary Diagnosis:
Cost Share:
Authentication Status: Active

2 Entries Authorizations Employees Notes Attachments Diagnosis

Entries Tab

Once on the Events Tab

1. Use search filters if needed
2. Scroll down to view list
3. Select entry to view Punch

Detail page*

*Punch Detail page shows basic punch data,

EVV & Service notes for the shift.

The screenshot displays the 'Entries Tab' interface. At the top, there are tabs for 'Entries', 'Authorizations', 'Employees', 'Notes', and 'Attachments'. Below the tabs are search filters: 'From (MM/DD/YYYY)' and 'To (MM/DD/YYYY)' with calendar icons, 'Type Employee/Program/Vendo', and 'Select Account Type'. There are also 'Reset' and 'Search' buttons. Below the filters, the text 'Entries 2' is shown, followed by 'Showing 30 out of 111 records'. A table lists entries with columns: Id, Service Date, Employee/Program/Vendor Name, Service Code, Units, and Status. The table contains three rows: 1980 (Apr 15, 2021, KELCE TRAVIS, PA, Dollar, Pending), 1956 (Apr 15, 2021, KELCE TRAVIS, PA, Dollar, Rejected), and 1954 (Apr 13, 2021, KELCE TRAVIS, PA, Dollar, Approved). A yellow circle with the number '3' highlights the entry with Id 1956.

Id	Service Date	Employee/Program/Vendor Name	Service Code	Units	Status
1980	Apr 15, 2021	KELCE TRAVIS	PA	Dollar	Pending
1956	Apr 15, 2021	KELCE TRAVIS	PA	Dollar	Rejected
1954	Apr 13, 2021	KELCE TRAVIS	PA	Dollar	Approved

Authorizations Tab

Once on the Auth Tab

1. Use search filters if needed
2. Scroll down to view list
3. Select entry to view

Authorization Detail page*

**Auth Detail page shows basic authorization data such as balances and budget period.*

The screenshot displays the 'Authorizations' tab in a software application. At the top, there are navigation tabs: 'Entries', 'Authorizations', 'Employees', 'Notes', and 'Attachments'. Below these are search filters: 'From (MM/DD/YYYY)' and 'To (MM/DD/YYYY)' dates with calendar icons, a 'Type Service Code' text input, an 'Initial Balance' text input, and a 'Select Status' dropdown menu. A blue 'Search' button and a grey 'Reset' button are located to the right of the filters. A yellow circle with the number '1' is placed over the 'To' date field. Below the filters is an 'Export' button with a document icon. The main content area is titled 'Authorizations' with a yellow circle and the number '2' next to it, and a status 'Showing 5 out of 5 records'. A table lists the authorization records with columns for Service Code, Start Date, End Date, Initial Balance, Holds, and Remaining Balance. A yellow circle with the number '3' is placed over the 'PA' service code in the second row of the table.

Service Code	Start Date	End Date	Initial Balance	Holds	Remaining Balance
unit	Apr 01, 2020	Mar 31, 2021	1000.00	0.00	972.00
PA	Jun 01, 2021	May 31, 2022	12000.00	0.00	12000.00
PA	Apr 01, 2020	Apr 30, 2021	10000.00	4357.75	10000.00
CS	Jun 01, 2021	May 31, 2022	5000.00	0.00	5000.00
CS	Apr 01, 2020	May 31, 2021	5000.00	547.93	5000.00

Notes Tab

Once on the Notes Tab

1. Use search filters if needed
2. Scroll down to view notes
3. Select note entry to view

Note Detail page*

*Note Detail page shows the complete note.

This step is **required** to view the Client

Monthly Summary Report.

The screenshot shows the 'Notes' tab interface. At the top, there are navigation tabs: 'Entries', 'Authorizations', 'Employees', 'Notes' (selected), and 'Attachments'. Below the tabs are search filters: 'From (MM/DD/YYYY)' with a calendar icon and a circled '1', 'To (MM/DD/YYYY)' with a calendar icon, and a 'Select Sub Type' dropdown menu. Below the filters, the word 'Notes' is displayed with a circled '2', and 'Showing 6 out of 6 records' is shown to the right. A table with columns 'Date', 'Sub Type', 'Subject', 'Body', and 'Added By' is shown. The first row contains the following data: 'Apr 15, 2021', 'ER or DR Monthly Summary', 'April 2021 Monthly Summary', and 'REID ANDY'. A circled '3' is placed over the 'Body' column of this row. The 'Body' column contains two paragraphs of text: 'Goal 1: Patrick will choose an activity in the community at least one time per week and work on socialization skills. Patrick chose a different activity each week this month (ice skating, the local park, a church service, and a friend's softball game). The staff was able to prompt Patrick to talk to others attending the activities, as appropriate. Patrick required several prompts to do this as he continues to struggle with interacting with others.' and 'Goal 2: Patrick will respect others' personal space while in the community at least one time per week with no more than 3 verbal prompts. Staff worked with Patrick on maintaining personal space at the community activities. Staff provided quiet verbal reminders when Patrick was getting too close to others. On average, staff reported only needing to remind Patrick once during each activity.'

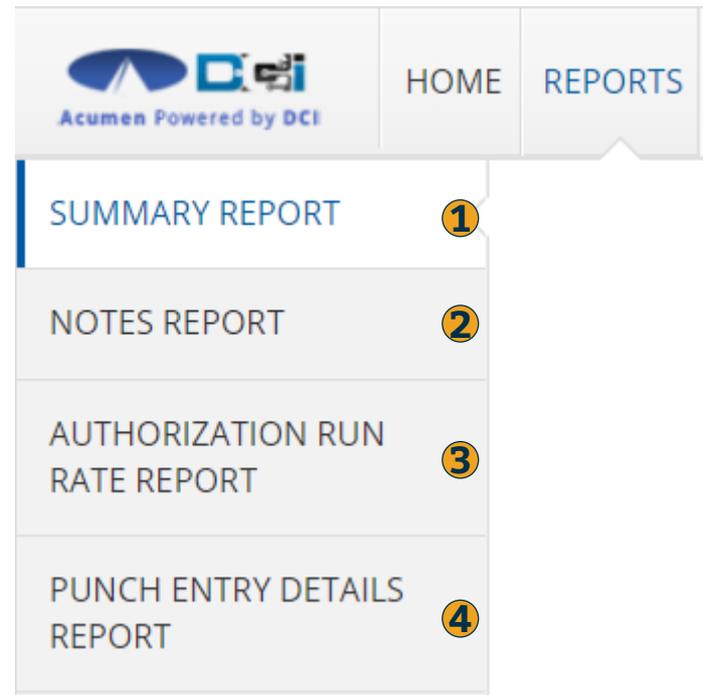
Date	Sub Type	Subject	Body	Added By
Apr 15, 2021	ER or DR Monthly Summary	April 2021 Monthly Summary	Goal 1: Patrick will choose an activity in the community at least one time per week and work on socialization skills. Patrick chose a different activity each week this month (ice skating, the local park, a church service, and a friend's softball game). The staff was able to prompt Patrick to talk to others attending the activities, as appropriate. Patrick required several prompts to do this as he continues to struggle with interacting with others. Goal 2: Patrick will respect others' personal space while in the community at least one time per week with no more than 3 verbal prompts. Staff worked with Patrick on maintaining personal space at the community activities. Staff provided quiet verbal reminders when Patrick was getting too close to others. On average, staff reported only needing to remind Patrick once during each activity.	REID ANDY

Reporting Features

Reporting Features

Once on the Reports Tab

1. Summary Report
 - Spending Summary
2. Notes Report
 - Service Notes
3. Authorization Run Rate Report
 - Shows actual vs projected budget usage
4. Punch Entry Details Report
 - List of entries in DCI



Summary Report

Summary Report Basics

Only One Summary Report

1. Select Summary Report
2. Type Client Name
 - Type 3 letters > Select Name
3. Click Search

Pro Tips:

Search without filters to view all active Authorizations in DCI.

The screenshot shows the DCI web application interface. At the top, there is a navigation bar with the DCI logo (Acumen Powered by DCI), a 'HOME' button, and a 'REPORTS' button. On the right side of the navigation bar, there is a 'Help' icon and the text 'kc.cas'. Below the navigation bar, there is a sidebar menu with the following items: 'SUMMARY REPORT' (highlighted with a yellow circle containing the number 1), 'NOTES REPORT', 'AUTHORIZATION RUN RATE REPORT', and 'PUNCH ENTRY DETAILS REPORT'. The main content area is titled 'Reports / Summary Report' and 'Reports - Summary Report'. It contains a form with the following fields: 'Service Start Date (MM/DD/YYYY)' with a calendar icon, a text input field containing 'MAHOMES PATRICK' (highlighted with a yellow circle containing the number 2) and a close button 'x', and another text input field labeled 'Type Service Code'. Below these fields is a checkbox labeled 'Ended Authorizations'. At the bottom right of the form, there are two buttons: 'Reset' and 'Search' (highlighted with a yellow circle containing the number 3).

View Report Results

Once Results are Listed

Download To PDF



1. Client/Program info
2. Budget Period
3. Budget Balances (\$\$)
4. Budget Time Remaining (%)

Pro Tip:

Scroll down for a list of punches.

★ Download to save for your records.

Spending Summary as of: 05/25/2021

Client Name: MAHOMES PATRICK

Participant Number MO15 Case Manager KC Case

Phone: (999) 999-9999

1

MO SDS

Auth	Start	End	% Time Elapsed	% Elapsed	% Remaining
	04/01/2020	05/31/2021	99		

2

Dollars (Dollar Based Programs)

Authorization Name	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
CS	\$5000.00	\$0.00	\$547.93	\$5000.00	

3

4

Notes Report

Punch Entry Notes Report

Daily Service Notes Report

1. Filter by Date Range

2. Filter by CLT or EE

3. Filter by Punch Status

4. Click Search for report

Pro Tip:

Searching without filters will pull ALL punches in DCI

★ Punch Entry Notes and Canned Statement Report

The screenshot shows a search form for the 'Punch Entry Notes and Canned Statement Report'. The form contains several input fields and a search button. Numbered callouts indicate the following steps:

- 1: Brackets the 'From (MM/DD/YYYY)' and 'To (MM/DD/YYYY)' date range fields.
- 2: Brackets the 'Type Client Name' and 'Type Employee Name' text input fields.
- 3: Points to the 'Select Status' dropdown menu.
- 4: Points to the blue 'Search' button.

Other visible fields include 'Select Account Type' (dropdown), 'Type Service Code' (text input), 'Select Entry Type' (dropdown), and an unchecked checkbox for 'Include Canceled and Rejected Punches'. A 'Reset' button is also present.

Download Report Results

Once Results are Listed

1. Select Download button
2. Complete Download Wizard
 - Select Columns & Format
3. See Next Slide for details

Punch Entry Notes and Canned Statement Report

From (MM/DD/YYYY)  Select Account Type 

Type Client Name Type Service Code

Select Status 

Include Canceled and Rejected Punches

[Reset](#) [Search](#)

Showing 157 out of 157 records 

Punch ID	Date of Serv...	Account Type	Client/ Resident...	Cost Center	Service
1983	05/04/2021	Hourly	PATRICK	OR-270 MR. K...	PYRL
1981					PYRL
1978	04/26/2021	Hourly	PATRICK	OR-270 MR. K...	PYRL

Download Report Wizard 

Download Report Wizard

Once Report Wizard is open

1. Select all desired columns
2. Click single arrow to add
3. Rearrange columns as needed
4. Select Next for more

Recommended Columns

- Punch ID
- Date of Service
- Employee Name
- Client Name
- Service Code
- Start Date
- End Date
- Statements

The screenshot shows the 'Download Report Wizard' window with two tabs: 'Columns' and 'Options'. The 'Columns' tab is active. It features two search boxes labeled 'Search Column' and a 'Search' button. Below the search boxes are two columns: 'Available Columns' and 'Selected Columns'. The 'Available Columns' list includes 'Punch ID', 'Reference Punch ID', 'Date of Service', 'Employee/Vendor Name', and 'Client/ Residential/ Day Program Name'. The 'Selected Columns' list includes 'Client/ Residential/ Day Program Name', 'Service Code', 'Start Date', 'End Date', and 'Statements'. A '1' in a yellow circle highlights the 'Available Columns' list. A '2' in a yellow circle highlights the right-pointing arrow button between the two columns. A '3' in a yellow circle highlights the 'Statements' item in the 'Selected Columns' list. A '4' in a yellow circle highlights the 'Next' button at the bottom right. Other buttons include 'Undo', 'Redo', 'Cancel', and 'Next'.

Download Notes Report

Once Columns are Selected

1. Select File Format
 - PDF is Recommended for Notes Reports
2. Save Report Preferences
3. Click Blue Download button
4. View, Save & Print Report

1 Download Report Wizard

Columns Options

Format: * PDF

Orientation: * Select Orientation

2 Save as Report Download Preference 3

Back Cancel Download

Punch Entry Notes and Canned Statement Report as of: 05/25/2021

Punch ID	1954
Date of Service	04/13/2021 4
Employee Name	KELCE TRAVIS
Client Name	MAHOMES PATRICK
Service Code	PA
Start Date	04/13/2021 07:25:00 AM
End Date	04/13/2021 05:37:00 PM
Statements	1-Mobile Device - Mobile device missing 2-Service Notes must include details. 3-Meal Prep - Pizza, made 2 pizzas and Pat pick the toppings on both. 2500 Character limit Welcome to Acumen!

Authorization Run Rate Report

Authorization Run Rate Report

Auth Run Rate Report

1. Type Client Name
 - Type 3 letters > Select Name
2. View other Authorizations
 - Not needed to view current Auth
3. Click Search

★ Authorization Reports - Authorization Run Rate Report

The screenshot shows a web form for generating an Authorization Run Rate Report. It includes a text input for 'Type Client Name' (marked with a yellow circle '1'), a dropdown menu for 'Select Account Type', and another text input for 'Type Service Code'. Below these are three checkboxes: 'Include Future Authorizations', 'Include Ended Authorizations', and 'Include Discharged Clients Authorizations'. A second yellow circle '2' is placed over the 'Include Rejected Authorizations' checkbox, which is not visible in the screenshot. At the bottom right, there are 'Reset' and 'Search' buttons, with a yellow circle '3' placed over the 'Search' button.

Pro Tip:

Searching without filters will pull ALL Authorizations in DCI

Download Report Results

Once Results are Listed

1. Select Download button
2. Complete Download Wizard
 - Select Columns & Format
3. See Next Slide for details

Authorization Reports - Authorization Run Rate Report

PATRICK - 171 Select Account Type Type Service Code

Include Future Authorizations Include Ended Authorizations Include Discharged Clients Authorizations

Include Rejected Authorizations

Reset Search

Showing 2 out of 2 records

1 Download

Authorization ID	CI	Service Code	Co:	Region Name	Start Date
1989	P/	PYRL2	OR...		04/01/2020
857	P/	PYRL	OR...		04/01/2020

Download Report Wizard **2**

Download Report Wizard

Once Report Wizard is open

1. Select all desired columns
2. Click single arrow to add
3. Rearrange columns as needed
4. Select Next for more

Recommended Columns

- Client Name
- Service Code
- Start & End Date
- Initial Balance
- Remaining Balance
- Holds
- Projected/Current Rate
- Weekly & Monthly

The screenshot shows the 'Download Report Wizard' window with two tabs: 'Columns' and 'Options'. The 'Columns' tab is active. It features two search boxes labeled 'Search Column' and 'Search'. Below the search boxes are two columns: 'Available Columns' and 'Selected Columns'. The 'Available Columns' list includes: Authorization ID, Client Name (highlighted in blue), Service Code (highlighted in blue), Cost Center, Region Name, and Projected # of Weeks Until Zero. Between the two columns are navigation buttons: 'Undo', a right arrow (labeled '2'), a left arrow, and 'Redo'. The 'Selected Columns' list includes: Start Date, End Date, Initial Balance, Remaining Balance, Holds, and Projected Weekly Run Rate (labeled '3'). At the bottom right, there are 'Cancel' and 'Next' (labeled '4') buttons.

Download Run Rate Report

Once Columns are Selected

1. Select File Format
 - PDF/Landscape is Recommended
2. Save Report Preferences
3. Click Blue Download button
4. View, Save & Print Report

Pro Tip:

Keep Current Rates slightly below Projected Rates to ensure proper budget usage

Download Report Wizard

Columns Options

1 Format: * PDF

Orientation: * Landscape

2 Save as Report Download Preference

3

Back Cancel Download

Authorization Run Rate Report as of: 05/07/2021

Client Name	Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Holds	Projected Weekly Run Rate	Current Weekly Run Rate	Projected Monthly Run Rate	Current Monthly Run Rate
PATRICK	PYRL2	04/01/2020	05/31/2022	12000.00	12000.00	0.00	106.19	0.00	455.06	0.00
PATRICK	PYRL	04/01/2020	05/31/2021	10000.00	10000.00	6407.87	164.31	0.00	704.23	0.00

Punch Entry Details Report

Punch Entry Details Report

Punch Entry Details Report

1. Filter by Date Range
2. Filter by Employee
3. Filter by Punch Status
4. Click Search for report

★ CoA Reports - Punch Entry Details Report

The screenshot shows a search form for the 'Punch Entry Details Report'. It includes the following fields and controls:

- 1:** A date range selector with 'From (MM/DD/YYYY)' and 'To (MM/DD/YYYY)' fields, each with a calendar icon.
- 2:** A text input field labeled 'Type Employee Name'.
- 3:** A dropdown menu labeled 'Select Status'.
- Other fields: 'Type Client Name', 'Type Service Code', 'Type Payroll Batch Name', and 'Enter Payroll Batch Id'.
- Checkboxes: 'Include Canceled and Rejected Punches' and 'Include Only Unbatched Punches'.
- Buttons: 'Reset' and 'Search'.

Pro Tip:

Searching without filters will pull ALL punches in DCI

Download Report Results

Once Results are Listed

1. Select Download button
2. Complete Download Wizard
 - Select Columns & Format
3. See Next Slide for details

CoA Reports - Punch Entry Details Report

 
 
 Include Canceled and Rejected Punches

1  Download

Showing 191 out of 191 records

Punch ID	Pay Week	Referer	Vehicle Type	Employee/V...	Emplo
1944					OR2 ^
859					OR2
867					OR2
870					OR9

Download Report Wizard **2**

Download Report Wizard

Once Report Wizard is open

1. Select all desired columns
2. Click single arrow to add
3. Rearrange columns as needed
4. Select Next for more

Recommended Columns

- Punch ID
- Date of Service
- Employee Name
- Client Name
- Service Code
- Start & End Date
- Hours
- Amount
- Pay Rate
- Employer Burden
- Status
- EVV

The screenshot shows the 'Download Report Wizard' window with two tabs: 'Columns' and 'Options'. The 'Columns' tab is active. It features a search bar and a list of 'Available Columns' on the left, and a list of 'Selected Columns' on the right. The 'Available Columns' list includes: Punch ID, Reference Punch ID, Date of Service, Employee/Vendor Name, and Client/ Residential/ Day Program Name. The 'Selected Columns' list includes: Service Code, Start Date, End Date, Hours, Pay Rate, and Amount. A yellow circle with the number '1' is placed over the 'Available Columns' header. A yellow circle with the number '2' is placed over the right-pointing arrow button between the two lists. A yellow circle with the number '3' is placed over the 'Amount' item in the 'Selected Columns' list, with a hand cursor icon pointing to it. A yellow circle with the number '4' is placed over the 'Next' button at the bottom right. Other buttons include 'Undo', 'Redo', 'Cancel', and 'Search'.

Download Report

Once Columns are Selected

1. Select File Format
 - Excel is Recommended for this report
2. Save Report Preferences
3. Click Blue Download button
4. View, Save & Print Report

The screenshot shows the 'Download Report Wizard' dialog box with the 'Options' tab selected. The 'Format' dropdown is set to 'Excel', and the 'Orientation' dropdown is set to 'Select Orientation'. The checkbox 'Save as Report Download Preference' is checked. The 'Download' button is highlighted in blue. Below the dialog box, an Excel spreadsheet is visible, showing a table of punch entry details. The table has columns for Date of Se, Punch ID, Reference Employee Client/ Re Service Cc, Start Date, End Date, Hours, Pay Rate, Amount, Employer, Employer EVV, Status, and Created B Ci. The data rows show various punch entries for employees like SPONGEB PATRICK and SQUIDWA PATRICK.

Date of Se	Punch ID	Reference Employee Client/ Re Service Cc	Start Date	End Date	Hours	Pay Rate	Amount	Employer	Employer EVV	Status	Created B Ci
04/08/202	1944	SPONGEB PATRICK PYRL	04/08/202	04/08/202	0:00:04	11.25	0.07	0.1065	0.87	Yes	Pending SPONGEB04
04/01/202	859	SPONGEB PATRICK PYRL	04/01/202	04/01/202	0:08:00	11.25	8.00	0.1065	99.59	No	Approved SPONGEB02
04/01/202	867	SPONGEB PATRICK PYRL	04/01/202	04/01/202	0:06:00	11.25	6.00	0.1065	74.69	No	Approved SPONGEB02
04/05/202	870	SQUIDWA PATRICK PYRL	04/05/202	04/05/202	0:08:00	11.25	8.00	0.1065	99.59	No	Approved MR_KRAB 02
04/06/202	877 876	SPONGEB PATRICK PYRL	04/06/202	04/07/202	16:00	11.25	16.00	0.1065	199.17	No	Approved SPONGEB02
04/07/202	879 876	SPONGEB PATRICK PYRL	04/07/202	04/07/202	0:00:00	11.25	4.00	0.1065	49.79	No	Approved SPONGEB02
04/06/202	881 877	SPONGEB PATRICK PYRL	04/06/202	04/07/202	16:00	11.25	-16.00	0.1065	199.17	N/A	Approved MR_KRAB 02
04/07/202	883 879	SPONGEB PATRICK PYRL	04/07/202	04/07/202	0:00:00	11.25	-4.00	0.1065	49.79	N/A	Approved MR_KRAB 02
04/06/202	885	SPONGEB PATRICK PYRL	04/06/202	04/06/202	0:08:00	11.25	8.00	0.1065	99.59	No	Approved SPONGEB02
05/21/202	905	SQUIDWA PATRICK PYRL	05/21/202	05/21/202	0:00:02	11.25	0.03	0.1065	0.37	Yes	Approved SQUIDWA 02
05/21/202	906	SQUIDWA PATRICK PYRL	05/21/202	05/21/202	0:00:05	11.25	0.08	0.1065	0.99	Yes	Approved SQUIDWA 02
08/12/202	1202	SPONGEB PATRICK PYRL	08/12/202	08/12/202	0:00:01	11.25	0.02	0.1065	0.24	Yes	Approved SPONGEB02
09/10/202	1278	SPONGEB PATRICK PYRL	09/10/202	09/10/202	0:02:00	11.25	2.00	0.1065	24.90	No	Approved MR_KRAB 02
09/02/202	1279	SPONGEB PATRICK PYRL	09/02/202	09/02/202	0:03:01	11.25	3.02	0.1065	37.59	No	Approved MR_KRAB 02
09/13/202	1286	SPONGEB PATRICK PYRL	09/13/202	09/13/202	0:02:00	11.25	2.00	0.1065	24.90	No	Approved SPONGEB02
09/09/202	1293	SPONGEB PATRICK PYRL	09/09/202	09/09/202	0:02:00	11.25	2.00	0.1065	24.90	No	Approved SPONGEB02
09/22/202	1298	SPONGEB PATRICK PYRL	09/22/202	09/22/202	0:03:00	11.25	3.00	0.1065	37.34	No	Approved SPONGEB02
09/25/202	1300	SPONGEB PATRICK PYRL	09/25/202	09/25/202	0:01:25	11.25	1.42	0.1065	17.68	No	Approved SPONGEB02

Authorization Widget

Authorization Widget

Available on Home/Dashboard

1. Type Client name and select
2. View Authorizations for services
3. Authorization period breakdown
4. Current balance available for use.

Authorizations

DUCK DONALD - OK9874 ① Search Reset

Authorization for Client: **DUCK DONALD**

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorizations Holds	Current Available Balance
PSA	11/01/2019	12/31/2022	10000.00	9804.72	0.00	9804.72
APSA	11/01/2019	12/31/2022	10000.00	9787.00	0.00	9787.00

Thank you!

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



Viewing Monthly Summaries (Support Coordinators) MO SDS

Viewing Employer/Designated Rep Monthly Summaries

- When viewing an Employer/Designated Representative Monthly Summary please ensure you are clicking on the Note itself and reviewing the “Notes Details” page for your view to be registered.
- If you are viewing the ER/DR Monthly Summary in the preview format on the Client Profile the view will not be registered.



- This is how notes look in the preview format on the Client Profile. Reading the note here will not register a view. You can click anywhere on the row for a particular Note to be brought to the Notes Detail page.

Entries Accounts Certifications EVP Locations Diagnosis Notes Attachments Events Custom

History

From (MM/DD/YYYY) To (MM/DD/YYYY) Select Type Select Sub

Subject Type Added By

Notes

Date	Type	Sub Type	Subject	Body
Apr 15, 2021	Custom	ER or DR Monthly Summary	April 2021 Monthly Summary	Goal 1: Patrick will choose an activity in the community at least one time per week and work on socialization skills. Patrick chose a different activity each week this month (ice skating, the local park, a church service, and a friend's softball game). The staff was able to prompt Patrick to talk to others attending the activities, as appropriate. Patrick required several prompts to do this as he continues to struggle with interacting with others. Goal 2: Patrick will respect others' personal space while in the community at least one time per week with no more than 3 verbal prompts. Staff worked with Patrick on maintaining personal space at the community activities. Staff provided quiet verbal reminders when Patrick was getting too close to others. On average, staff reported only needing to

- Once you click on the Notes Details page it will register your view. The Notes Details page will also have additional info that can be reviewed.

Note Details

Note Id: 1864
Date: May 07, 2021
Type: Note
Added By: [SIMPSON MARGE](#)
Subject: April 2021 ER/DR Monthly Summary
Description: Goal 1: Patrick will choose an activity in the community at least one time per week and work on socialization skills. Patrick chose a different activity each week this month (ice skating, the local park, a church service, and a friend's softball game). The staff was able to prompt Patrick to talk to others attending the activities, as appropriate. Patrick required several prompts to do this as he continues to struggle with interacting with others.

Goal 2: Patrick will respect others' personal space while in the community at least one time per week with no more than 3 verbal prompts. Staff worked with Patrick on maintaining personal space at the community activities. Staff provided quiet verbal reminders when Patrick was getting too close to others. Staff provided quiet verbal reminders when Patrick was getting too close to others.

Thank you!

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Calculating Loaded Wage (Support Coordinators) MO SDS

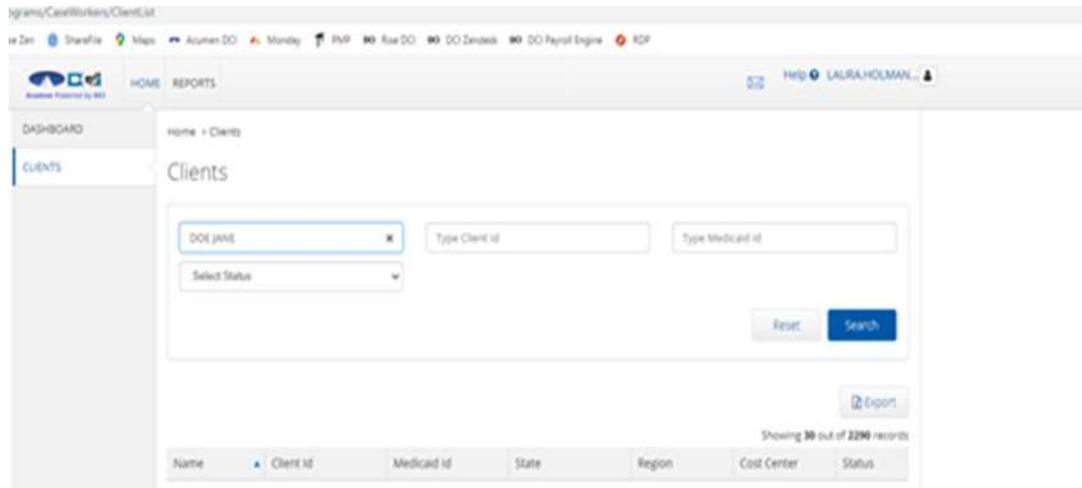
Estimated Loaded Wage

- To calculate an estimated loaded wage for a particular employer and employee you will need the employee's hourly rate and the employer's estimated burden.



Finding Employee Hourly Rate

- Go to “Clients” on the left hand menu. You can choose from the list that is generated below or search by name. Click on the row to be brought to the “Client Details” page.



The screenshot shows a web application interface for finding employee hourly rates. The interface includes a search form with the following fields:

- Name:
- Type Client Id:
- Type Medicaid Id:
- Select Status:

Buttons:

Showing 30 out of 229 records

Name	Client Id	Medicaid Id	State	Region	Cost Center	Status
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- On the Client's Details page scroll down and click on Employees tab. The rate for that client's employees by service will be displayed.

The screenshot displays the 'Employees' tab within a client's details page. At the top right, there is a list of settings: Authentication: Active, Status: (blank), Email confirm: Yes, Photo Set: No, Signature Set: No, Enable caregiver: No, Rating Email: (blank), Enable Vendor: No, Payment: (blank), Enable Employee: No, Reimbursement: (blank). Below this is a navigation bar with tabs for Entries, Authorisations, Employees (selected), Notes, and Attachments. There are input fields for 'Type Employee Idno' and 'Type Service Code', a 'Result' button, and a 'Search' button. An 'Export' button is also present. The main content area is titled 'Employees' and shows 'Showing 1 out of 1 record'. A table with the following data is displayed:

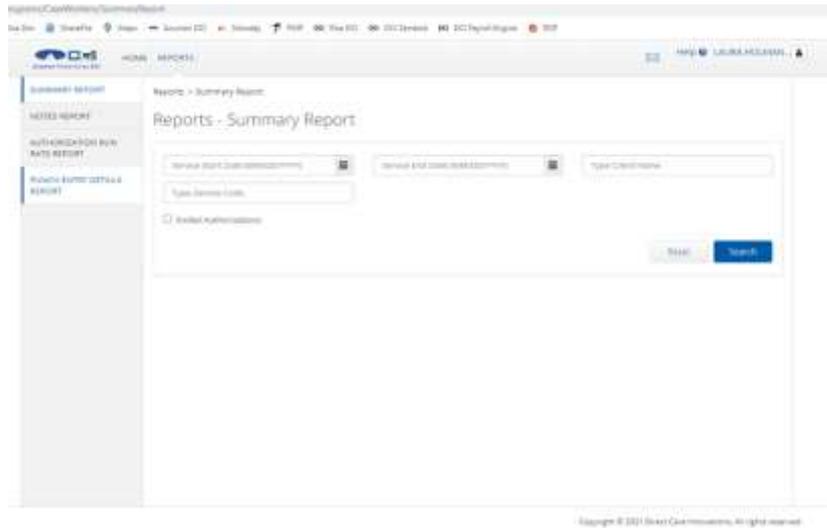
Employee Name	Service Code	Pay Rate Name	Pay Rate	Pay Rate Effective Date	Pay Rate End Date
MAR 5	RA	Standard	15.00	05 Apr 2021	

The 'Pay Rate' value '15.00' is circled in blue. At the bottom of the page, there is a copyright notice: 'Copyright © 2011 Direct Care Innovations. All rights reserved.'



Finding Employer Burden Rate

- To find the employer burden rate, go to “Reports” at the top, and then “Punch Entry Details Report” on the left hand menu.



- Enter filters for search such as “Client Name” and/or “Employee Name.”

The screenshot shows a web browser window displaying the 'Punch Entry Details Report' page. The browser's address bar shows the URL: `ifwcare.com/Programs/CaseWorkers/PunchEntryDetailsReport`. The page header includes navigation links for 'HOME' and 'REPORTS', and a user profile for 'LAURA HOLMAN'. A left sidebar contains a menu with options: 'SUMMARY REPORT', 'NOTES REPORT', 'AUTHORIZATION RUN RATE REPORT', and 'PUNCH ENTRY DETAILS REPORT' (which is highlighted). The main content area is titled 'Punch Entry Details Report' and contains a search form with the following fields and controls:

- From (MM/DD/YYYY) [calendar icon]
- To (MM/DD/YYYY) [calendar icon]
- Select Account Type [dropdown menu]
- Type Client Name [text input]
- Type Employee Name [text input]
- Type Service Code [text input]
- Type Cost Center [text input]
- Select Activity [dropdown menu]
- Select Status [dropdown menu]
- Type Payroll Batch Name [text input]
- Enter Payroll Batch Id [text input]
- Select Entry Type [dropdown menu]
- Include Cancelled and Rejected Punches
- Include Only Unbatched Punches
- Reset [button]
- Search [button]

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- On either the results entries at the bottom (see next page) or when downloading the results find a punch for the particular employee and scroll to the right to find “Employer Burden Rate” column. This will tell you the estimated employer burden rate for that employee.
- This is based on that employer’s state unemployment (SUTA) rate along with Medicare, social security (FICA), federal unemployment (FUTA), and workers compensation rates and may also take into account that particular employee’s tax exemption if applicable (ex. exempt due to family relationship).



Type Payroll batch name: Enter payroll batch ID: Select entry type:

Include Canceled and Rejected Punches Include Only Unbatched Punches

Showing 47 out of 47 records

Amount	Billable Amo...	Employer B...	Employer Cost	EVV	EVV Method	Status	Created
1.35		0.1250	2.9	Yes	Multiple	Processed	EVERI...
3.62		0.1250	1.42	Yes	Multiple	Processed	EVERI...
2.48		0.1250	2.08	Yes	Multiple	Processed	EVERI...
2.52		0.1250	2.75	Yes	Multiple	Processed	EVERI...
3.08		0.1250	2.26	Yes	Multiple	Processed	EVERI...
2		0.1250	3.94	No	Client Portal S...	Processed	EVERI...
7.5		0.1250	27.26	No	Client Portal S...	Processed	EVERI...
1.35		0.1250	2.9	Yes	Multiple	Processed	EVERI...
5.77		0.1250	7.9	Yes	Multiple	Processed	EVERI...
4.52		0.1250	6.69	Yes	Multiple	Processed	EVERI...
3.83		0.1250	4.98	Yes	Multiple	Processed	EVERI...
1.83		0.1250	1.05	Yes	Multiple	Processed	EVERI...
2.07		0.1250	35.12	Yes	Multiple	Processed	EVERI...
0.88		0.1250	14.93	Yes	Multiple	Processed	EVERI...



Calculating Loaded Wage

Estimated Loaded Wage =

Employee's Hourly Rate x (1 + Estimated Employer Burden Rate)



Thank you!

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