Acumen powered by DCI Software

Case Worker Portal Guide

MO SDS

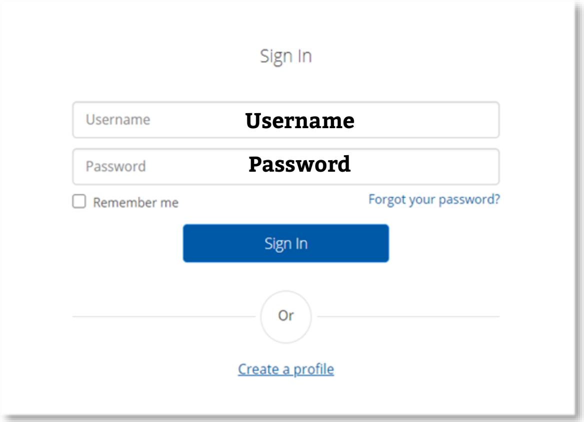
Case Worker Profile Basics

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

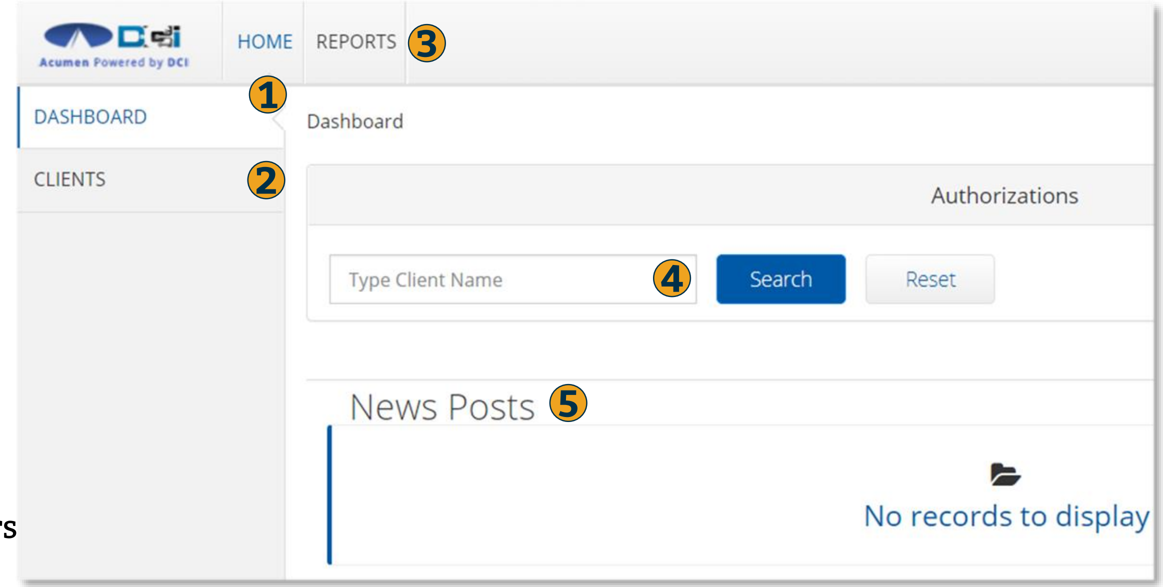
How to access

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



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

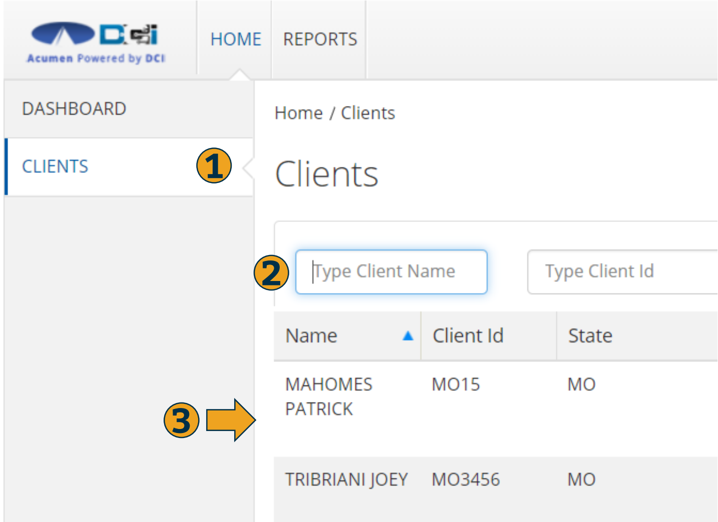


Client Details

Case Worker – Clients

<u>Once logged into the DCI Portal</u>

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

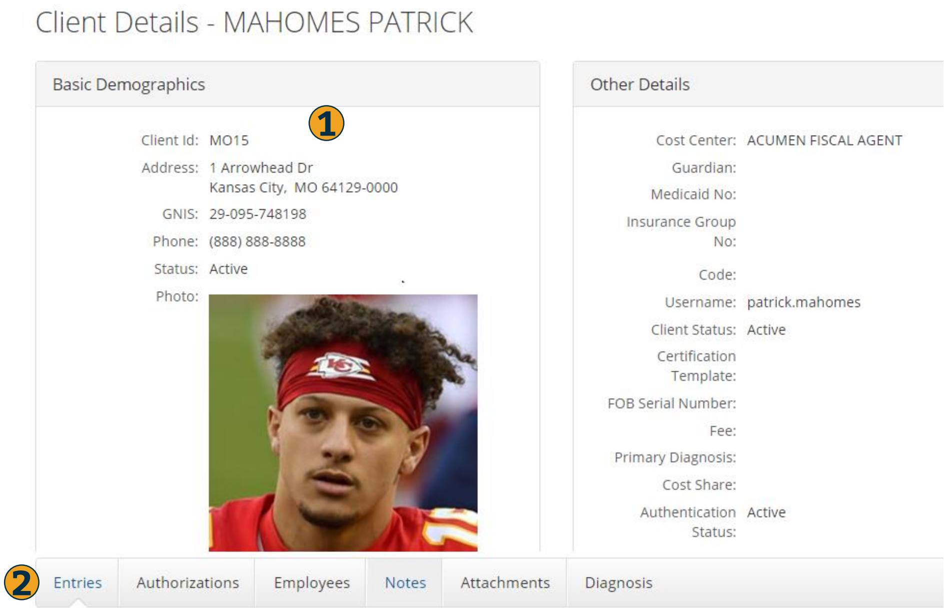


Client Details Page

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*

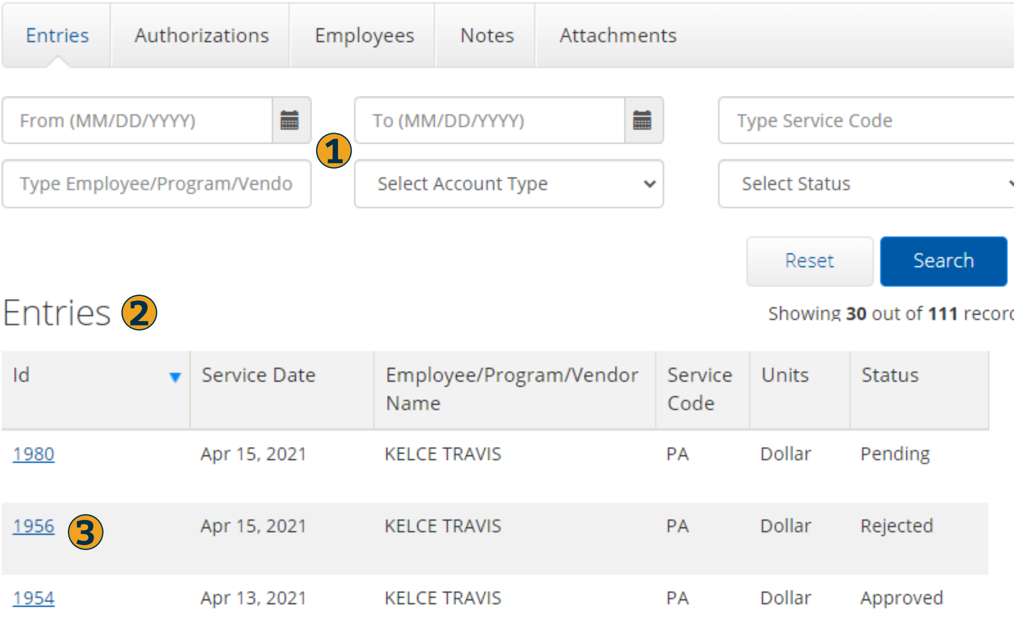


Entries Tab

<u>Once on the Events Tab</u>

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.*



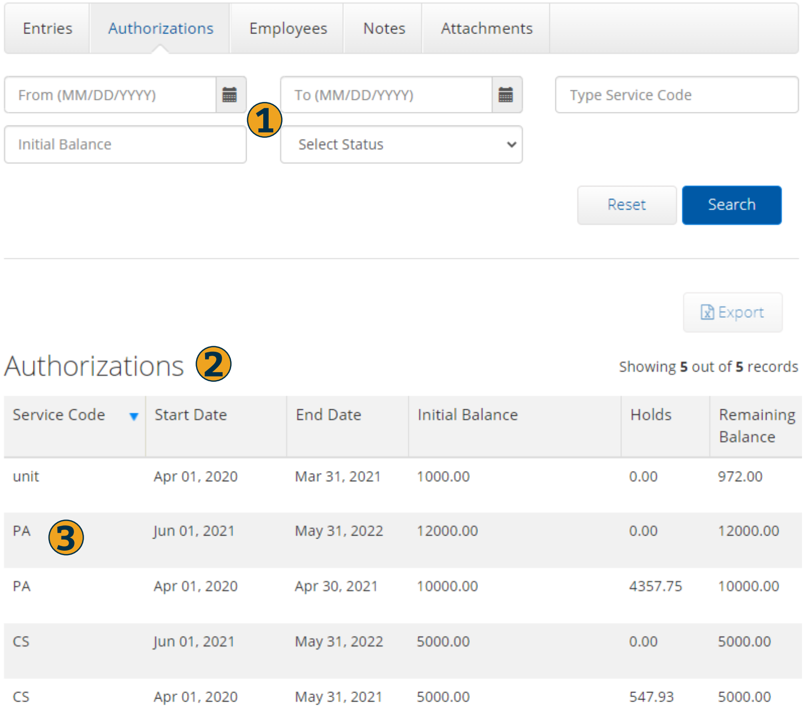
Authorizations Tab

<u>Once on the Auth Tab</u>

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.*



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

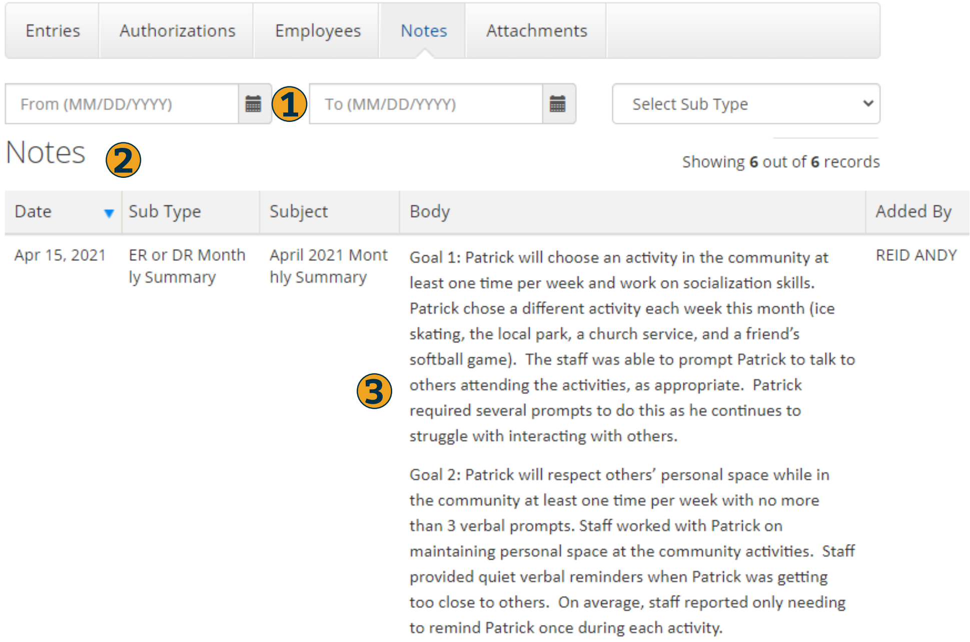
Notes Tab

<u>Once on the Notes Tab</u>

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.*

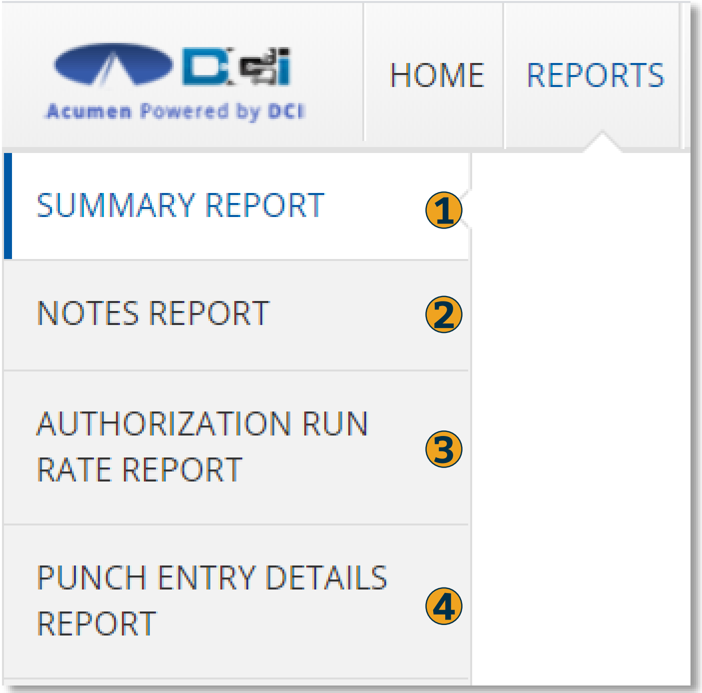


Reporting Features

Reporting Features

<u>Once on the Reports Tab</u>

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



Summary Report

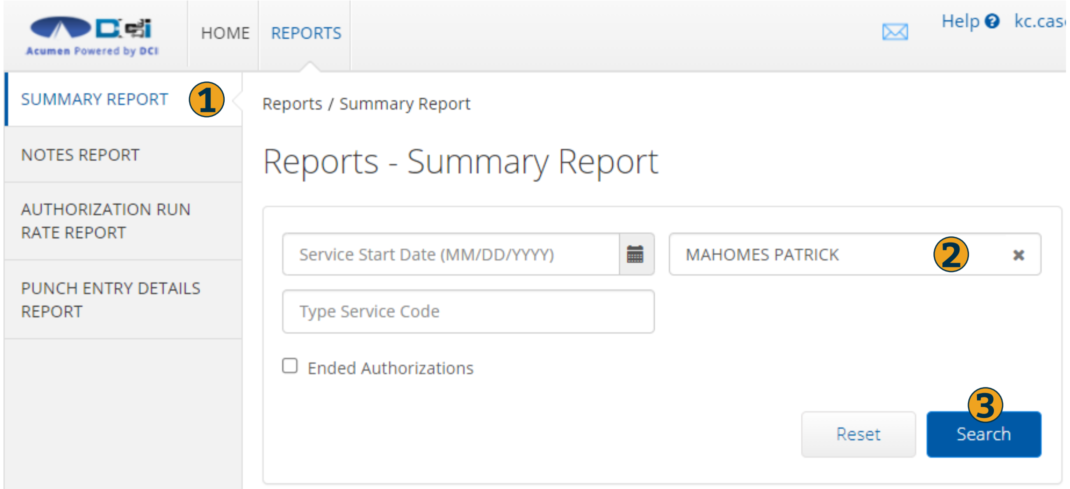
Summary Report Basics

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.



View Report Results

<u>Once Results are Listed</u>

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.*

Download To PDF ★

Spending Summary as of: 05/25/2021

Client Name: MAHOMES PATRICK

Participant Number
MO15

Case Manager
KC Case

Phone:
(999) 999-9999

1

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

2

% Elapsed % Remaining

0 50 100

4

Dollars (Dollar Based Programs)

3

Authorization Name	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
CS	$5000.00	$0.00	$547.93	$5000.00	100 %

Notes Report

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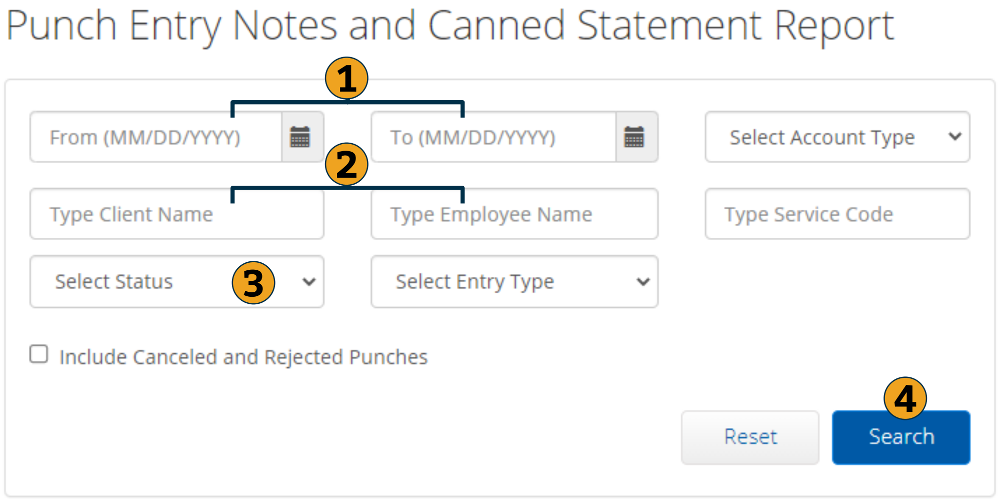
Punch Entry Notes Report

Daily Service Notes Report

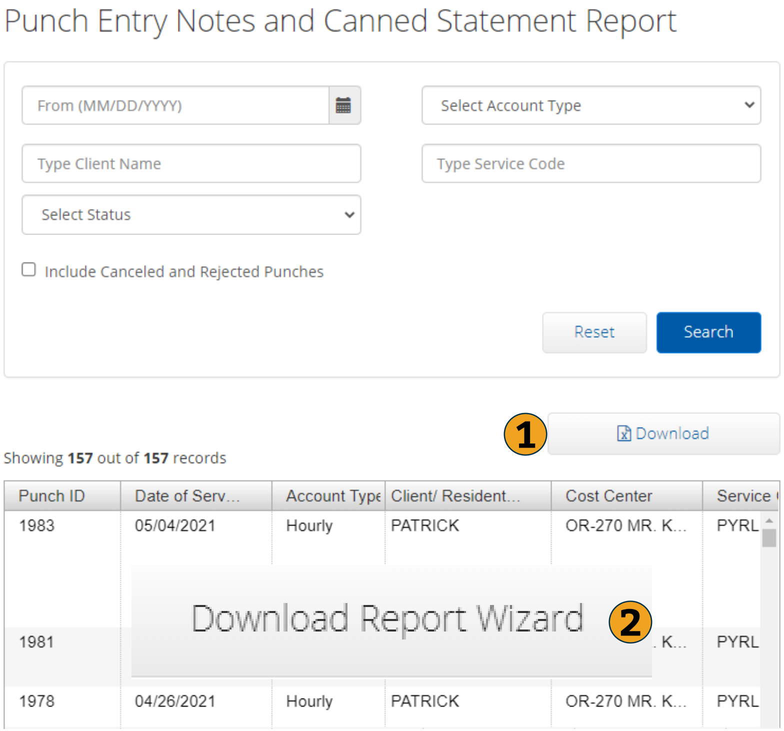
1. Filter by Date Range
2. Filter by CLT or EE
3. Filter by Punch Status
4. Click Search for report

Pro Tip:

Searching without filters will pull ALL punches in DCI



Download Report Results



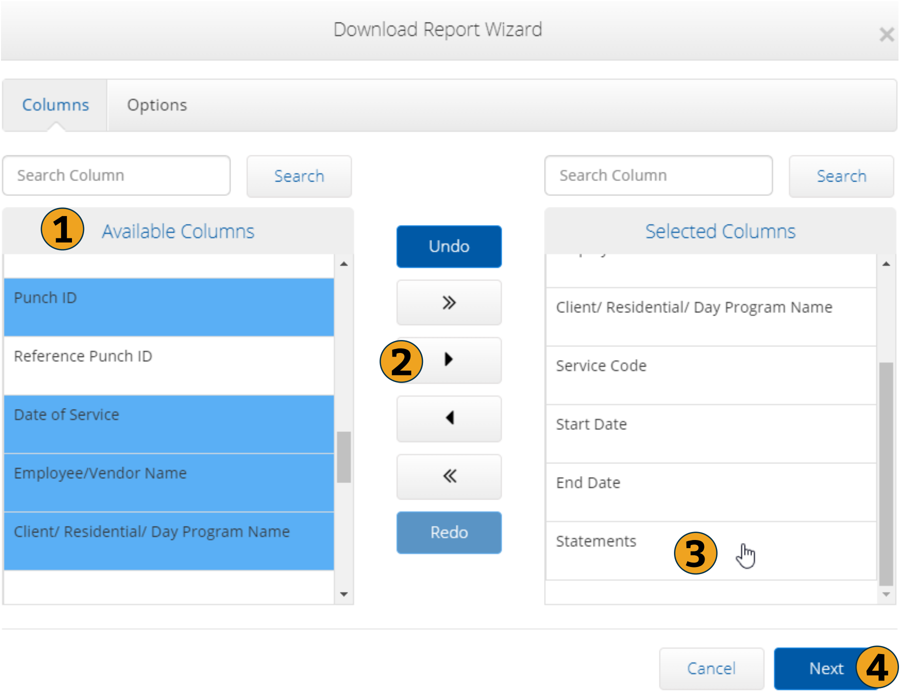
<u>Once Results are Listed</u>

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

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



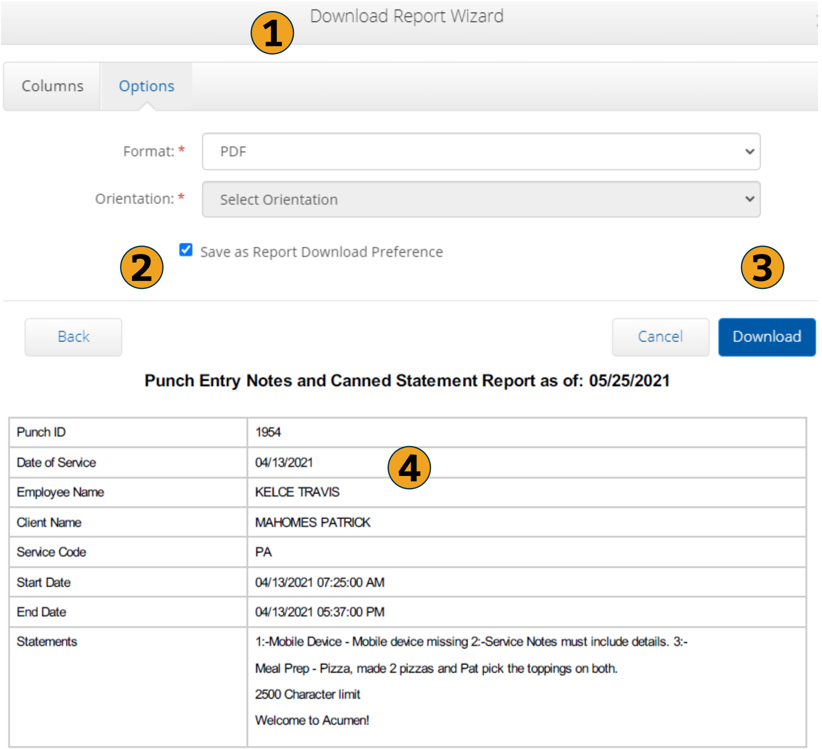
Recommended Columns

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

Download Notes Report

<u>Once Columns are Selected</u>

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



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

Punch ID	1954
Date of Service	04/13/2021
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

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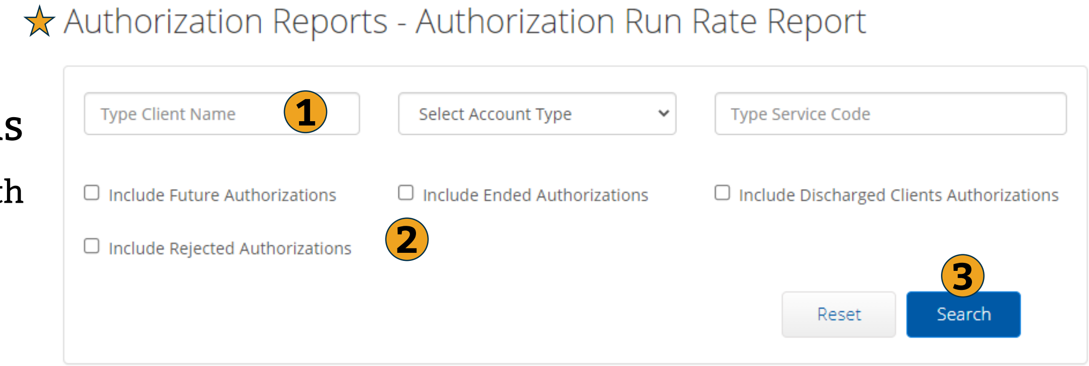
Authorization Run Rate Report

<u>Auth Run Rate Report</u>

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

Pro Tip:

Searching without filters will pull ALL Authorizations in DCI



Download Report Results

<u>Once Results are Listed</u>

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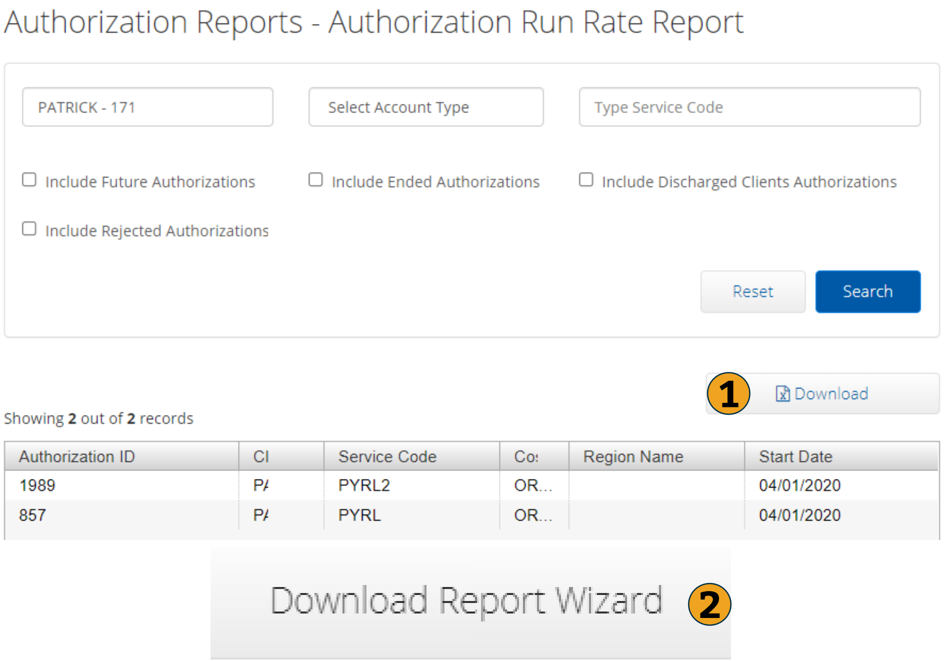


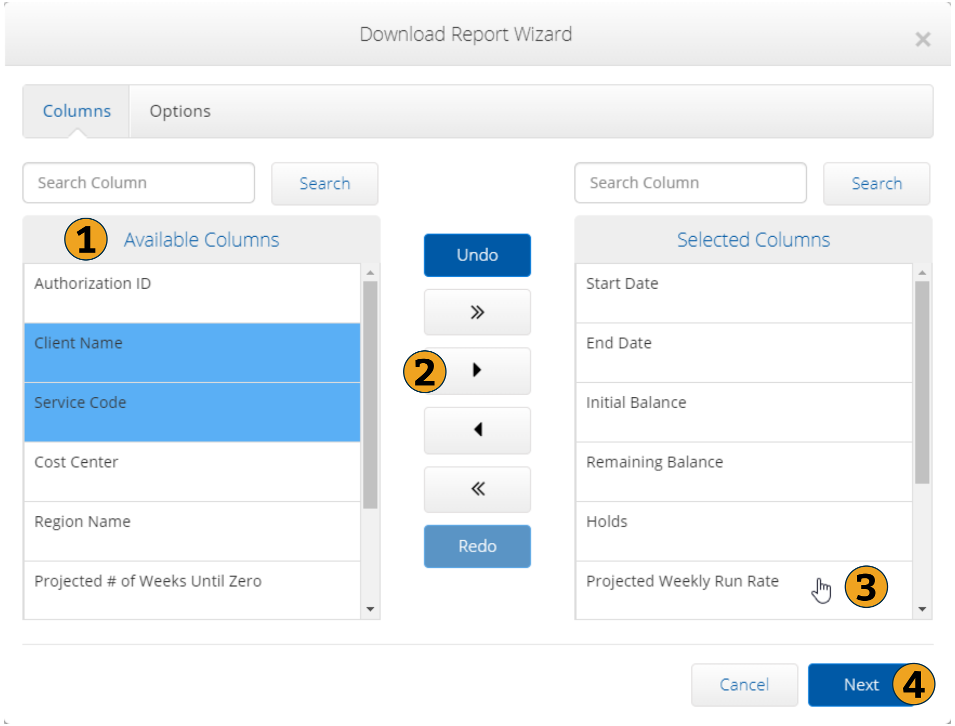
Download Report Wizard

<u>Once Report Wizard is open</u>

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

<u>Recommended Columns</u>

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



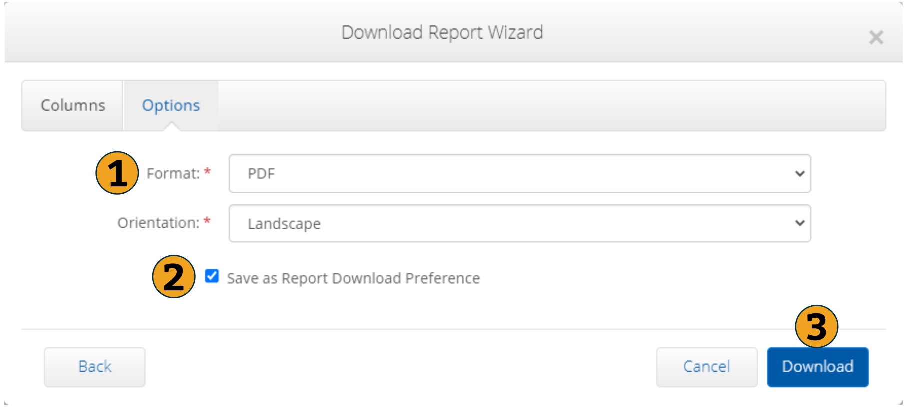
Download Run Rate Report

<u>Once Columns are Selected</u>

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



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

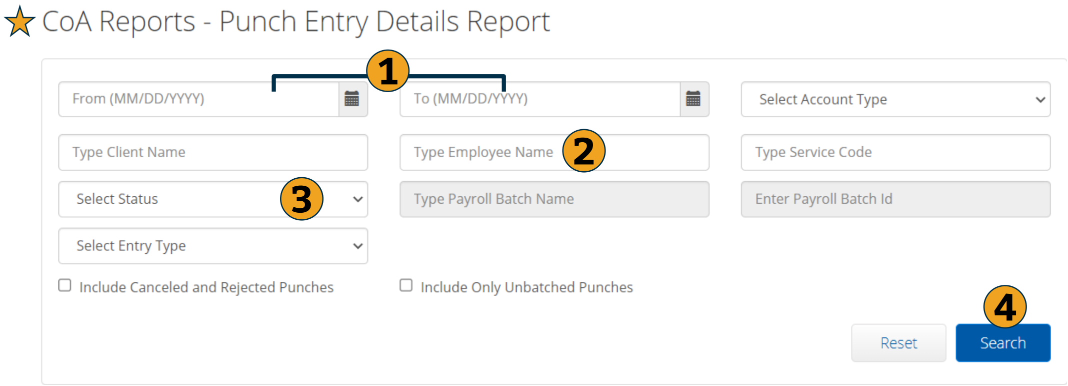
Punch Entry Details Report

<u>Punch Entry Details Report</u>

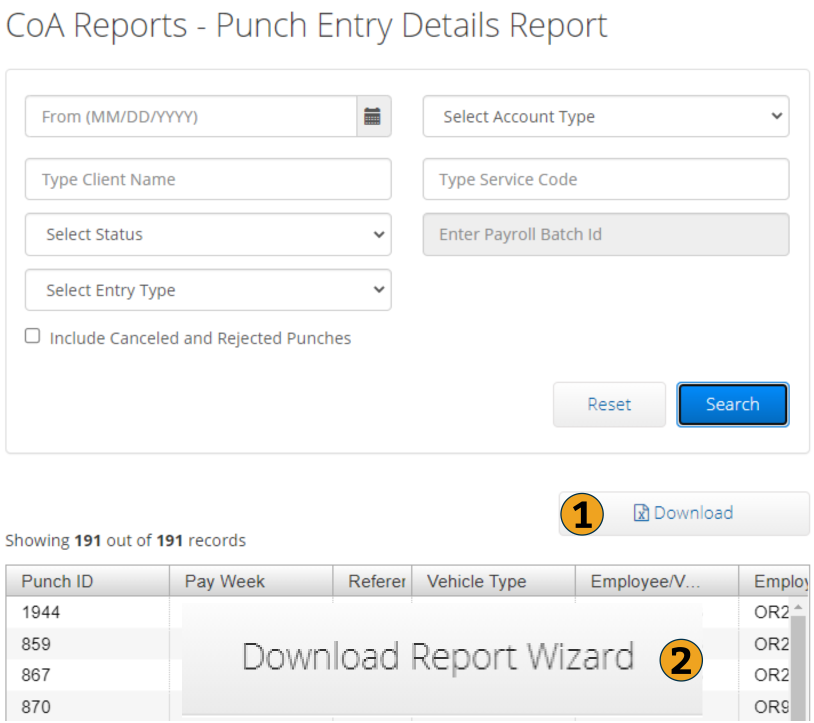
1. Filter by Date Range
2. Filter by Employee
3. Filter by Punch Status
4. Click Search for report

Pro Tip:

Searching without filters will pull ALL punches in DCI



Download Report Results



<u>Once Results are Listed</u>

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2. Complete Download Wizard
    - Select Columns & Format

3. See Next Slide for details

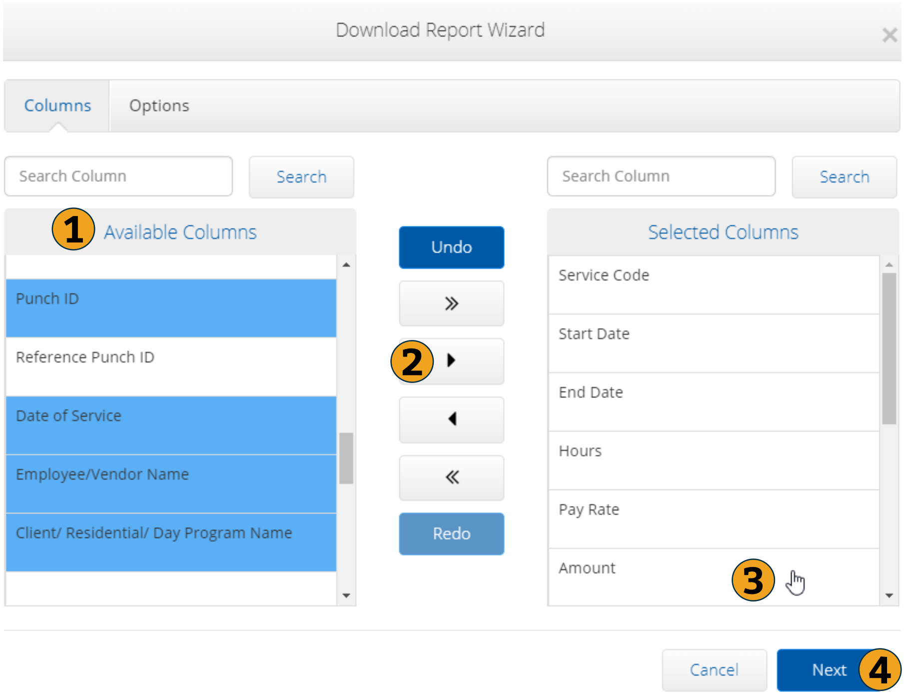
Download Report Wizard

<u>Once Report Wizard is open</u>

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

<u>Recommended Columns</u>

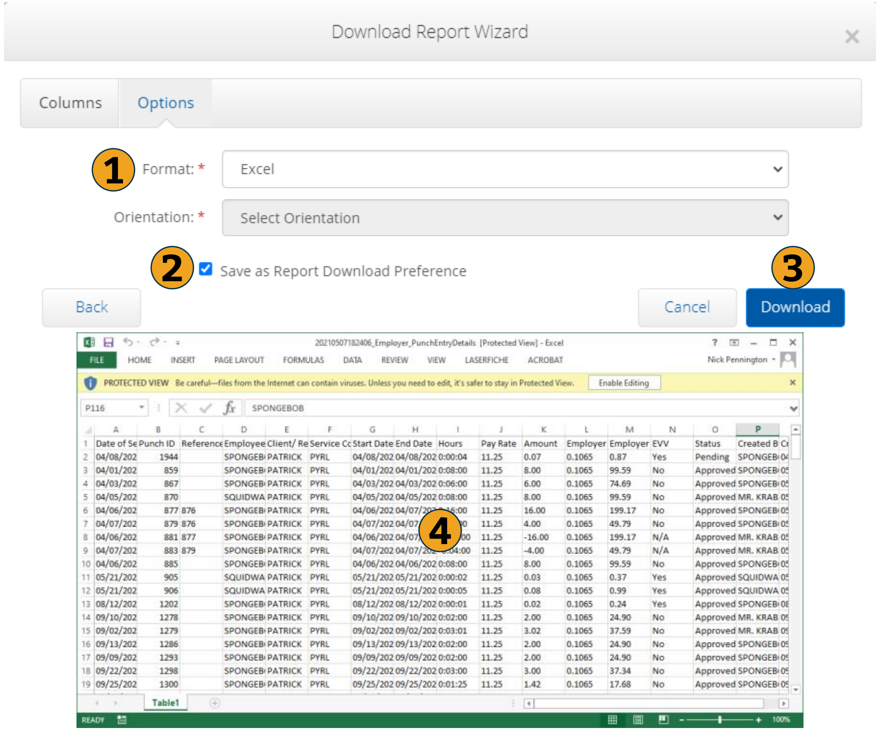
- Punch ID
- Date of Service
- Employee Name
- Client Name
- Service Code
- Start & End Date
- Hours
- Amount
- Pay Rate
- Employer Burden
- Status
- EVV



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



Authorization Widget

Authorization Widget

<u>Available on Home/Dashboard</u>

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 | 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)

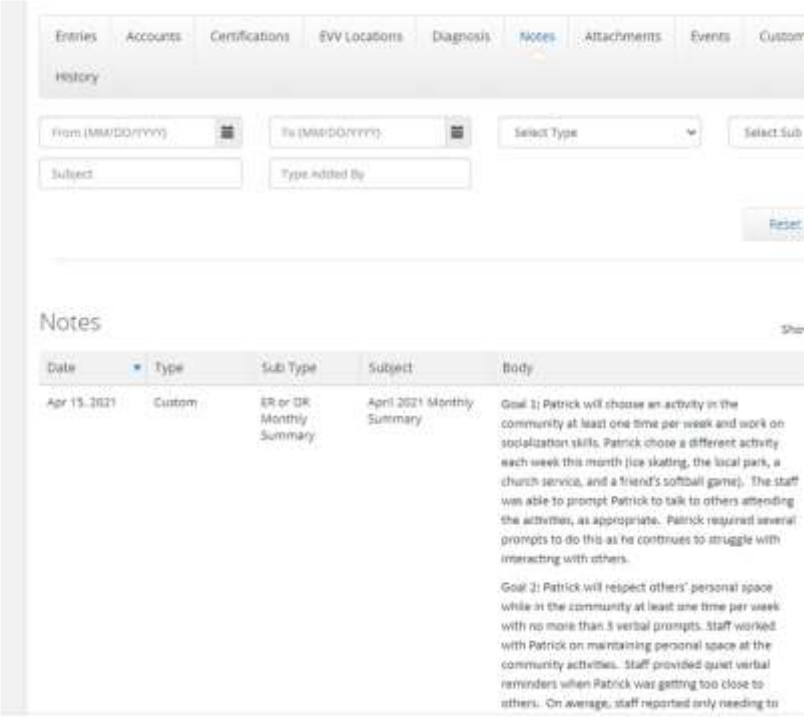
MO SDS

Viewing Employer/Designated Rep Monthly Summaries

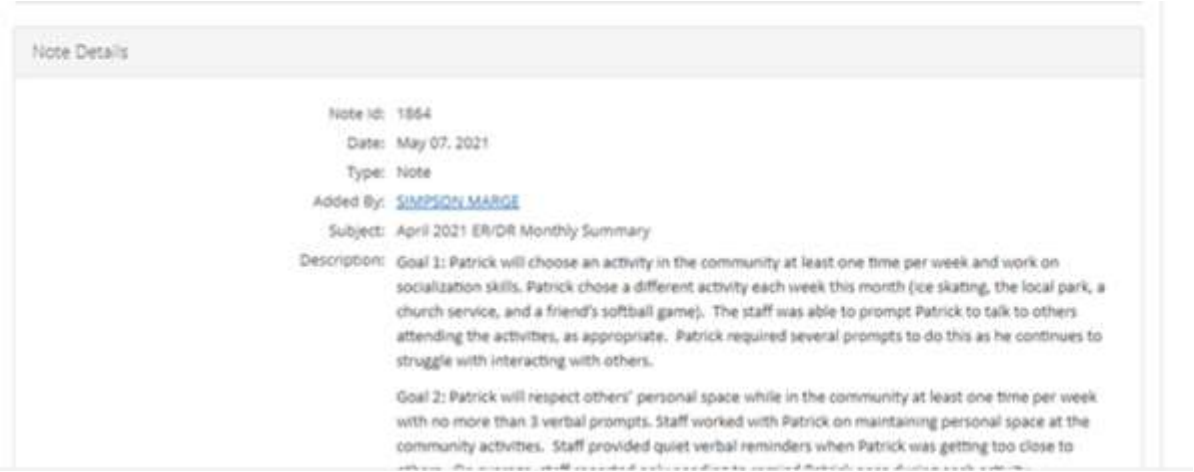
- When viewing an Employer/Designated Representative Monthly Summary please ensure you are clicking on the Note itself and reviewing the "Notes Details" page for your view to be registered.

- 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.



- 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.



Thank you!

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acumenfiscalagent.zendesk.com

Acumen powered by DCI Software

Calculating Loaded Wage (Support Coordinators)

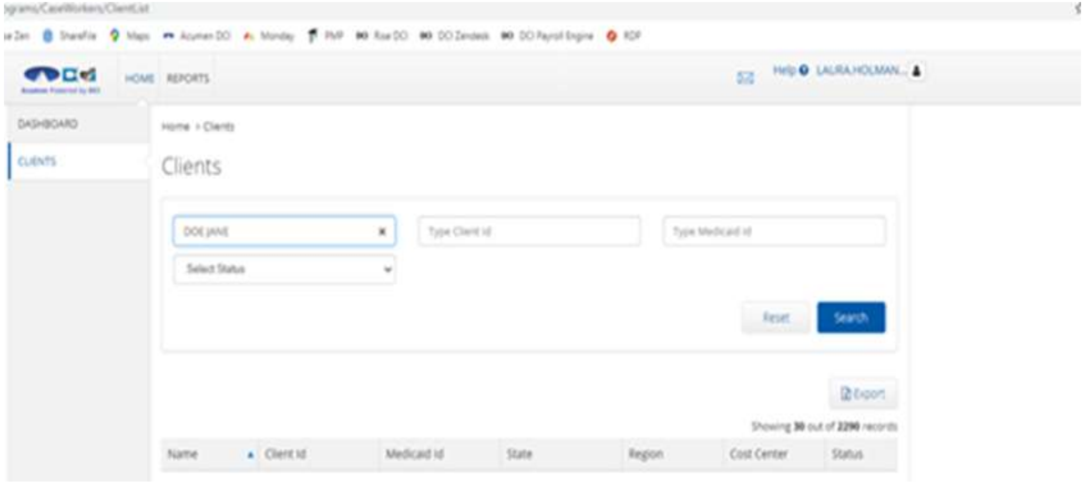
MO SDS

Estimated Loaded Wage

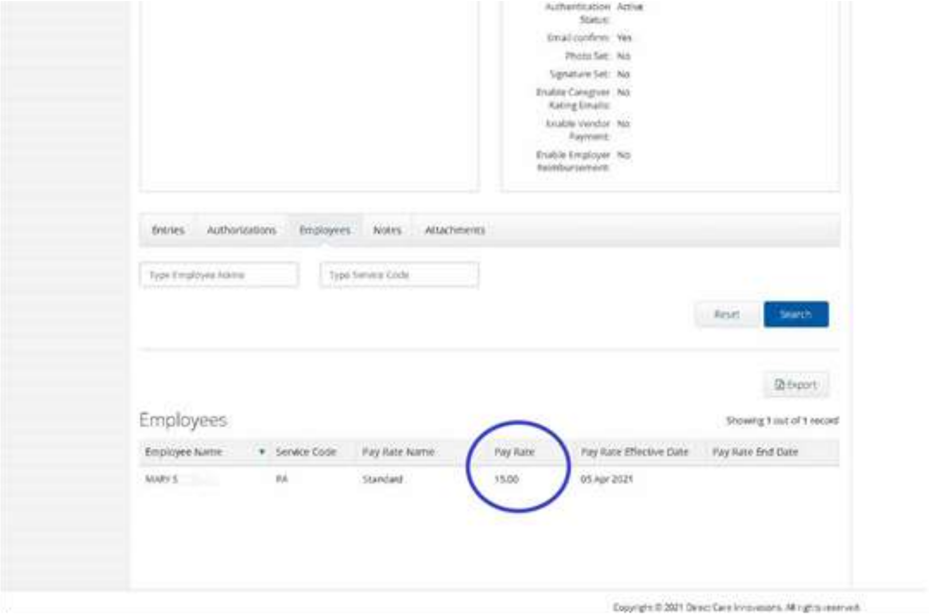
- To calculate an estimated loaded wage for a particular employer and employee you will need the employee's hourly rate and the employer's estimated burden.

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.

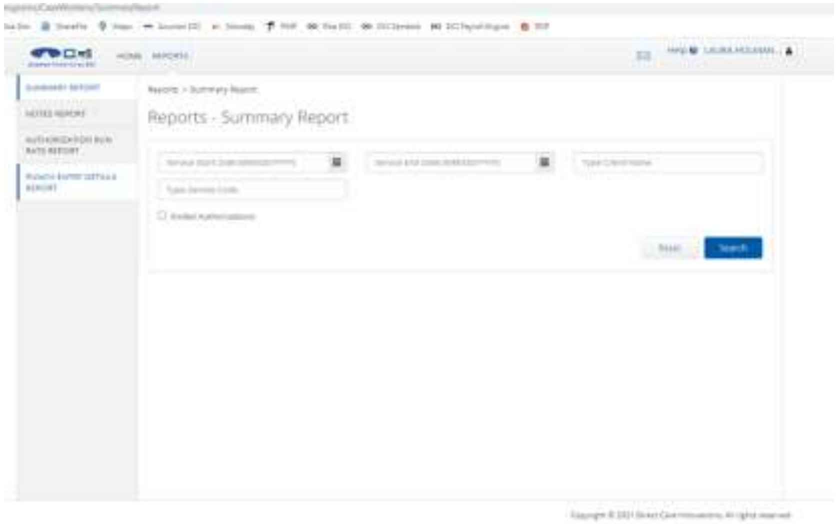


- On the Client's Details page scroll down and click on Employees tab. The rate for that client's employees by service will be displayed.

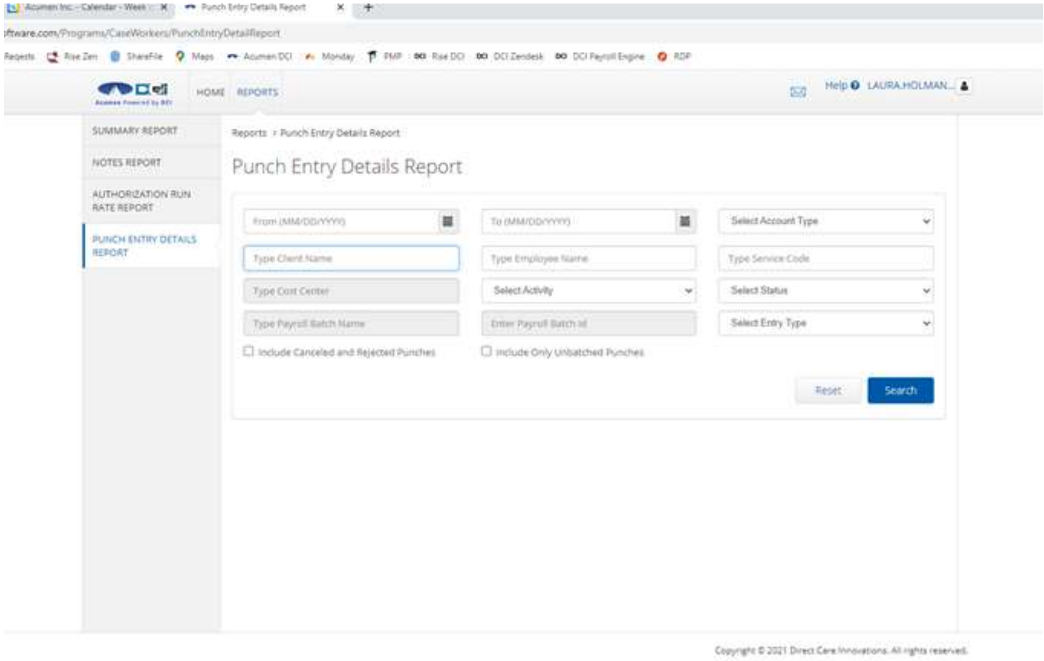


Finding Employer Burden Rate

- 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.”



- 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

Reset Search

Download

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	5.94	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	5.69	Yes	Multiple	Processed	EVERI
3.83		0.1250	4.98	Yes	Multiple	Processed	EVERI
1.83		0.1250	31.05	Yes	Multiple	Processed	EVERI
2.07		0.1250	35.12	Yes	Multiple	Processed	EVERI
0.88		[illegible]	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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