

Wisconsin Time Entry Training for Employers & Employees

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 + Mobile App Download & Login



Employee – Mobile App Entry & EVV/Client Attestation



Employer – Mobile App – Manage Entries



Employee – Web Portal Historical Entry & Edit Entries



Employer – Web Portal – Manage Entries



Troubleshooting



Phone EVV (IVR) – Real time & Historical Entries

Quick Resources

- View short, step-by-step resource documents on the [DCI Webinar – Wisconsin Training](#) page providing instructions for the punch entry and approval process.
- **Employee Specific Resources:**
 - ✓ Employee Mobile App Entries
 - ✓ Employee Web Portal Entries with EVV Location
- **Employer Specific Resources:**
 - ✓ Employer Manage Entries
 - ✓ Employer Manage Budgets
- **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



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



Important Update!



- Paper timesheets will no longer be utilized after **March 8th, 2025**.
- Beginning **March 9th, 2025**, DCI Mobile EVV App or Phone EVV (IVR) will be the only compliant time entry methods.
- DCI works as both the Electronic Visit Verification (EVV) and time entry system
- Employees are responsible for all time entries including new and edited entries
- Employers are responsible for reviewing and approving all time

Ways to Enter Time

Only use one per shift (each clock in/out)

Mobile App



OR

Phone EVV



OR

Web Portal



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

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

- 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

DCI Mobile App

***Preferred Time Entry Method**

Proprietary: For Acumen and Customer Use Only



Mobile App Basics

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



Download DCI Mobile EVV

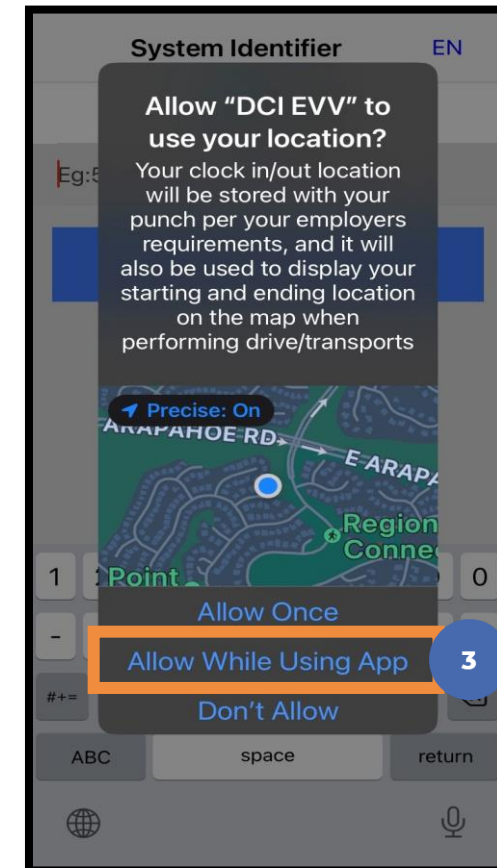
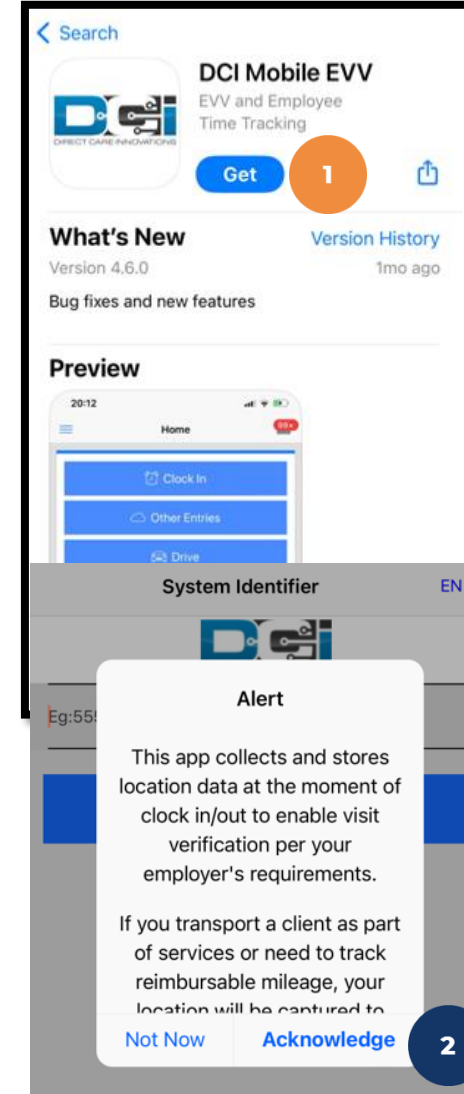
1. [Download](#) the **DCI Mobile EVV** App



2. Select Acknowledge on the Alert
 - The alert states the app collects and stores location data at clock in and clock out, if you transport a client as part of services and/or need to track reimbursable mileage.
3. Select **Allow While Using App** only when accessing the app for the first time or after a new download to give the app access to the device's location
 - Location is only captured at clock in & out

***Please note!**

- There is more than one DCI app available. Please be sure to select the one labeled **DCI Mobile EVV**.
- Users may need to set app permissions. Media access is not necessary.



Initial Agency Selection

1. After downloading the app, the Select Agency screen appears with a Search Agency field.
2. Type at least three consecutive characters of the agency name OR the system identifier in the Search Agency field.
 - ❖ The Acumen system identifier for North Carolina & Wisconsin is **2015**
 - ❖ The consecutive characters can be located anywhere in the agency name or system identifier

3. Select the agency from the list
4. Click the blue **Next** button
5. The agency is now selected and appears on the login screen

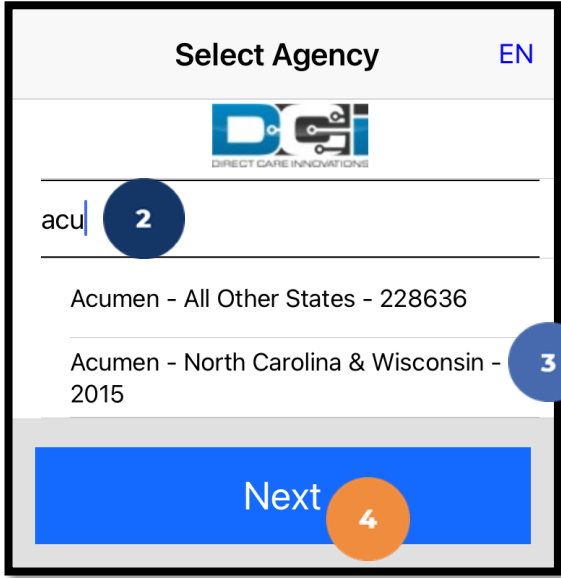


1 Select Agency EN



Search Agency 1

Next



Select Agency EN

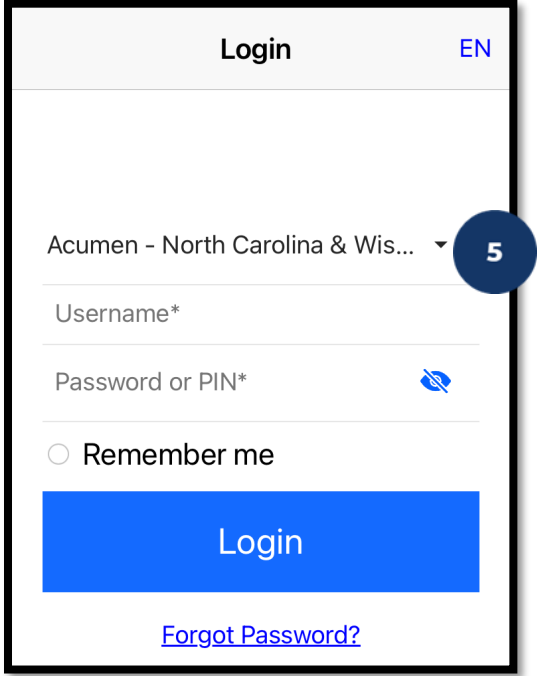


acu 2

Acumen - All Other States - 228636

Acumen - North Carolina & Wisconsin - 2015 3

Next 4



Login EN

Acumen - North Carolina & Wis... 5

Username*

Password or PIN* 

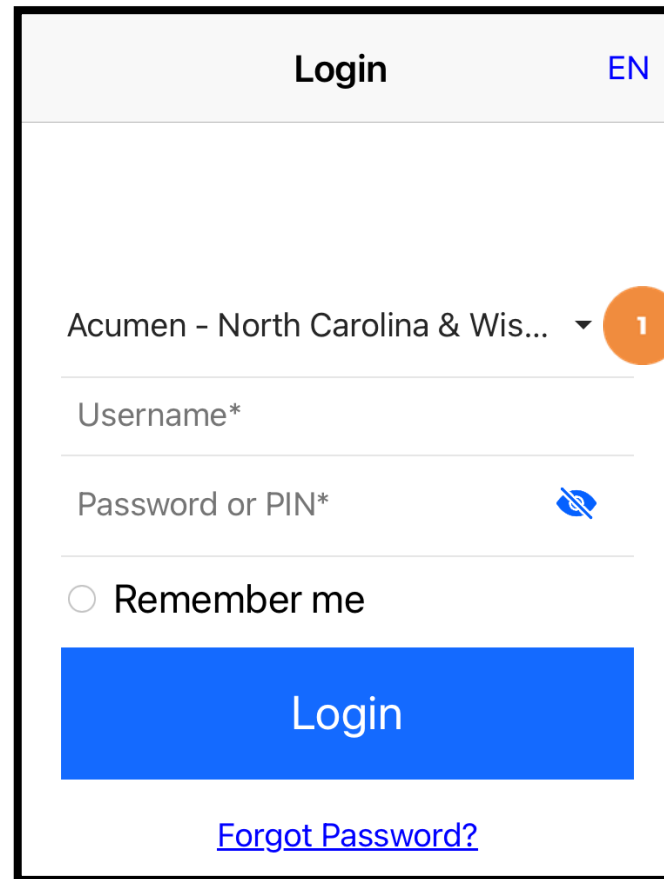
☐ Remember me

Login

[Forgot Password?](#)

Add More Agencies

1. To add more agencies, click the **drop-down** on the agency field.
2. If the desired agency is not listed, click **Add New** on the Agency results list.



Login EN

Acumen - North Carolina & Wis... ▾ 1

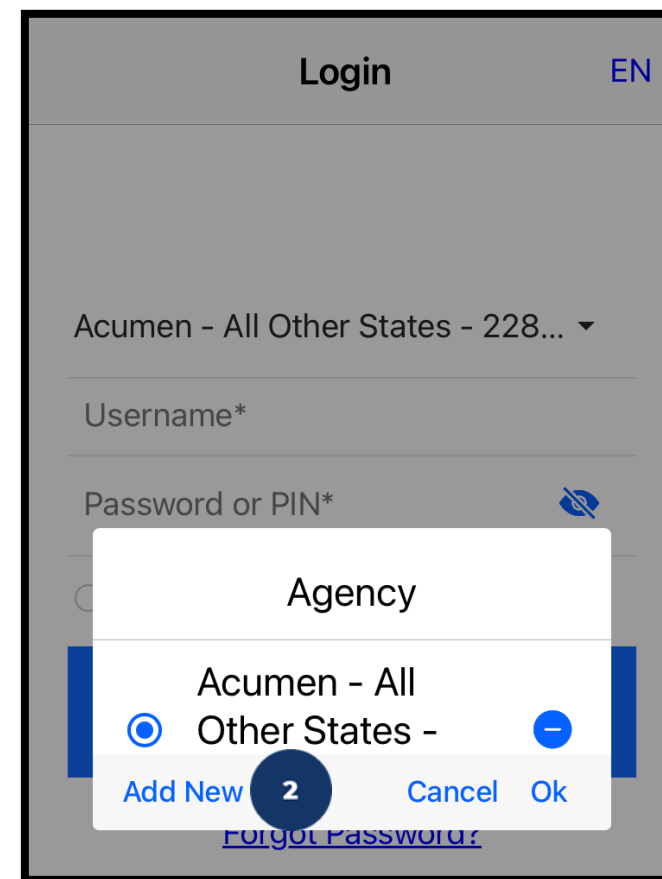
Username*

Password or PIN* 

☐ Remember me

Login

[Forgot Password?](#)



Login EN

Acumen - All Other States - 228... ▾

Username*

Password or PIN* 

Agency

Acumen - All

☒ Other States - 

Add New 2 Cancel Ok

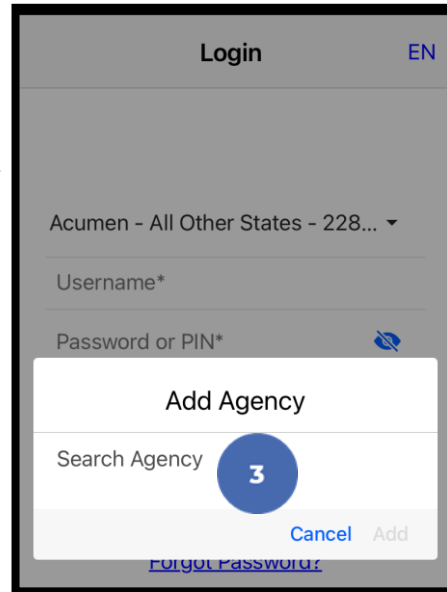
[Forgot Password?](#)

Add More Agencies

3. On the Add Agency window, type at least three consecutive characters of the agency name OR the system identifier in the Search Agency field.

❖ The consecutive characters can be located anywhere in the agency name or system identifier

4. Select the agency from the list
5. Click Add



Login EN

Acumen - All Other States - 228... ▾

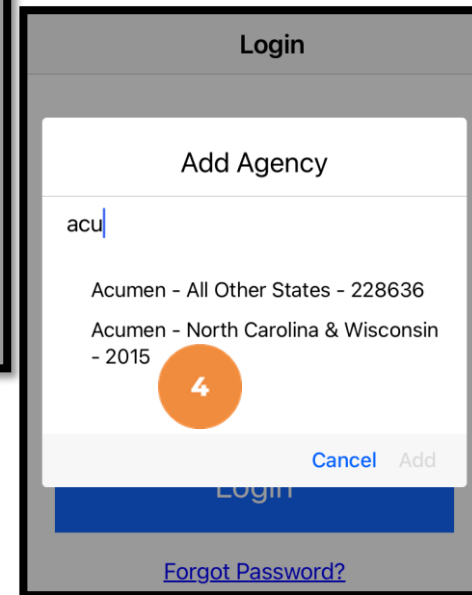
Username*

Password or PIN* 

Add Agency

Search Agency **3**

[Forgot Password?](#) Cancel Add



Login

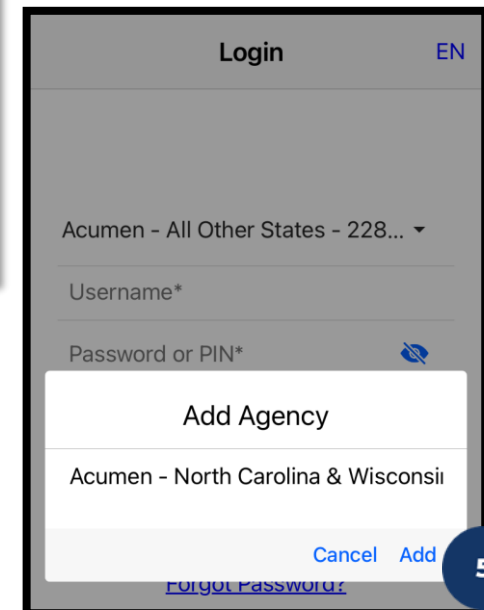
Add Agency

acu

Acumen - All Other States - 228636

Acumen - North Carolina & Wisconsin - 2015 **4**

[Forgot Password?](#) Cancel Add



Login EN

Acumen - All Other States - 228... ▾

Username*

Password or PIN* 

Add Agency

Acumen - North Carolina & Wisconsin

[Forgot Password?](#) Cancel Add **5**

The agency is now added and displays on the agency drop-down menu.
At each log in, select the appropriate agency.

Log into the DCI Mobile EVV App



1. Enter employee credentials
 - ✓ Acumen provided a **username** and **password** on the Good to Go letter via email or mail
2. Optionally, select the **Remember me** button to remember the Username.

***Please note:** Do not use on a shared device

3. Click the blue **Login** button to access the mobile app
 - ✓ The **Forgot Password** link is available if necessary but requires a valid email address to be on file

***Please note:** Contact Acumen customer service or your support coordinator with any login issues

A screenshot of the mobile app's login interface. At the top, the word "Login" is centered, and "EN" is in the top right corner. Below this is a dropdown menu showing "Acumen - North Carolina & Wis...". The next section contains two input fields: "Username*" and "Password or PIN*", each with an orange circle containing the number "1" next to it. Below these fields is a radio button labeled "Remember me" with an orange circle containing the number "2" next to it. At the bottom of the form is a large blue button labeled "Login" with an orange circle containing the number "3" next to it. Below the button is a blue link that says "Forgot Password?".

Login EN

Acumen - North Carolina & Wis... ▼

Username* 1

Password or PIN* 1

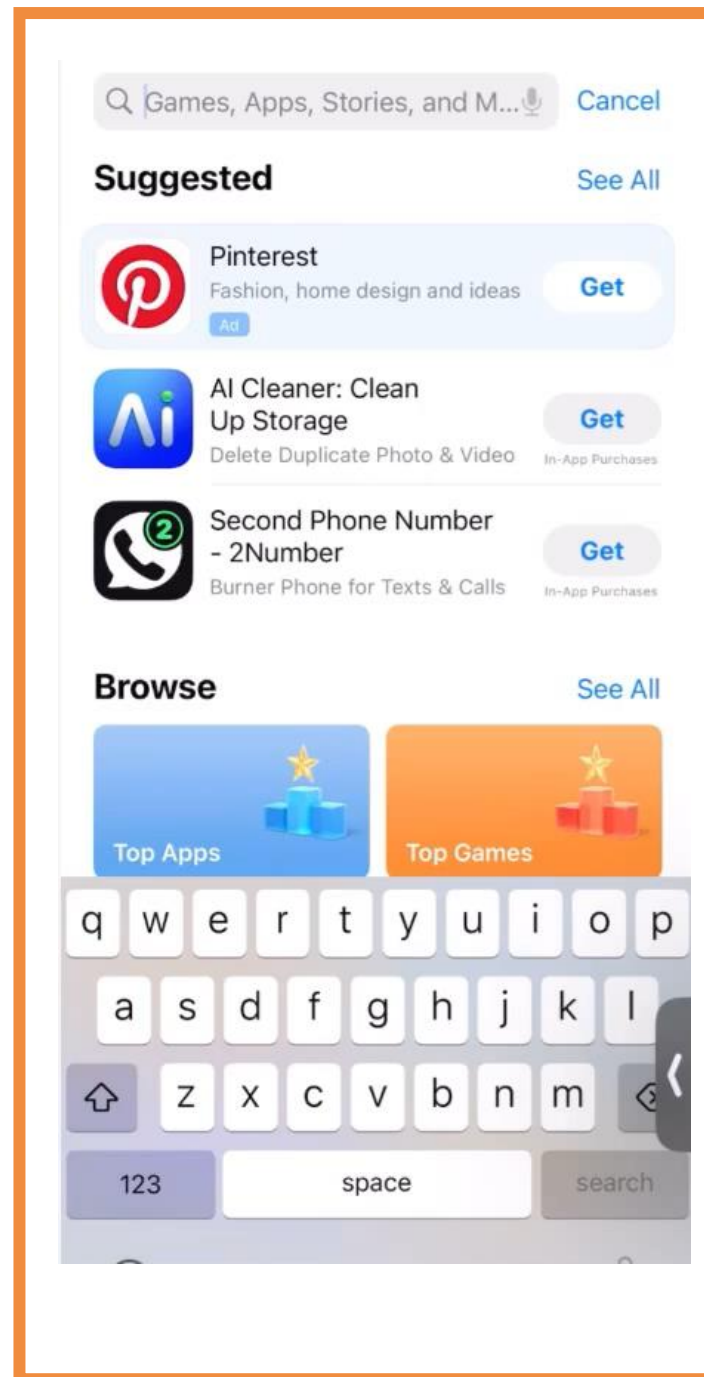
☐ Remember me 2

Login 3

[Forgot Password?](#)

Mobile App Video

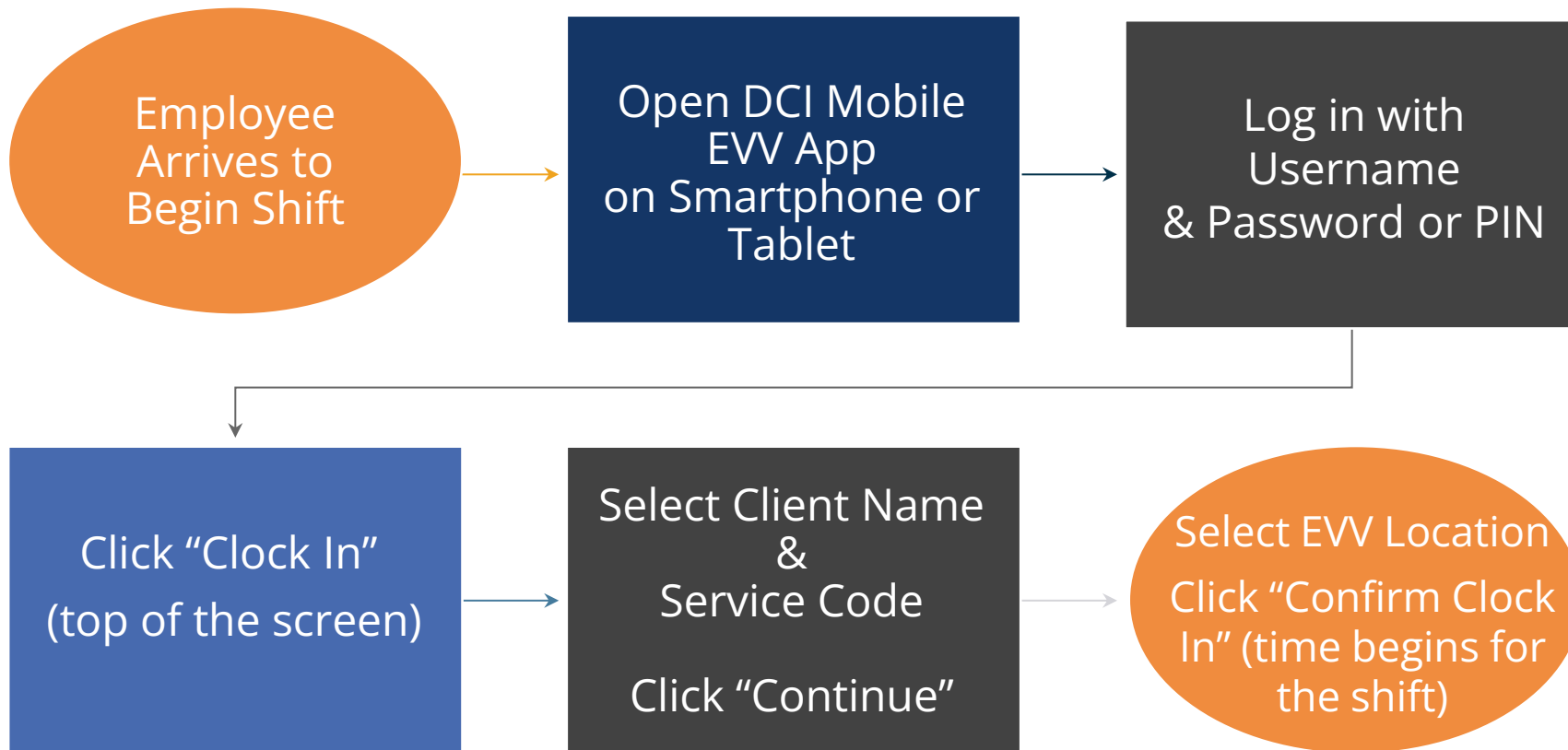
**Download,
Select
Agency,
Log In**



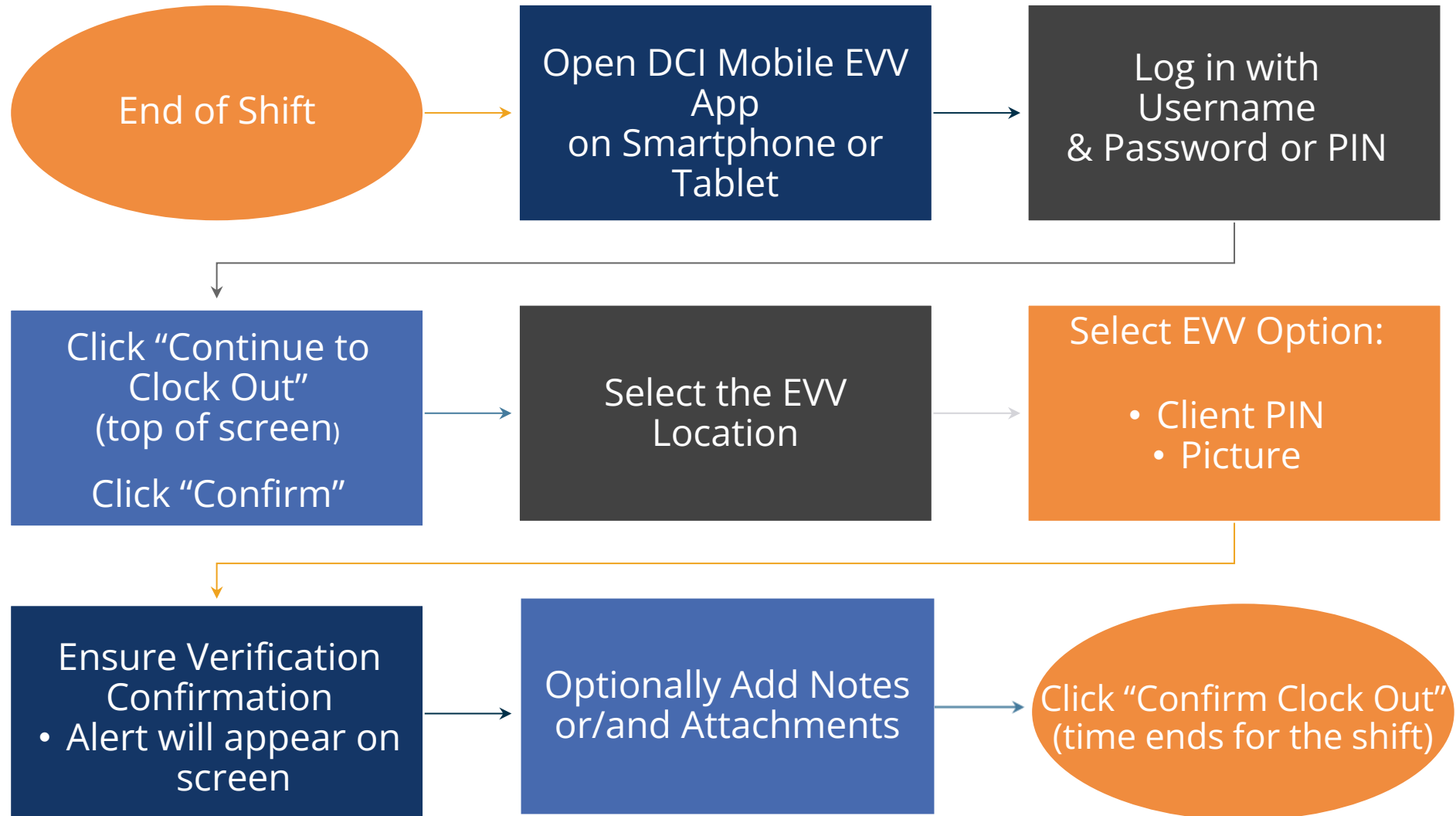
Employee Mobile App

Employee Clock In/Out Process

Overview Mobile App Clock In

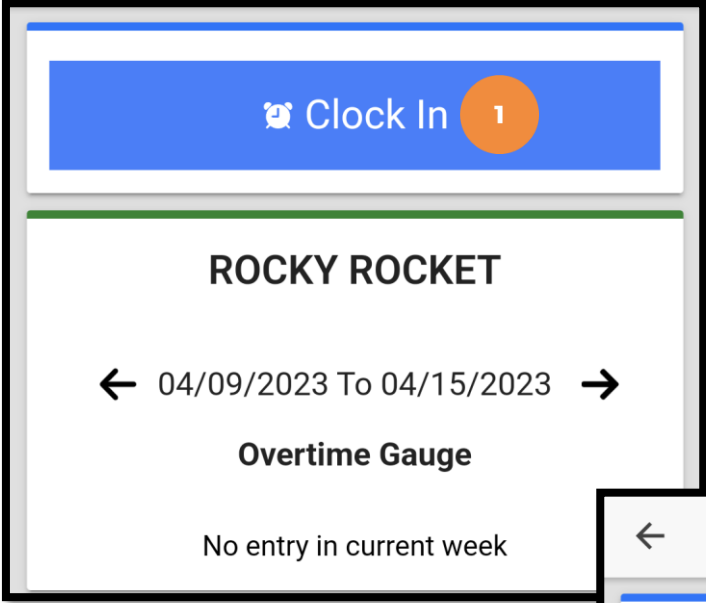


Overview Mobile App Clock Out



Clock In on Mobile App

1. Click the blue **Clock In** Button
2. Select the Client's Name
 - Auto-fills for a single client
3. Select the Service Code
 - Auto-fills for a single service
4. Cost Center is always auto-filled
5. Click the blue **Continue** button



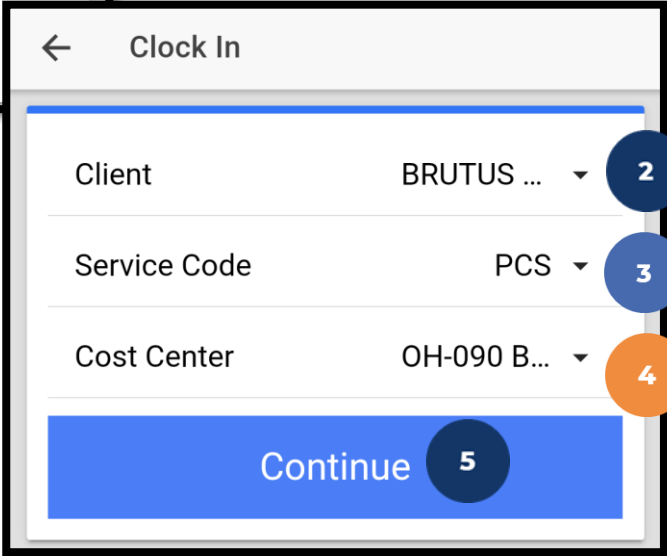
Clock In 1

ROCKY ROCKET

← 04/09/2023 To 04/15/2023 →

Overtime Gauge

No entry in current week



← Clock In

Client BRUTUS ... 2

Service Code PCS 3

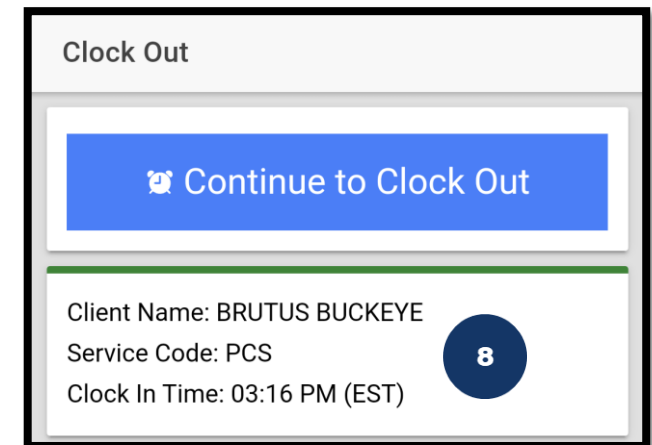
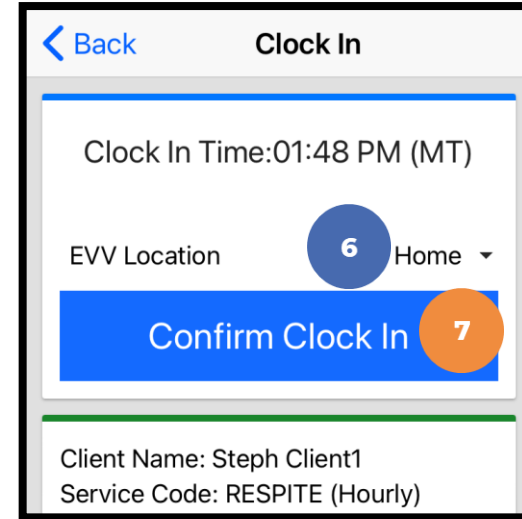
Cost Center OH-090 B... 4

Continue 5

Clock In on Mobile App (cont.)

6. Select the EVV Location
 - Defaults to the primary location
7. Select Confirm Clock In
 - * *This will start the time for the shift*
8. Clock In Details Summary
 - Clock in is successful when the blue **Continue to Clock Out** button displays
 - Clock in details display in summary form

***Please note:** Users do not need to stay logged into the mobile app during their shift and cannot take any other action until clocked out.



Mobile App – EVV Options (Client/Employer Attestation)



- There are two EVV (client attestation) options that allow the client to verify that they received service
 - ✓ Choose only one option per shift (each clock out)
- Client attestation is an extra layer of protection against potential fraud because the client/employer is “signing off” on the punch in real time

***Please note:** The employer must still *review* AND *approve* punch entries in their Pending Entries tab each pay period.

A screenshot of a mobile application interface titled "Clock Out Verification". At the top left is a blue back arrow and the word "Back". The title "Clock Out Verification" is at the top right. Below the title is a section "Clock Out Verification Required". Under this, "EVV Location" is displayed with "Home" and a dropdown arrow. There are two large blue buttons: "Client PIN" with a lock icon and "Picture" with a camera icon. At the bottom, a white box contains the text: "Client Name: Steph Client", "Service Code: PCS", and "Clock In Time: 07:12 AM (MT)".

< Back | Clock Out Verification

Clock Out Verification Required

EVV Location Home ▾

Client PIN

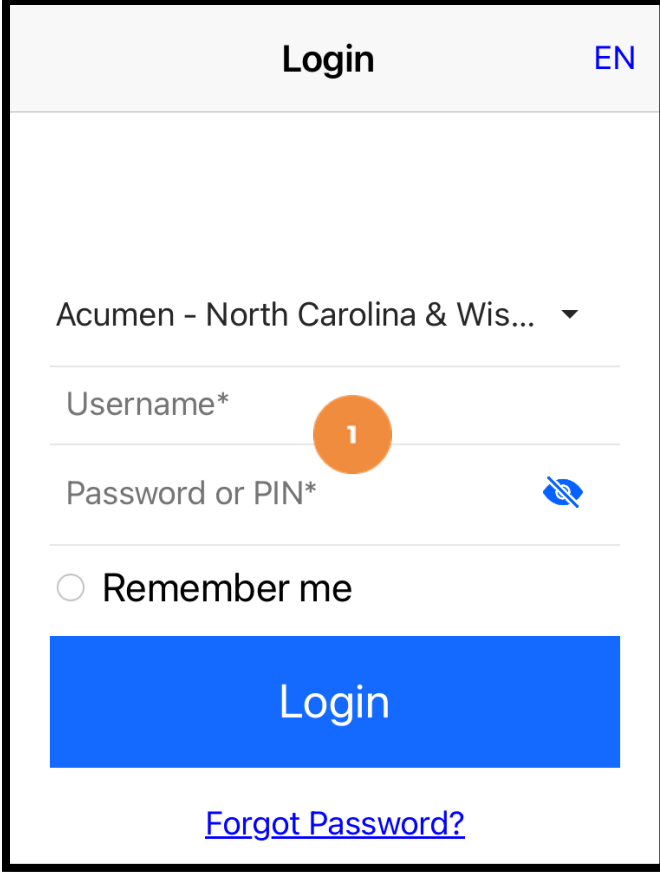
Picture

Client Name: Steph Client
Service Code: PCS
Clock In Time: 07:12 AM (MT)

Clock Out - EVV Option #1

Client PIN

1. At the end of the shift, log in to the mobile app.
2. Click the blue **Continue to Clock Out** button
3. Select **Confirm** to proceed with clocking out



EN

Acumen - North Carolina & Wis... ▾

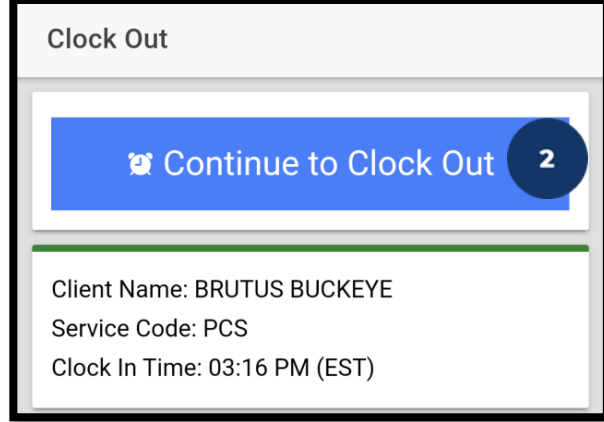
Username* 1

Password or PIN* 

☐ Remember me

Login

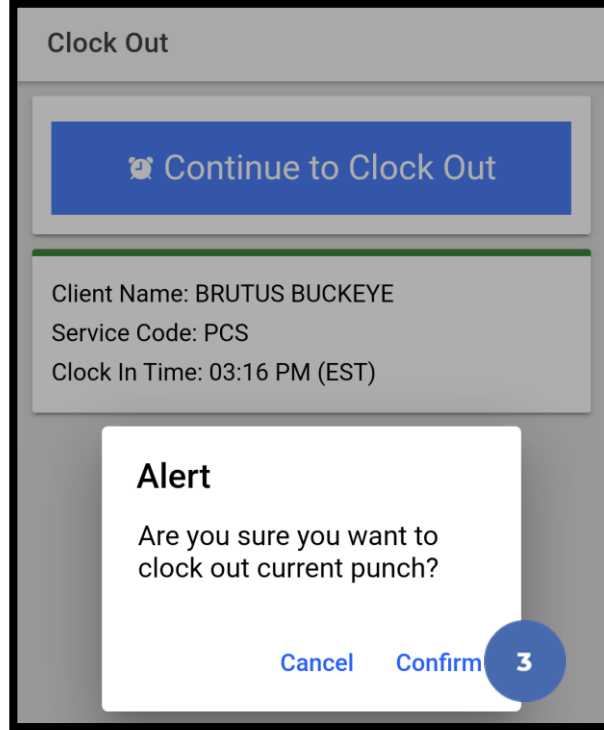
[Forgot Password?](#)



Clock Out

 Continue to Clock Out 2

Client Name: BRUTUS BUCKEYE
Service Code: PCS
Clock In Time: 03:16 PM (EST)



Clock Out

 Continue to Clock Out

Client Name: BRUTUS BUCKEYE
Service Code: PCS
Clock In Time: 03:16 PM (EST)

Alert

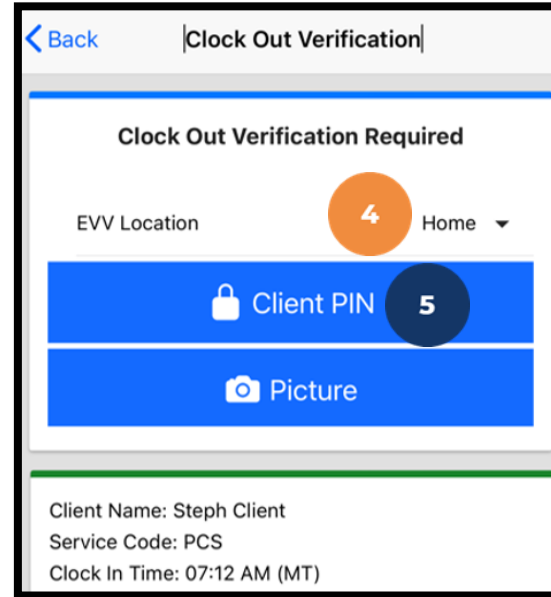
Are you sure you want to clock out current punch?

Cancel Confirm 3

Clock Out - EVV Option #1 (cont.)

Client PIN

4. Select the EVV Location
5. Select the clock out verification type:
 - ✓ Client PIN
6. Hand the mobile device to the client or employer, who enters the Client PIN
The client or employer clicks the blue **Submit** button when ready
7. The client or employer clicks **Confirm** to validate the PIN and hands the mobile device back to the employee



Back | Clock Out Verification

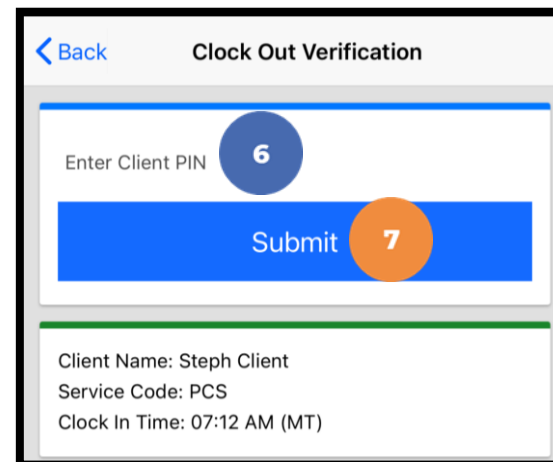
Clock Out Verification Required

EVV Location 4 Home

Client PIN 5

Picture

Client Name: Steph Client
Service Code: PCS
Clock In Time: 07:12 AM (MT)

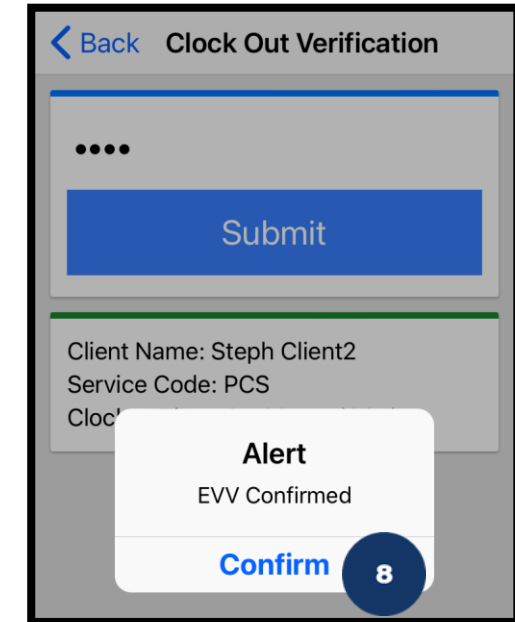


Back Clock Out Verification

Enter Client PIN 6

Submit 7

Client Name: Steph Client
Service Code: PCS
Clock In Time: 07:12 AM (MT)



Back Clock Out Verification

Submit

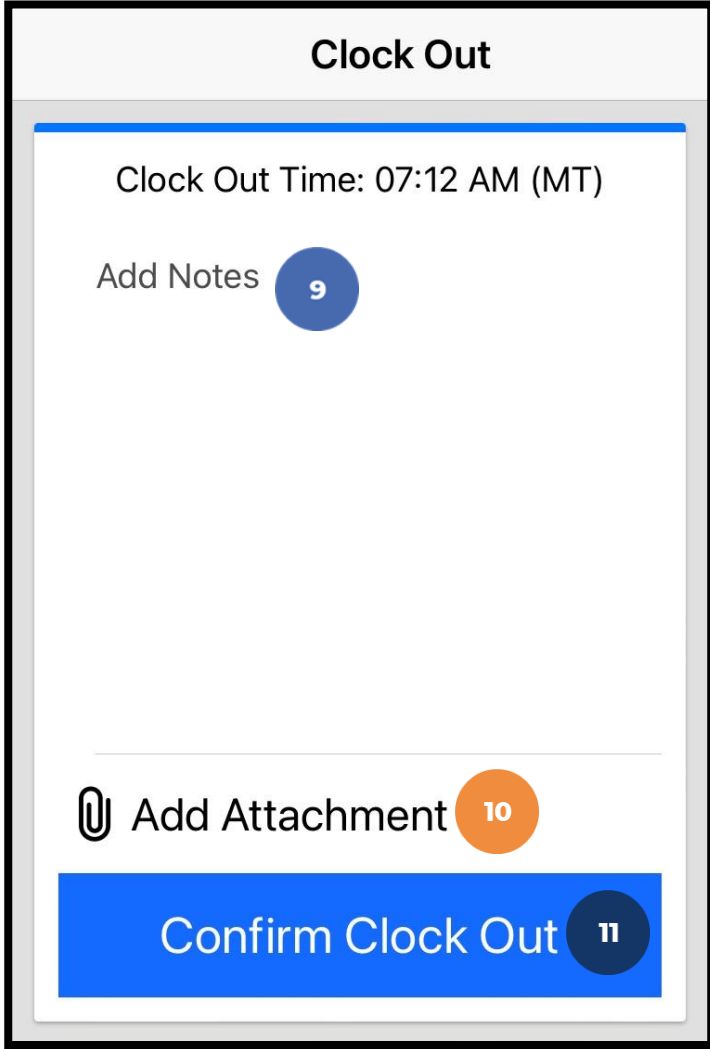
Client Name: Steph Client2
Service Code: PCS
Clock In Time: 07:12 AM (MT)

Alert
EVV Confirmed
Confirm 8

Clock Out – EVV Option #1 (cont.)

The employee:

9. Enters any notes for the punch (optional)
10. Adds an attachment for the punch (optional)
11. Clicks the blue **Confirm Clock Out** button when ready
 - ✓ *This will stop the time for the shift*
12. Punch Confirmation
 - Punch details are shown
 - Click the blue **Home** button when ready



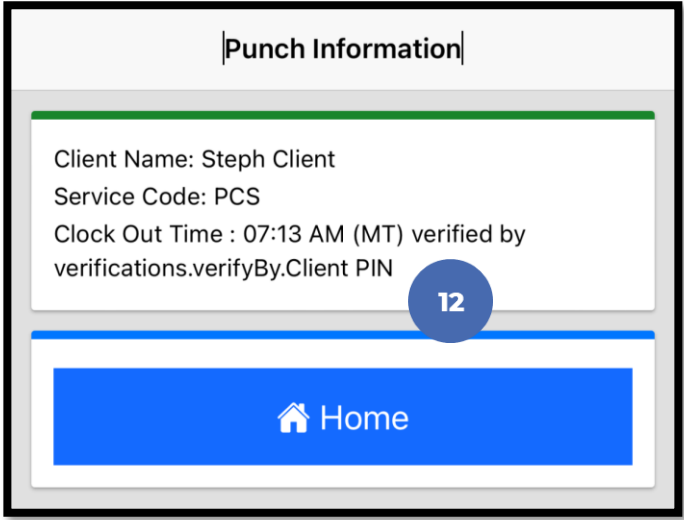
Clock Out

Clock Out Time: 07:12 AM (MT)

Add Notes **9**

Add Attachment **10**

Confirm Clock Out **11**



Punch Information

Client Name: Steph Client
Service Code: PCS
Clock Out Time : 07:13 AM (MT) verified by verifications.verifyBy.Client PIN **12**

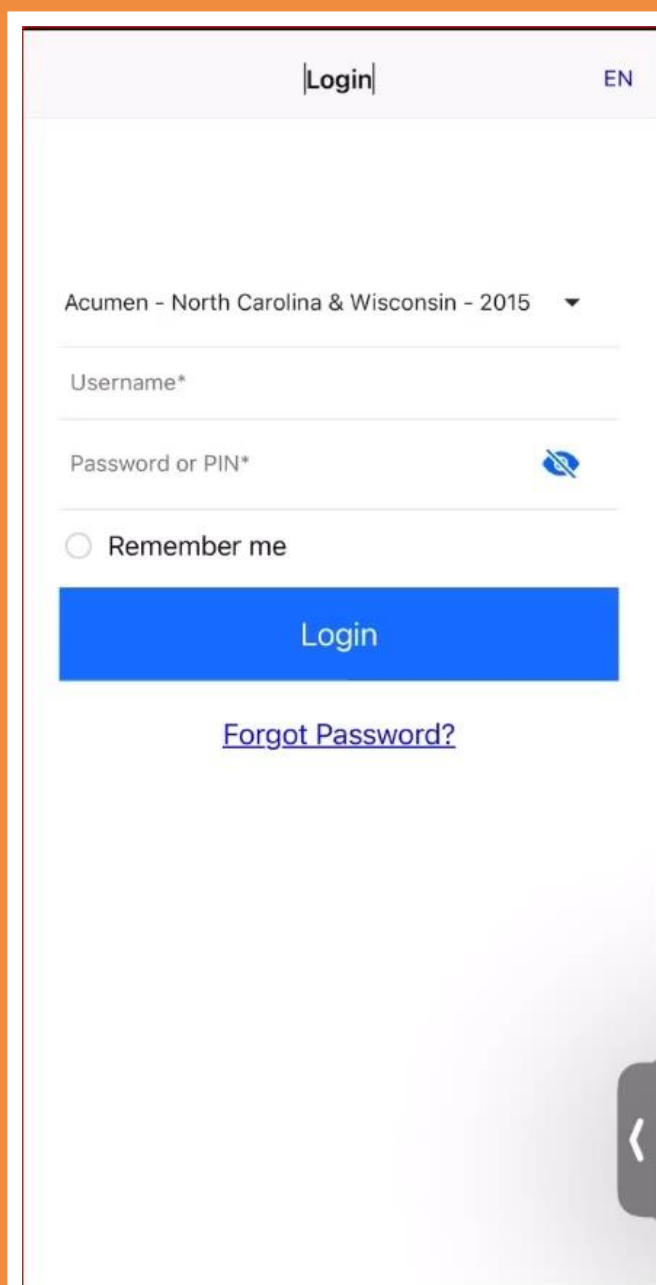
Home

Congratulations!
The shift is complete.

Mobile App Video

Clock in and Out Using Client PIN Option

Proprietary: For Acumen and Customer Use Only

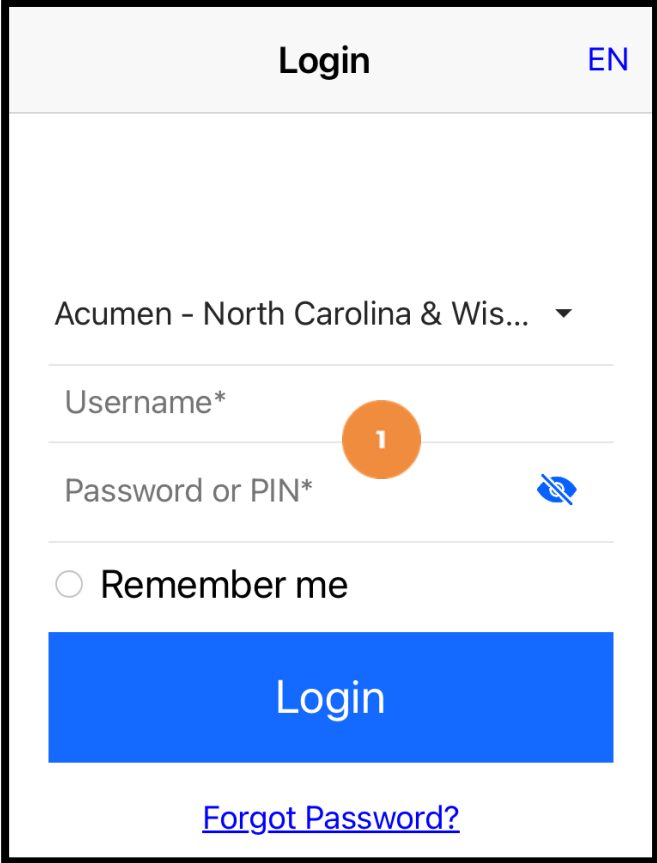


The screenshot shows the login interface of the Acumen mobile app. At the top, there is a header bar with a "Login" button and a language selector set to "EN". Below the header, a dropdown menu displays "Acumen - North Carolina & Wisconsin - 2015". The main form contains two input fields: "Username*" and "Password or PIN*", the latter with a toggle icon for visibility. A "Remember me" checkbox is positioned below the password field. A large blue "Login" button is centered below the form. A link for "Forgot Password?" is located below the login button. The bottom of the screen shows a portion of a navigation bar with a back arrow icon.

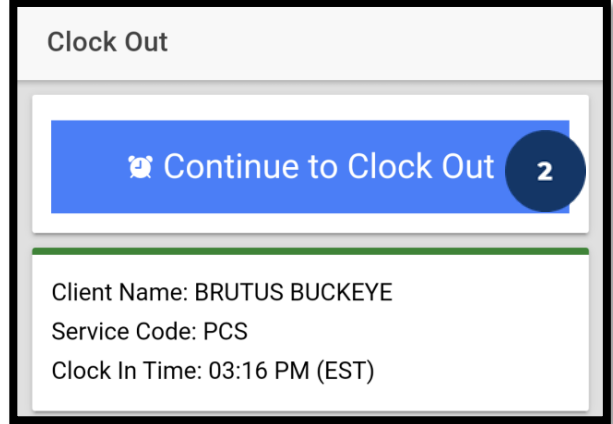
Clock Out - EVV Option #2

Picture

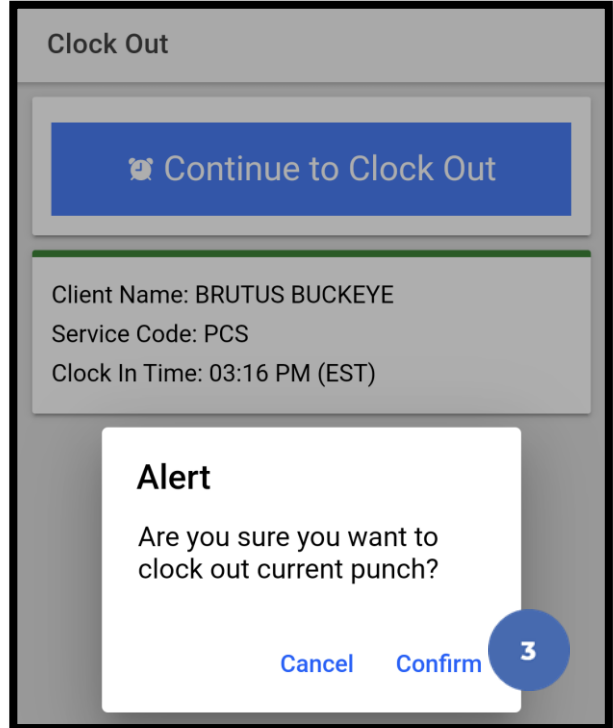
1. At the end of the shift, log in to the mobile app.
2. Click the blue **Continue to Clock Out** button
3. Select **Confirm** to proceed with clocking out



The login screen features a header with 'Login' and 'EN'. Below is a dropdown menu for 'Acumen - North Carolina & Wis...'. There are input fields for 'Username*' and 'Password or PIN*', with an orange circle '1' highlighting the password field. A 'Remember me' radio button is present. A large blue 'Login' button is at the bottom, with a '[Forgot Password?](#)' link below it.



The 'Clock Out' screen shows a blue button with a clock icon and the text 'Continue to Clock Out', with a blue circle '2' highlighting it. Below the button, the following information is displayed: Client Name: BRUTUS BUCKEYE, Service Code: PCS, and Clock In Time: 03:16 PM (EST).



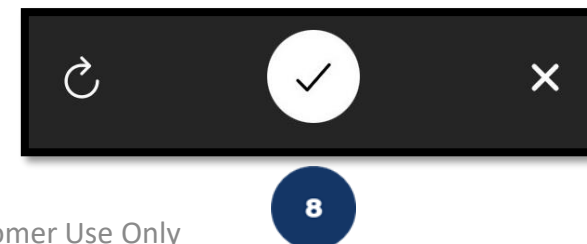
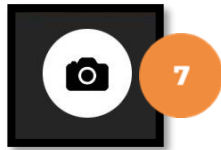
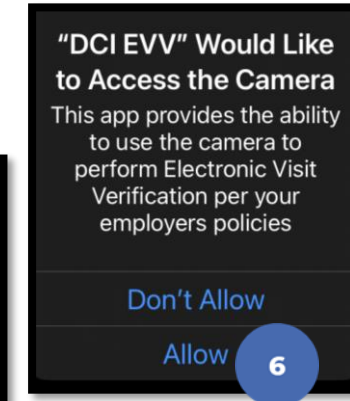
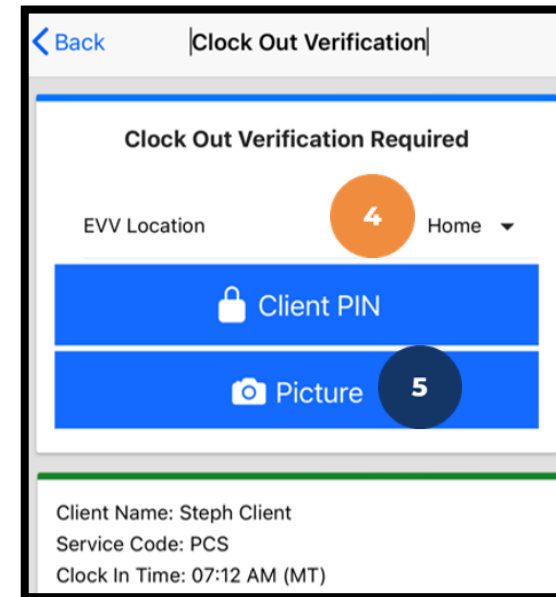
The 'Clock Out' screen shows the same information as the previous screen. Below the information, there is an 'Alert' box with the text 'Are you sure you want to clock out current punch?'. At the bottom of the alert box are 'Cancel' and 'Confirm' buttons, with a blue circle '3' highlighting the 'Confirm' button.

Clock Out - EVV Option #2 (cont.)

Picture

4. Select the EVV Location
5. Select the clock out verification type:
 - ✓ Picture
6. A pop-up stating "DCI EVV" Would Like to Access the Camera appears. Select **Allow**.
7. Click the **camera** icon to take a picture of the client
8. Click the **checkmark** to accept the picture, the X to cancel, or the circular arrow to retake the picture.
9. Click **Confirm** in the alert pop-up box to confirm the punch

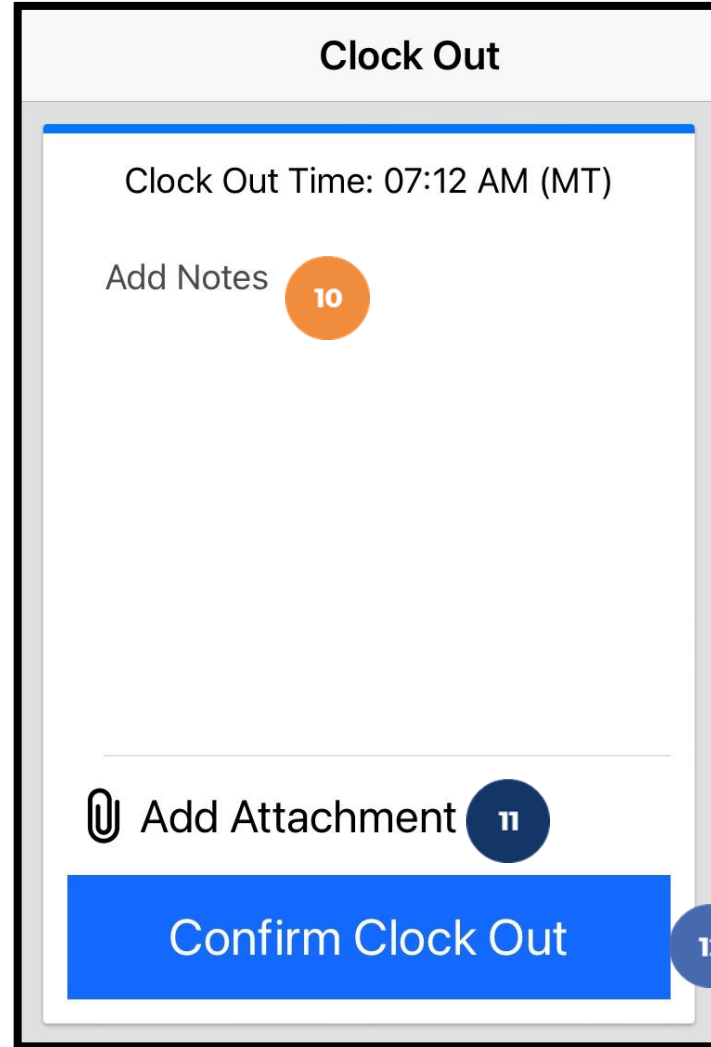
***Please note:** Client photos taken by the employee for electronic visit verification (EVV) are never stored on the employee's cell phone when using the DCI Mobile App



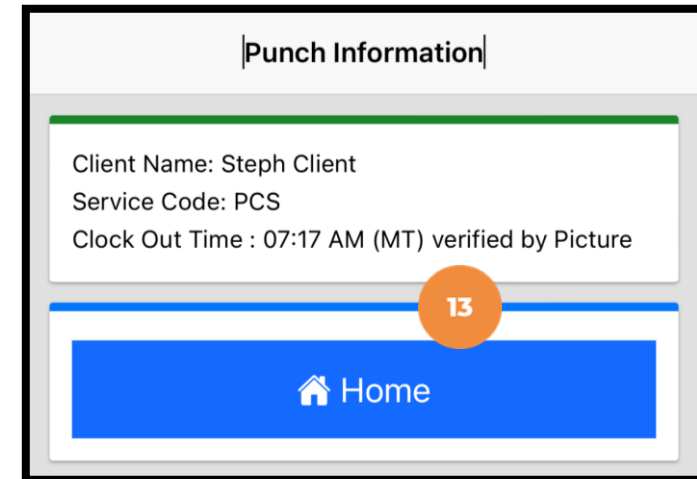
Clock Out – EVV Option #2 (cont.)

The employee:

10. Enters any notes for the punch (optional)
11. Adds an attachment for the punch (optional)
12. Clicks the blue **Confirm Clock Out** button when ready
 - ✓ *This will stop the time for the shift*
13. Punch Confirmation
 - ✓ Punch details are shown
 - ✓ Click the blue **Home** button when ready



The screenshot shows the 'Clock Out' interface. At the top, it says 'Clock Out'. Below that, it displays 'Clock Out Time: 07:12 AM (MT)'. There is a section for 'Add Notes' with a blue circle containing the number 10. At the bottom, there is an 'Add Attachment' button with a paperclip icon and a blue circle containing the number 11. Below that is a large blue button labeled 'Confirm Clock Out' with a blue circle containing the number 12.



The screenshot shows the 'Punch Information' screen. It displays the following details: 'Client Name: Steph Client', 'Service Code: PCS', and 'Clock Out Time : 07:17 AM (MT) verified by Picture'. Below this information is a blue button labeled 'Home' with a house icon and a blue circle containing the number 13.

Congratulations!
The shift is complete.

Mobile App Video

Clock in and Out Using Client Picture Option

Login EN

Acumen - North Carolina & Wisconsin - 2015

Username*

Password or PIN*

☐ Remember me

Login

[Forgot Password?](#)

Proprietary: For Acumen and Customer Use Only

Mobile App Offline Mode

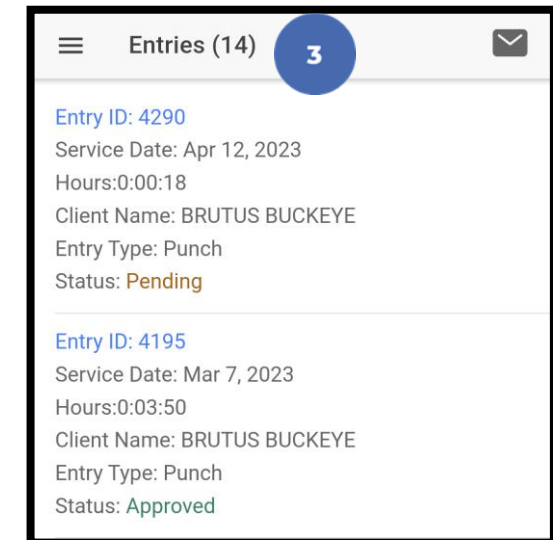
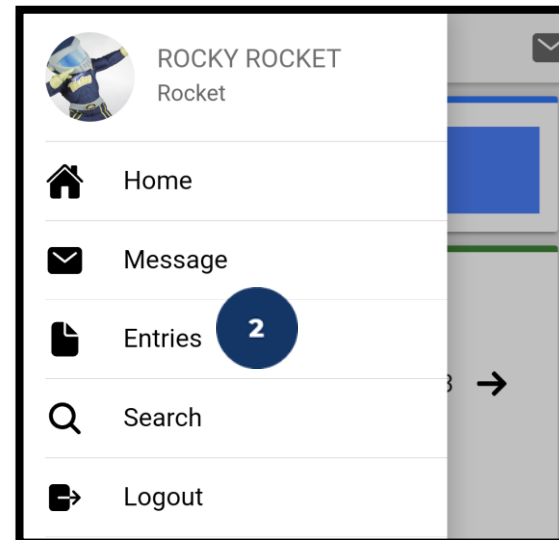
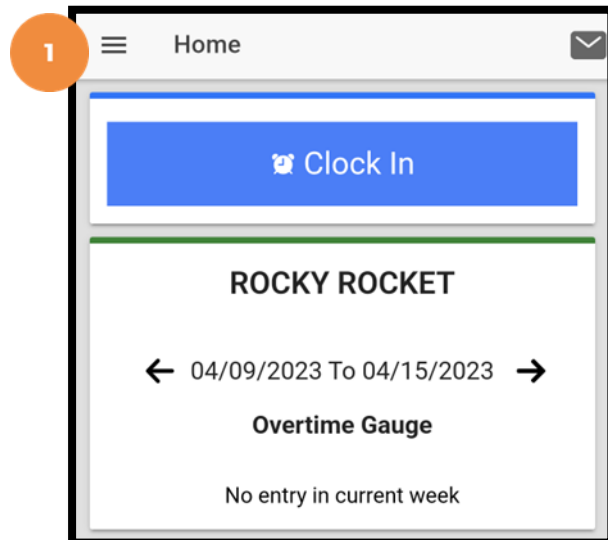


- Offline mode allows the employee to use the mobile app on a **registered device** when the device is not connected to the internet or loses connection while the app is in use
 - ✓ **Please note:** A device is registered automatically the first time the user logs into the mobile app while connected to a cellular network or internet
 - ✓ A user can only have one registered device
- Useful when there is limited or no cellular or Wi-Fi connection at the service location
- Limits users to only clock in and clock out
- Offline mode status is indicated by a red **"Offline"** bar at the top of the dashboard
- Punches made in offline mode are saved in the mobile app as offline punches, will automatically upload when the user connects to a cellular or wireless network, and will be listed under Entries.

Review Entries

1. Click the **Menu** in the top left corner of the screen
2. Select **Entries** on the submenu
3. View the complete list of entries
 - Verify that all time is submitted
 - The employer approves the time as needed

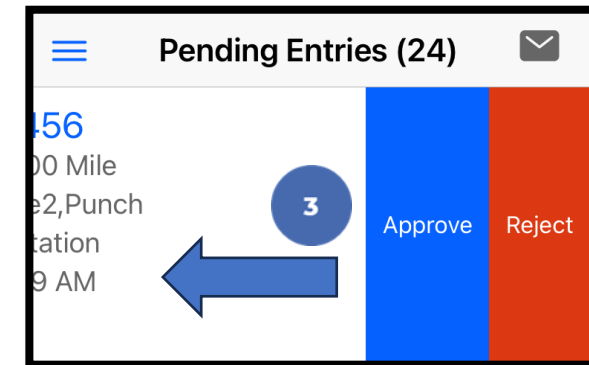
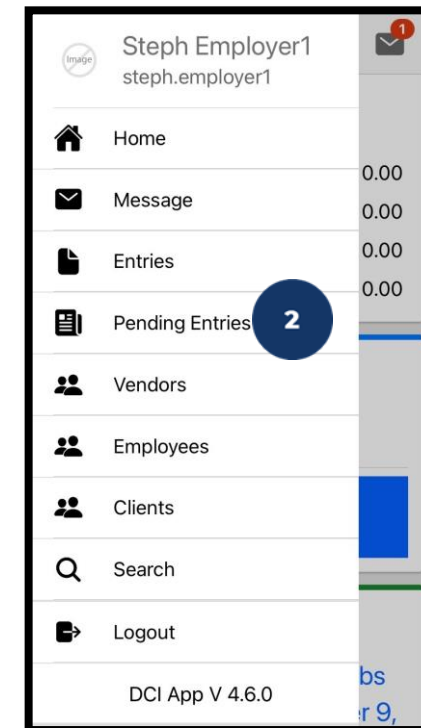
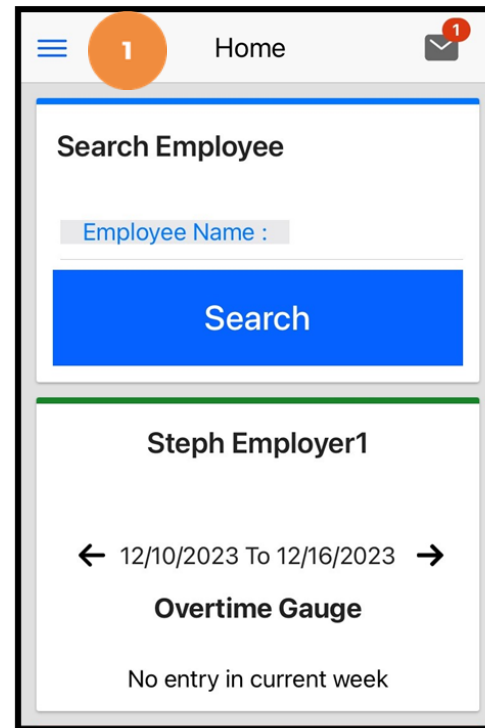
***Please note:** Punches cannot be edited in the mobile app. Please edit the punch via the web portal.



Employer Mobile App

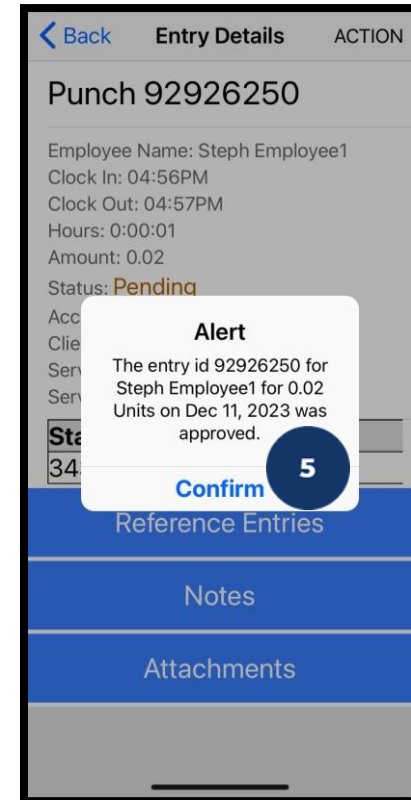
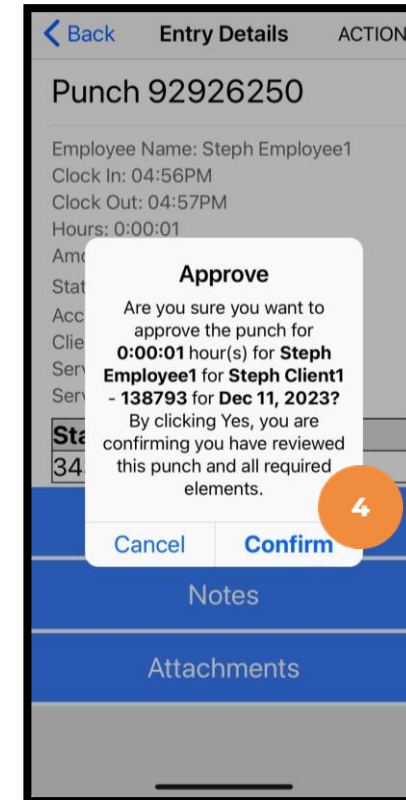
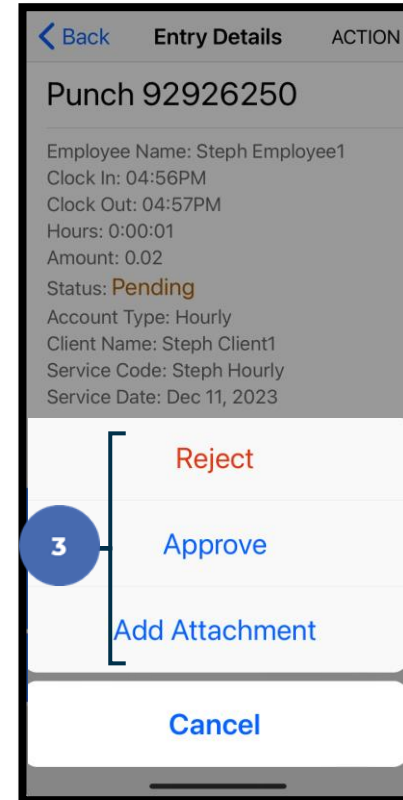
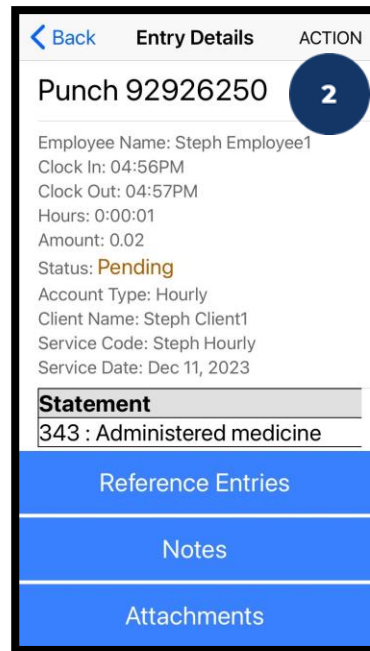
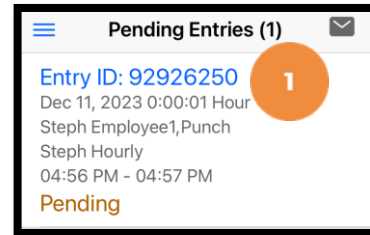
Review & Approve Entries

1. Click the **Menu** in the top left corner of the screen
2. Select **Pending Entries** on the submenu
3. **Swipe left** on the punch to select either the blue **Approve** button or the red **Reject** button



Review & Approve Entries (cont.)

1. Alternatively, click the blue entry ID hyperlink to open the entry details and take action
2. Click **ACTION** in the top right corner
3. Select **Reject**, **Approve**, or **Add Attachment**.
4. On the pop-up alert window, view the punch details and Click **Confirm** to initiate the confirmation process.
5. On the pop-up alert window, click **Confirm** again to complete the confirmation process.



*Please note:

If the action taken was to approve the entry, the status changes to Approved and the entry will be processed for payment.

Mobile App Video

Employer Reviews & Approves Entries

LoginEN

Username*

Password or PIN*

☐ Remember me

Login

[Forgot Password?](#)

DCI Web Portal

Proprietary: For Acumen and Customer Use Only



Navigation

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

Web Portal Basics

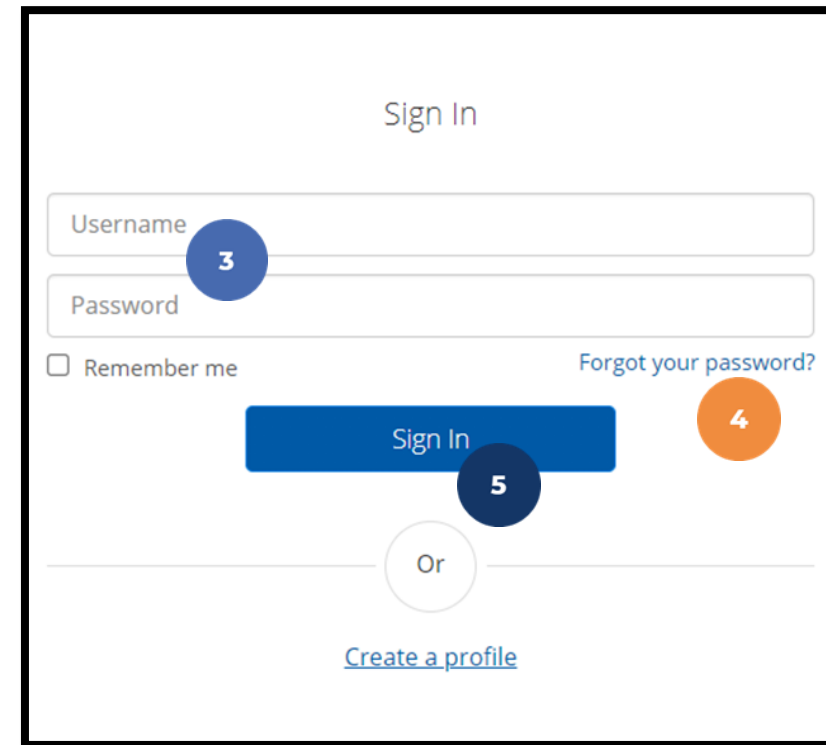
- The employer reviews and manages time
- Employees correct punches and/or enter historical time
- Users may update profile settings



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
 - This feature is only available for employees
3. Enter **username** and **password**
 - Credentials provided by Acumen
4. Utilize the “Forgot your password?” link if needed
5. Click the blue **Sign In** button

1 **outreach.dcisoftware.com**



Sign In

Username **3**

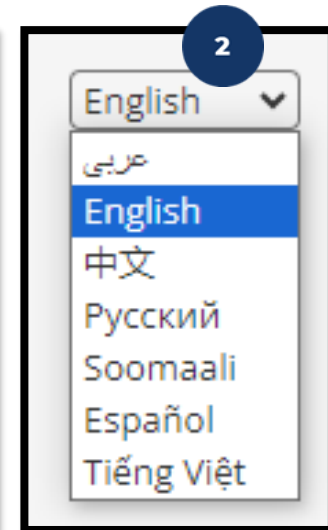
Password **3**

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

5 Sign In

Or

[Create a profile](#)



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

Profile Settings

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

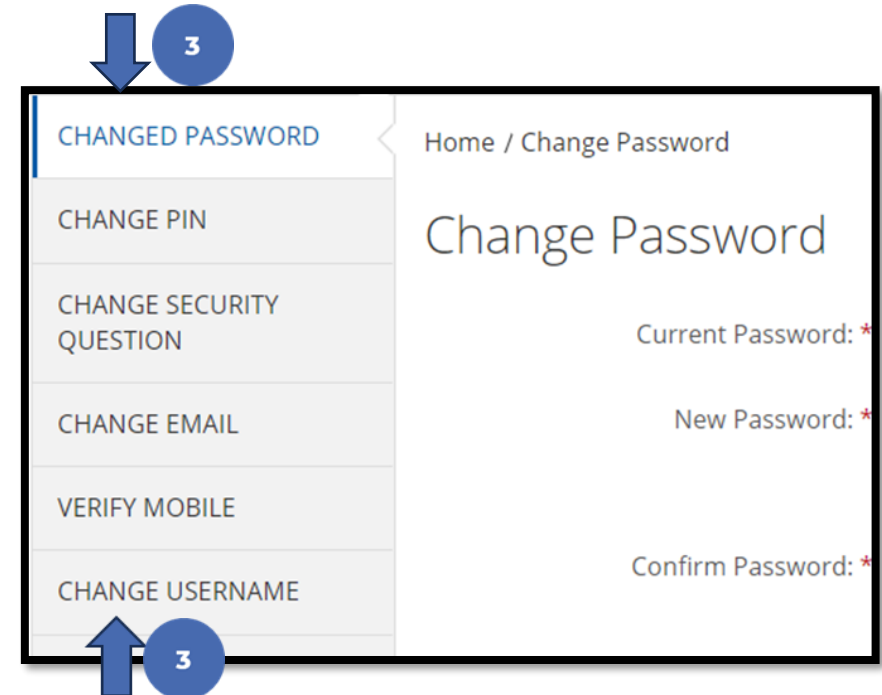
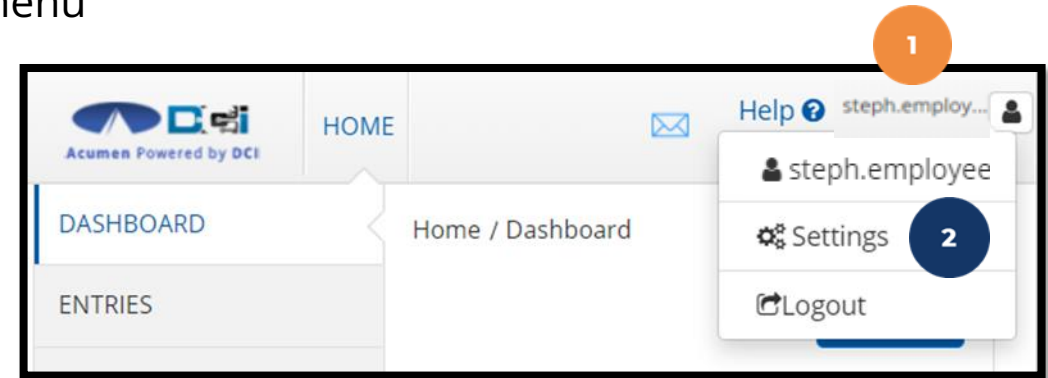


1. Click the **username** in the top right corner of the main menu

2. Click **Settings**

3. Select a submenu tab to update:

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



Add / Change PIN

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

1. Log in to the DCI web portal
2. Click the username in the top right corner of the main menu
3. Click **Settings** from the drop-down menu
4. Select **Change PIN** or **Add New PIN**
 - ✓ Add New PIN after a reset
 - ✓ Change PIN anytime
5. Enter password
6. Click the blue **Verify** button



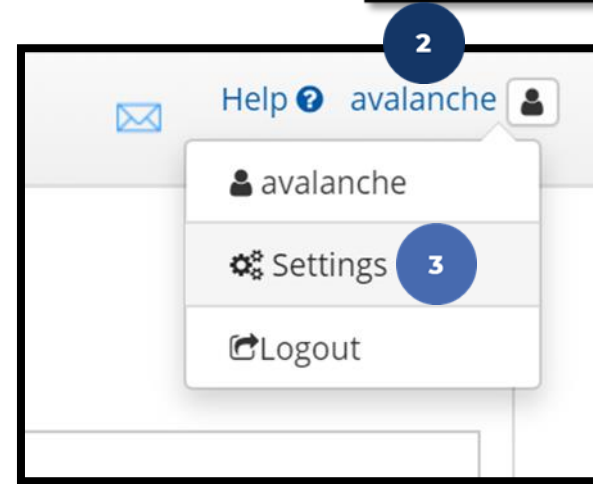
Sign In

Username

Password

☐ Remember me [Forgot your password?](#)

Sign In

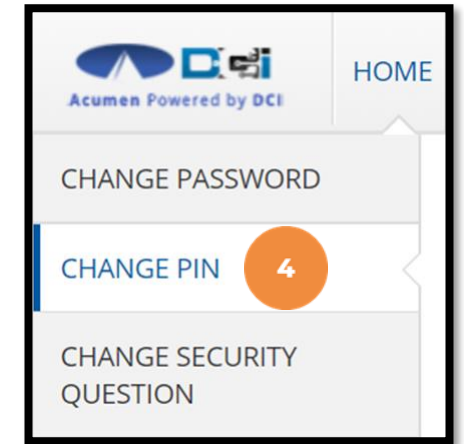


Help ? avalanche

avalanche

Settings

Logout



HOME

CHANGE PASSWORD

CHANGE PIN

CHANGE SECURITY QUESTION



Password: * Please enter password

Cancel Verify

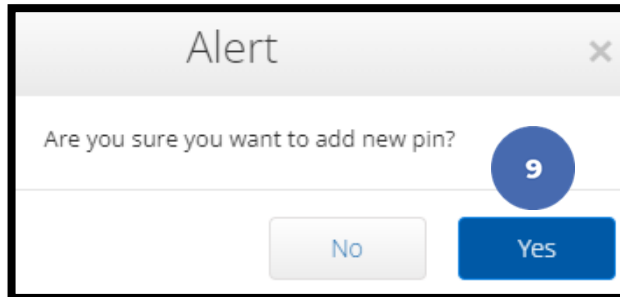
Add / Change PIN (cont.)

- Complete the New Pin field and retype the pin in the Confirm Pin field
- Click the blue **Change Pin** button
- Select **Yes** to confirm the pin change
- A green bar stating “Pin Changed Successfully!” appears



The screenshot shows a web form for changing a PIN. It has two input fields: "New Pin: *" and "Confirm Pin: *". The "New Pin" field contains the placeholder text "Please enter New Pin" and has an orange circle with the number 7 next to it. The "Confirm Pin" field contains the placeholder text "Please Confirm Pin" and has a blue circle with the number 8 next to it. At the bottom right of the form are two buttons: a light gray "Cancel" button and a blue "Change Pin" button.

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



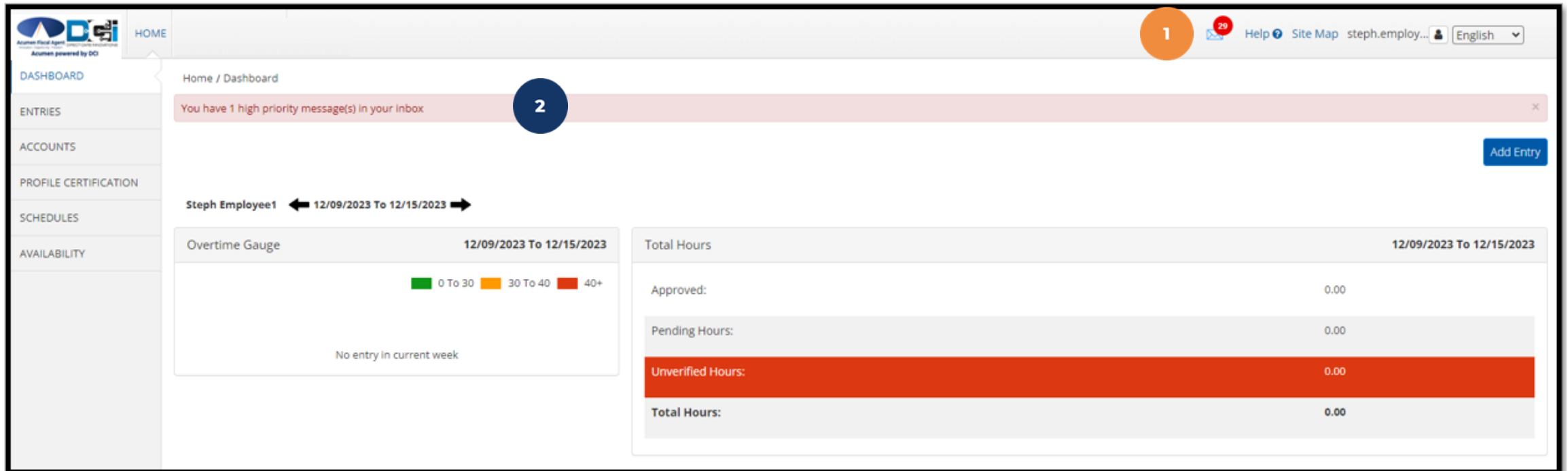
The screenshot shows a modal alert box titled "Alert" with a close button (X) in the top right corner. The text inside the alert says "Are you sure you want to add new pin?". There are two buttons at the bottom: a light gray "No" button and a blue "Yes" button. A blue circle with the number 9 is positioned to the right of the text.



The screenshot shows a green horizontal bar with a black border. Inside the bar, the text "Pin Changed Successfully!" is displayed in green. 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.



HOME

Acumen Fiscal Agent
powered by DCI

DASHBOARD

ENTRIES

ACCOUNTS

PROFILE CERTIFICATION

SCHEDULES

AVAILABILITY

Home / Dashboard

You have 1 high priority message(s) in your inbox

2

Add Entry

Steph Employee1 12/09/2023 To 12/15/2023

Overtime Gauge 12/09/2023 To 12/15/2023

0 To 30 30 To 40 40+

No entry in current week

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



ArchiveDelete

Export

Showing 30 out of 72 records

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

View Paystubs/Statements via Messaging Module

1. Locate the Paystub/Statement 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

☐	★	Attachments	From	Subject	Date/Time	Action
☐	★		DCI Support	Paystub for check date XX/XX/XXXX	07:13 PM	 

Notes

Attachments

2

☐	Date	File Name	File Type	File Size	Added By	Download	Status
☐	Dec 08, 2023	Paystub.pdf		2554.02 KB	Kristen Ziegler	 	Active

Employee Web Portal

***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.

Home Tab Details & Add New Entry



1. Log in to the [DCI Web Portal](https://outreach.dcisoftware.com)
2. Select the **Entries** tab to view a complete list of submitted time entries
3. Overtime Gauge & Total Hours display for the current calendar week
4. Click the **Add Entry** button to enter a historical time punch

outreach.dcisoftware.com

Sign In

Username 1

Password

☐ Remember me [Forgot your password?](#)

Sign In

The Dashboard is the landing page

HOME

DASHBOARD

ENTRIES 2

ACCOUNTS

PROFILE CERTIFICATION

Steph Employee ← 09/01/2024 To 09/07/2024 → 3

Overtime Gauge 09/01/2024 To 09/07/2024

123 Steph Employer

3.06

Total Hours 09/01/2024 To 09/07/2024

Approved:	0.00
Pending Hours:	3.06
Unverified Hours:	0.00
Total Hours:	3.06

4 Add Entry

Add New Entry (cont.)

5. Type a minimum of three characters to generate results and select the Client's name from the list
6. Select the Service Code
7. Select the Service Date
8. Enter the Check In (start) and Check Out (end) times

Add New Entry

Entry Type: *

Punch

Employee Name:

Steph Employee

Account Type: *

Hourly

Client: *

Steph Client - 125

5

X

Service Code: *

PCS Service Code

6

▼

Service Date: *

11/14/2024

7

📅

Check In: *

5:00 AM

8

🕒

Check Out: *

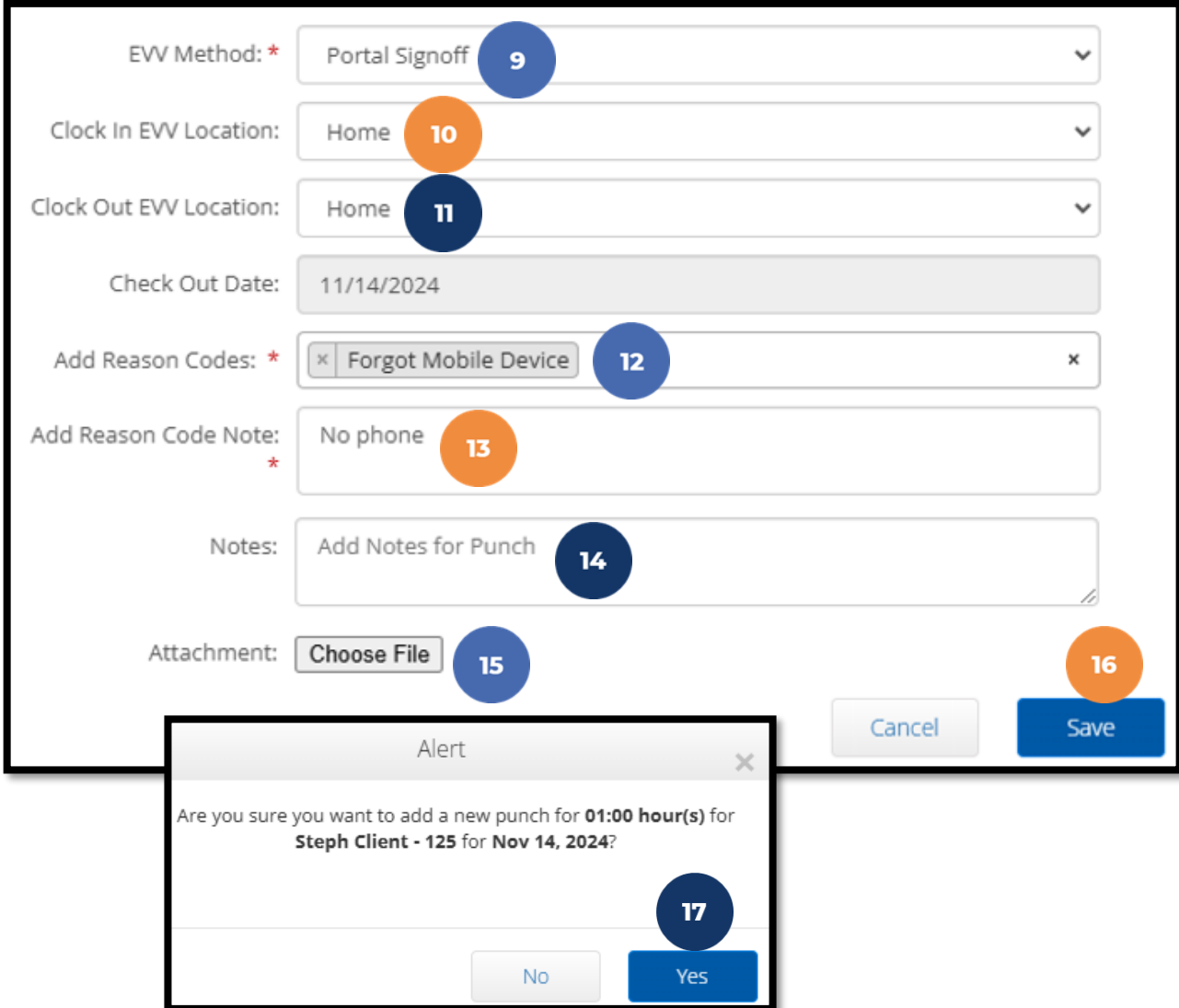
6:00 AM

8

🕒

Add New Entry (cont.)

9. Select Portal Signoff as the EVV Method
10. Select the Clock In EVV Location
11. Select the Clock Out EVV Location
12. Select a Reason Code from the drop-down
13. If required, add a Reason Code Note.
14. Enter Notes for the punch (optional)
15. Click the **Choose File** button to select and upload Attachments (optional)
16. Click **Save**
17. Click **Yes** to submit



EVV Method: * Portal Signoff 9

Clock In EVV Location: Home 10

Clock Out EVV Location: Home 11

Check Out Date: 11/14/2024

Add Reason Codes: * x Forgot Mobile Device 12 x

Add Reason Code Note: * No phone 13

Notes: Add Notes for Punch 14

Attachment: Choose File 15

Cancel 16 Save

Alert

Are you sure you want to add a new punch for 01:00 hour(s) for Steph Client - 125 for Nov 14, 2024?

No 17 Yes

Web Portal Video

Employee Adds (Historical) Entry



Sign In

☐ Remember me [Forgot your password?](#)

Or

[Create a profile](#)

Proprietary: For Acumen and Customer Use Only

Edit 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

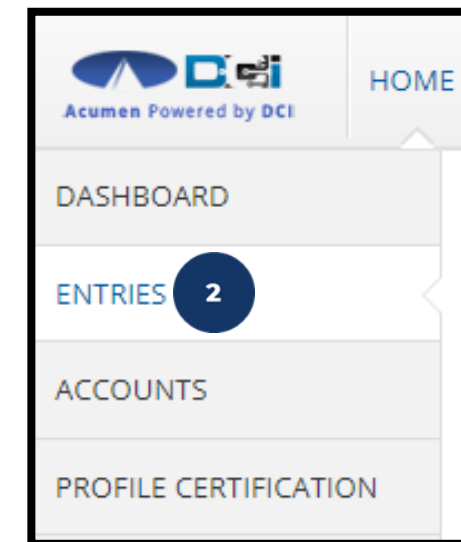
Sign In

Username

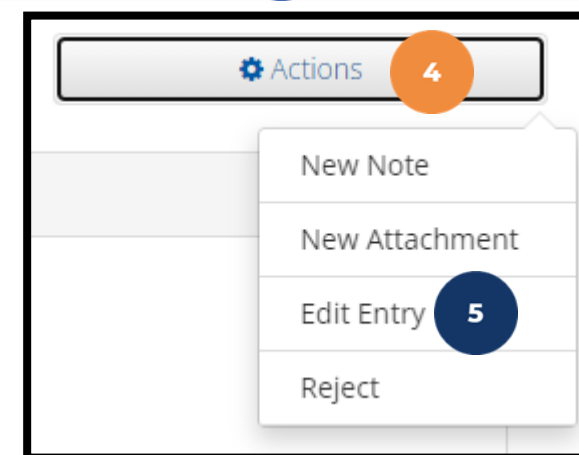
Password

☐ Remember me [Forgot your password?](#)

Sign In



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



Edit Entry (cont.)

***Please note!** Only entries in a Pending status can be edited by the employee



Edit Entry 6

Entry Type: * Punch

Employee Name: Steph Employee - 125

Account Type: * Hourly

Client: * Steph Client - 550

Service Code: * SDFSS

Select Date: * 09/05/2024

Check In: * 6:00 AM Check Out: * 9:00 AM

Pay Rate Name: THR

Check Out Date: 09/05/2024

EVV Method: * Portal Signoff

Diagnostic Code: Diagnostic Code

Notes: Add Notes for Punch

Attachment: Choose File

7 Cancel Save

6. Complete the necessary changes in the Edit Entry form wizard

7. Click **Save**

8. Click **Yes** to confirm the changes

The edited entry moves into a Rejected status, and a new (corrected) entry in Pending status is created.

Alert

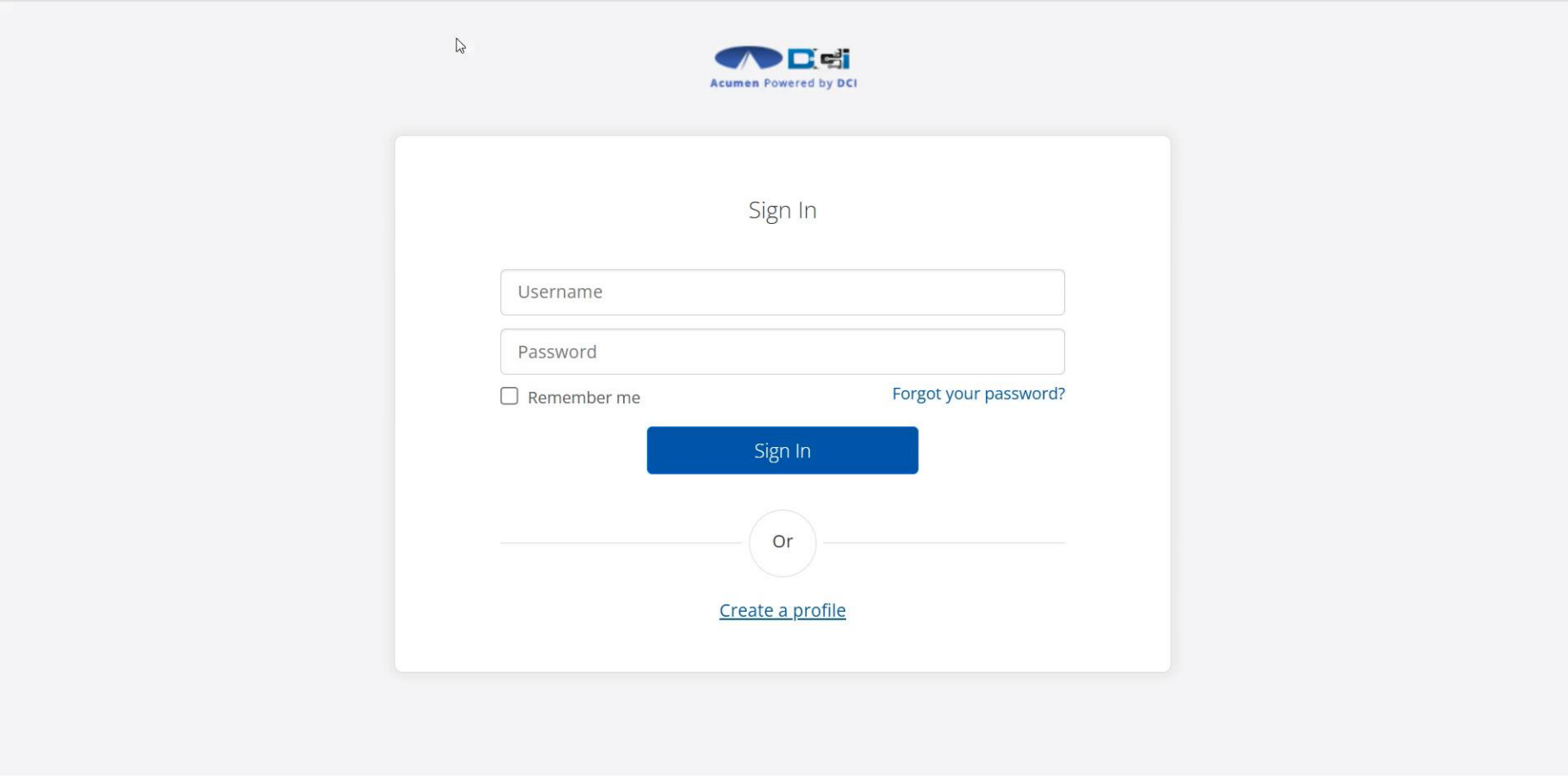
Are you sure you want to cancel the existing punch for **0:03:00** hour(s) for **Sep 05, 2024** and add a new punch for **02:30** hour(s) for **Steph Employee** for **Steph Client-550** for **Sep 05, 2024**?

8

No Yes

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 text "Acumen Powered by DCI". Below the logo is a "Sign In" heading. There are two input fields: "Username" and "Password". Below the "Password" field is a checkbox labeled "Remember me" and a link "Forgot your password?". A blue "Sign In" button is centered below the inputs. Below the button is a horizontal line with a circle containing the word "Or" in the center. Below this line is a link "Create a profile". At the bottom of the page, there is a footer text: "Proprietary: For Acumen and Customer Use Only".

Acumen Powered by DCI

Sign In

Username

Password

☐ Remember me [Forgot your password?](#)

Sign In

Or

[Create a profile](#)

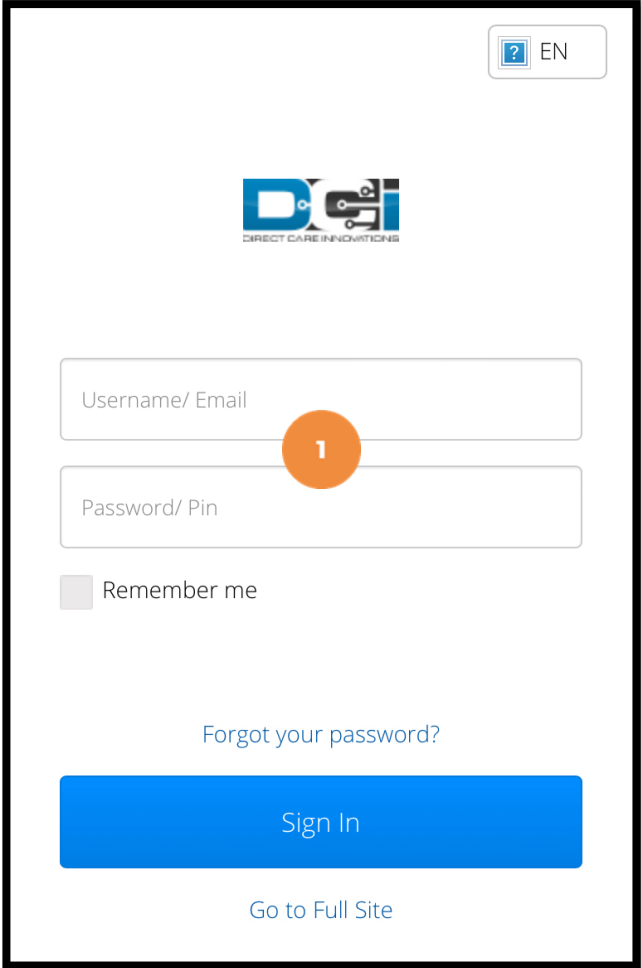
Proprietary: For Acumen and Customer Use Only

Employee Mobile Web Portal

Accessed via smartphone or tablet

***Please note!** Mobile Web Portal (historical) entries are only used for a missed punch due to a service interruption. The goal should always be to enter punches in real time (Mobile App) to maintain EVV compliance.

Add New Entry - Mobile Web



EN

DCI
DIRECT CARE INNOVATIONS

Username/ Email

1

Password/ Pin

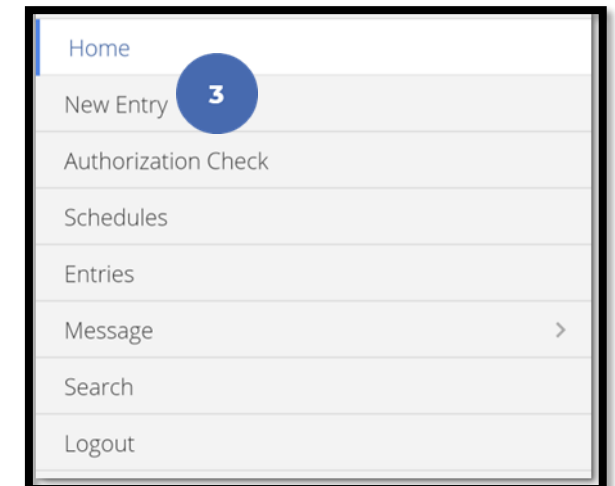
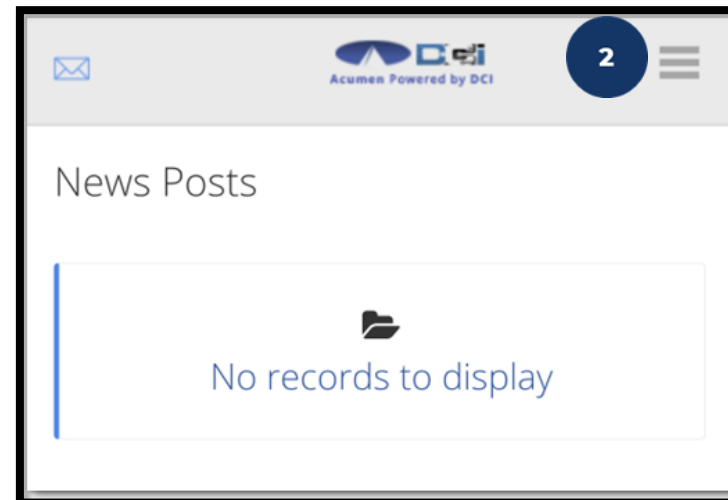
☐ Remember me

[Forgot your password?](#)

Sign In

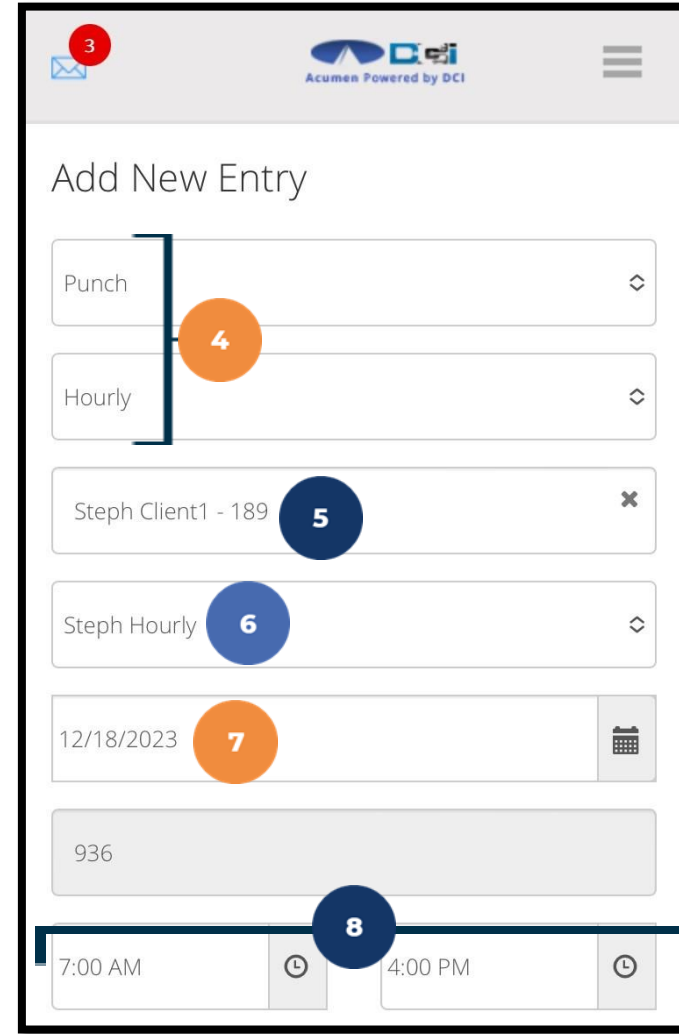
[Go to Full Site](#)

1. Log in to the DCI Web Portal on a mobile device
2. Click the **Menu** in the top right corner of the screen
3. Select the **New Entry** tab from the submenu



Add New Entry - Mobile Web (cont.)

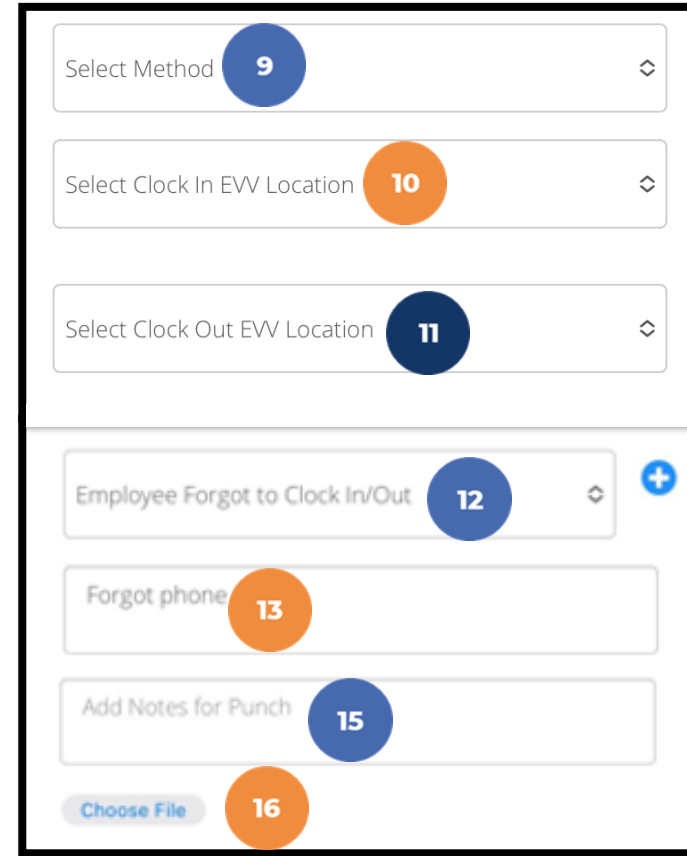
4. The first two fields are prefilled
5. Type a minimum of three characters to generate results and select the Client's name from the list
6. Select the Service Code from the drop-down
7. Select the Service Date
8. Enter the Check In (start) and Check Out (end) times



The image shows a mobile web interface for adding a new entry. The header includes a notification icon with a red circle containing the number 3, the Acumen logo, and a menu icon. The title "Add New Entry" is displayed. The form contains several fields: a "Punch" dropdown menu, an "Hourly" dropdown menu, a text field with "Steph Client1 - 189" and a close button, a "Steph Hourly" dropdown menu, a date field with "12/18/2023" and a calendar icon, a text field with "936", and a time selection area with "7:00 AM" and "4:00 PM" and clock icons. Numbered callouts 3 through 8 are placed over the interface to indicate the steps: 3 is over the notification icon, 4 is over the "Punch" dropdown, 5 is over the "Steph Client1 - 189" text field, 6 is over the "Steph Hourly" dropdown, 7 is over the "12/18/2023" date field, and 8 is over the time selection area.

Add New Entry - Mobile Web (cont.)

9. Select Portal Signoff as the Method
10. Select the Clock In EVV Location
11. Select the Clock Out EVV Location
12. Select a Reason Code from the drop-down list
13. Add a Reason Code Note
14. Click the blue **plus sign (+)** to populate the reason code details
15. Enter Notes for the punch (optional)
16. Click the **Choose File** button to select and upload Attachments (optional)



Select Method 9

Select Clock In EVV Location 10

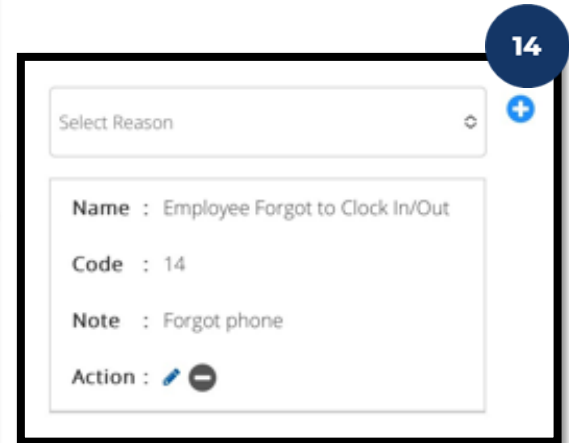
Select Clock Out EVV Location 11

Employee Forgot to Clock In/Out 12

Forgot phone 13

Add Notes for Punch 15

Choose File 16



Select Reason 14

Name : Employee Forgot to Clock In/Out

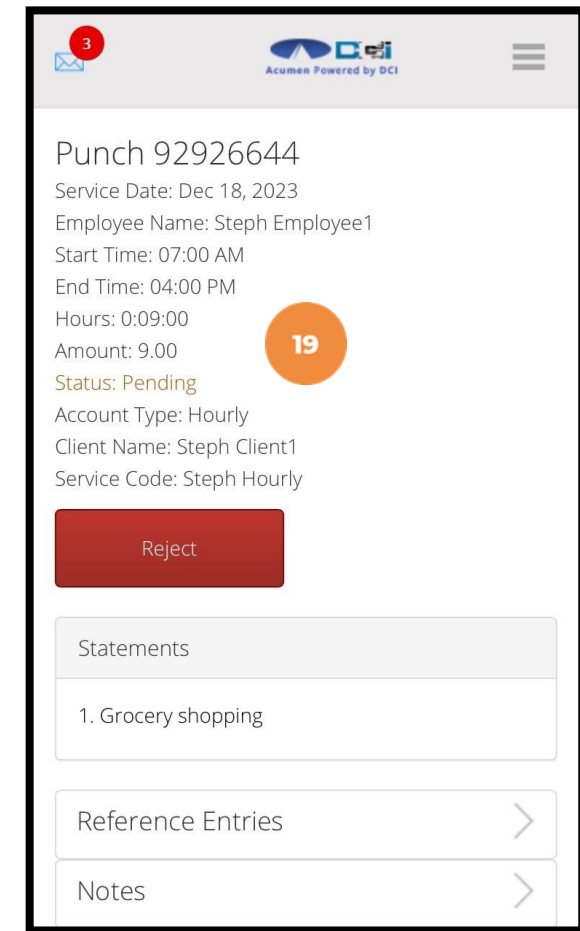
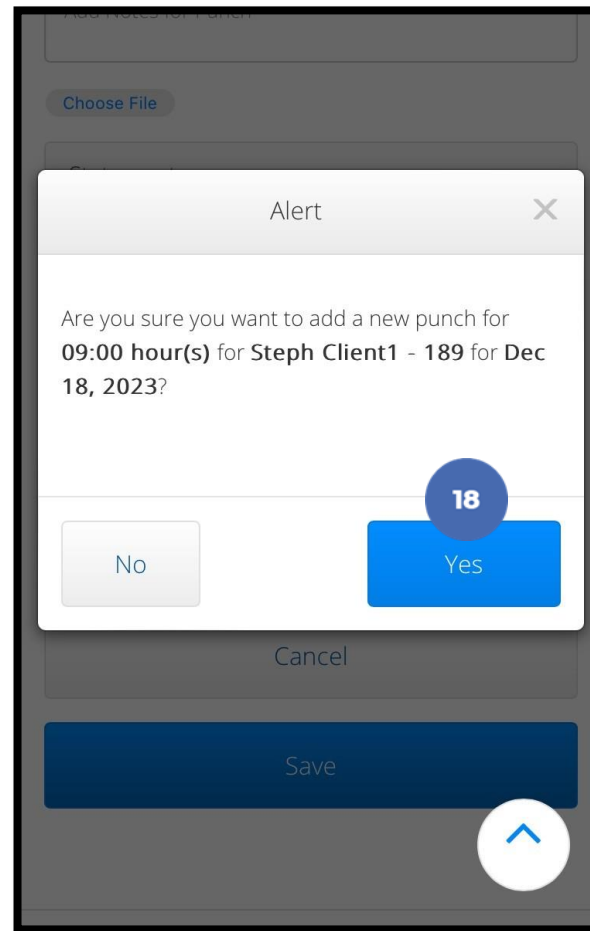
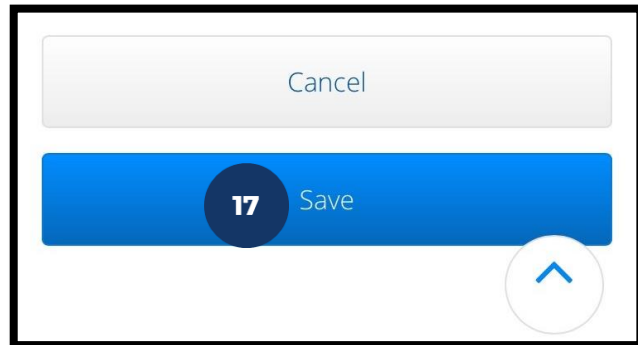
Code : 14

Note : Forgot phone

Action : 

Add New Entry - Mobile Web (cont.)

17. Click **Save**
18. Click **Yes** to submit
19. The punch has been submitted



Employer Web Portal

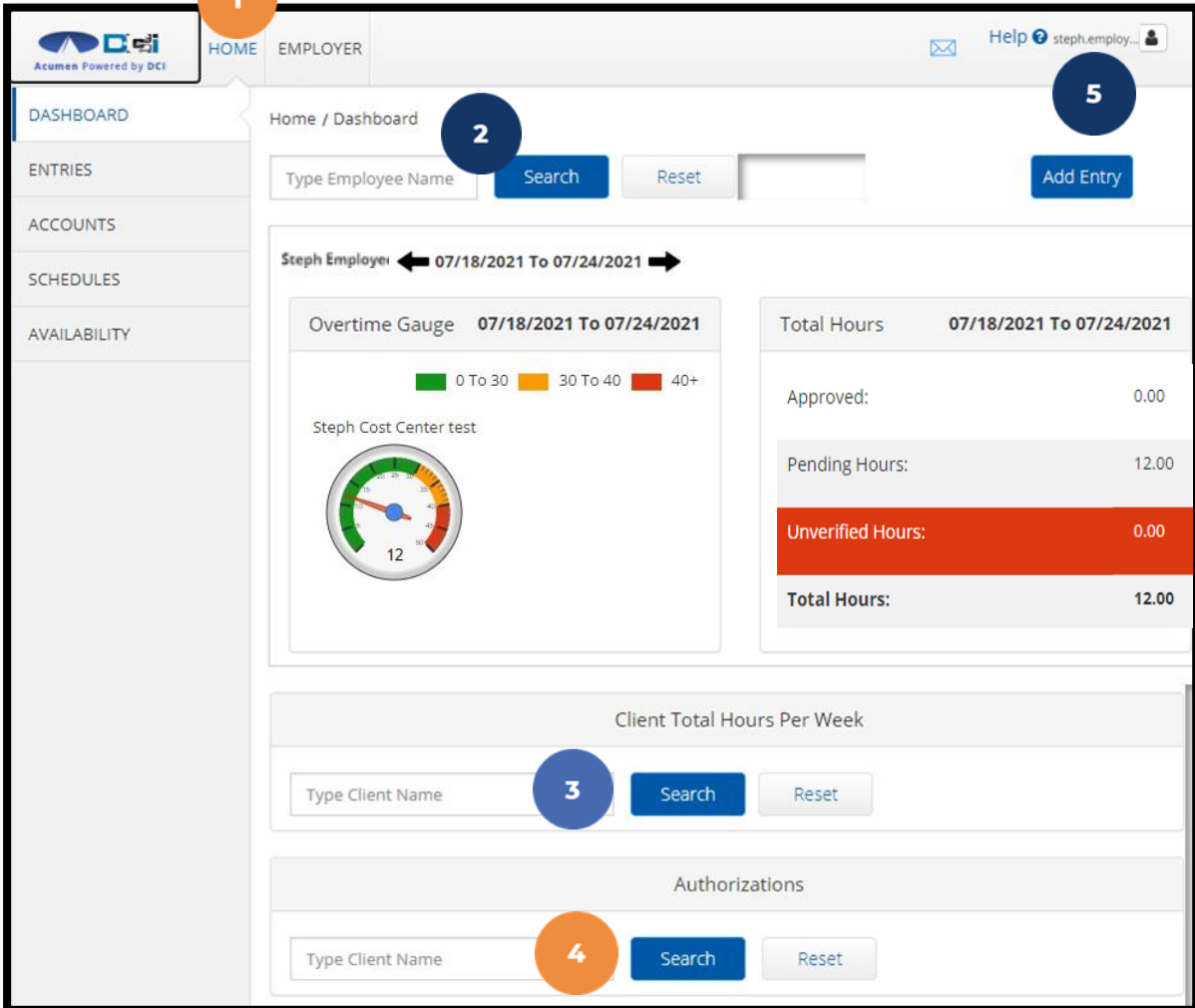
Full Site – Most compatible when accessed via computer or laptop

***Please note!** Employer mobile web portal actions are similar to the web portal but are compatible with a mobile device and do not require horizontal scrolling.

Home Tab Details

1. Select **Home** on the main menu
2. Enter an **employee name** and click the blue **Search** button to view the information below by week. Use the black arrows to toggle between weeks:
 - ✓ Overtime Gauge
 - ✓ Total Hours breakdown
3. Client Total Hours Per Week Widget
 - ✓ Enter the **client name** and click the blue **Search** button to view the total hours worked for the client by week
4. Authorizations (Budget) Widget
 - ✓ Enter the **client name** and click the blue **Search** button to view details of all active authorizations (budgets) detailed on next slide
5. Profile Settings

The Dashboard is the landing page



The screenshot shows the Acumen Fiscal Agent Dashboard. The interface includes a top navigation bar with 'HOME' and 'EMPLOYER' tabs, and a left sidebar with menu items: DASHBOARD, ENTRIES, ACCOUNTS, SCHEDULES, and AVAILABILITY. The main content area displays the following components:

- Search Bar:** A search bar with the placeholder 'Type Employee Name', a blue 'Search' button, a 'Reset' button, and an 'Add Entry' button. A blue circle with the number '2' is next to the Search button.
- Employee Selection:** A dropdown menu showing 'Steph Employee' with left and right arrow buttons. A blue circle with the number '1' is above the dropdown.
- Overtime Gauge:** A gauge for the period '07/18/2021 To 07/24/2021'. The gauge has three segments: green (0 To 30), yellow (30 To 40), and red (40+). The needle points to 12. A blue circle with the number '3' is next to the gauge.
- Total Hours Breakdown:** A table showing hours for the same period:

Total Hours 07/18/2021 To 07/24/2021	
Approved:	0.00
Pending Hours:	12.00
Unverified Hours:	0.00
Total Hours:	12.00
- Client Total Hours Per Week:** A section with a search bar for 'Type Client Name', a blue 'Search' button, and a 'Reset' button. A blue circle with the number '4' is next to the Search button.
- Authorizations:** A section with a search bar for 'Type Client Name', a blue 'Search' button, and a 'Reset' button. A blue circle with the number '5' is next to the Search button.

Authorizations (Service Plan) Widget



- The authorizations (service plan) widget allows the user to search by client (required) or optionally use the date filter to view approved authorizations (service plan) in the past, present, or future.
- As employees clock in/out, their time (units) will be deducted from the authorization and placed into a pre-authorization hold.
- Units in a pre-authorization hold remain in that status until billing and payroll have been processed. After payroll and billing completion, the units that were previously in a pre-authorization hold status will be deducted from the remaining balance and an updated remaining balance will be displayed.

Authorizations

KZ Client2 - T45158 06/18/2024

Authorization for Client: **KZ Client2** ⓘ

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
PCSED	01/01/2024	01/01/2025	10000.00 Units	9928.00 Units	68.00 Units	9860.00 Units	833.00 Units	208.00 Units	30.00 Units

← **Authorizations display as units.** Click to display as time.

Authorizations

KZ Client2 - T45158 06/18/2024

Authorization for Client: **KZ Client2** ⓘ

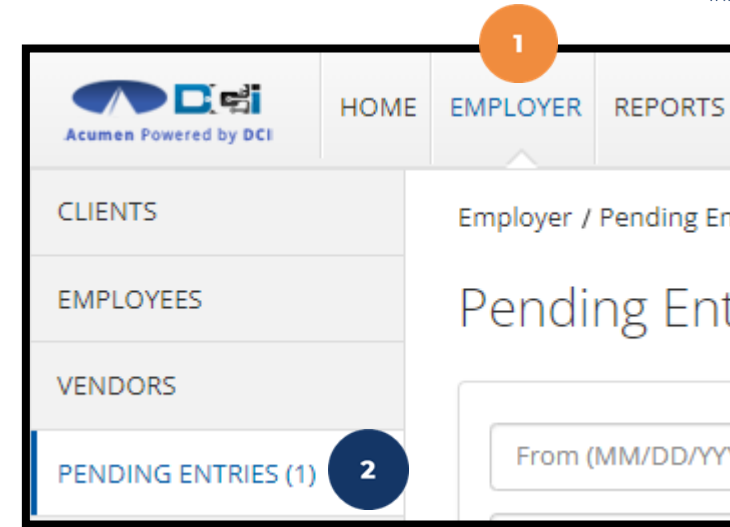
Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
PCSED	01/01/2024	01/01/2025	2500 Hours, 0 Minutes	2482 Hours, 0 Minutes	17 Hours, 0 Minutes	2465 Hours, 0 Minutes	208 Hours, 15 Minutes	52 Hours, 0 Minutes	7 Hours, 30 Minutes

← **Authorizations display as time. Click to display as units.**

1. Initial Balance - Total amount of authorization
2. Remaining Balance - Amount remaining after pre-authorization holds have been processed for billing and payment
3. Pre-Authorization Holds - Amount deducted from the authorization that has not yet been processed for billing and payment
4. Current Available Balance - The total of the remaining balance minus any pre-authorization holds

Navigate to Pending Entries

1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
 - ✓ The number of pending entries displays in parenthesis on the submenu



All entries requiring review/action appear in the table

Approve	Punch ID	Service Date	Start Time	End Time	Cost Center	Client/ Program Name	Employee/ Program Name	Service Code/Type	Amount	EVV	Needs Review
☐ ☒	68312	Dec 19, 2023	01:06 PM	01:10 PM	JVK Cost Center - JVKCostCenter			EVVRequired	0:00:04	No	
☐ ☒	68310	Dec 19, 2023	12:47 PM	12:51 PM	JVK Cost Center - JVKCostCenter			EVVRequired	0:00:04	YES	
☐ ☒	68306	Dec 19, 2023	11:57 AM	12:46 PM	Kenneth Cost Center - KEN			Hourly	0:00:49	YES	
☐ ☒	68304	Dec 19, 2023	01:18 PM	01:18 PM	Default Cost Center - 00-000			DPI Hourly	0:00:00	YES	

Verify Picture

1. If an entry has a red eye icon in the Needs Review column, hover over it to see why it needs review. If it states, "Picture Unverified", **click anywhere on the entry row** to open the punch details page.
2. Select the **Verifications** tab
3. Click the **double arrows** in the Compare column to compare the client's profile picture with the EVV picture taken by the employee during the shift
4. Click the **A** to approve the picture or the red **R** to reject it. The punch may now be approved or rejected.

Approve	Punch ID	Service Date	Start Time	End Time	Cost Center	Client/ Program Name	Employee/ Program Name	Service Code/Type	Amount	EVV	Needs Review
A R	68341	Dec 21, 2023	09:28 AM	09:32 AM	Steph Cost Center test - Steph Cost Center test	Steph Client1	Steph Employee1	RESPIRE (Hourly)	0:00:04	- Picture Unverified	

Ref Entries

Notes

Attachments

Events

Verifications

Map

Business Rules

Auto Approval

Custom Fields

History

From (MM/DD/YYYY)

2 (MM/DD/YYYY)

Verification Type

Select Status

Reset

Search

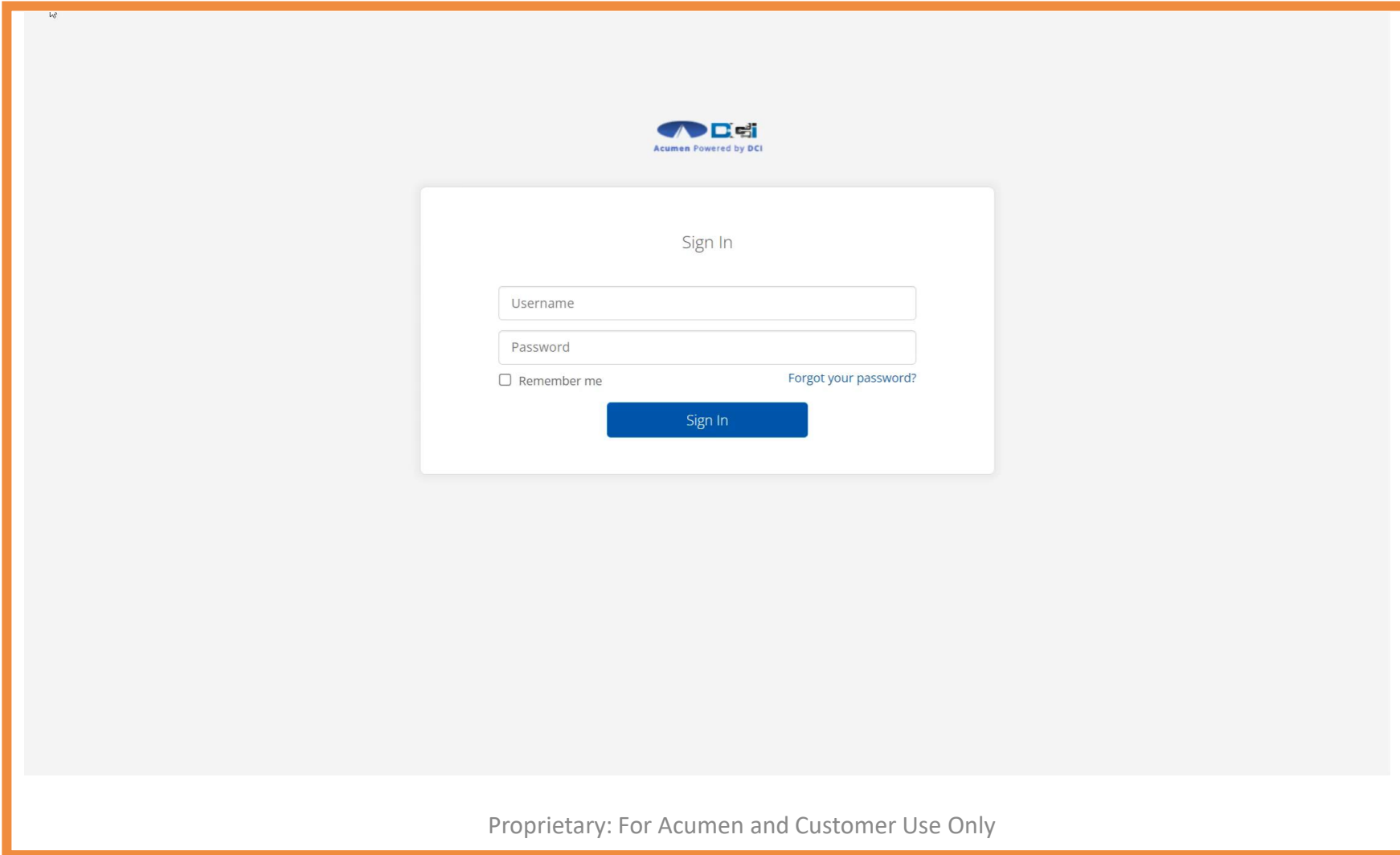
EVV Verifications

Showing 1 out of 1 record

Approve	Date	Verification Type	Status	Attachments	Compare	Approved By	Approved Date
A R	Dec 21, 2023 09:31:46 AM	Picture	Unverified	6bdde351-0119-483c-b3b2-e31d99223e9d.jpeg	=		

Employer Web Portal Video

Verify Picture



The screenshot shows a web portal sign-in interface. At the top center is the logo "Acumen Powered by DCI". Below it is a "Sign In" heading. There are two input fields: "Username" and "Password". Below the "Username" field is a checkbox labeled "Remember me". To the right of the "Password" field is a link that says "Forgot your password?". At the bottom of the form is a blue "Sign In" button. The entire form is centered on a light gray background.

Acumen Powered by DCI

Sign In

Username

Password

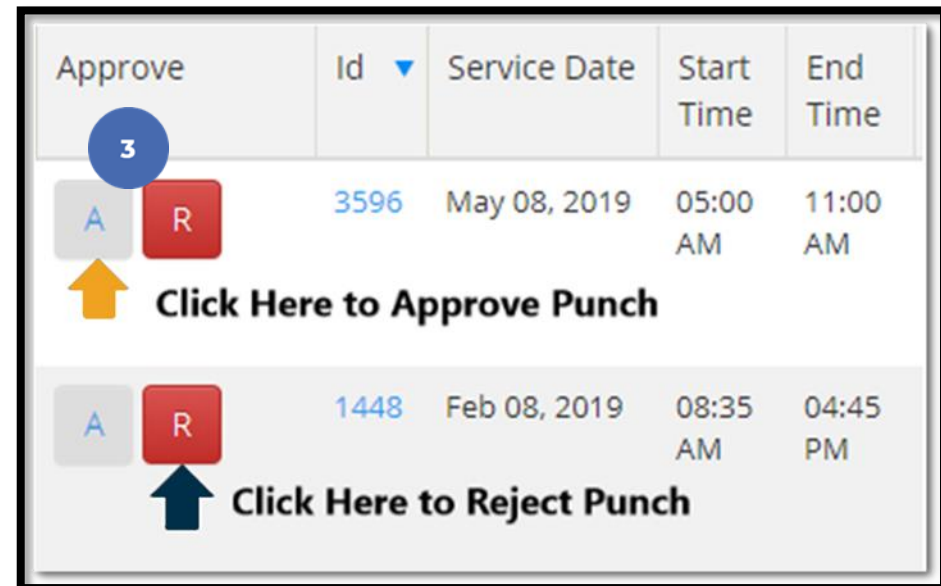
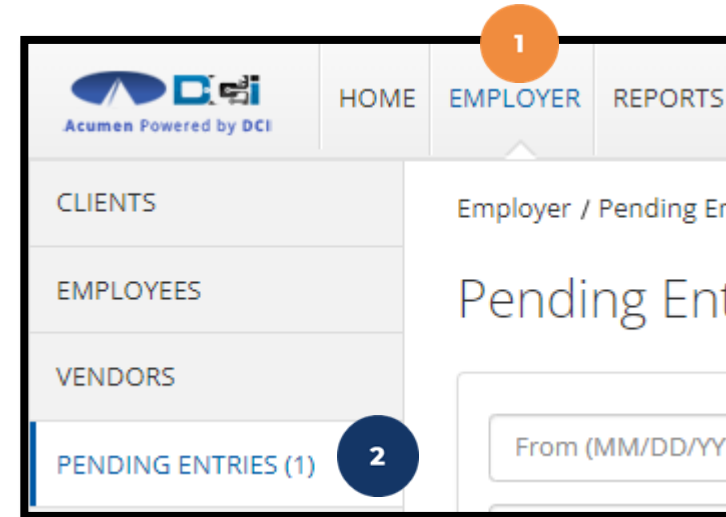
☐ Remember me [Forgot your password?](#)

Sign In

Proprietary: For Acumen and Customer Use Only

Manage Pending Entries

1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
 - ✓ The number of pending entries displays in parenthesis on the submenu
3. Any punch that requires approval is listed here
 - ✓ Review each entry
 - Click on the entry to view all details
 - ✓ Approve or reject
 - Click the **A** on the entry line to approve
 - Click the red **R** on the entry line to reject
 - ❖ If an entry is rejected, ask the employee to re-enter the time correctly in the DCI web portal.



The screenshot shows a table of pending entries. The first entry has an 'A' button highlighted with a blue circle '3' and an orange arrow pointing to it, with the text 'Click Here to Approve Punch' below it. The second entry has a red 'R' button highlighted with a blue arrow pointing to it, with the text 'Click Here to Reject Punch' below it.

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

Employer Web Portal Video

Manage Entries



Acumen Powered by DCI

Sign In

☐ Remember me

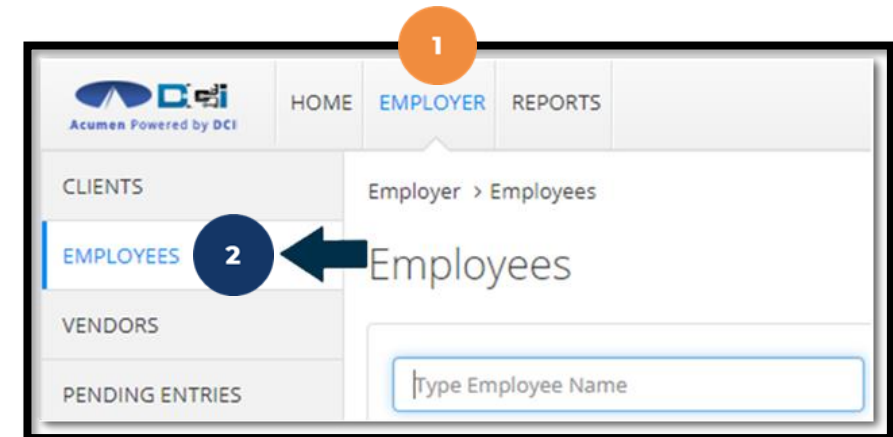
[Forgot your password?](#)

Proprietary: For Acumen and Customer Use Only



Using the Employees Page

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



Name	Employee #	Phone #	Email	Time Zone	Type	Status
Steph Employee1	721	(222) 222-2222	stephanies+320@dcisoftware.com	MT (UTC-07)	Hourly Non Exempt	Active

Using the Employees Page (cont.)

4. View the employee details page
5. Unlock Employee Profile if needed
6. Scroll down to the Entries tab

Home / Employees / Steph Employee1

Employee Details - Steph Employee1

[Actions](#)

Basic Demographics

Address: 100 Happy Jack Lane
Aurora, CO 80016-0000

GNIS: 08-005-204737

Phone: (222) 222-2222

Email: stephanies+68@dcisoftware.com

Username: steph.employee1

Time Zone: MT (UTC-07)

Type: Hourly Non Exempt

SSN: ###-##-#### [Show](#)

Allow SSN Retrieval: No ⓘ

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

Status: Active

Other Details

Average Caregiver Rating: 0

Domestic Worker: No ⓘ

Domestic Worker 7 Day Exemption: No ⓘ

Domestic Worker Preferred Day of Rest: Sunday ⓘ

Employee Number: 216

Weekly Hours Available: 40.00

Holiday Schedule: [Default Holiday Schedule - 1](#)

Cost Center: [Steph Cost Center](#)

Custom Reports List: None

Employment Status: Active

Authentication Status: **Locked** [Unlock](#)

Photo Set: No

Signature Set: No

Email confirm: Yes

6

Entries Accounts Certifications EVV Locations Notes Attachments Events Custom Fields History

Using the Employees Page (cont.)

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

EntriesAccountsCertificationsEVV LocationsNotesCaregiver RatingsAttachmentsCustom FieldsHistory

From (MM/DD/YYYY)

To (MM/DD/YYYY)

Type Punch Id

Type Client Name

Type Service Code

Select Account Type

Select Status

Reset

Search

Entries7

Showing 13 out of 13 records

Export

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
1897873	Jul 12, 2023			Client Transportation	1897872	Steph Cost Center - 75	Steph Client1	Client Transportation	0.00	Approved
1894616	Jun 07, 2023	05:00 AM	08:00 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:03:00	Approved
1894612	Jun 04, 2023	04:00 PM	05:00 PM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:01:00	Approved
1894611	Jun 03, 2023	04:00 PM	06:00 PM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:02:00	Approved
1897872	Jul 12, 2023	06:22 AM	06:25 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:00:03	Pending
1894620	Jun 23, 2023	07:18 AM	07:19 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:00:01	Pending

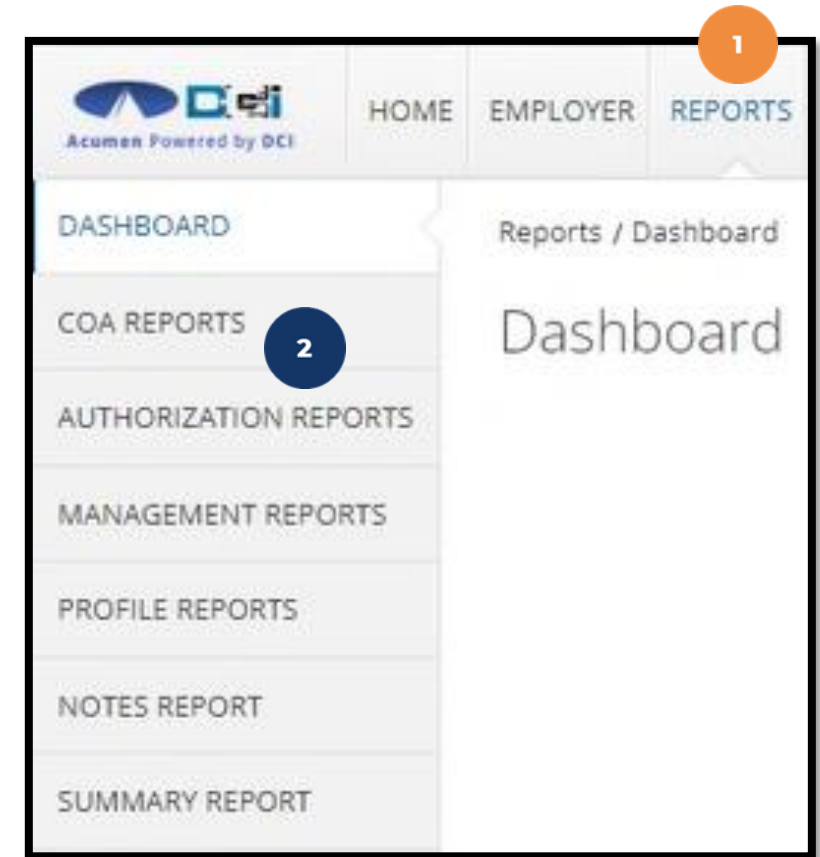
Entry Status



- **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

Using Reports

1. Select **Reports** on the main menu
2. Select a report category from the submenu
 - ✓ **COA Reports**
 - Punch Entries Report – Use the filters to locate specific entries
 - ✓ **Authorization (Service Plan) Reports**
 - Authorization Run Rate Report – View the service plan usage breakdown by client, account type, or service code.
 - ✓ **Notes Reports**
 - Punch Entry Notes and Canned Statements (Tasks) Report - Pull service notes and canned statements (tasks) entered on punches
 - ✓ **Summary Report** - Breakdown of punches and percentages of service plan units remaining



Troubleshooting

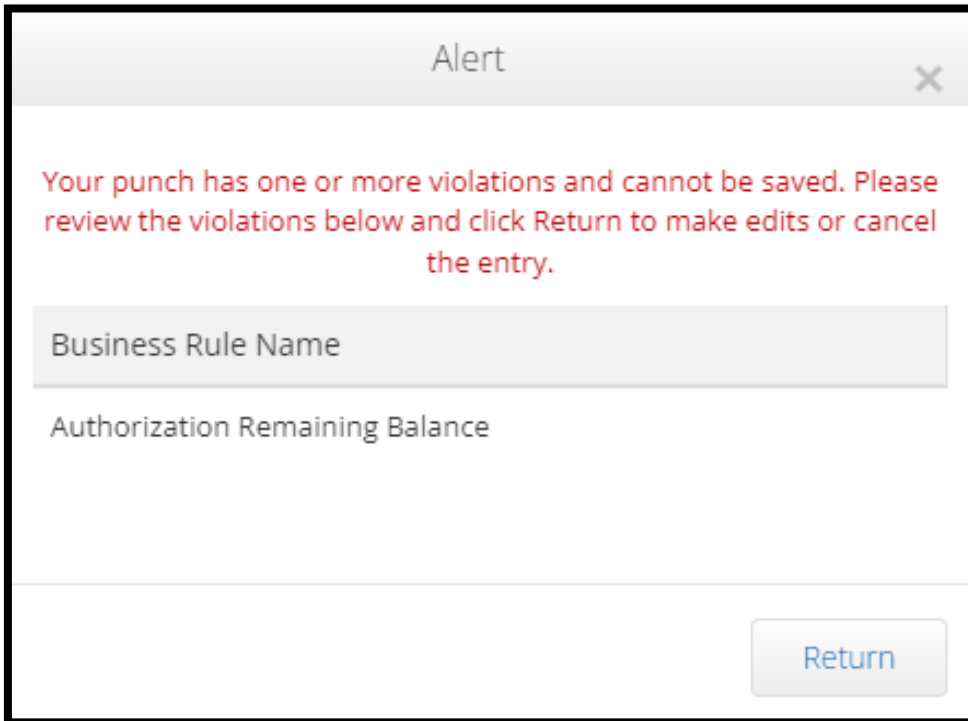
Proprietary: For Acumen and Customer Use Only



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, the employee 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.

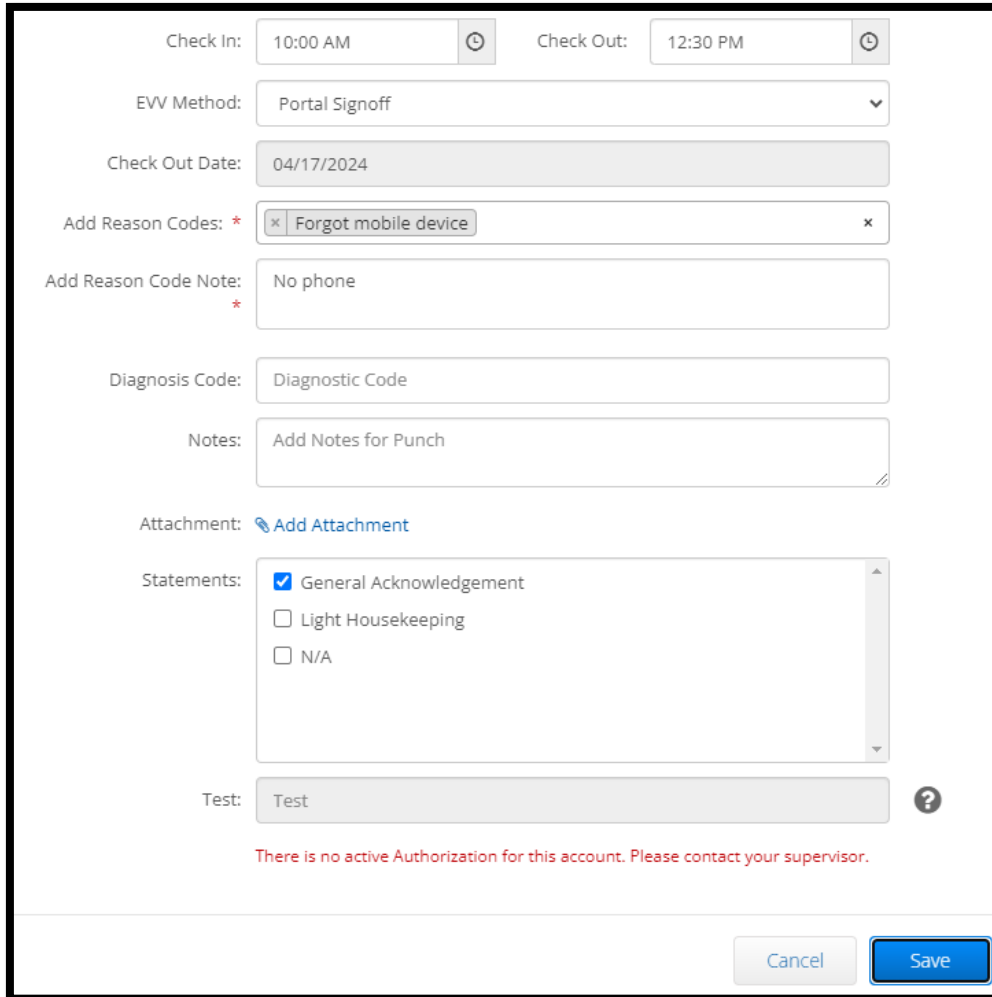


Business Rule Name
Authorization Remaining Balance

- The employee will receive this alert and cannot save the punch
- They 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 displays a web-based punch clock interface. At the top, there are fields for 'Check In' (10:00 AM) and 'Check Out' (12:30 PM). Below these is a dropdown for 'EVV Method' set to 'Portal Signoff'. The 'Check Out Date' is 04/17/2024. Under 'Add Reason Codes', a code 'Forgot mobile device' is entered. The 'Add Reason Code Note' field contains 'No phone'. The 'Diagnosis Code' is 'Diagnostic Code'. The 'Notes' field is empty. An 'Attachment' link is present. The 'Statements' section has three checkboxes: 'General Acknowledgement' (checked), 'Light Housekeeping', and 'N/A'. A 'Test' dropdown is set to 'Test'. A red error message at the bottom states: 'There is no active Authorization for this account. Please contact your supervisor.' At the bottom right are 'Cancel' and 'Save' buttons.

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

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. The employee does 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. The employee should always review their 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

The employee should contact the employer

Phone IVR (Interactive Voice Response)

***Option when access to a mobile device
or computer is limited**

Phone EVV Basics

- Employer - Confirm the landline phone number on file with Acumen is for the client
 - ✓ Employees must call from a recognized number only
 - *Please note!** If calling from a number not associated with the client, the employee will receive an error message.
- Employee - Will be asked to validate the following information:
 - ✓ Last four digits of their social security number
 - ✓ PIN (add in the web portal under user settings)
 - ✓ MMDD of their birthday
 - ✓ Client Name & Service Code for the shift
- Client or Employer – Need client PIN for historical (non-EVV-compliant) phone entries
 - ✓ Client PIN is on the Employer Good To Go letter



Clock In: Real Time Entry

1. Sign in:
 - ✓ Call (844) 608-0047 from the client's landline to start the shift
 - ✓ Enter the last four digits of the social security number
 - ✓ Enter PIN
 - ✓ Enter month/day of birth (MMDD)
2. Press 1 for hourly
3. Confirm the client's name with the prompt given
4. Press 1 for real time entry
5. Select the service code with the prompts given
6. Select the clock in EVV location
 - ✓ If the user is calling from the associated EVV phone number, this step will not occur. The EVV location will be automatically selected.
7. Press 1 to confirm and save the punch
8. The recording will read back the punch details and then disconnect



Clock Out: Real Time Entry



1. Sign in:
 - ✓ Call (844) 608-0047 from the client's landline to end the shift
 - ✓ Enter the last four digits of the social security number
 - ✓ Enter PIN
 - ✓ Enter month/day of birth (MMDD)
2. The system announces that there is an open punch. When prompted, press 1 to confirm closing the punch.
3. Select the clock out EVV location
 - ✓ If the user is calling from the associated EVV phone number, this step will not occur. The EVV location will be automatically selected.
4. The punch is now closed, and the employee is clocked out. Press 2 to disconnect or Press 1 to open a new punch.



Historical Entry

***Please note!** 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 to maintain EVV compliance.

The client or employer must be present at the end of this process.

1. Sign in:
 - ✓ Call (844) 608-0047 from the client's landline to enter the shift
 - ✓ Enter the last four digits of the social security number
 - ✓ Enter PIN
 - ✓ Enter month/day of birth (MMDD)
2. Press 1 for hourly
3. Confirm the client's name with the prompt given
4. Select 2 for historical entry
5. Select the service code with the prompts given



Historical Entry (cont.)

6. Enter the date of service in MMDDYYYY format (i.e., April 28, 2025 = 04282025)
7. Enter the clock-in time in HH:MM (i.e., 0830)
8. Select 1 for AM or 2 for PM
9. Enter the clock-out time in HH:MM (i.e., 0530)
10. Select 1 for AM or 2 for PM
11. Select the clock in EVV location
 - ✓ If the user is calling from the associated EVV phone number, this step will not occur. The EVV location will be automatically selected.
12. Select the clock out EVV location
 - ✓ If the user is calling from the associated EVV phone number, this step will not occur. The EVV location will be automatically selected.
13. The recording will read back the punch details
14. Press 1 to confirm



Historical Entry (cont.)

***Please Note!** The client or employer must be present for the following final steps:

15. Hand the phone to the client/employer who presses 1 when ready
16. The client/employer reviews the punch details and presses 1 to accept or 2 to reject the entry
17. The client/employer will validate the call using the client PIN
18. The punch is created
19. The phone disconnects and the shift is recorded



Troubleshooting

- Is the employee having trouble signing in?
 - ✓ PIN not working? Update under profile settings
 - ✓ Employee can call Acumen to confirm their date of birth & last four digits of their social security number on their profile
- Is the employee having trouble clocking in?
 - ✓ Only call from the client's landline
 - Call Acumen at 877-901-5826 to confirm the client's number
- Is the employee having trouble adding historical entries?
 - ✓ Enter the date & time in the correct format (MM/DD/YYYY & HH:MM)
 - ✓ Do not overlap with other employee's shifts
- Is the client having trouble validating the entry?
 - ✓ Employer calls Acumen to reset their client PIN
- Does the employee need to edit or reject an entry?
 - ✓ Entries cannot be edited or rejected using Phone EVV. The employee must use the web portal instead.



Payroll Schedule & Deadlines

Proprietary: For Acumen and Customer Use Only



Important Update!



- Paper timesheets will no longer be utilized after **March 8th, 2025**.
- Beginning **March 9th, 2025**, DCI Mobile EVV App or Phone EVV (IVR) will be the only compliant time entry methods.
- DCI works as both the Electronic Visit Verification (EVV) and time entry system
- Employees are responsible for all time entries including new and edited entries
- Employers are responsible for reviewing and approving all time

Payment Schedule

- Time must be approved by the due date
- Pay dates are bi-weekly



Acumen 2025 IRIS PHW Payroll Calendar

Period	Start Date	End Date	Due Date	Pay Day
P1	12/1/2024	12/14/2024	12/20/2024	1/3/2025
P2	12/15/2024	12/28/2024	1/3/2025	1/17/2025
P3	12/29/2024	1/11/2025	1/17/2025	1/31/2025
P4	1/12/2025	1/25/2025	1/31/2025	2/14/2025
P5	1/26/2025	2/8/2025	2/14/2025	2/28/2025
P6	2/9/2025	2/22/2025	2/28/2025	3/14/2025
P7	2/23/2025	3/8/2025	3/14/2025	3/28/2025
P8	3/9/2025	3/22/2025	3/28/2025	4/11/2025
P9	3/23/2025	4/5/2025	4/11/2025	4/25/2025
P10	4/6/2025	4/19/2025	4/25/2025	5/9/2025
P11	4/20/2025	5/3/2025	5/9/2025	5/23/2025
P12	5/4/2025	5/17/2025	5/23/2025	6/6/2025
P13	5/18/2025	5/31/2025	6/6/2025	6/20/2025
P14	6/1/2025	6/14/2025	6/20/2025	7/3/2025
P15	6/15/2025	6/28/2025	7/4/2025	7/18/2025
P16	6/29/2025	7/12/2025	7/18/2025	8/1/2025
P17	7/13/2025	7/26/2025	8/1/2025	8/15/2025
P18	7/27/2025	8/9/2025	8/15/2025	8/29/2025
P19	8/10/2025	8/23/2025	8/29/2025	9/12/2025
P20	8/24/2025	9/6/2025	9/12/2025	9/26/2025
P21	9/7/2025	9/20/2025	9/26/2025	10/10/2025
P22	9/21/2025	10/4/2025	10/10/2025	10/24/2025
P23	10/5/2025	10/18/2025	10/24/2025	11/7/2025
P24	10/19/2025	11/1/2025	11/7/2025	11/21/2025
P25	11/2/2025	11/15/2025	11/21/2025	12/5/2025
P26	11/16/2025	11/29/2025	12/5/2025	12/19/2025
P1	11/30/2025	12/13/2025	12/19/2025	1/2/2026
P2	12/14/2025	12/27/2025	1/2/2026	1/16/2026

2025 Acumen Office Closures:

- New Year's Day - January 1st
- Martin Luther King Jr. Day - January 20th
- Presidents' Day - February 17th
- Good Friday - April 18th
- Memorial Day - May 26th
- Juneteenth - June 19th
- Independence Day - July 4th
- Labor Day - September 1st
- Indigenous Peoples' Day - October 13th
- Veterans Day - November 11th
- Thanksgiving - November 27th
- Day After Thanksgiving - November 28th
- Christmas Eve - December 24th
- Christmas Day - December 25th

- The DCI Portal or Mobile App should be used to submit time, whenever possible.
- Visit <https://outreach.dcisoftware.com/> to access the DCI Portal.
- To ensure timely payment, please make sure all service hours are reviewed and approved no later than the listed due date.
- Reach out to your Acumen Agent for assistance with submitting time in DCI.

Acumen Contact Information:

Wisconsin@Acumen2.net
 Fax: 800-687-3121
 Phone: 877-901-5826

The Wisconsin Department of Health Services currently requires non-live in workers providing routine supportive home care or self-directed personal care services to use electronic visit verification (EVV). For more information on EVV, please see <https://www.dhs.wisconsin.gov/evv/iris-evv.htm>. To hear more about EVV options and setup, please call 877-901-5826.



Acumen Fiscal Agent
 Innovation • Opportunity • Freedom

Where to go for help?

- Utilize our DCI Training Materials for more help

- This will give you a full list of Training Materials for DCI



Acumen phone: 877-901-5826

Acumen fax: 800-687-3121



www.acumenfiscalagent.com



Enrollment & General Questions: wisconsin@acumen2.net

Payroll Questions: wi-payroll@acumen2.net



Questions?

Thank you!

**Visit the Acumen Help Center
to learn more at:**

acumenfiscalagent.zendesk.com