

# Client Transportation Entry Training



**Acumen Fiscal Agent**

Innovation • Opportunity • Freedom

# Agenda



**Acumen Fiscal Agent**  
Innovation • Opportunity • Freedom



**Mobile App (time & mileage)**



**Web Portal –  
Account Type Hourly (time)**



**Web Portal – Account Type  
Client Transportation  
(mileage)**

# Mobile App

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## Clock In/Out with Client Transportation (time & mileage)

**\*Please note!** Only one entry is required to capture time worked and mileage driven while on the hourly shift when using the Client Transportation button in the mobile app.

Preferred time entry method

# Log into the DCI Mobile EVV App



1. Enter employee credentials
  - ✓ Acumen provides a **username** and **password** on the Good to Go/Welcome letter
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 broker/service coordinator/program worker 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 - All Other States - 228...". 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 the password field is a radio button labeled "Remember me" with a grey circle containing the number "2" next to it. At the bottom of the form is a large blue button labeled "Login" with a grey circle containing the number "3" next to it. Below the button is a blue underlined link that says "Forgot Password?".

EN

Acumen - All Other States - 228... ▾

Username\* 1

Password or PIN\* 1

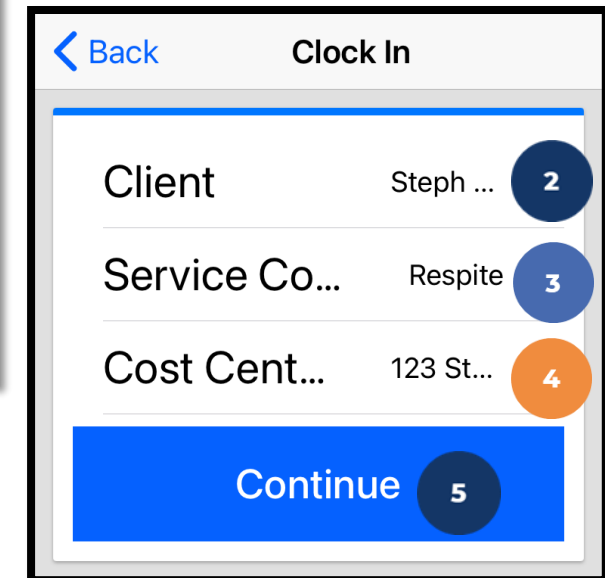
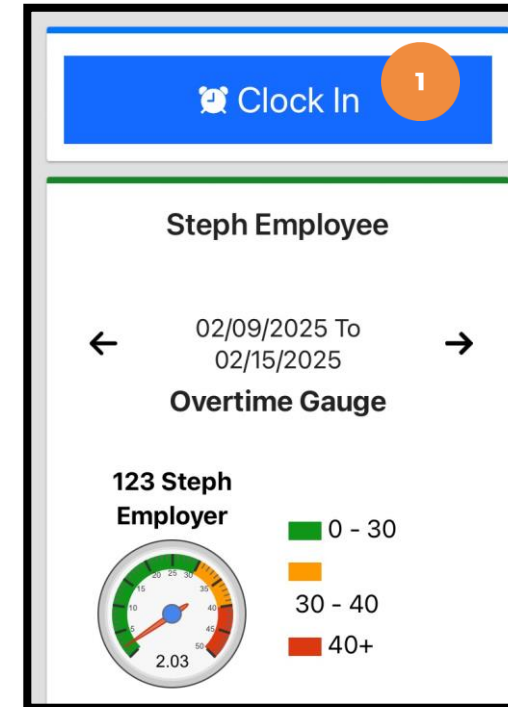
☐ Remember me 2

Login 3

[Forgot Password?](#)

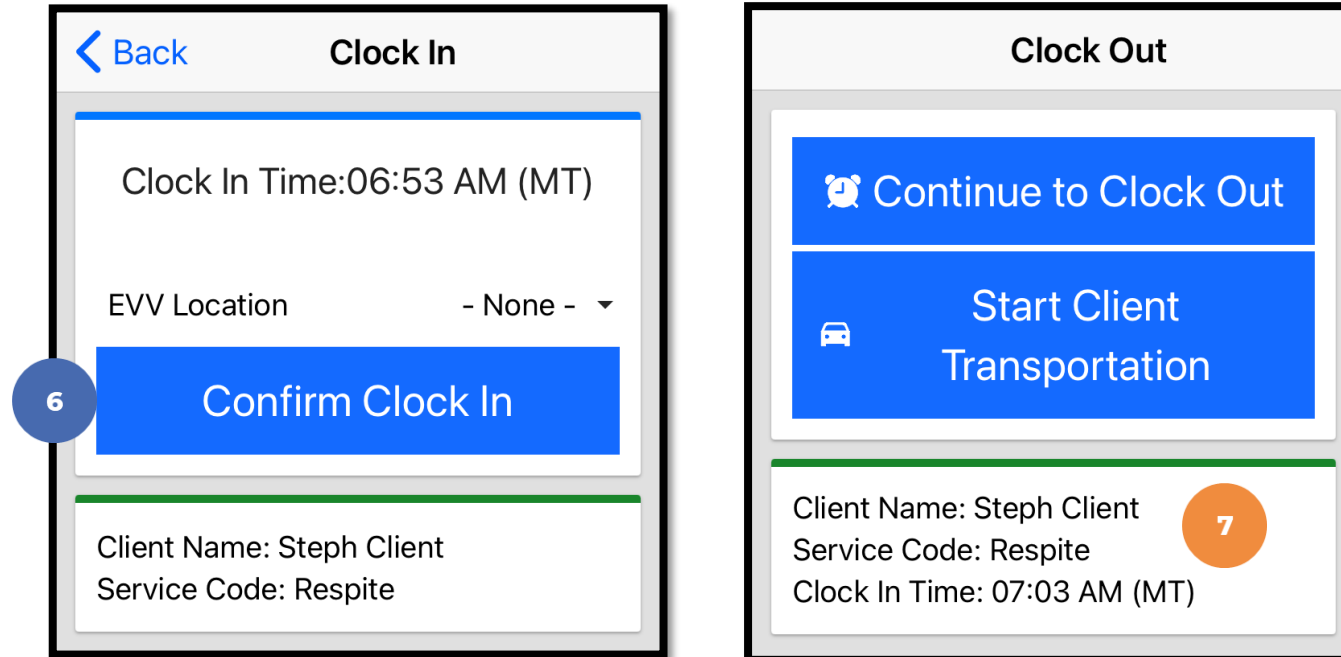
# Clock In on Mobile App

1. Click the blue **Clock In** Button
2. Select the Client's Name
  - Auto-fills for a single client
3. Select the Hourly service code for the service being provided
  - ❖ 5197 Transportation – ***Do not select. Auto payment if utilized by employee/employer.***
  - ❖ 5196 Trip Rate – ***Do not select. Only processed through invoice payment request submitted and approved by support broker/service coordinator/program worker.***
4. Cost Center is always auto-filled
5. Click the blue **Continue** button



# Clock In on Mobile App (cont.)

6. Click the blue **Confirm Clock In** button
  - \* *This starts the time for the shift*
7. Clock In Details Summary displays
  - Clock in is successful when the blue **Continue to Clock Out** button displays



**Clock In**

< Back

Clock In Time: 06:53 AM (MT)

EVV Location - None - ▾

**Confirm Clock In**

Client Name: Steph Client  
Service Code: Respite

**Clock Out**

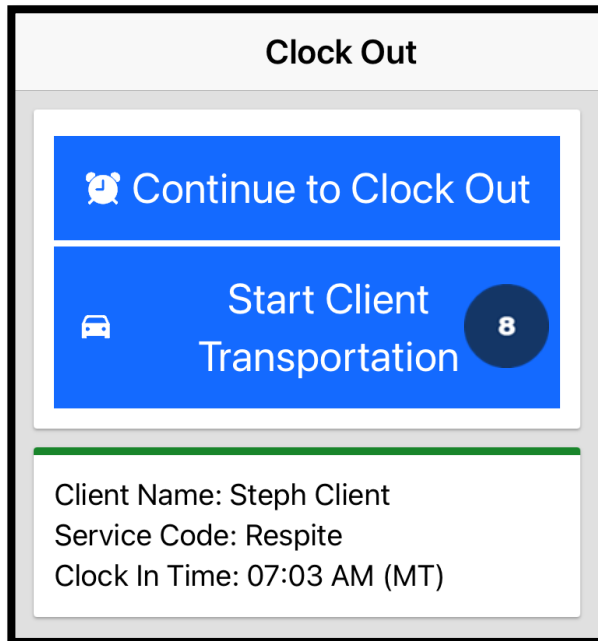
**Continue to Clock Out**

**Start Client Transportation**


Client Name: Steph Client  
Service Code: Respite  
Clock In Time: 07:03 AM (MT)


# Clock In on Mobile App (cont.)

8. Click the blue **Start Client Transportation** button when ready to transport the client
  - Creates a separate entry for mileage
  - Start and stop from point A to point B. Will not calculate for round trip mileage.
9. Select service code **5198 Mileage** from the drop-down to track mileage
10. Click **Ok**
11. Click the blue **Continue** button

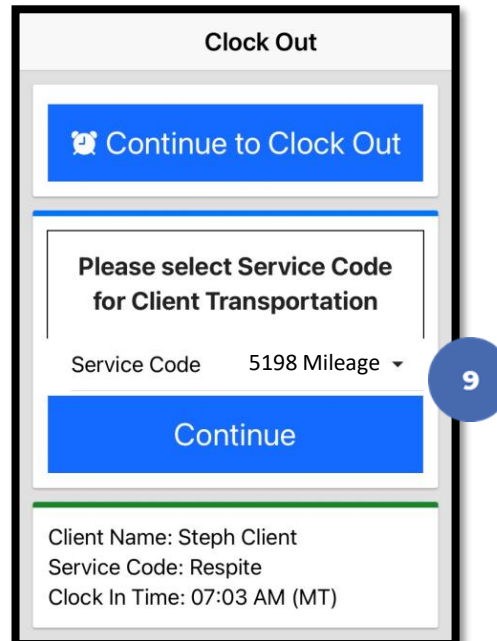


**Clock Out**


 Continue to Clock Out

 **Start Client Transportation** **8**

Client Name: Steph Client  
Service Code: Respite  
Clock In Time: 07:03 AM (MT)



**Clock Out**

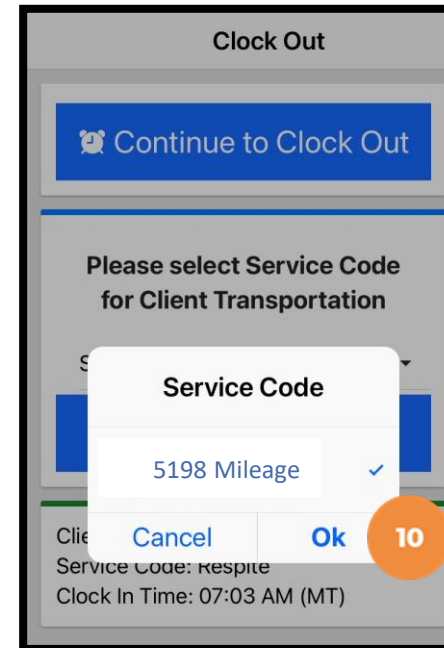
 Continue to Clock Out

**Please select Service Code for Client Transportation**


Service Code 5198 Mileage **9**

**Continue**

Client Name: Steph Client  
Service Code: Respite  
Clock In Time: 07:03 AM (MT)



**Clock Out**

 Continue to Clock Out

**Please select Service Code for Client Transportation**

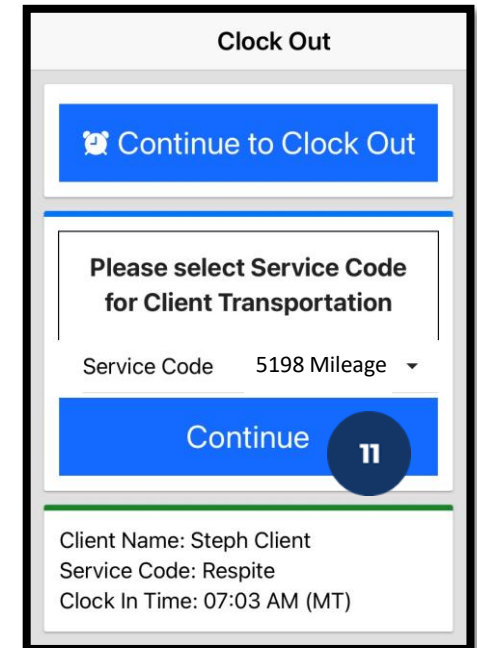
Service Code 5198 Mileage

**Service Code**


5198 Mileage ✓

**Cancel** **Ok** **10**

Client Name: Steph Client  
Service Code: Respite  
Clock In Time: 07:03 AM (MT)



**Clock Out**

 Continue to Clock Out

**Please select Service Code for Client Transportation**

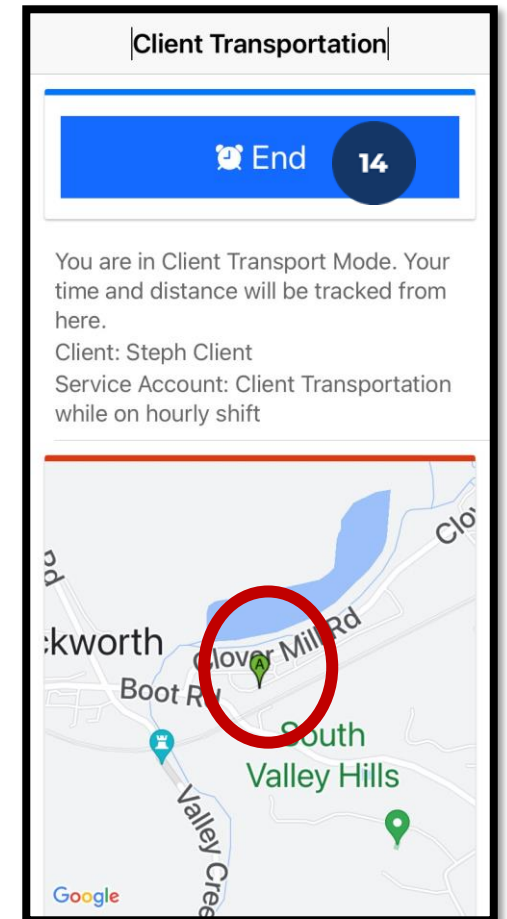
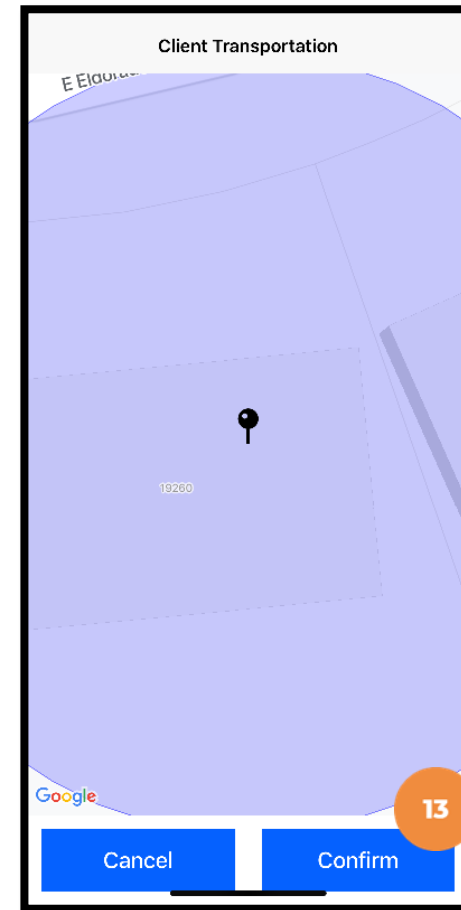
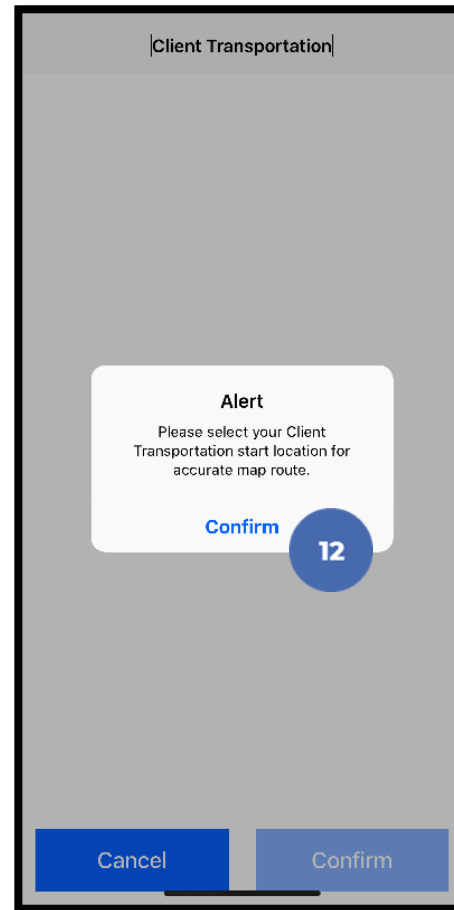
Service Code 5198 Mileage

**Continue** **11**

Client Name: Steph Client  
Service Code: Respite  
Clock In Time: 07:03 AM (MT)

# Clock In on Mobile App (cont.)

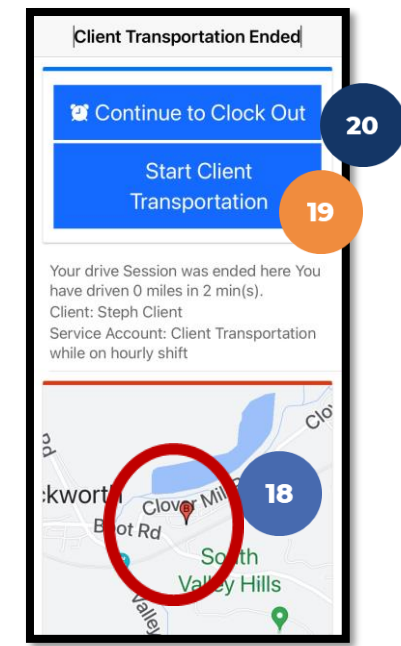
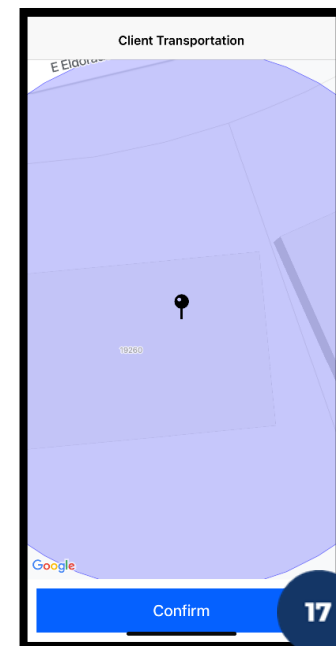
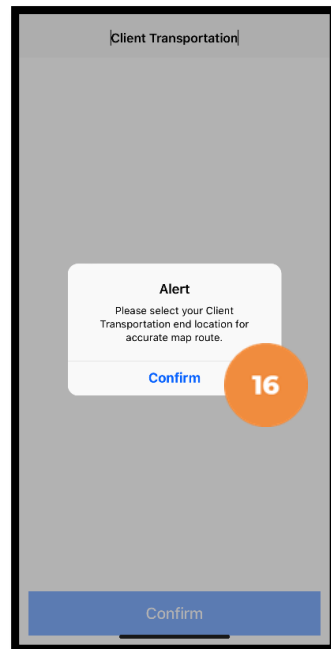
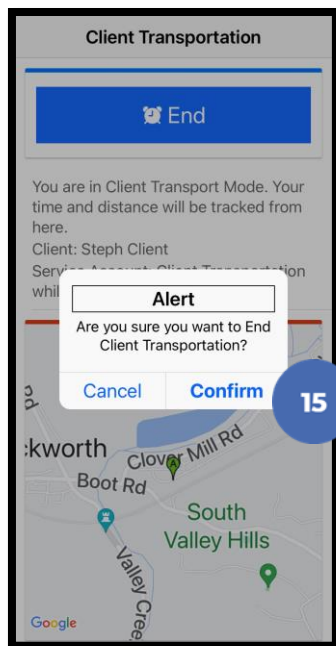
12. Click **Confirm** to acknowledge the alert
13. Click the blue **Confirm** button to validate the location
  - Mileage is recorded when driving begins
  - Starting location is marked on the map with a green pinpoint labeled A
14. Click the blue **End** button when arrived at the destination





# Clock In on Mobile App (cont.)

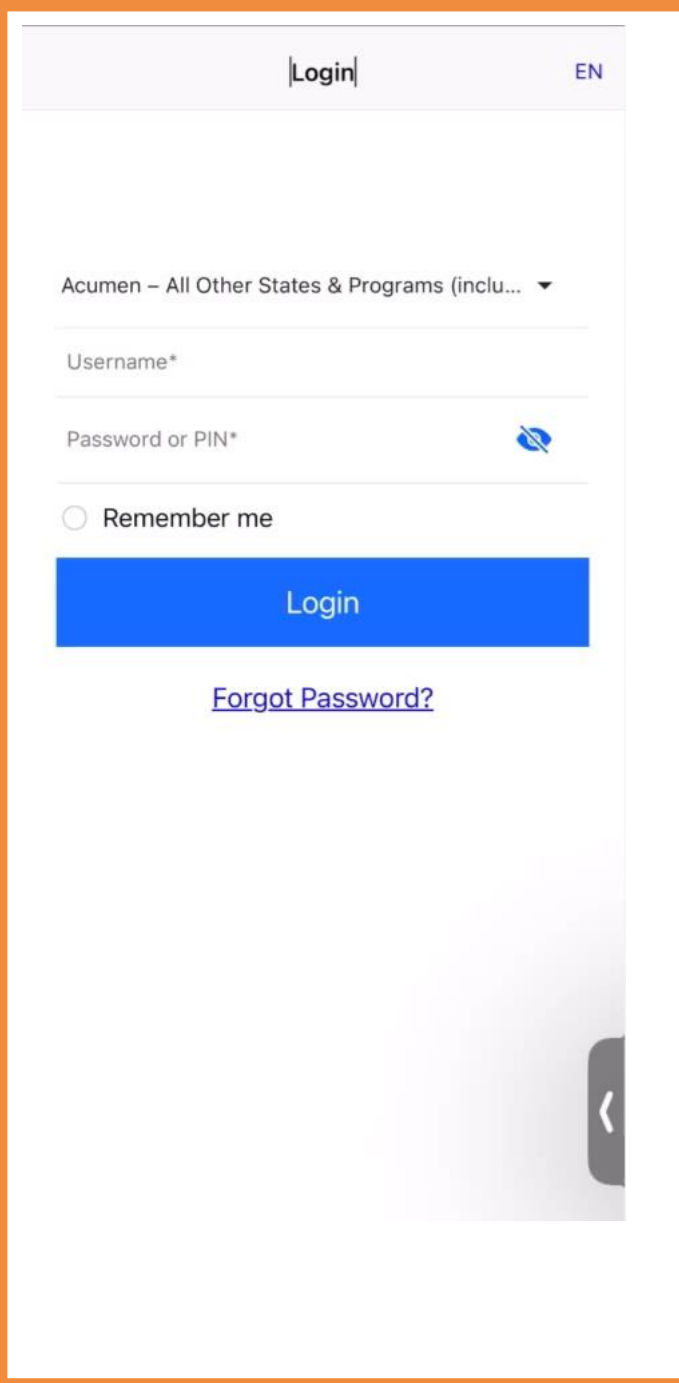
15. Click **Confirm** to acknowledge the alert ending client transportation
16. Click **Confirm** to acknowledge the alert to select the ending location
17. Click the blue **Confirm** button to validate the location
18. Ending location is marked on the map with a red pinpoint labeled B
19. To add more stops, click the blue **Start Client Transportation** button and repeat the steps.
20. At the end of the shift, click the blue **Continue to Clock Out** button.



# Mobile App Video

## Clock In/Out with Client Transportation

Proprietary: For Acumen and Customer Use Only

A screenshot of a mobile application's login screen, framed by an orange border. At the top, there is a header bar with the word "Login" in the center and "EN" on the right. Below the header, there is a dropdown menu labeled "Acumen – All Other States & Programs (inclu...". Underneath the dropdown are two input fields: "Username\*" and "Password or PIN\*", with a small blue icon of a crossed-out eye to the right of the password field. Below these fields is a checkbox labeled "Remember me". A large blue button with the text "Login" is positioned below the checkbox. Underneath the button is a link that says "Forgot Password?". At the bottom right of the screen, there is a grey button with a white left-pointing arrow.

# Web Portal - Historical Entry

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## Account Type Hourly (entering time)

**\*Please note!** Two separate entries are required:

1. Hourly entry to record the time

AND

2. Client Transportation entry to record the mileage while on the hourly shift

# Add New Entry

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

**\*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.



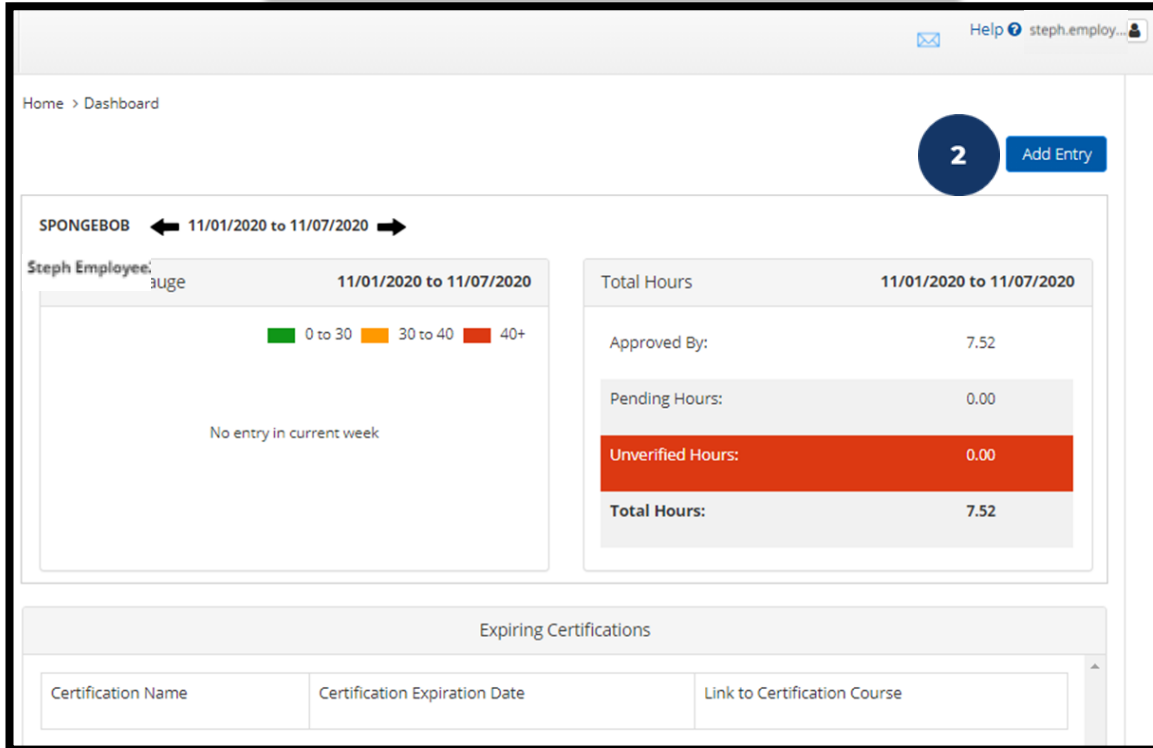
Sign In

Username

Password

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

Sign In



Home > Dashboard

Help steph.employ...

2 Add Entry

SPONGEBOB ← 11/01/2020 to 11/07/2020 →

Steph Employee: auge 11/01/2020 to 11/07/2020

0 to 30 30 to 40 40+

No entry in current week

Total Hours 11/01/2020 to 11/07/2020

Approved By:	7.52
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	7.52

Expiring Certifications

Certification Name	Certification Expiration Date	Link to Certification Course
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# Add New Entry (cont.)



3. Complete the entire Add New Entry form wizard (not all fields shown below)
4. Account Type: **Hourly**
5. Client: Type and select the client's name
6. Service Code: Select the Hourly service code for the service that was provided
  - ❖ 5197 Transportation – ***Do not select.** Auto payment if utilized by employee/employer.*
  - ❖ 5196 Trip Rate – ***Do not select.** Only processed through invoice payment request submitted and approved by support broker/service coordinator/program worker.*

A screenshot of the "Add New Entry" form. The form has a title bar with the text "Add New Entry" and a blue circle with the number "3". Below the title bar are five input fields, each with a label and a red asterisk indicating it is required. The first field is "Entry Type:" with a dropdown menu showing "Punch". The second field is "Employee Name:" with a text input showing "Steph Employee". The third field is "Account Type:" with a dropdown menu showing "Hourly", marked with an orange circle and the number "4". The fourth field is "Client:" with a dropdown menu showing "Steph Client - 125", marked with a blue circle and the number "5". The fifth field is "Service Code:" with a dropdown menu showing "Client Transportation", marked with a blue circle and the number "6".

# Web Portal - Historical Entry

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## Account Type Client Transportation (entering mileage)

**\*Please note!** Two separate entries are required:

1. Hourly entry to record the time


AND

2. Client Transportation entry to record the mileage while on the hourly shift

# Add New Entry

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

**\*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.



Sign In

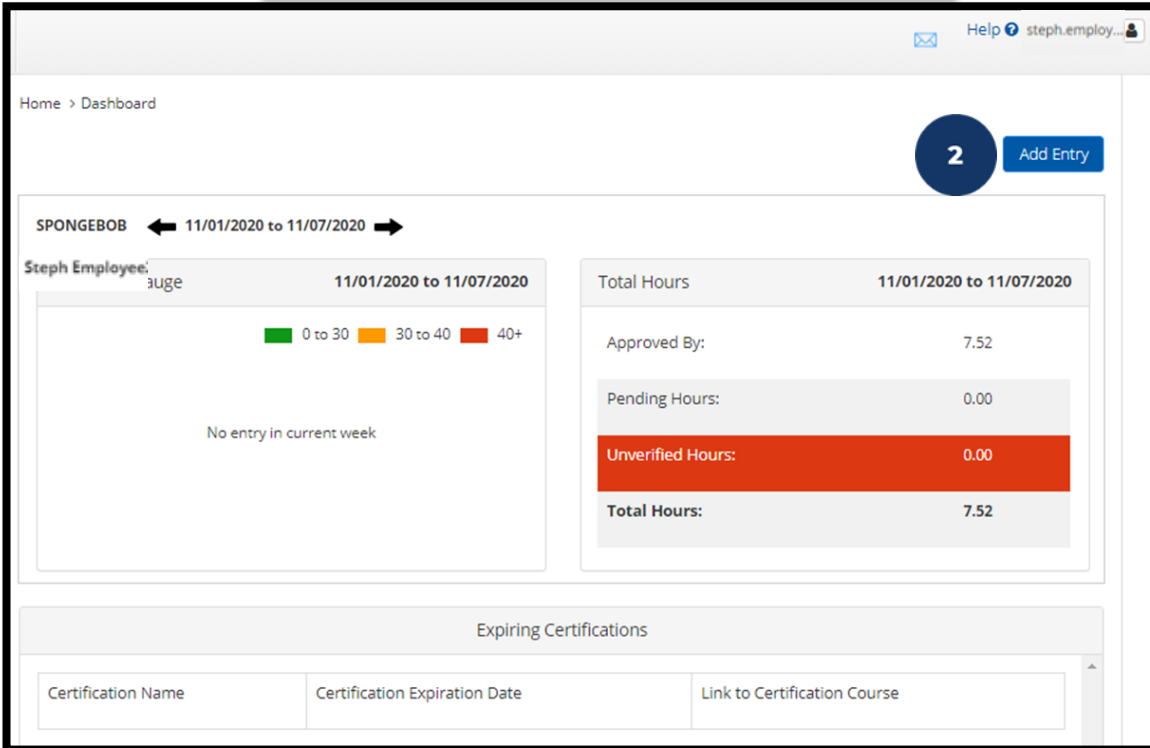
Username

Password

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

Sign In

A red circle with the number 1 is placed over the Password field.



Home > Dashboard

Help steph.employ...

2 Add Entry

SPONGEBOB ← 11/01/2020 to 11/07/2020 →

Steph Employee: auge 11/01/2020 to 11/07/2020

0 to 30 30 to 40 40+

No entry in current week

Total Hours 11/01/2020 to 11/07/2020

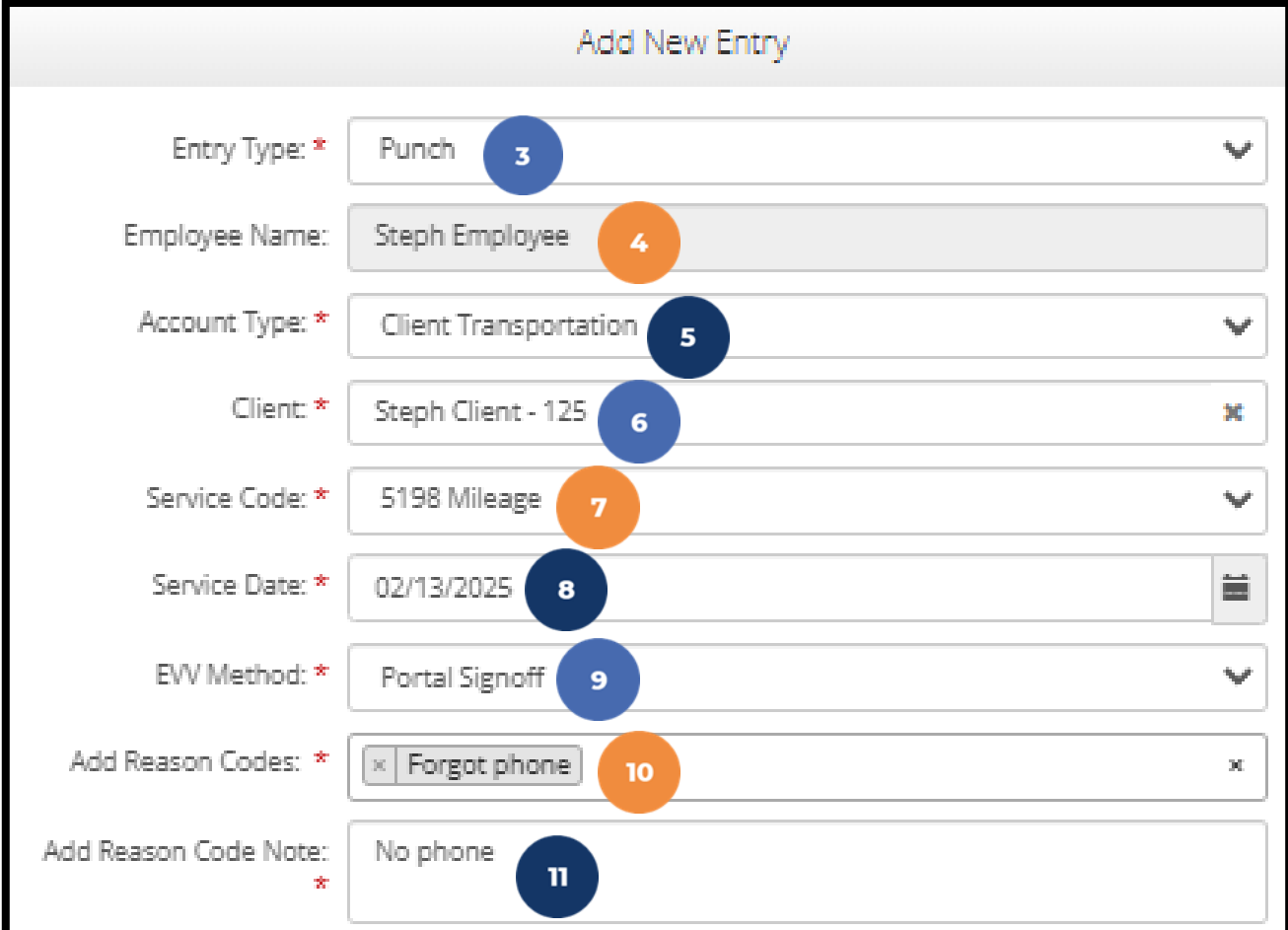
Approved By:	7.52
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	7.52

Expiring Certifications

Certification Name	Certification Expiration Date	Link to Certification Course
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# Add New Entry (cont.)

- Entry Type: Punch defaults
- Employee Name: Auto-populates the name of the employee logged in
- Account Type: Select **Client Transportation**
- Client: Type and select the client's name
- Service Code: Select **5198 Mileage**
- Service Date: The date the driving took place. This must fall within the 30-day timely filing window.
- EVV Method: Select **Portal Signoff**
- Add Reason Codes: Select a Reason Code(s) for the historical entry from the drop-down
- Add Reason Code Note: Add a supporting note for the selected reason code



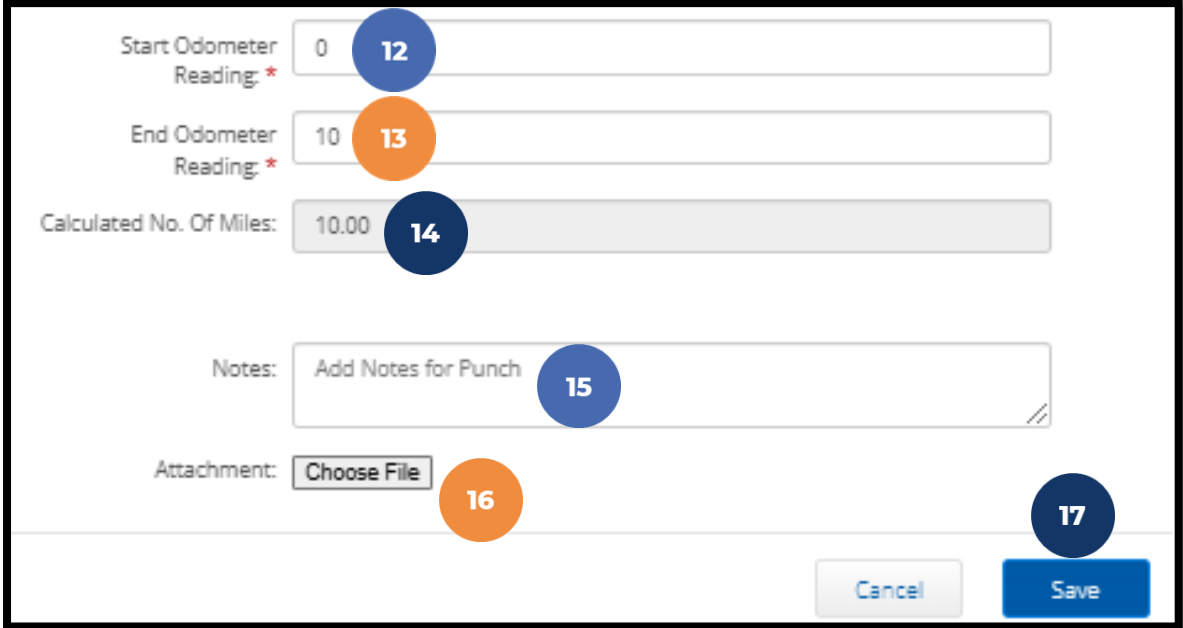
The screenshot shows the 'Add New Entry' form with the following fields and values:

- Entry Type:** \* Punch (3)
- Employee Name:** Steph Employee (4)
- Account Type:** \* Client Transportation (5)
- Client:** \* Steph Client - 125 (6)
- Service Code:** \* 5198 Mileage (7)
- Service Date:** \* 02/13/2025 (8)
- EVV Method:** \* Portal Signoff (9)
- Add Reason Codes:** \* x Forgot phone x (10)
- Add Reason Code Note:** \* No phone (11)



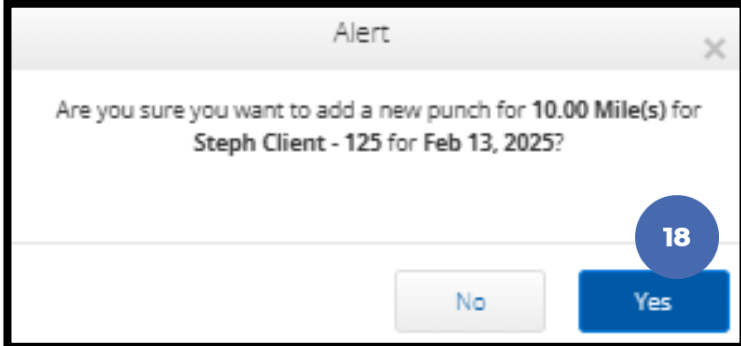
# Add New Entry (cont.)

12. Starting Odometer Reading: Enter the true starting odometer reading, or optionally, enter 0.
13. Ending Odometer Reading: If the true starting odometer reading was entered, enter the true ending odometer reading. If 0 was entered, enter the number of miles driven (i.e., 0 starting, 10 ending).
14. Calculated No. Of Miles: Total miles driven (system-calculated based on odometer readings)
15. Notes (optional): Enter notes for the punch
16. Attachment (optional): Click the **Choose File** button to select and upload
17. Click **Save**
18. Click **Yes** to submit



The screenshot shows a web form for adding a new entry. It includes the following fields and buttons:

- Start Odometer Reading:** A text input field with the value '0'. A blue circle with the number '12' is next to it.
- End Odometer Reading:** A text input field with the value '10'. An orange circle with the number '13' is next to it.
- Calculated No. Of Miles:** A text input field with the value '10.00'. A blue circle with the number '14' is next to it.
- Notes:** A text area with the placeholder text 'Add Notes for Punch'. A blue circle with the number '15' is next to it.
- Attachment:** A button labeled 'Choose File'. An orange circle with the number '16' is next to it.
- Buttons:** At the bottom right, there are two buttons: 'Cancel' and 'Save'. A blue circle with the number '17' is next to the 'Save' button.




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

- Title:** Alert
- Message:** Are you sure you want to add a new punch for 10.00 Mile(s) for Steph Client - 125 for Feb 13, 2025?
- Buttons:** At the bottom right, there are two buttons: 'No' and 'Yes'. A blue circle with the number '18' is next to the 'Yes' button.

# Web Portal Video

## Employee Adds (Historical) Entry for Account Type Client Transportation



Sign In

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

Or

[Create a profile](#)

Proprietary: For Acumen and Customer Use Only

# Questions?

**Visit the Acumen Help Center  
to learn more at:  
[acumenfiscalagent.zendesk.com](https://acumenfiscalagent.zendesk.com)**



**Acumen Fiscal Agent**

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**THANK YOU!**

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