

National Time Entry Training for Employees – Web Portal

Welcome to Acumen!

Thank you for joining the Acumen Family!



Acumen powered by DCI

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

Agenda



| | |
|---|---|
| ✓ | <u>Overview</u> |
| ✓ | <u>Navigation, Profile Settings, Messaging & Dashboard</u> |
| ✓ | <u>Authorization Check</u> |
| ✓ | <u>Add Entry</u> |
| ✓ | <u>Edit or Reject Entry</u> |
| ✓ | <u>Review Entries</u> |
| ✓ | <u>Troubleshooting</u> |

Quick Resources

- Short step-by-step resource documents have been added to the [National Time Entry & Time Management Training](#) page providing instructions for the punch entry and approval process.
- **Employee Specific Resources:**
 - ✓ Employee Web Portal Entries
 - ✓ Employee Mobile Web Entries
 - ✓ Employee Mobile App Entries
- **Shared Resources:**
 - ✓ Download the DCI Mobile EVV App & Log In
 - ✓ Logging into the Web Portal or the Mobile App
 - ✓ Phone EVV IVR Real Time & Historical Entries
 - ✓ Business Rule Alerts



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Overview

What is EVV?

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



Why DCI & EVV (Electronic Visit Verification)?

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



Ways to Enter Time

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

Mobile App



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



Navigation, Profile Settings, Messaging & Dashboard

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

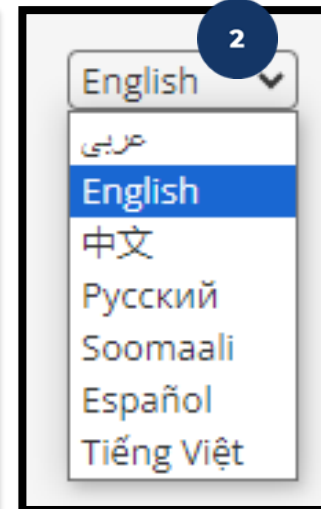
***Please note:** Contact Acumen with login issues

[acumen.dcisoftware.com](#)
OR
[outreach.dcisoftware.com](#)



The screenshot shows the sign-in page with the following elements and callouts:

- 1**: The URL bar showing the website address.
- 2**: The language drop-down menu in the top right corner, showing a list of languages including English, Arabic, Chinese, Russian, Somali, Spanish, and Vietnamese.
- 3**: The Username input field.
- 4**: The Password input field.
- 5**: The blue Sign In button.
- 6**: The "Forgot your password?" link.
- 7**: The "Remember me" checkbox.
- 8**: The "Or" separator.
- 9**: The "Create a profile" link.



This is a close-up of the language drop-down menu. It shows the current selection as "English" with a checkmark. Below it, a list of other languages is displayed: Arabic (عربي), Chinese (中文), Russian (Русский), Somali (Soomaali), Spanish (Español), and Vietnamese (Tiếng Việt).

Profile Settings

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

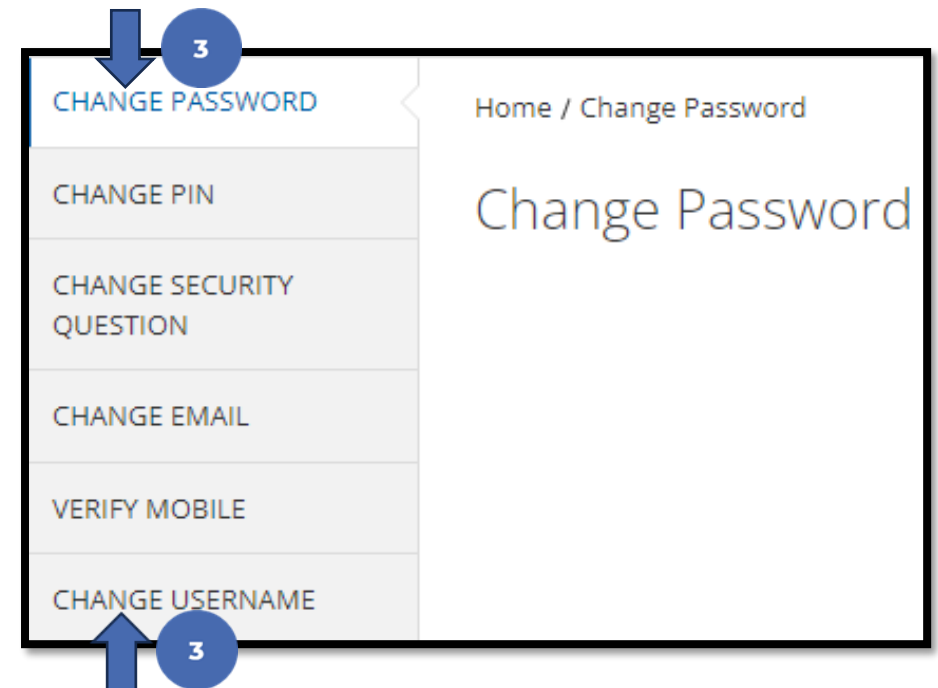
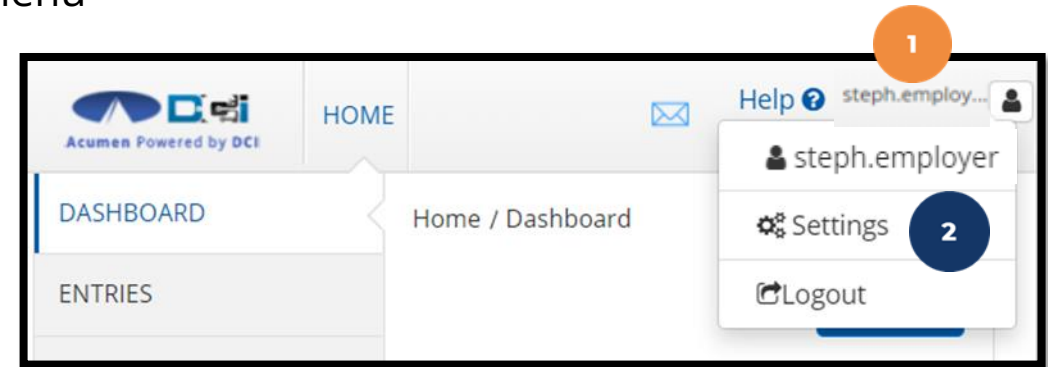


1. Click the **username** in the top right corner of the main menu

2. Click **Settings**

3. Select a submenu tab to update:

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



Add / Change PIN

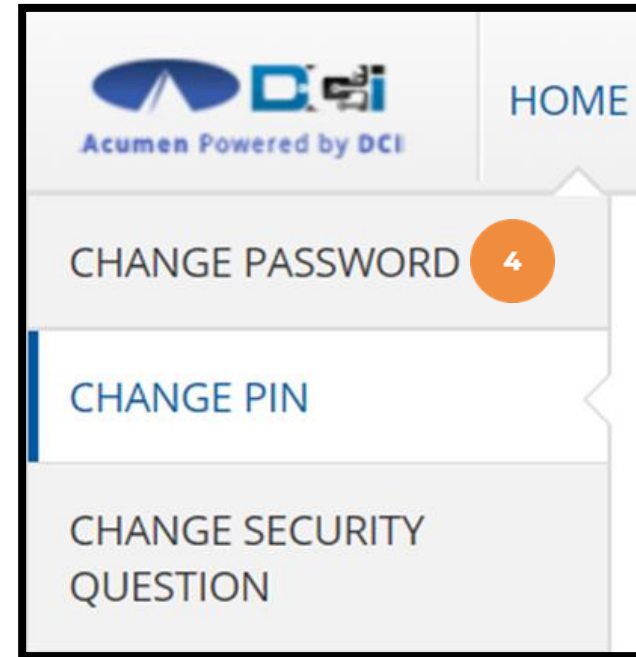
***Please Note!** The PIN can only be added or changed in the web portal

4. Select Change PIN or Add New PIN

- ✓ Add New PIN after a reset
- ✓ Change PIN anytime

5. Enter password

6. Click the blue **Verify** button

A screenshot of the password verification form. It features a label 'Password: *' followed by a text input field containing the placeholder text 'Please enter password'. A blue circle with the number 5 is positioned over the input field. To the right of the input field is a blue circle with the number 6. Below the input field are two buttons: a light gray 'Cancel' button and a blue 'Verify' button.

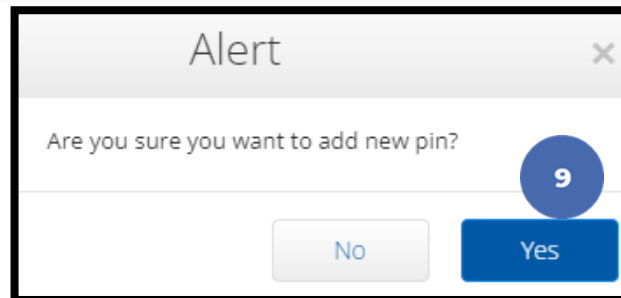
Add / Change PIN (cont.)

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



The screenshot shows a web form for changing a PIN. It has two input fields: "New Pin: *" with placeholder text "Please enter New Pin" and "Confirm Pin: *" with placeholder text "Please Confirm Pin". An orange circle with the number 7 is positioned between the two fields. To the right of the fields are two buttons: a light gray "Cancel" button and a blue "Change Pin" button. A blue circle with the number 8 is positioned above the "Change Pin" button.

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



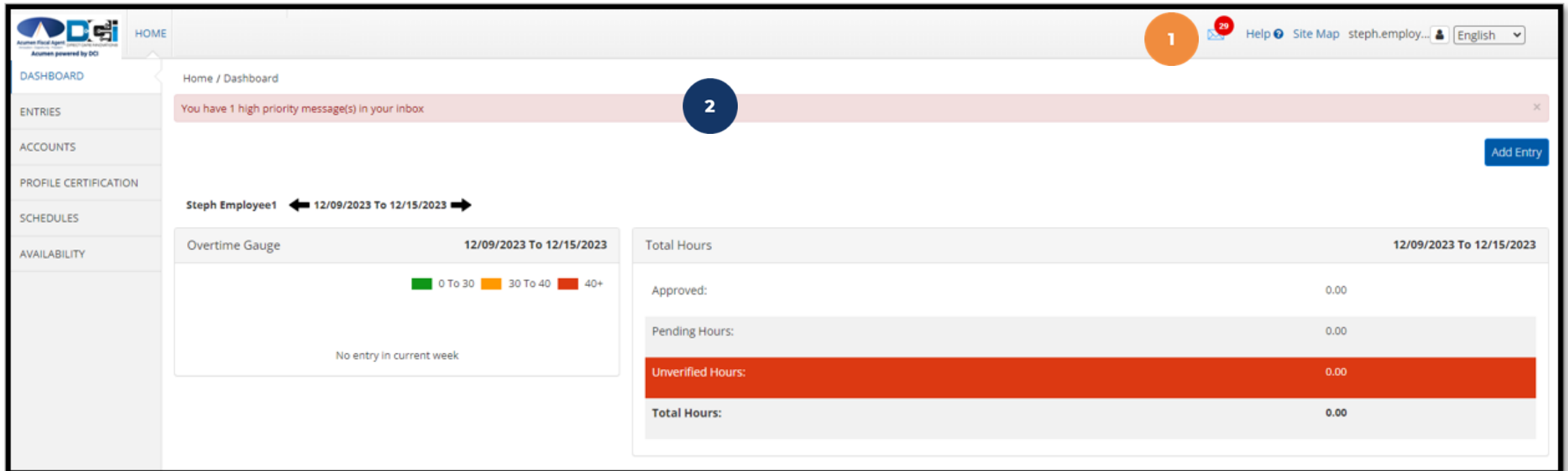
The screenshot shows a modal alert box titled "Alert" with a close button (X) in the top right corner. The text inside the alert says "Are you sure you want to add new pin?". Below the text are two buttons: a light gray "No" button and a blue "Yes" button. A blue circle with the number 9 is positioned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



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.



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

Web Portal Messaging Module

Select a message to view by clicking anywhere on the line

- ✓ Bold text indicates the message has not been read
- ✓ Light text indicates the message has been read
- ✓ A yellow star indicates a high priority message
- ✓ A paperclip indicates an attachment



Archive

Delete

Export

Showing 30 out of 72 records




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

View Paystubs via Messaging Module

1. Locate the paystub message in the inbox and click anywhere on the line to view it
2. Click the **Attachments** tab
3. Click the **eye** icon in the download column to view the paystub/statement or the **download** icon to download it

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

| | |
|-------|-------------|
| Notes | Attachments |
|-------|-------------|

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

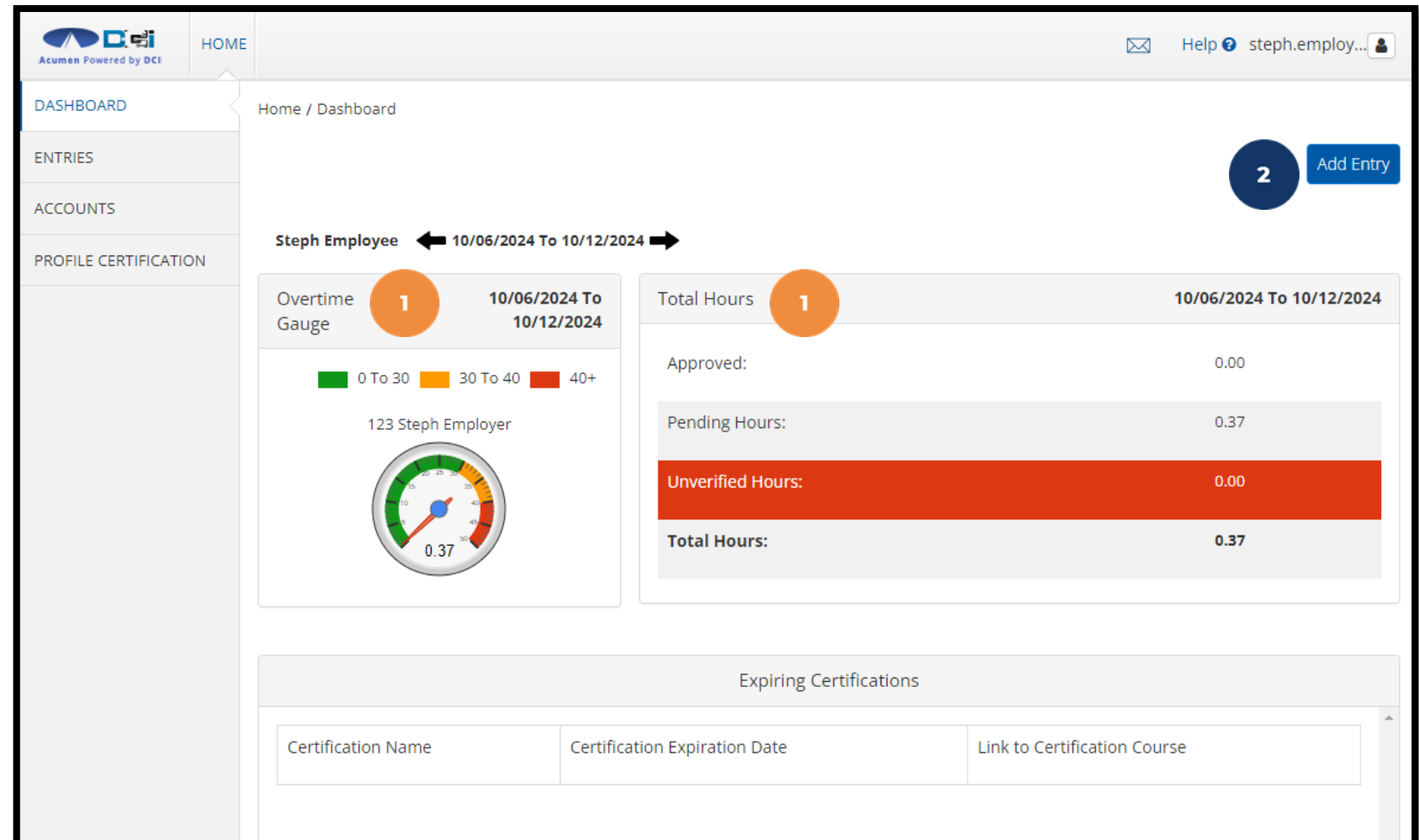
Dashboard

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

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

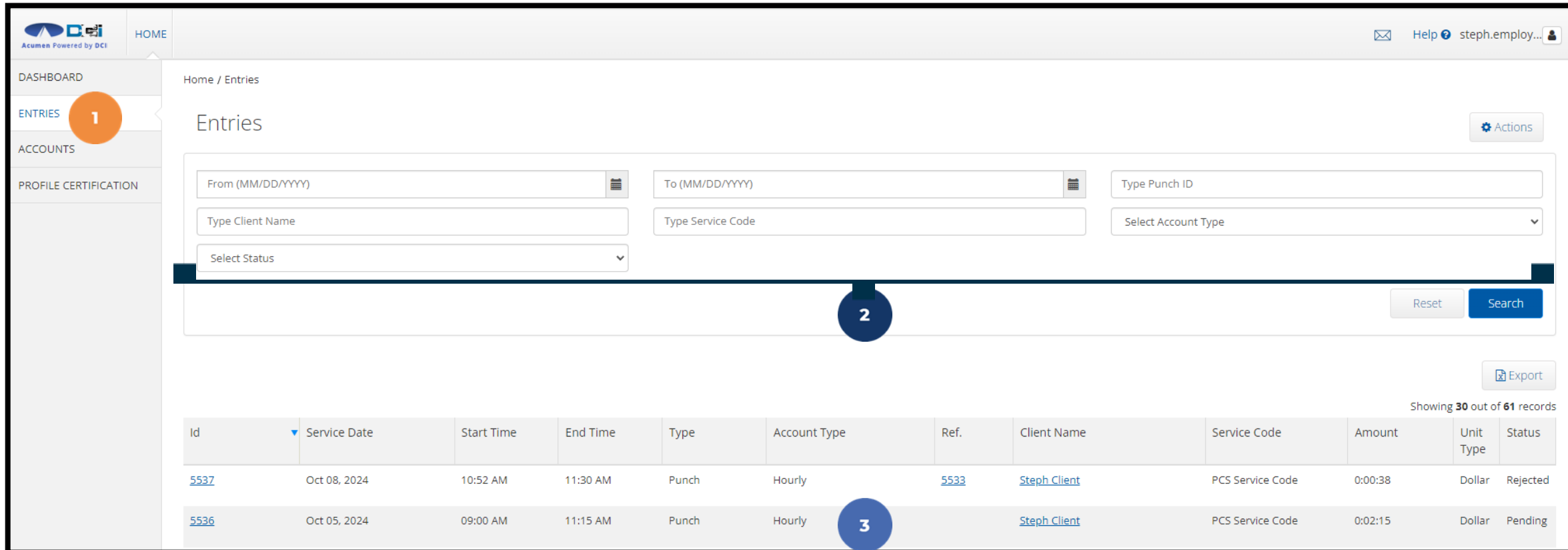
2. Click **Add Entry** to enter a historical time punch
 - ❖ Historical entries are non-EVV-compliant so should only be used if a service interruption occurred that prevented a real-time entry

The Dashboard is the landing page



Entries

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



Home / Entries

Entries

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

Type Client Name Type Service Code Select Account Type

Select Status

Reset Search

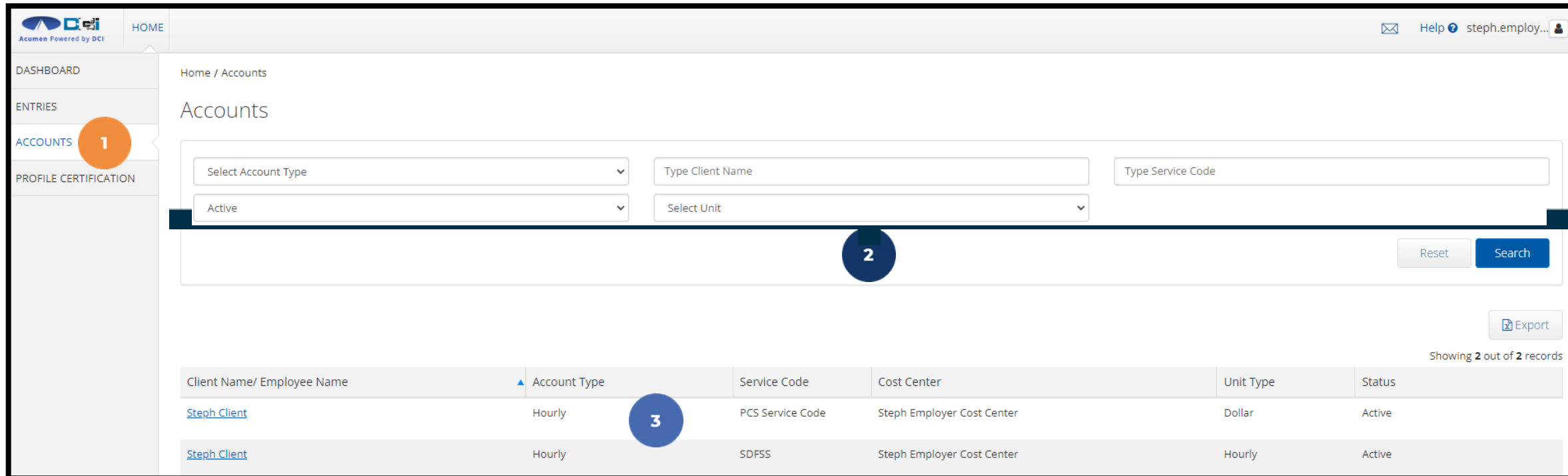
Export

Showing 30 out of 61 records

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

Accounts

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



Home / Accounts

Accounts

Select Account Type ▼ Type Client Name Type Service Code

Active ▼ Select Unit ▼

Reset Search

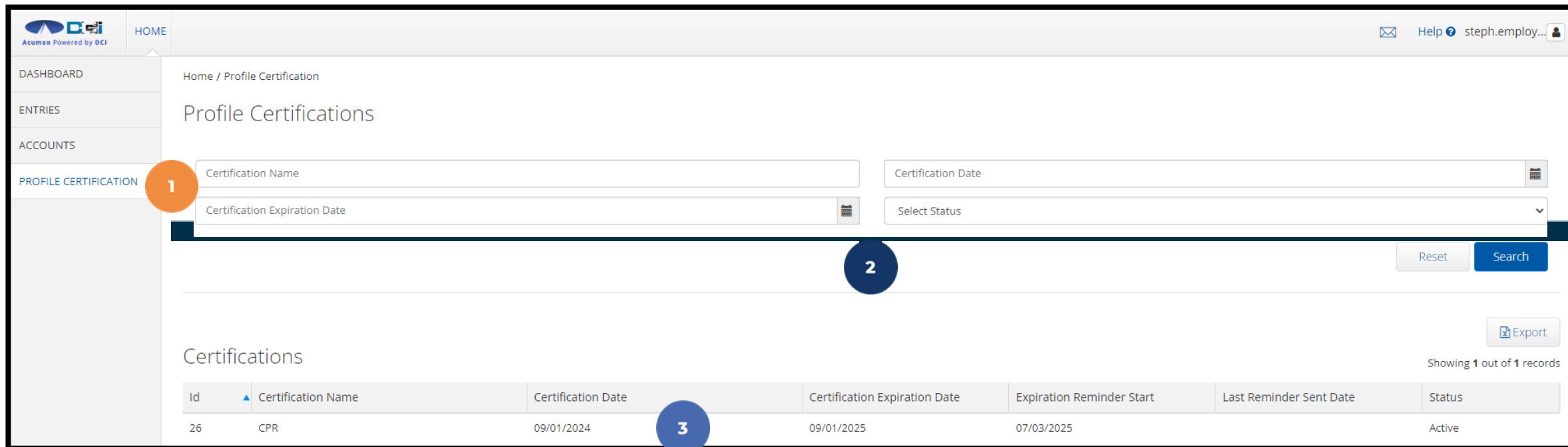
Export

Showing 2 out of 2 records

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

Profile Certification

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



The screenshot shows the Acumen Profile Certification interface. On the left is a sidebar with navigation links: DASHBOARD, ENTRIES, ACCOUNTS, and PROFILE CERTIFICATION (highlighted with a blue bar and an orange circle with the number 1). The main content area has a breadcrumb 'Home / Profile Certification' and a title 'Profile Certifications'. Below the title are four filter input fields: 'Certification Name', 'Certification Date', 'Certification Expiration Date', and 'Select Status'. A dark blue bar with a white circle containing the number 2 spans the width of these filters. Below the filters are 'Reset' and 'Search' buttons. An 'Export' button is located at the bottom right of the filter section. Below the filters is a table titled 'Certifications'. The table has columns: Id, Certification Name, Certification Date, Certification Expiration Date, Expiration Reminder Start, Last Reminder Sent Date, and Status. A single row is displayed with the following data: Id 26, Certification Name CPR, Certification Date 09/01/2024, Certification Expiration Date 09/01/2025, Expiration Reminder Start 07/03/2025, Last Reminder Sent Date, and Status Active. A blue circle with the number 3 is placed over the 'Certification Date' cell of this row. At the bottom right of the table, it says 'Showing 1 out of 1 records'.

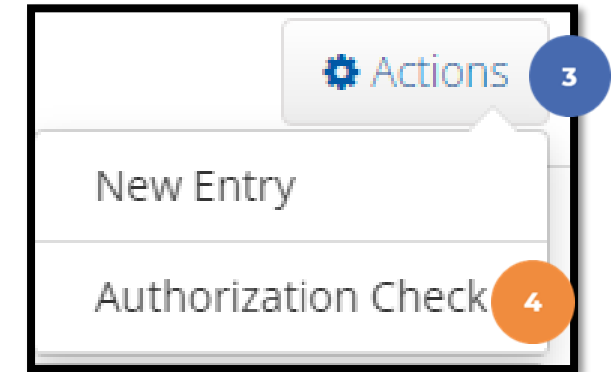
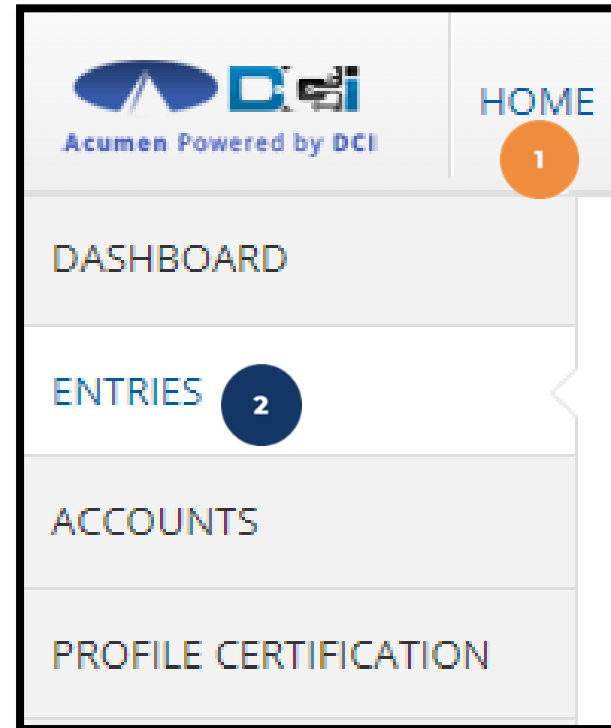
| Id | Certification Name | Certification Date | Certification Expiration Date | Expiration Reminder Start | Last Reminder Sent Date | Status |
|----|--------------------|--------------------|-------------------------------|---------------------------|-------------------------|--------|
| 26 | CPR |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

Authorization Check

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

Authorization Check

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



Authorization Check



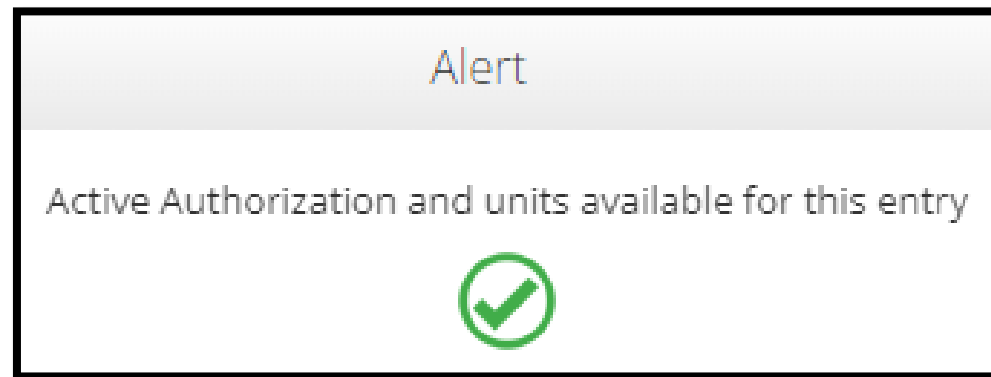
5. Select the Account Type
6. Type at least three characters of the client's name and select it from the drop-down
7. Select the Service Code
8. Enter the current date or a future date for the Authorization Check
 - Cannot be a past date
9. Enter the Check In and Check Out times
 - If the current date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

Complete the Authorization Check form wizard

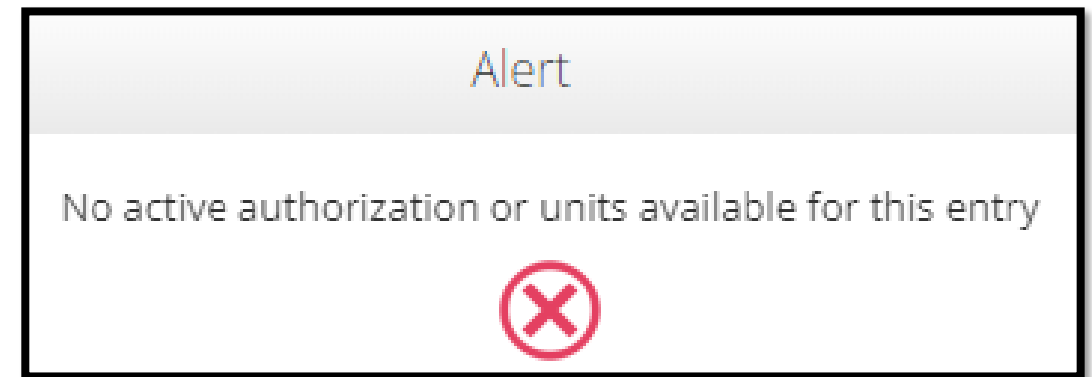
A screenshot of a web-based form titled "Authorization Check" with a close button (X) in the top right corner. The form contains several input fields: "Account Type:" with a dropdown menu showing "Hourly"; "Client:" with a text input field containing "Type Client Name"; "Service Code:" with a dropdown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

Authorization Check Results

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



OR



Add Entry

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

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

Add New Entry

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

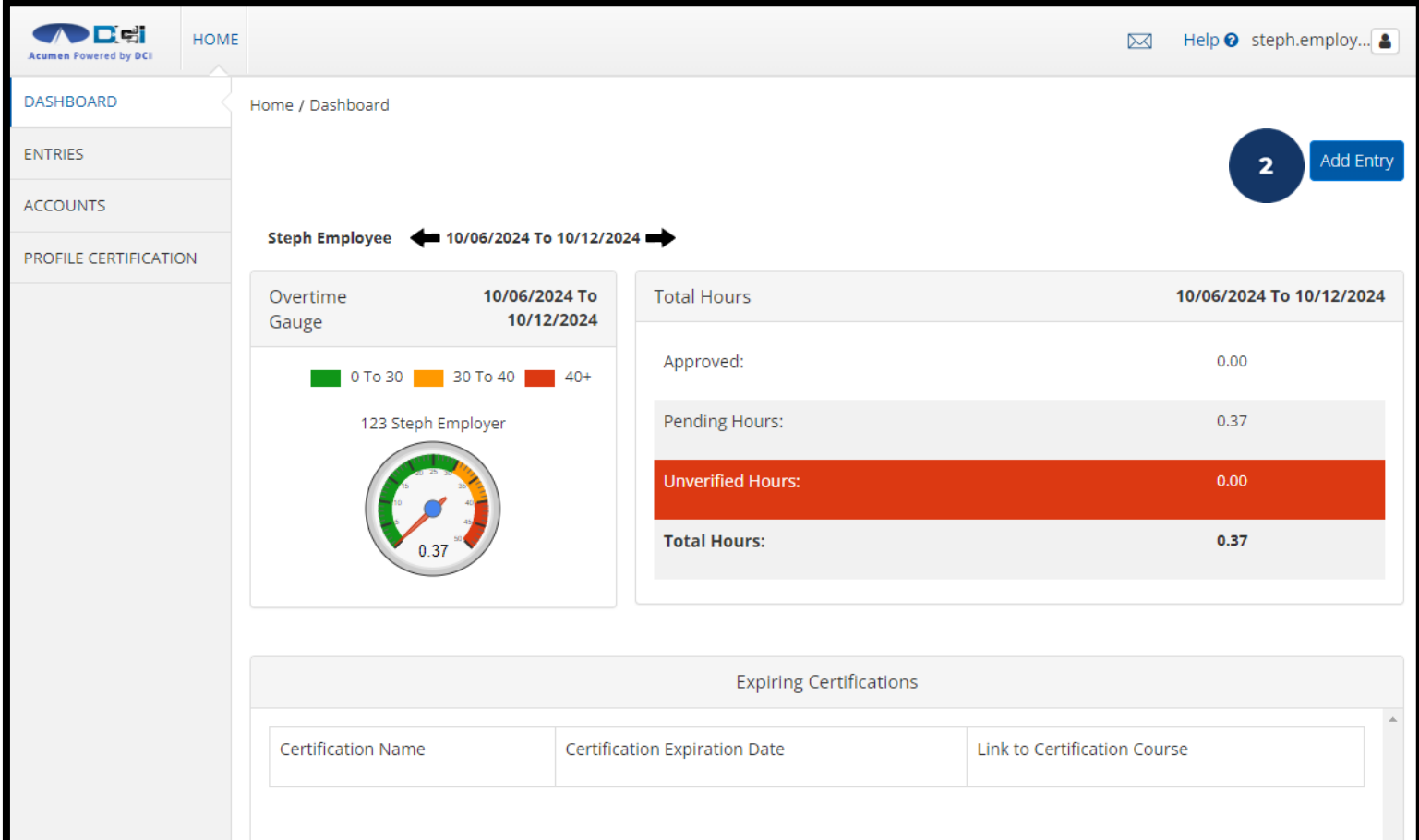
Sign In

Username 1

Password

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

Sign In



The screenshot shows the DCI Web Portal dashboard for a user named Steph Employee. The dashboard includes a sidebar with navigation links (DASHBOARD, ENTRIES, ACCOUNTS, PROFILE CERTIFICATION), a top navigation bar with a HOME link and user profile, and a main content area. The main content area displays an Overtime Gauge for the period 10/06/2024 To 10/12/2024, showing a value of 0.37. A table on the right shows Total Hours for the same period, with values for Approved (0.00), Pending Hours (0.37), Unverified Hours (0.00), and Total Hours (0.37). At the bottom, there is a section for Expiring Certifications with a table containing columns for Certification Name, Certification Expiration Date, and Link to Certification Course.

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HOME

Help ⓘ steph.employ...

DASHBOARD Home / Dashboard

ENTRIES

ACCOUNTS

PROFILE CERTIFICATION

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

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

0 To 30 30 To 40 40+

123 Steph Employer

0.37

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

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

Expiring Certifications

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

Add New Entry – Portal Signoff



3. Type a minimum of three characters to generate results and select the Client's name from the list
4. Select the Service Code from the drop-down
5. Select the Service Date
6. Enter the Check In (start) and Check Out (end) times
7. If applicable to the program, select the Pay Rate Name from the drop-down.
8. Select Portal Signoff as the EVV Method
9. If required by the program, select Clock In and Out EVV Location.
10. Check Out Date will auto-populate based on the Service Date entered

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

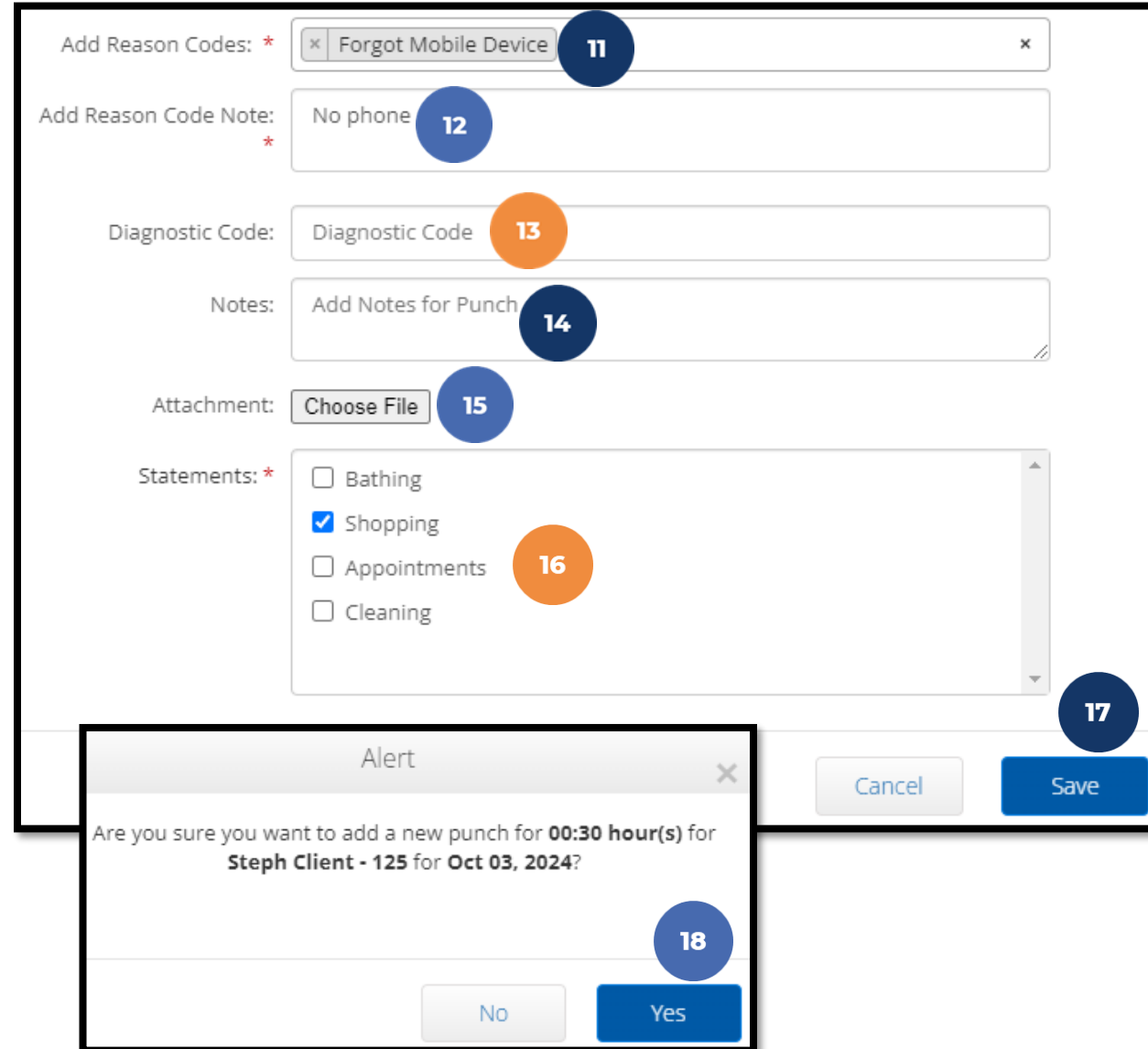
- Entry Type: * Punch
- Employee Name: Steph Employee
- Account Type: * Hourly
- Client: * Steph Client - 125
- Service Code: * PCS Service Code
- Service Date: * 10/03/2024
- Check In: * 7:00 AM
- Check Out: * 7:30 AM
- Pay Rate Name: * Standard
- EVV Method: * Portal Signoff
- Clock In EVV Location: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

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

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

Add New Entry – Portal Signoff

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




The screenshot displays the 'Add New Entry' form with the following elements and callouts:

- 11**: 'Add Reason Codes: *' dropdown menu showing 'Forgot Mobile Device'.
- 12**: 'Add Reason Code Note: *' text input field containing 'No phone'.
- 13**: 'Diagnostic Code:' text input field containing 'Diagnostic Code'.
- 14**: 'Notes:' text input field containing 'Add Notes for Punch'.
- 15**: 'Attachment:' section with a 'Choose File' button.
- 16**: 'Statements: *' section with a list of checkboxes: 'Bathing' (unchecked), 'Shopping' (checked), 'Appointments' (unchecked), and 'Cleaning' (unchecked).
- 17**: 'Cancel' and 'Save' buttons at the bottom right of the form.
- 18**: An 'Alert' dialog box in the foreground asking: 'Are you sure you want to add a new punch for 00:30 hour(s) for Steph Client - 125 for Oct 03, 2024?'. It has 'No' and 'Yes' buttons.

Web Portal Video

Employee Adds (Historical) Entry – Portal Signoff



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Sign In

☐ Remember me

[Forgot your password?](#)

Or

[Create a profile](#)

Proprietary: For Acumen and Customer Use Only

Add New Entry – Secure FOB

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

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



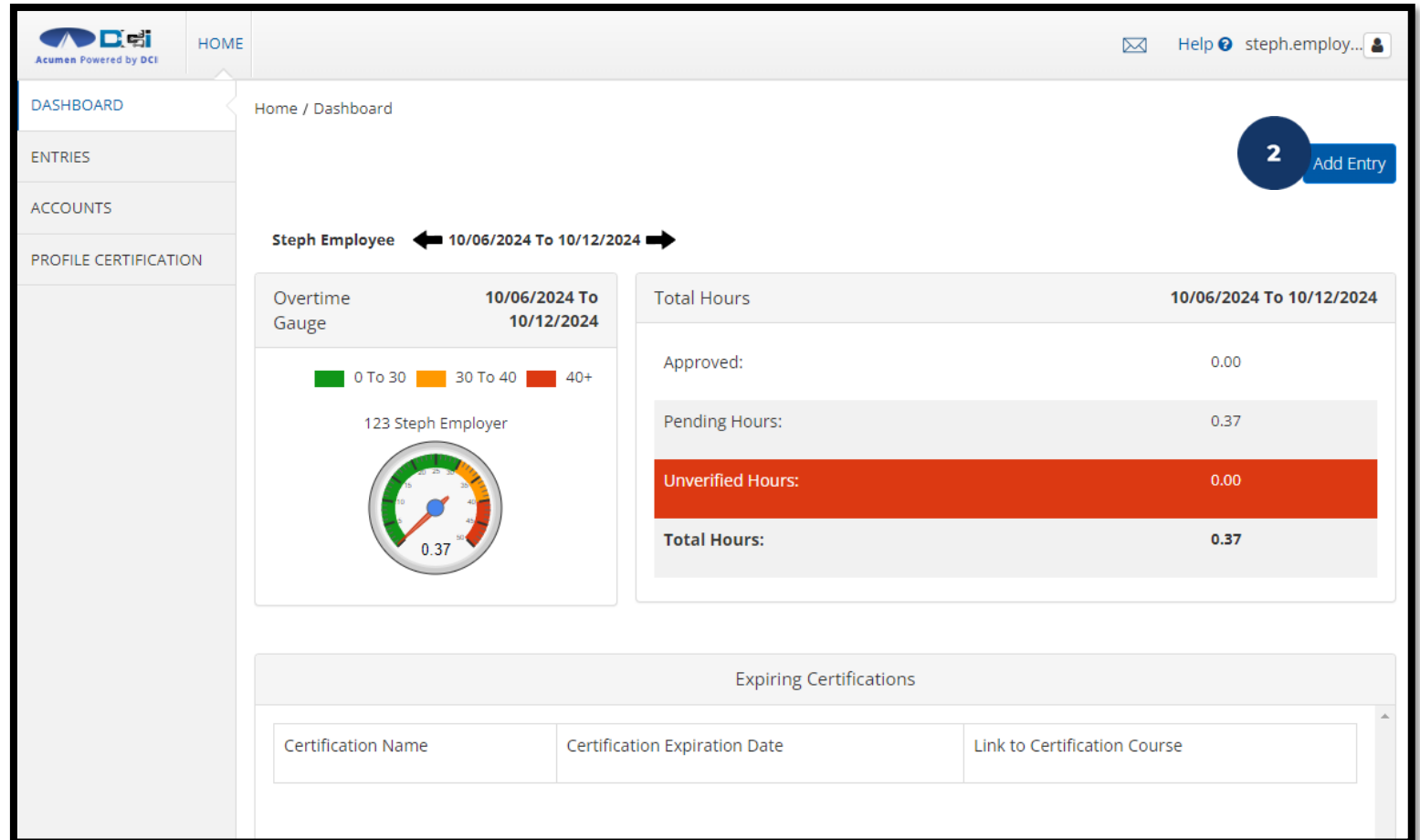
Sign In

Username 1

Password

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

Sign In



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HOME

Help steph.employ...

DASHBOARD Home / Dashboard

ENTRIES

ACCOUNTS

PROFILE CERTIFICATION

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

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

0 To 30 30 To 40 40+

123 Steph Employer

0.37

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

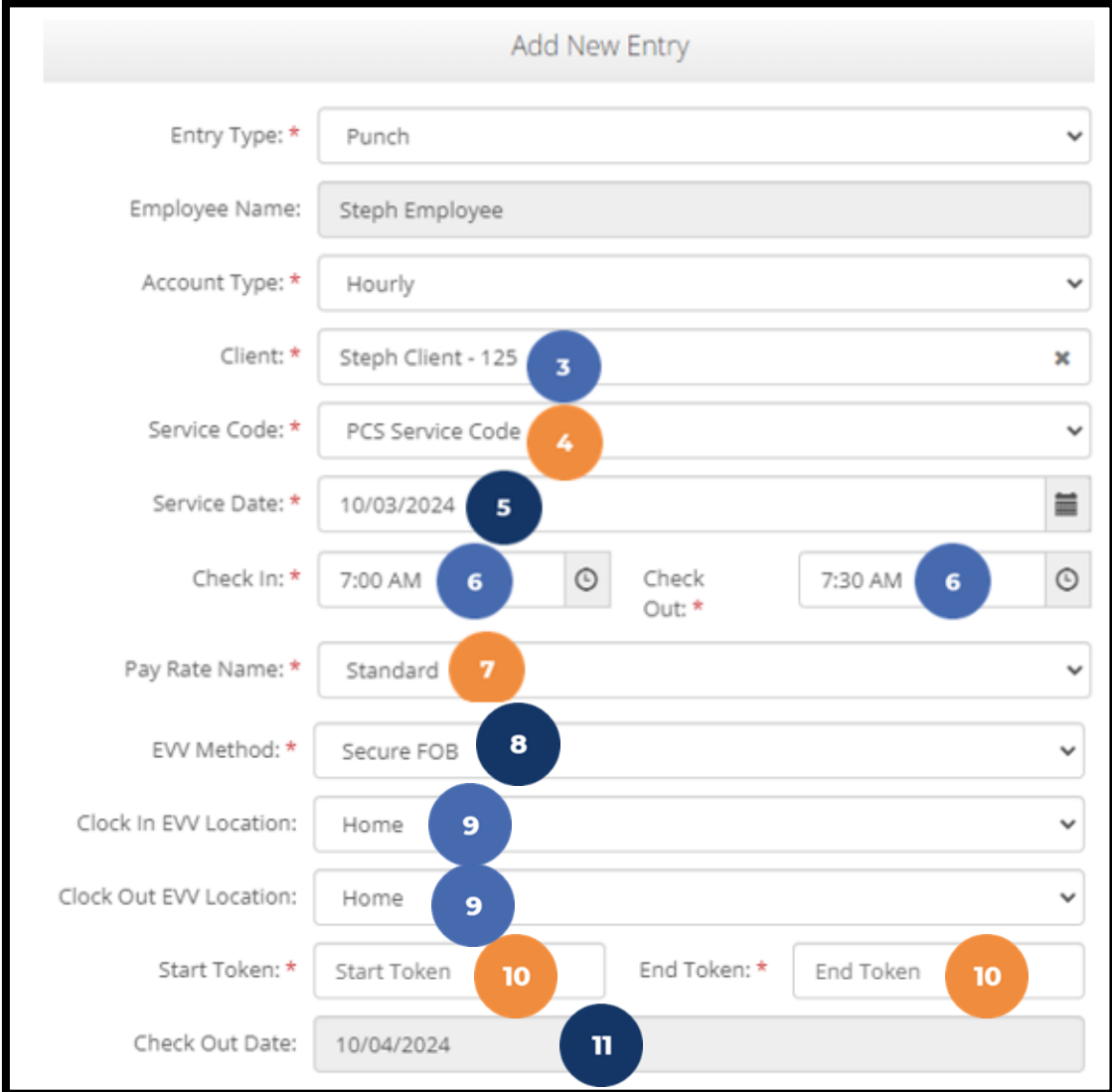
| | |
|-------------------|------|
| Approved: | 0.00 |
| Pending Hours: | 0.37 |
| Unverified Hours: | 0.00 |
| Total Hours: | 0.37 |

Expiring Certifications

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

Add New Entry – Secure FOB

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



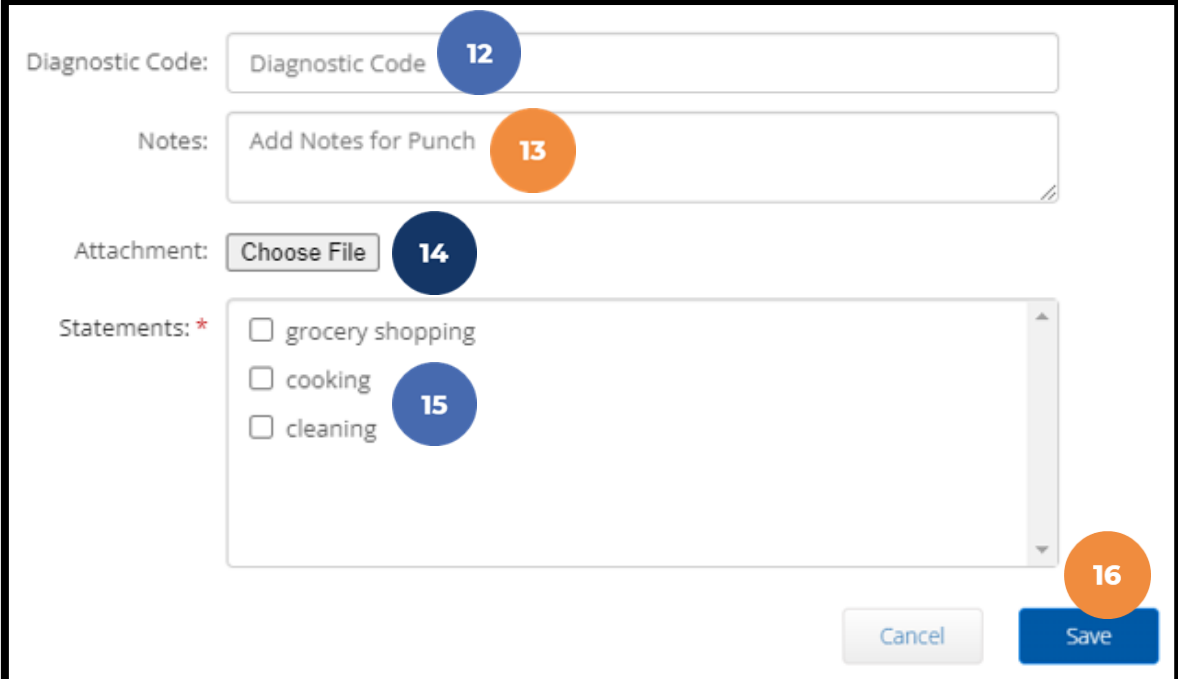
The screenshot shows the 'Add New Entry' form with the following fields and values:

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

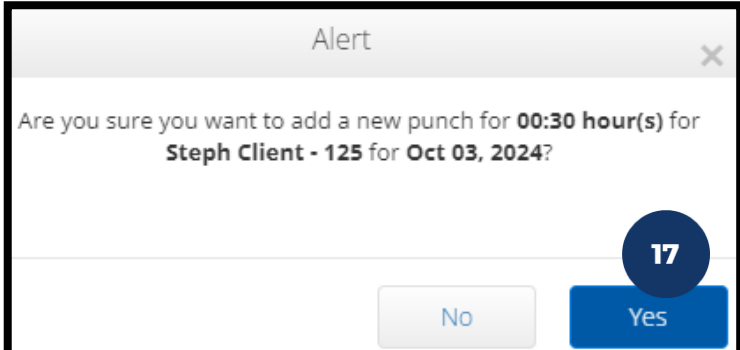
Numbered callouts (3-11) are placed over the form fields to indicate the sequence of steps for adding a new entry.

Add New Entry – Secure FOB

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



The screenshot shows a form for adding a new entry. It includes fields for 'Diagnostic Code' (callout 12), 'Notes' (callout 13), and an 'Attachment' section with a 'Choose File' button (callout 14). Below these is a 'Statements' section with a list of checkboxes: 'grocery shopping', 'cooking' (callout 15), and 'cleaning'. At the bottom right are 'Cancel' and 'Save' buttons (callout 16).



The screenshot shows an 'Alert' dialog box with the text: 'Are you sure you want to add a new punch for 00:30 hour(s) for Steph Client - 125 for Oct 03, 2024?'. At the bottom are 'No' and 'Yes' buttons (callout 17).

Edit or Reject Entry

Edit or Reject Entry

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



1. Log in to the [DCI Web Portal](#)
2. Click **Entries** on the submenu
3. Click anywhere on the line of the punch entry to be edited
4. Click the **Actions** button in the top right corner
5. Select **Edit Entry** from the drop-down menu

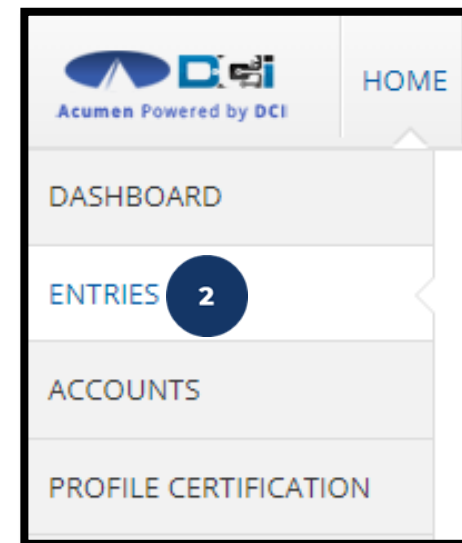
Sign In

Username

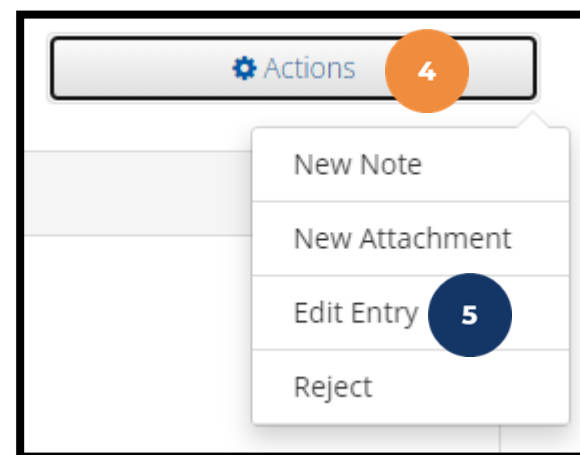
Password

☐ 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 |



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

Edit Entry

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

6. Complete the necessary changes in the Edit Entry form wizard
7. If required by the program, select a Reason Code from the drop-down list.
8. If required by the program, add a Reason Code Note.
9. Click **Save**
10. Click **Yes** to confirm the changes


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

The screenshot shows the 'Edit Entry' form with the following fields and callouts:

- 6**: Entry Type: Punch
- Employee Name: Steph Employee - 125
- Account Type: Hourly
- Client: Steph Client - 550
- Service Code: PCS Service Code
- Select Date: 10/03/2024
- Check In: 12:06 PM
- Check Out: 12:10 PM
- Pay Rate Name: Standard
- Check Out Date: 10/03/2024
- EVV Method: Portal Signoff
- Clock In EVV Location: Home
- Clock Out EVV Location: Home
- Diagnostic Code: Diagnostic Code
- 7**: Add Reason Codes: Forgot Mobile Device
- 8**: Add Reason Code Note: Add Reason Code Note
- Notes: Add Notes for Punch
- Attachment: Choose File
- Statements: ☒ Bathing, ☐ Shopping, ☐ Appointments, ☐ Cleaning
- 9**: Save button
- 10**: Yes button in the Alert dialog

Web Portal Video

Employee Edits (Historical) Entry



Acumen Powered by DCI

Sign In

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

Or

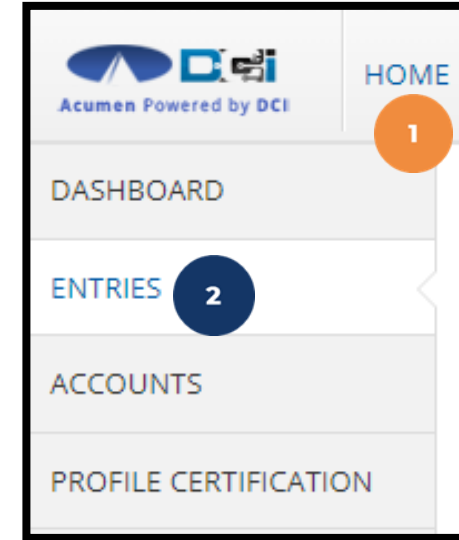
[Create a profile](#)

Proprietary: For Acumen and Customer Use Only

Review Entries

Review Entries

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



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

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

Entry Status



- **Unverified:** Entries that the Employer or Admin (someone other than the employee) enters or edits on behalf of an employee. The employee must resolve the unverified entries so the employer can review.
- **Unvalidated:** Temporary status. Entries that are waiting for the business rule validation process to complete. This process runs multiple times an hour. Moves to pending or rejected status after processes run.
- **Pending:** Entries that are awaiting review and approval by the Employer. Display on the Pending Entries page.
- **Rejected:** Entries that have been rejected by the Employer or a system process
- **Approved:** Entries that have been approved by the Employer and are ready to be processed
- **Batched:** An approved entry that has been included in a pending payroll batch
- **Processed:** Entries that have been processed and are ready for payroll

Punch Detail Page

- Widgets contain detailed information on the punch

Employer / Pending Entries / 76561

Punch Detail - 76561

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

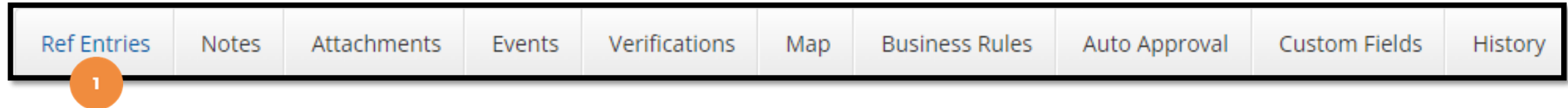
Punch Detail Page

- Additional widgets

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

Punch Detail Page - Tabs

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



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

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

Reference Entries

Showing 1 out of 1 record

| Reject | <div>Id</div> | Service Date | Account Type | <div>Ref.</div> | Type | Cost Center | Client/ Program | Employee/ Program | Service Code | Amount | Unit Type | Status |
|--------|-----------------------|--------------|------------------|-----------------------|-------|---|-------------------------------|---------------------------------|------------------|---------|-----------|---------|
| | 74969 | Jul 17, 2024 | Employee Service | 74963 | Punch | Steph Cost Center test - Steph Cost Center test | Steph Client1 | Steph Employee1 | RESPIRE (Hourly) | 0:00:02 | Hourly | Pending |

Punch Detail - Tabs

| | | | | | | | | | |
|-------------|-------|-------------|--------|---------------|-----|----------------|---------------|---------------|---------|
| Ref Entries | Notes | Attachments | Events | Verifications | Map | Business Rules | Auto Approval | Custom Fields | History |
| | 2 | 3 | 4 | 5 | | | | | |

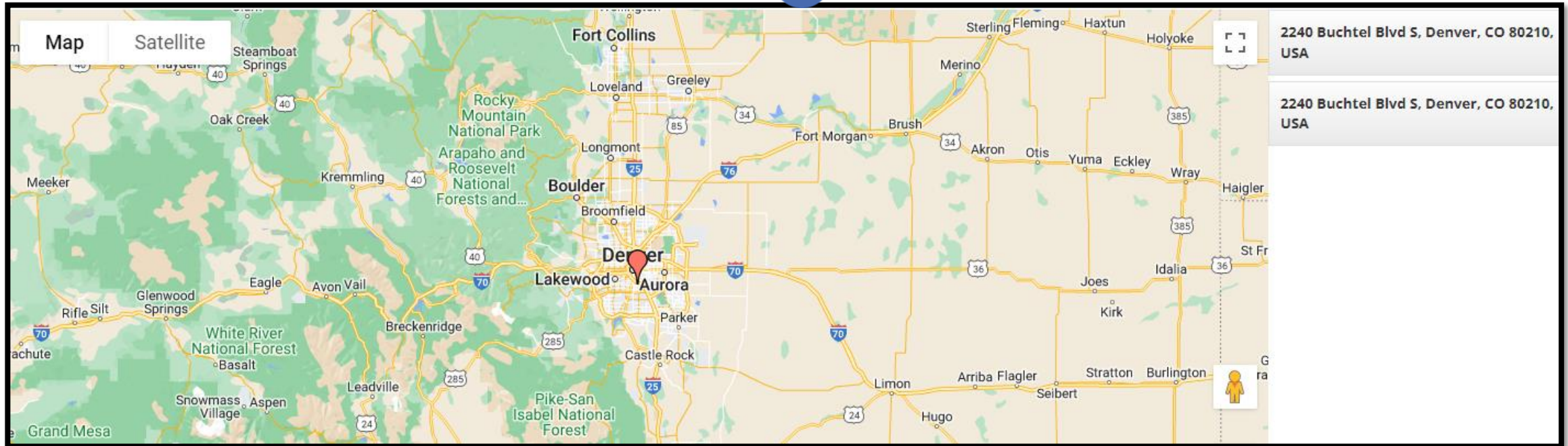
2. **Notes** – View notes on the punch, reason codes, reason code notes, and statements/tasks.
3. **Attachments** – View attachments on the punch
4. **Events** – Log including date/time, subject, description, input type (web portal or mobile app), OS, OS version, app version, and user/system process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

| | | | | | | | | |
|-------------------|--------------------------|---------------------------|----------|---|---------|----------------|---------------|--|
| EVV Verifications | | Showing 1 out of 1 record | | | | | | |
| Approve | Date | Verification Type | Status | Attachments | Compare | Approved By | Approved Date | |
| | Jul 17, 2024 11:02:51 AM | Picture | Approved | 53e8b14b-bfe8-4c62-91bd-fb9e4cbe7392.jpeg | ≡ | Matthew Chavez | Jul 17, 2024 | |

Punch Detail - Tabs

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

6



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

Punch Detail Page

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

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

Punch Detail Page

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

| Ref Entries | Notes | Attachments | Events | Verifications | Map | Business Rules | Auto Approval | Custom Fields | History | |
|---------------------------|--------------|--|----------------------------------|-----------------------------|---------------------|--------------------|---------------------------|---------------|---------|--------|
| | | | | | | | 8 | 9 | 10 | Export |
| Auto Approval Results | | | | | | | | | | |
| Run Date | Result | Failure Reason(s) | Schedule Compare Check Attempted | Geo Fencing Check Attempted | EVV Check Attempted | OT Check Attempted | Over Auth Check Attempted | | | |
| 09/22/2024 09:49:43 PM | Approved | | No | No | Yes | Yes | Yes | | | |
| 10/09/2024 12:00:46 PM | Not Approved | EVV:There is no approved Electronic Visit Verification for this punch. | No | N/A | Yes | Yes | Yes | | | |

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

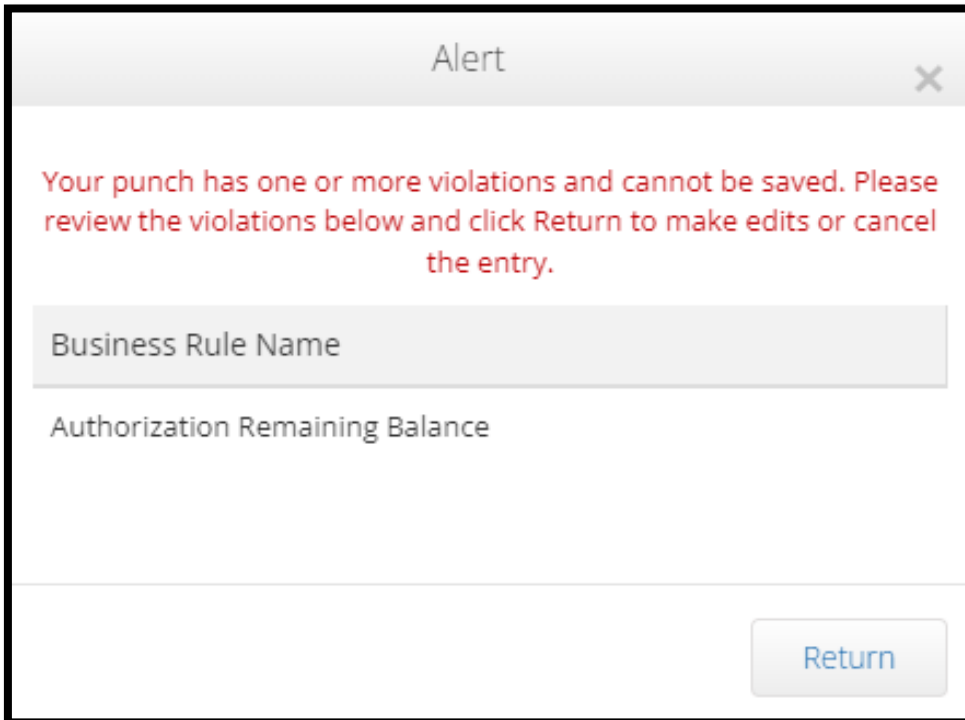
10. **History** – Record of all changes for the entry

Troubleshooting

Alerts

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

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



Alert

Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry.

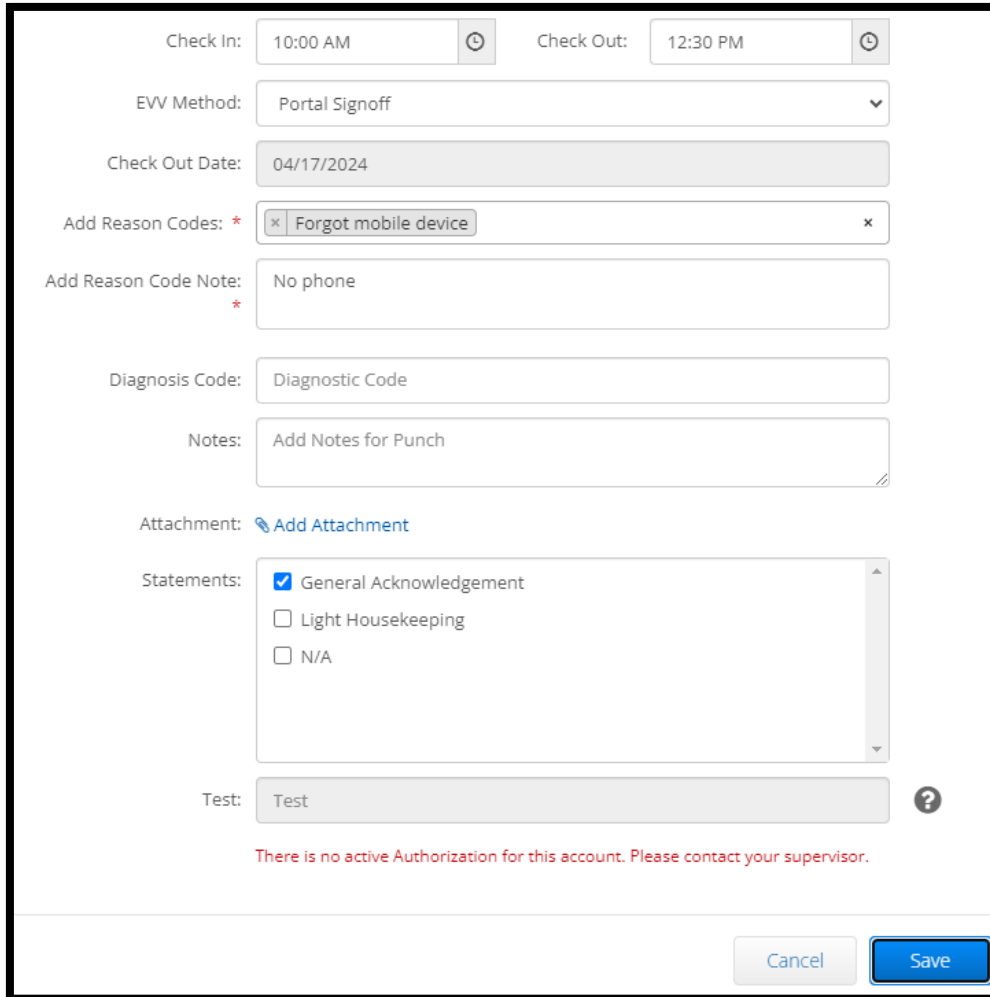
| Business Rule Name |
|---------------------------------|
| Authorization Remaining Balance |

Return

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

Alerts

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



The screenshot 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. An 'Add Reason Codes' section shows a code 'Forgot mobile device'. Below that is a text field for 'Add Reason Code Note' with the text 'No phone'. A 'Diagnosis Code' field contains 'Diagnostic Code'. A 'Notes' section has a placeholder 'Add Notes for Punch'. An 'Attachment' section includes a link 'Add Attachment'. The 'Statements' section has three checkboxes: 'General Acknowledgement' (checked), 'Light Housekeeping', and 'N/A'. A 'Test' field contains the word 'Test'. At the bottom, a red error message states: 'There is no active Authorization for this account. Please contact your supervisor.' Below the message are 'Cancel' and 'Save' buttons.

Check In: 10:00 AM Check Out: 12:30 PM

EVV Method: Portal Signoff

Check Out Date: 04/17/2024

Add Reason Codes: * x Forgot mobile device x

Add Reason Code Note: * No phone

Diagnosis Code: Diagnostic Code

Notes: Add Notes for Punch

Attachment: Add Attachment

Statements: ☒ General Acknowledgement
☐ Light Housekeeping
☐ N/A

Test: Test ?

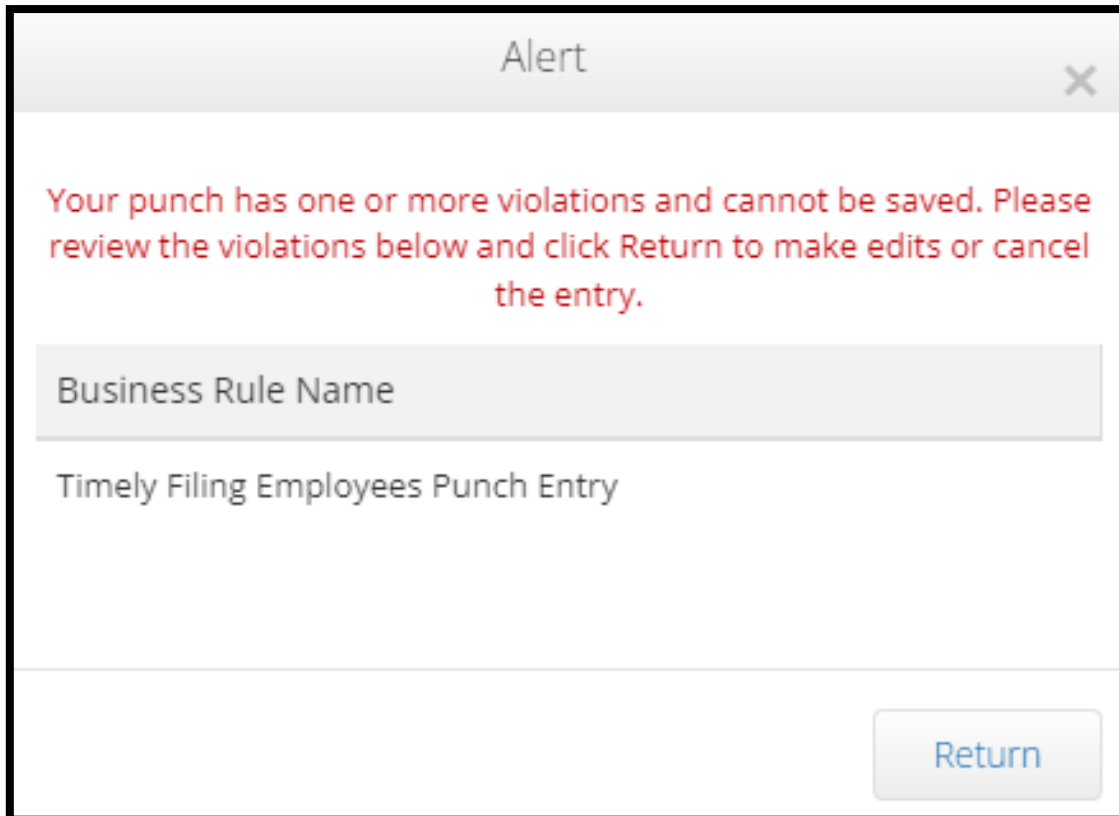
There is no active Authorization for this account. Please contact your supervisor.

Cancel Save

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

Alerts

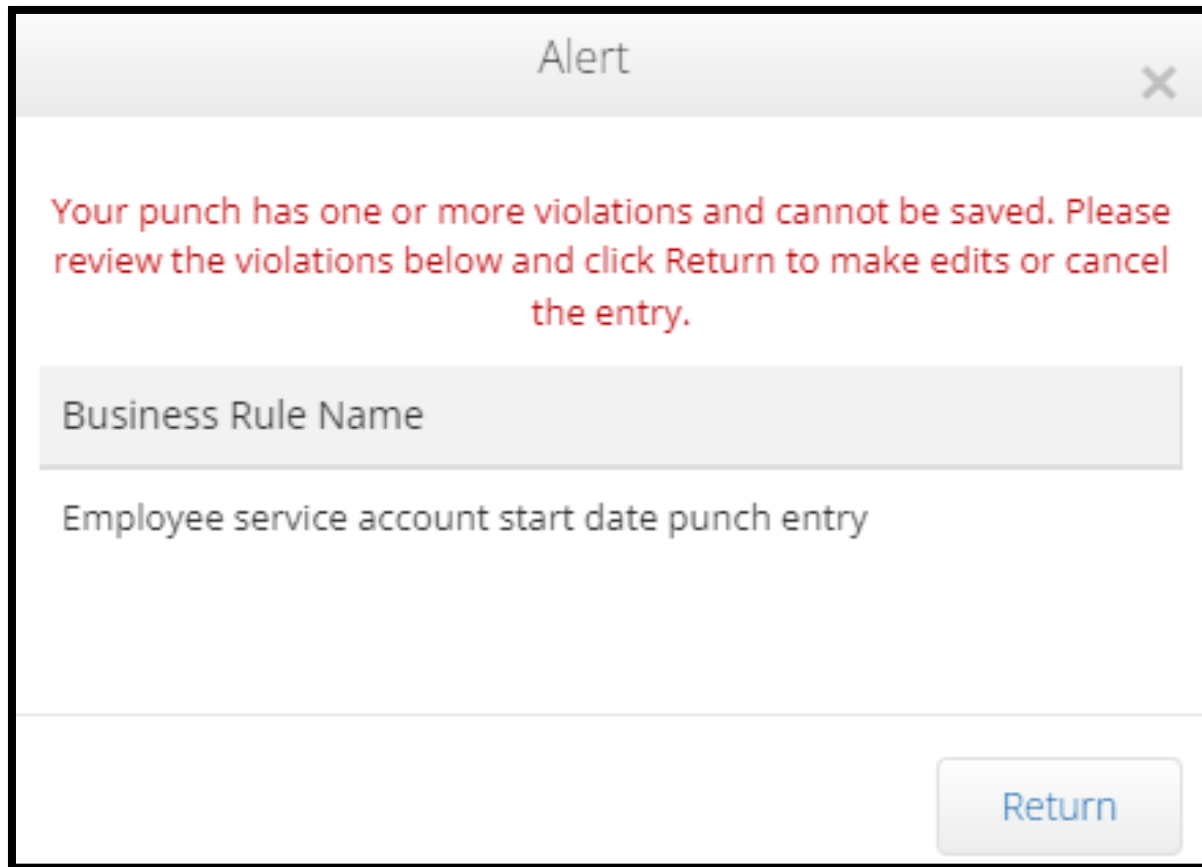
Punches must be **entered AND approved** within a certain number of days of the date of service (program-determined). After that number of days has passed, the **Timely Filing Employees Punch Entry** or the **Timely Filing Employee Punch Approval** rules will prohibit the punch from being saved.



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

Alerts

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



Alert

Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry.

Business Rule Name

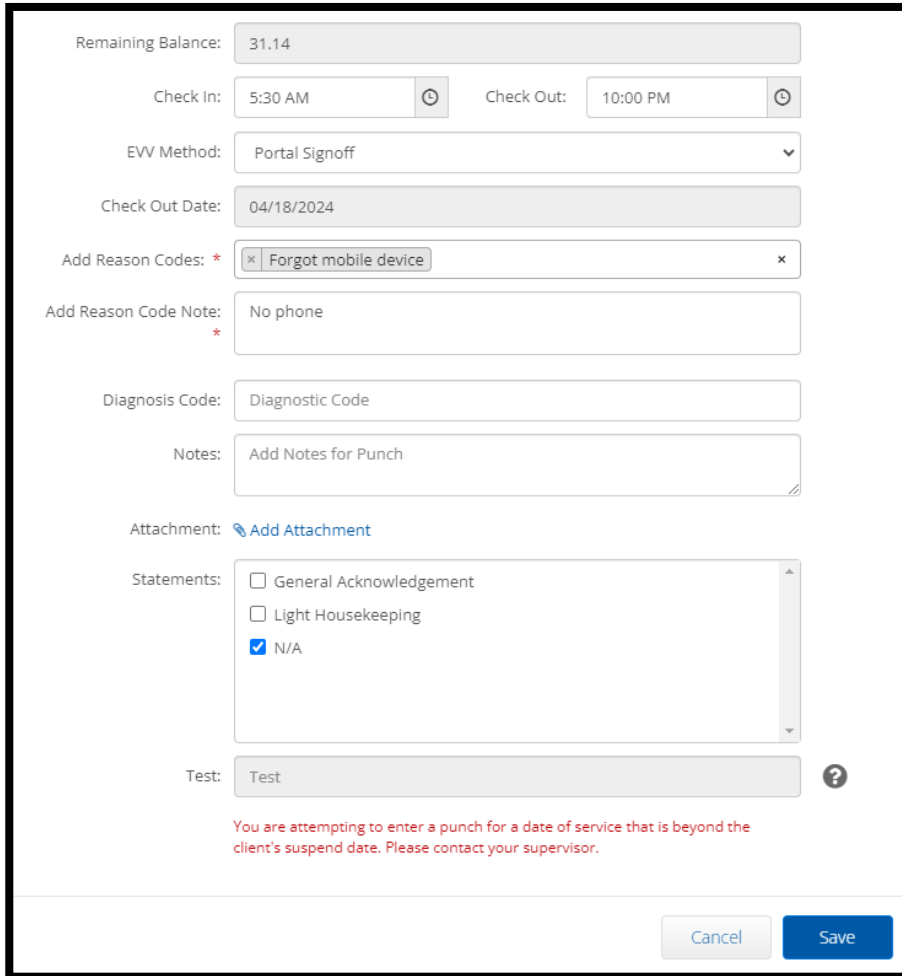
Employee service account start date punch entry

Return

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

Alerts

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



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

- Remaining Balance: 31.14
- Check In: 5:30 AM (with a clock icon)
- Check Out: 10:00 PM (with a clock icon)
- EW Method: Portal Signoff (dropdown menu)
- Check Out Date: 04/18/2024
- Add Reason Codes: * Forgot mobile device (with a close icon)
- Add Reason Code Note: * No phone
- Diagnosis Code: Diagnostic Code
- Notes: Add Notes for Punch
- Attachment: Add Attachment (with a link icon)
- Statements:
 - ☐ General Acknowledgement
 - ☐ Light Housekeeping
 - ☒ N/A
- Test: Test (with a help icon)

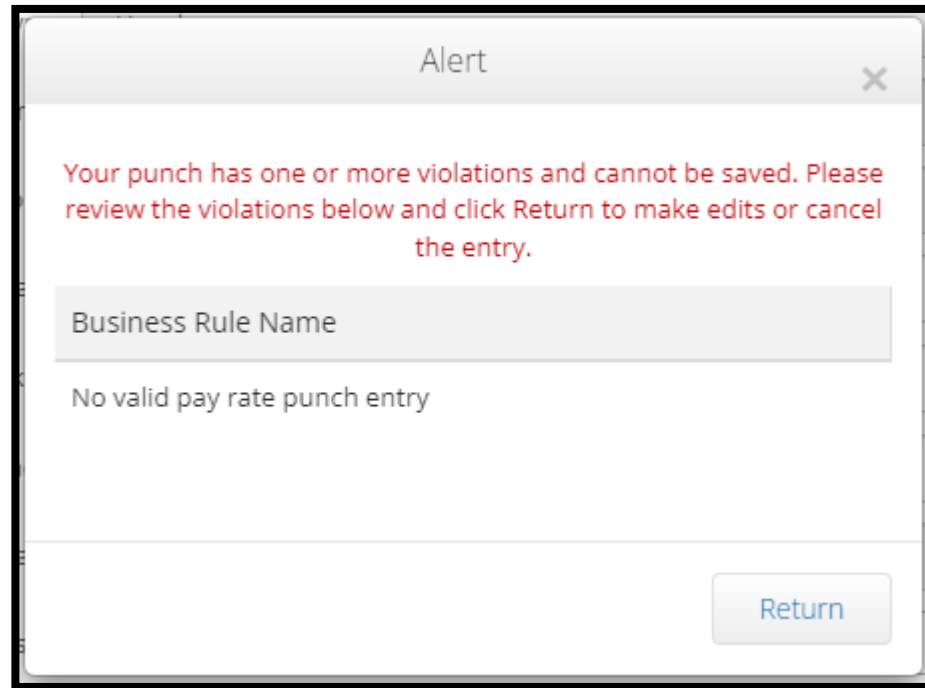
A red error message at the bottom states: "You are attempting to enter a punch for a date of service that is beyond the client's suspend date. Please contact your supervisor."

Buttons: Cancel, Save

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

Alerts

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



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

Check Entries

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

Entries Export

Showing 30 out of 380 records

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

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

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

Contact your employer

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