

National Time Entry Training for Employers – Web Portal

Welcome to Acumen!

Thank you for joining the Acumen Family!



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

Agenda



Overview



Navigation, Profile Settings, Messaging & Dashboard



Facial Recognition Setup



Manage Entries



Employees, Clients & Reports



Troubleshooting



Acumen Fiscal Agent
Innovation • Opportunity • Freedom

Quick Resources

- Short step-by-step resource documents have been added to [National Time Entry & Time Management Training](#) page providing instructions for the punch entry and approval process.
- **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
 - ✓ Business Rule Alerts



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 Employees Enter Time

They select 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

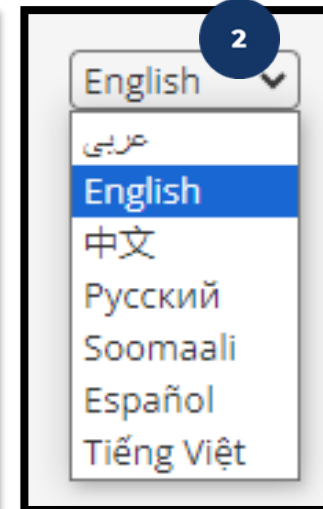
***Please note:** Contact Acumen with login issues

[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, currently set to English.
- 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.



Profile Settings

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

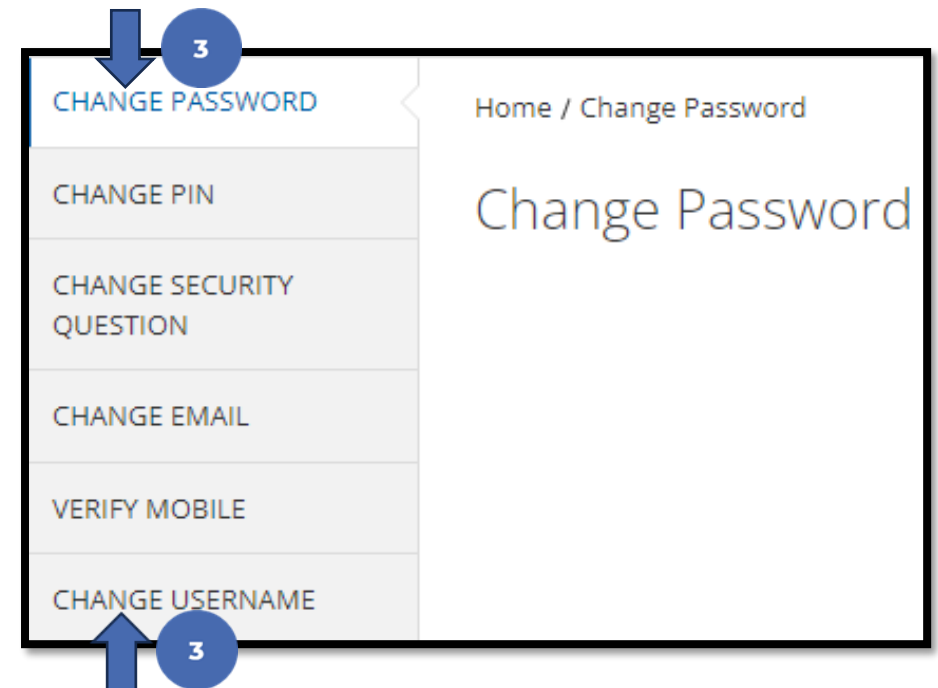
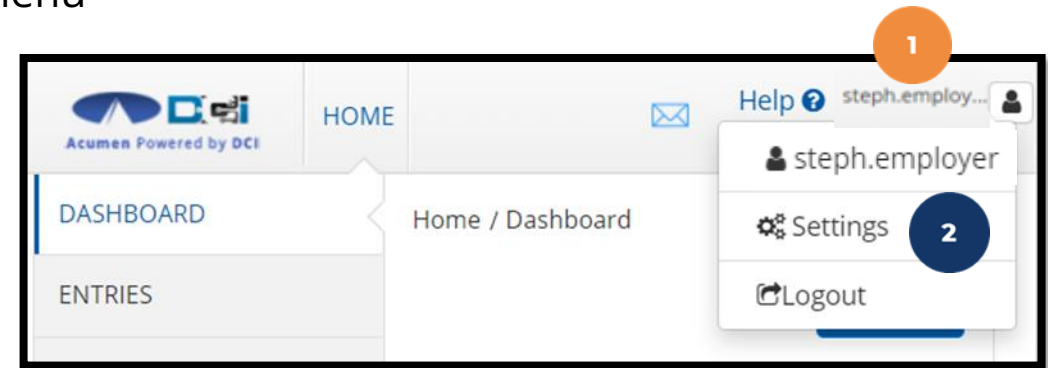


1. Click the **username** in the top right corner of the main menu

2. Click **Settings**

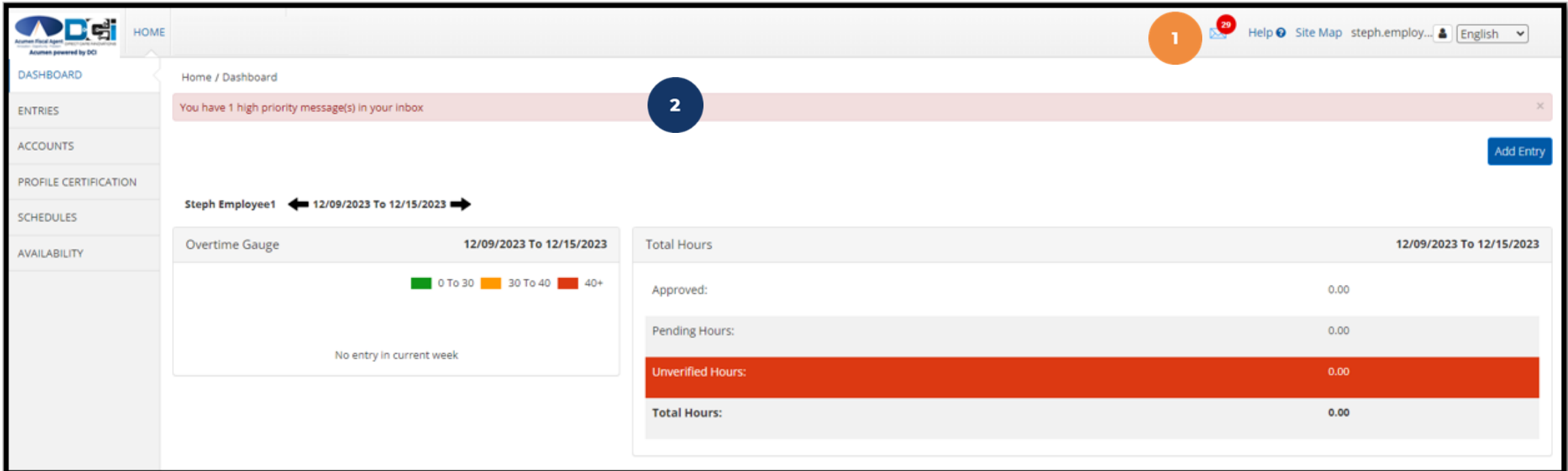
3. Select a submenu tab to update:

- 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



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/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

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>			DCI Support	Account Statement	07:42 AM	 

Notes

Attachments

2

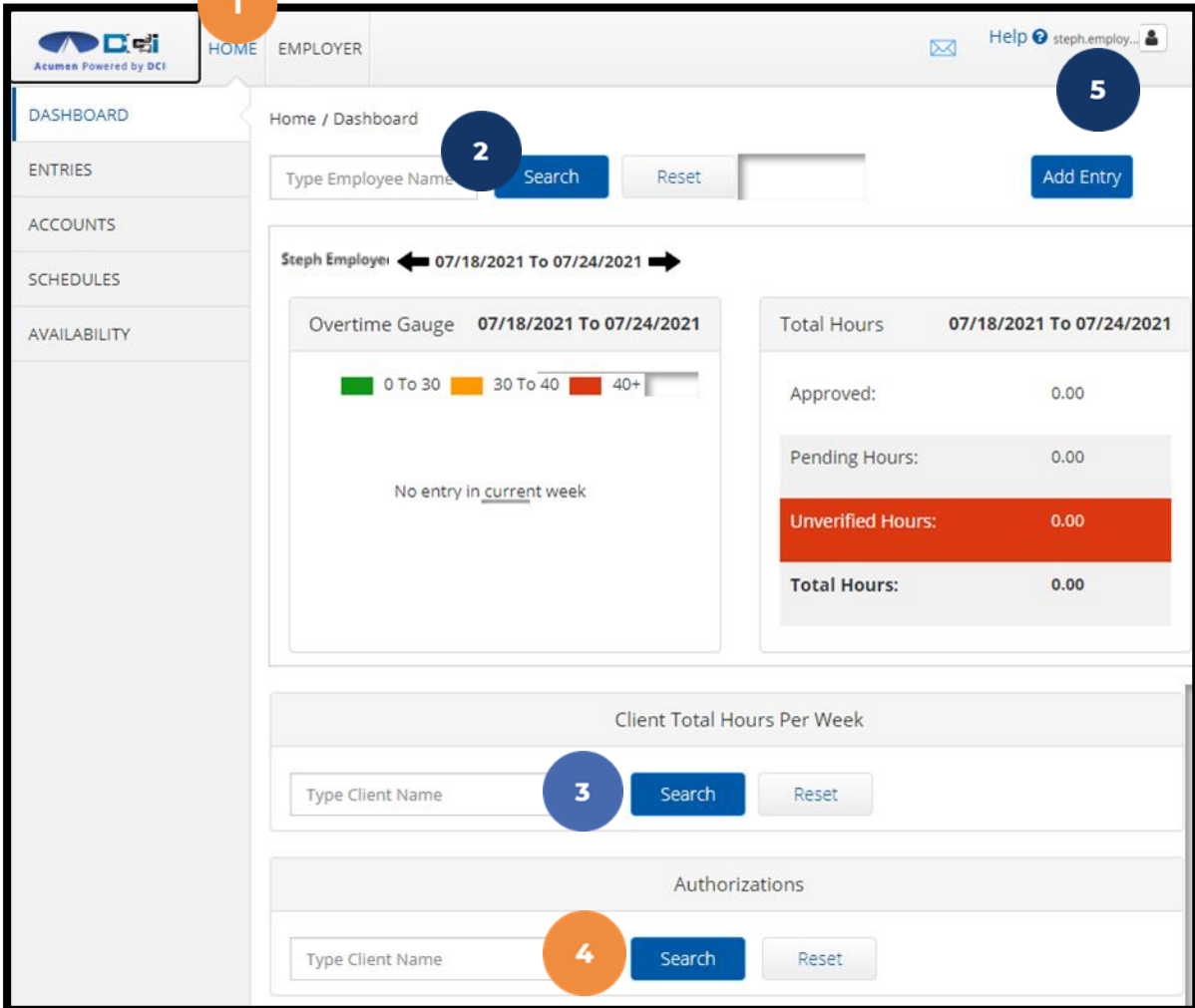
<input type="checkbox"/>	Date	File Name	File Type	File Size	Added By	Download	Status
<input type="checkbox"/>	Aug 27, 2024	Account Statement.pdf		82.16 KB	Stephanie Smith	 	Active

3

Dashboard

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. It features a sidebar menu on the left with options: DASHBOARD, ENTRIES, ACCOUNTS, SCHEDULES, and AVAILABILITY. The main content area is titled 'Home / Dashboard' and includes a search bar for 'Type Employee Name' with a blue 'Search' button (callout 2) and a 'Reset' button. A date range selector shows '07/18/2021 To 07/24/2021'. Below this, there's an 'Overtime Gauge' section with a legend: 0 To 30 (green), 30 To 40 (yellow), and 40+ (red). The gauge shows 'No entry in current week'. To the right, a 'Total Hours' section displays a table with rows for 'Approved:', 'Pending Hours:', 'Unverified Hours:', and 'Total Hours:', all showing '0.00'. At the bottom, there's a 'Client Total Hours Per Week' section with a search bar for 'Type Client Name' and a blue 'Search' button (callout 3). Below that, an 'Authorizations' section has another search bar for 'Type Client Name' and a blue 'Search' button (callout 4). A user profile icon with the name 'steph.employ...' is in the top right corner (callout 5).

Authorizations (Budget) Widget



- The authorizations (budget) widget allows the user to search by client and optionally by date to view approved authorizations (budgets) in the past, present, or future.
- For units-based authorizations, optionally click the Display as Time button to view the data in time instead of units.
- As employees clock in and clock out, their time is deducted from the authorization and placed into a pre-authorization hold.
- Units or dollars in a pre-authorization hold remain in that status until billing and payroll have been processed, then are deducted from the remaining balance and an updated remaining balance will be displayed.

Authorizations

KZ Client2 - T45158

Date of Service

Search

Reset

Display as Time

Authorization for Client: KZ Client2

1

2

3

4

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
PCS	01/17/2022	01/31/2024	1000.00 Dollars	785.00 Dollars	0.30 Dollars	784.70 Dollars	100.00 Dollars	100.00 Dollars	20.00 Dollars

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

Facial Recognition Setup

What is Facial Recognition?

- Facial recognition is the process of identifying or verifying a person's identity by comparing their face to a collection of pictures of them
- It “learns” over time and becomes more accurate with each submission
- Acumen collects but does not share photos
 - Photos are stored in a secure business cloud and are only used by our facial recognition technology to verify that the client was present for the employee's visit
 - Photos are not stored on the employee's device



Facial Recognition Setup

Take a picture of the client (participant). Photos must comply with the requirements below:

- ✓ Participant is the only individual in the photo
- ✓ Participant is facing the camera directly with a full face in view
- ✓ Participant is not wearing sunglasses, hat, or any other accessory that alters the Participant's appearance.
- ✓ Photos are taken with a solid color background
- ✓ Photo size is 2MB or less
- ✓ JPG format



Facial Recognition Setup

Email the picture to Acumen Customer Service at customerservice@acumen2.net

***Please note!** A valid email must be on file for the employer/client (participant) to set up facial recognition. The photo must be sent from the email on file.

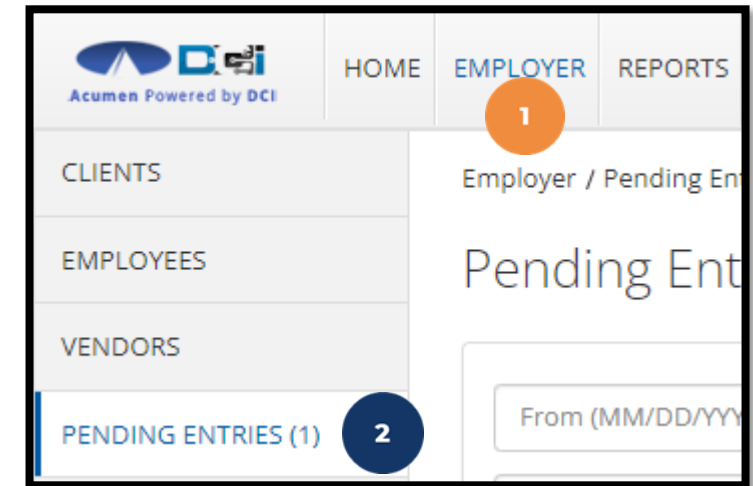
- Type "Photo - Facial Recognition Setup" in the email subject line
- Enter the client's name, state, and program in the body of the email.
- Acumen will send notification when setup is complete
 - ✓ Your employee will now be able to use Picture as an EVV option at clock out when using the mobile app



Manage Entries

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
3. Hover over the icon in the Needs Review column to see what specifically requires review
 - ✓ Gray Question Mark indicates Portal Signoff Pending. The entry can be approved.
 - ✓ Red Eye indicates that action must be taken to resolve the issue before the punch can be approved



Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Estimate)	Client Name	Employee Name	Service Code	Account Type	Needs Review
A R	Sep 04, 2024	10:56 AM	10:59 AM	12.00	0:00:03		Steph Client1	Steph Employee1	RESPIRE (Hourly)	Hourly	?
A R	Jun 05, 2024	10:52 AM	10:53 AM	26.00	0.02	0.52	Steph Client1	Steph Employee4	RESPIRE (Dollars)	Hourly	?
A R	Sep 25, 2024	01:11 PM	01:13 PM	12.00	0:00:02		Steph Client2	Steph Employee1	RESPIRE (Hourly)	Hourly	👁
A R	Sep 25, 2024	01:09 PM	01:10 PM	12.00	0:00:01		Steph Client2	Steph Employee1	RESPIRE (Hourly)	Hourly	👁

Verify Signature, Picture, or Voice

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, "Signature Unverified", "Picture Unverified", or "Voice Unverified", click anywhere on the entry row to open the punch details page.
2. Scroll down to select the **Verifications** tab
3. Click the **attachment** to review the signature or picture. Click the **download** icon to download, open, and listen to the voice recording.
4. Click the **A** to approve the attachment or the red **R** to reject it. The punch may now be approved or rejected.

Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Estimate)	Client Name	Employee Name	Service Code	Account Type	Needs Review
<div><div>A</div><div>R</div></div>	Feb 25, 2025	11:18 AM	11:19 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code	- Voice Unverified	
<div><div>A</div><div>R</div></div>	Feb 25, 2025	11:17 AM	11:18 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code	- Picture Unverified	
<div><div>A</div><div>R</div></div>	Feb 25, 2025	11:16 AM	11:17 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code	- Signature Unverified	

Ref Entries

Notes

Attachments

Events

Verifications

Map

Business Rules

Auto Approval

Custom Fields

History

From (MM/DD/YYYY)

To (MM/DD/YYYY)

Verification Type

Select Status

Reset

Search

EWV 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

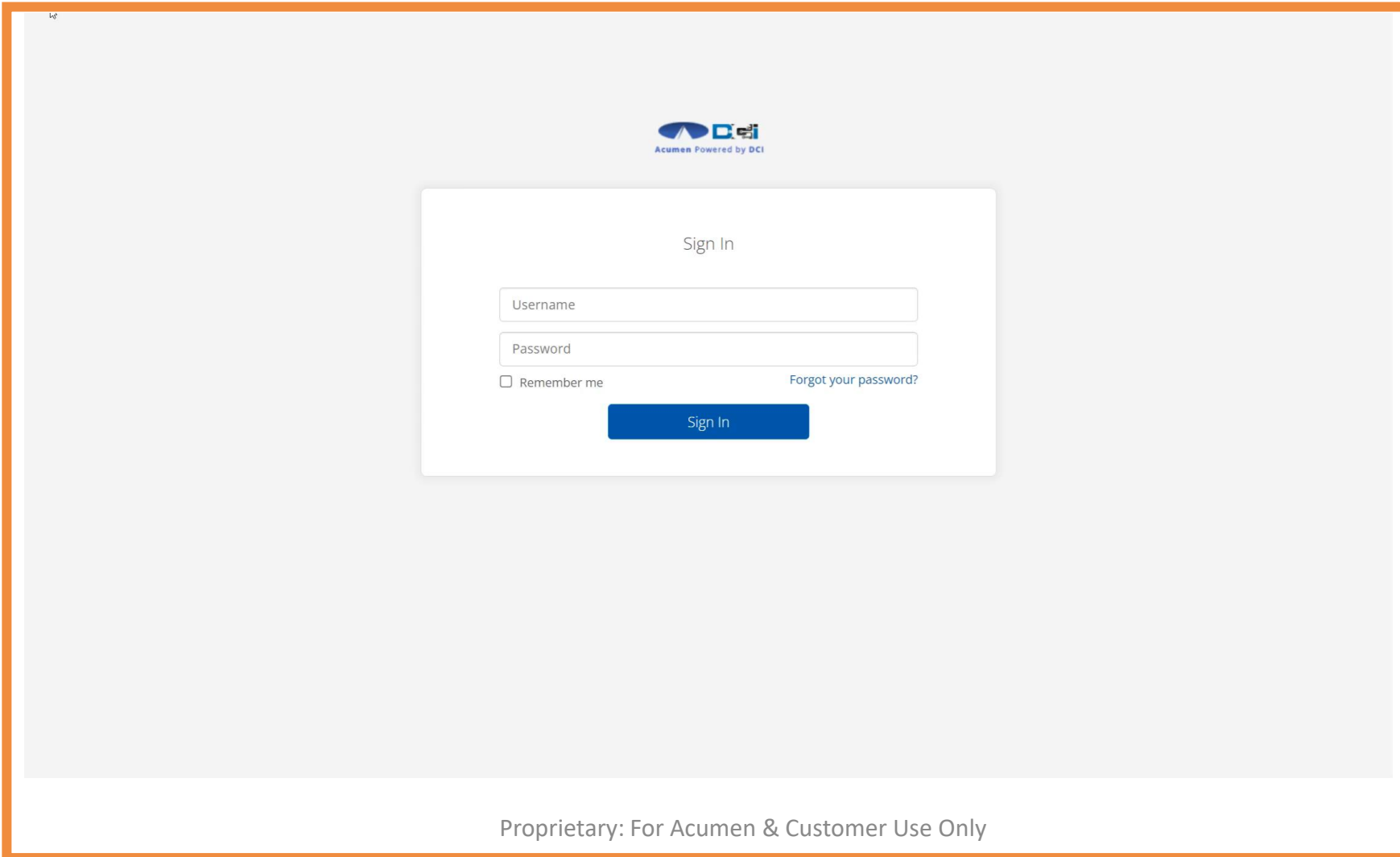
Picture

Unverified

6bdde351-0119-483c-b3b2-e31d99223e9d.jpeg

Employer Web Portal Video

Verify Picture, Signature, or Voice



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 "Password" field is a checkbox labeled "Remember me" and a link "Forgot your password?". A blue "Sign In" button is at the bottom of the form. The entire interface is enclosed in an orange border.

Acumen Powered by DCI

Sign In

Username

Password

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

Sign In

Proprietary: For Acumen & Customer Use Only

Manage Pending Entries



***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

Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Estimate)	Client Name	Employee Name	Service Code	Account Type	Needs Review
<input type="button" value="A"/> <input type="button" value="R"/>	Sep 05, 2024	01:49 PM	01:51 PM	20.00	0:00:02	0.60	Steph Client3	Steph Employee3	SDFSS	Hourly	
<input type="button" value="A"/> <input type="button" value="R"/>	Sep 05, 2024	01:41 PM	01:43 PM	20.00	0:00:02	0.60	Steph Client3	Steph Employee3	SDFSS	Hourly	
<input type="button" value="A"/> <input type="button" value="R"/>	Sep 04, 2024	10:56 AM	10:59 AM	12.00	0:00:03		Steph Client1	Steph Employee1	RESPITE (Hourly)	Hourly	

- View high-level punch information on the entry row
- After needed verifications have been performed, click the **A** to approve the entry or the red **R** to reject it.
- Optionally, click anywhere on the entry row to view the details.

Punch Detail

- 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

EVV Method: Portal Signoff

EVV: No

Clock In EVV Location : Home

Clock In EVV Address: 835 White House Road
Mansfield, TX 76063

Clock Out EVV Location : Home

Clock Out EVV Address: 835 White House Road
Mansfield, TX 76063

Employee Fail InHome Validation: No

Supervisor Approved Failed InHome Validation: NA

EVV Compliant: No ⓘ

Reason Codes

Reason Code Name: Forgot device

Reason Code: 10

Free Text Note: forgot

Statements

1. bathing

⚙️ Actions 1

New Note

New Attachment

Edit Custom Field Values

Approve 2

Reject 2

Edit Entry

Approve or reject the entry from the punch detail page or return to pending entries to manage

1. Click **Actions**
2. Select from the drop-down menu

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					

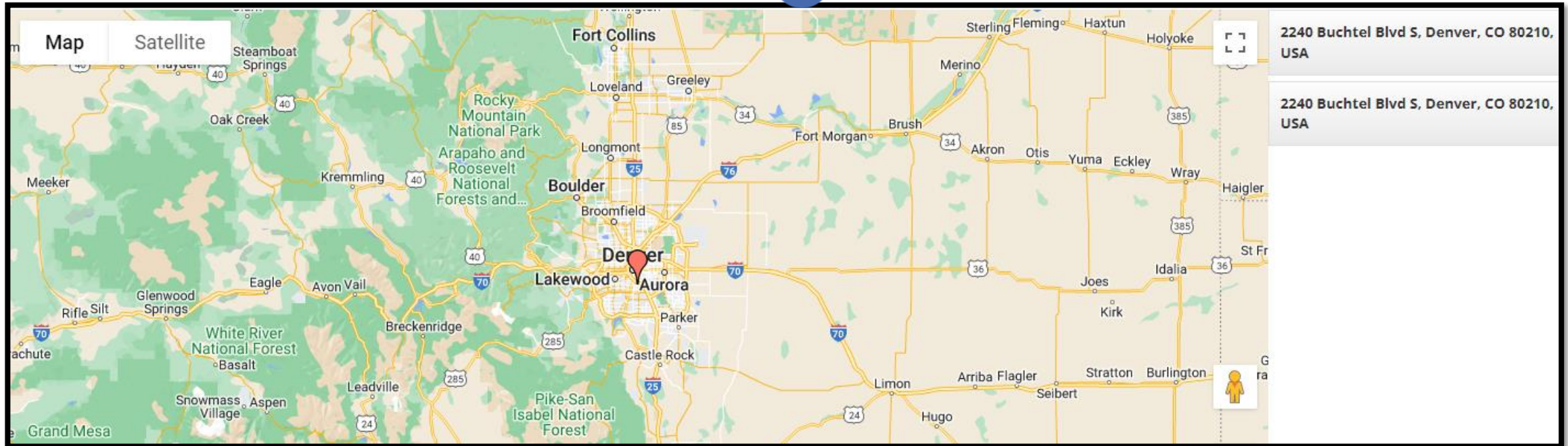
2. **Notes** – View notes on the punch, reason codes, reason code notes, and statements/tasks.
3. **Attachments** – View attachments on the punch
4. **Events** – Log including date/time, subject, description, input type (web portal or mobile app), OS, OS version, app version, and user/system process 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.

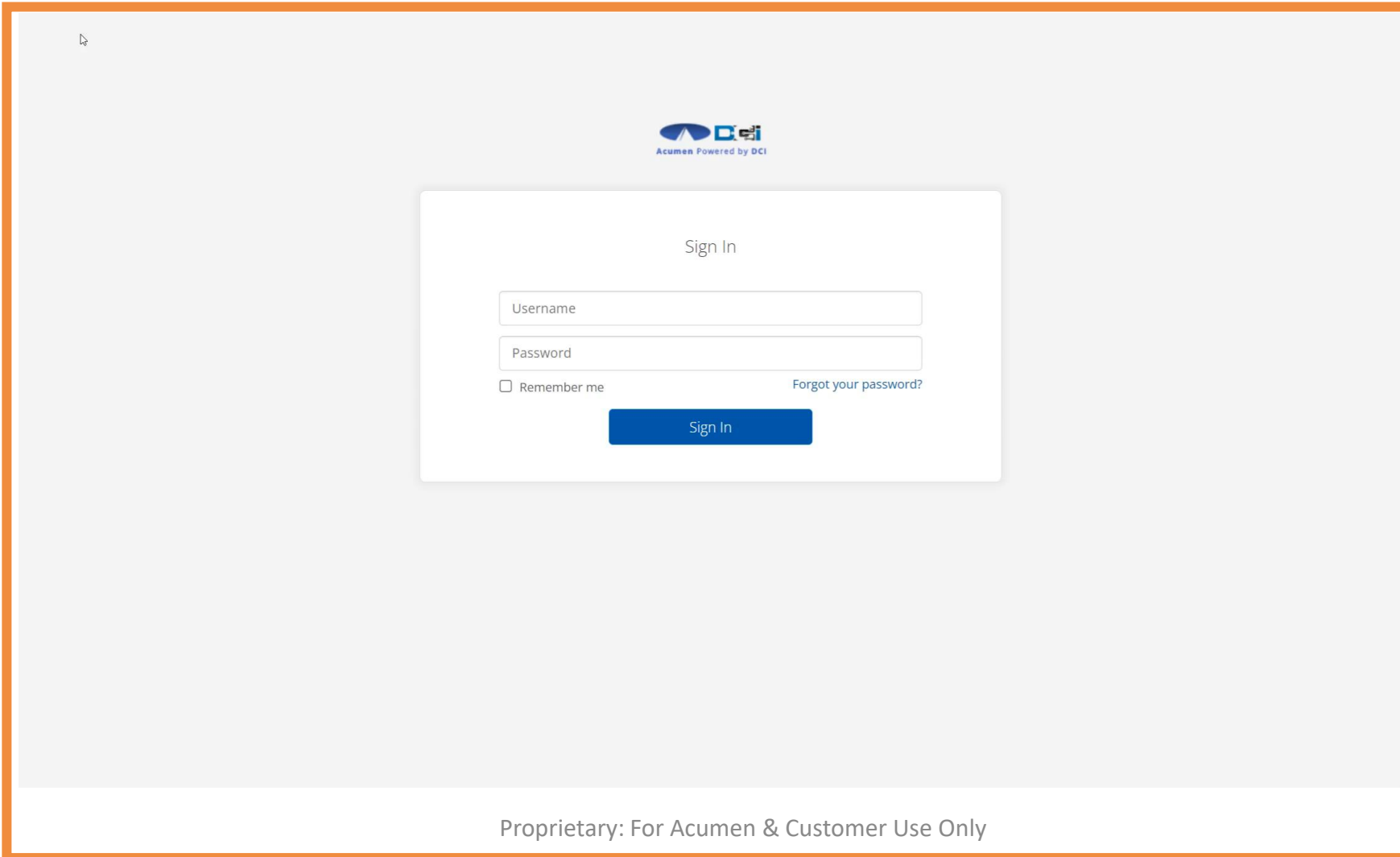
Ref Entries	Notes	Attachments	Events	Verifications	Map	Business Rules	Auto Approval	Custom Fields	History	
							8	9	10	Export
Auto Approval Results										
Run Date	Result	Failure Reason(s)	Schedule Compare Check Attempted	Geo Fencing Check Attempted	EVV Check Attempted	OT Check Attempted	Over Auth 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

Employer Web Portal Video

Manage Entries



The screenshot shows a web portal sign-in interface. At the top center is the logo for "Acumen Powered by DCI". Below the logo is a "Sign In" heading. Under the heading are two input fields: "Username" and "Password". Below the "Password" field is a checkbox labeled "Remember me" and a link labeled "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 & Customer Use Only

Employees, Clients & Reports

Employee Details 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

Employee Details Page

4. View the employee details page including widget boxes (Basic Demographics, Other Details) containing important information
5. Unlock Employee Profile if needed
6. Scroll down to the tabs and select 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

[Entries](#) | Accounts | Certifications | EVW Locations | Notes | Attachments | Events | Custom Fields | History

Employee Details Page

Entries Tab

- View the punch entries for the employee
- Use the Status column to ensure all time for the pay period is entered and approved before the payroll deadline
- Click anywhere on an entry row to see the punch details

Entries										Export
										Showing 13 out of 13 records
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

Employee Details Page

Accounts Tab

- The Accounts tab displays all accounts (connections) for the employee and is useful for troubleshooting
- Use the filters to narrow the search if needed
- Click anywhere on the account row to view the details, including associated entries and rates.

Entries

Accounts

Certifications

EVV Locations

Notes

Attachments

Custom Fields

History

Select Account Type

Select Profile Type

Type Client Name

Type Service Code

Select Unit

Active

Reset

Search

Accounts

Showing 1 out of 1 record

Account Type

Profile Type

Service Code

Cost Center

Client/ Program Name/ Employee Name

Unit

Status

Employee Service

Client

SDFSS

Steph Employer Cost Center - 123
Steph Employer

Steph Client

Hourly

Active

Employee Details Page

Certifications Tab

- The Certifications tab displays all certifications the employee has on file
- If a certification is missing, please contact the program administrator.
- Click anywhere on the certification row to view the details

EntriesAccountsCertificationsEVV LocationsNotesAttachmentsCustom FieldsHistory

Certification Name

Certification Date

Certification Expiration Date

Select Status

ResetSearch

Certifications

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

Client Details Page

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



Name	Client Id	Status
Steph Client	125	Active

Client Details Page

4. View the client details page including widget boxes (Basic Demographics, Other Details) containing important information
5. Scroll down to the tabs and select the Entries tab

Employer / Clients / Steph Client

Client Details - Steph Client 4

[Actions](#)

Basic Demographics

Client Id: 125
Address: 5416 E Baseline Road
Mesa, AZ 85206-4700
GNIS: 04-013-7890
Phone: (222) 222-2222
Email: stephanies+51@dcisoftware.com
Date of Birth: May 01, 2001
Allow SSN Retrieval: No ⓘ
No. of Funding Accounts: 2
No. of Service Accounts: 4
Status: Active

Other Details

Cost Center: Steph Employer Cost Center
Username: steph.client
Client Status: Active
Authentication Status: Active
Email confirm: Yes
Photo Set: No
Signature Set: No
Enable Caregiver Rating Emails: No
Enable Vendor Payment: Yes
Enable Employer Reimbursement: Yes

5

Entries Accounts Certifications EVV Locations Diagnosis Notes Attachments Custom Fields History

Client Details Page

Entries Tab

- View the entries associated with the client
- Use the Status column to ensure all time for the pay period is entered and approved before the payroll deadline
- Click anywhere on an entry row to see the details

Entries Showing 30 out of 171 records [Export](#)

Id	Service Date	Type	Service Code	Cost Center	Employee /Program /Vendor Name	Ref.	Amount	Unit Type	Status	Portal Sign-off
77111	Sep 23, 2024	Punch	RESPITE (Hourly)	Steph Cost Center test - Steph Cost Center test	Steph Employee1		0:00:04	Hourly	Approved	Yes
77102	Sep 23, 2024	Punch	RESPITE (Hourly)	Steph Cost Center test - Steph Cost Center test	Steph Employee1		0:00:02	Hourly	Approved	Yes
77093	Sep 20, 2024	Punch	RESPITE (Hourly)	Steph Cost Center test - Steph Cost Center test	Steph Employee1		0:00:03	Hourly	Approved	Yes
77092	Sep 20, 2024	Punch	RESPITE (Hourly)	Steph Cost Center test - Steph Cost Center test	Steph Employee1		0:00:03	Hourly	Approved	Yes
77091	Sep 20, 2024	Punch	RESPITE (Hourly)	Steph Cost Center test - Steph Cost Center test	Steph Employee1		0:00:01	Hourly	Rejected	No

Client Details Page

Accounts Tab

- The Accounts tab displays all accounts (connections) for the client and is useful for troubleshooting
- Use the filters to narrow the search if needed
- Click anywhere on the account row to view the details, including associated entries and rates.

Entries

Accounts

Certifications

EVV Locations

Diagnosis

Notes

Attachments

Custom Fields

History

Select Account Type

Select Profile Type

Type Service Code

Type Funding Source

Select Unit

Active

Reset

Search

Accounts

Showing 14 out of 14 records

Account Type	Profile Type	Cost Center	Funding Source	Service Code	Employee/ Client/ Program Name	Unit	Status
Employee Service	Employee	Steph Cost Center test - Steph Cost Center test	Steph Funding Source	Reimbursements	Steph Employee3	Dollar	Active
Employee Service	Employee	Steph Cost Center test - Steph Cost Center test	Steph Funding Source	Bonus Payments	Steph Employee1	Dollar	Active
Employee Service	Employee	Steph Cost Center test - Steph Cost Center test	Steph Funding Source	RESPIRE (Dollars)	Steph Employee4	Dollar	Active

Client Details Page



EVV Locations Tab

- The EVV Locations tab displays all locations for the client, and which is primary (if applicable).
- Click anywhere on the EVV location row to view the details

EntriesAccountsCertificationsEVV LocationsDiagnosisNotesAttachmentsCustom FieldsHistory

Type EVV Name

Begin Date (MM/DD/YYYY)

End Date (MM/DD/YYYY)

Select Type

Type City

Type State

Active

Reset

Search

EVV Locations

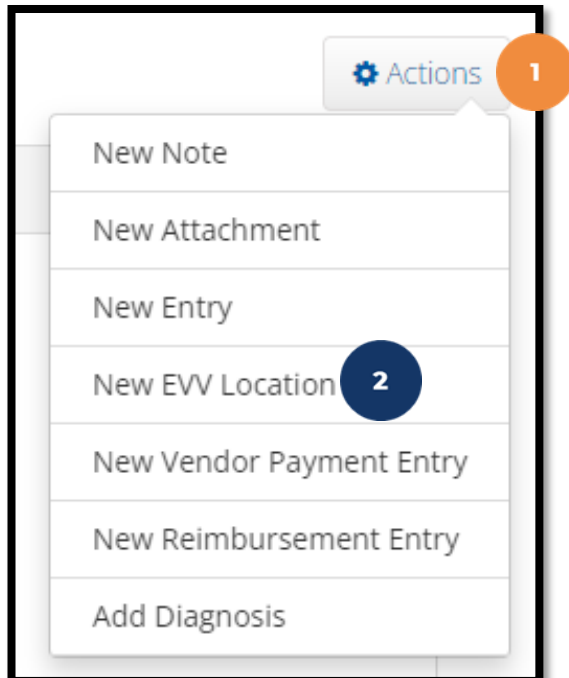
Showing 2 out of 2 records

EVV Name	Primary	EVV Location Type	Address	Begin Date	End Date	Status
Dad's House	FALSE	Residential	701 S Nedderman Drive Arlington , TX 76019	Sep 01, 2024		Active
Home	TRUE	Residential	835 White House Road Mansfield , TX 76063	Aug 16, 2022		Active

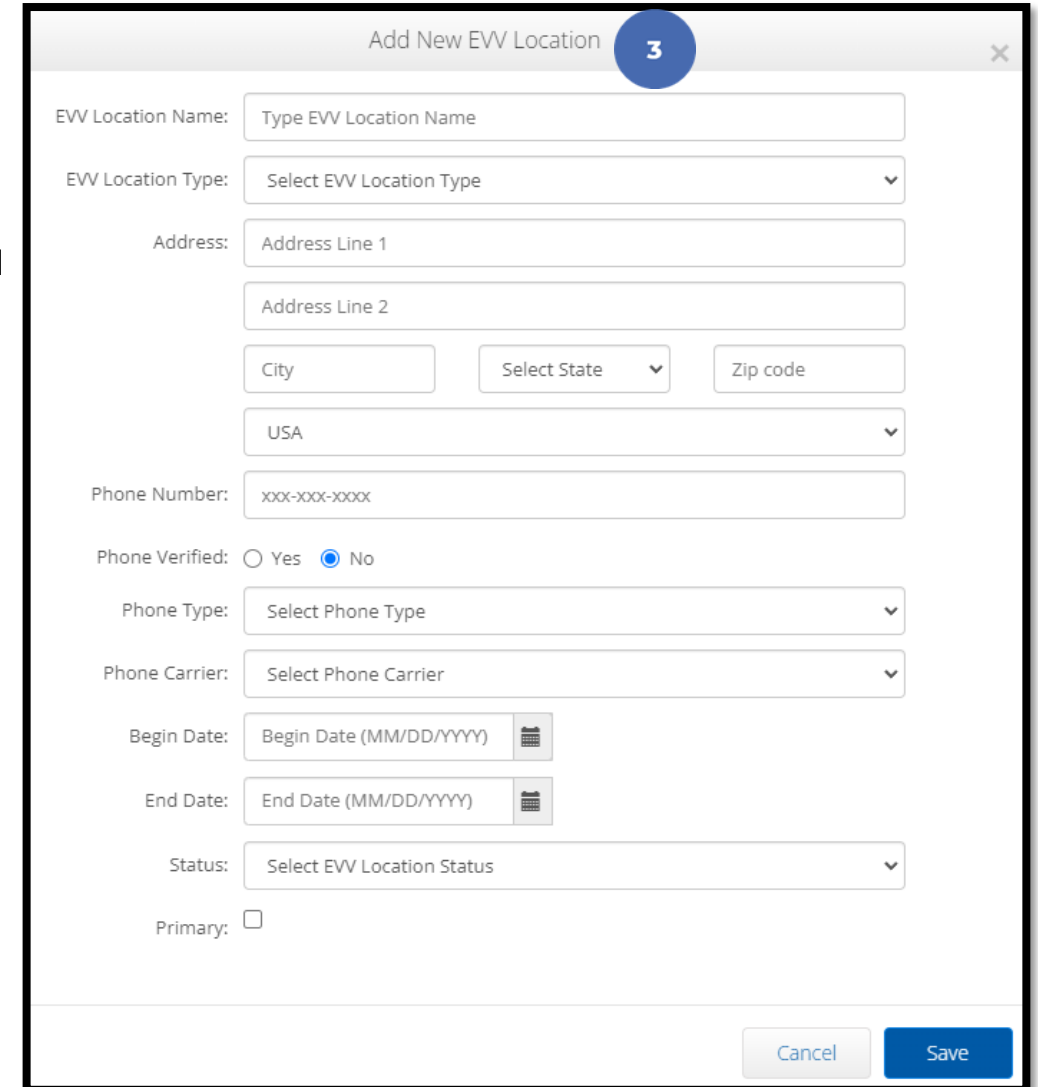
Client Details Page

Add an EVV Location

1. Click the **Actions** button
2. Select **New EVV Location** from the drop-down menu
3. Complete the Add New EVV Location form wizard



A screenshot of the 'Actions' menu in the software. The menu is open, showing a list of options: 'New Note', 'New Attachment', 'New Entry', 'New EVV Location', 'New Vendor Payment Entry', 'New Reimbursement Entry', and 'Add Diagnosis'. The 'New EVV Location' option is highlighted with a blue circle and the number '2'. The 'Actions' button itself is marked with an orange circle and the number '1'.



A screenshot of the 'Add New EVV Location' form wizard. The form is titled 'Add New EVV Location' with a blue circle and the number '3' in the top right corner. The form contains the following fields and options:

- EVV Location Name:** Text input field with placeholder 'Type EVV Location Name'.
- EVV Location Type:** Drop-down menu with placeholder 'Select EVV Location Type'.
- Address:** Two text input fields for 'Address Line 1' and 'Address Line 2'.
- City:** Text input field.
- Select State:** Drop-down menu.
- Zip code:** Text input field.
- USA:** Drop-down menu.
- Phone Number:** Text input field with placeholder 'xxx-xxx-xxxx'.
- Phone Verified:** Radio buttons for 'Yes' and 'No' (selected).
- Phone Type:** Drop-down menu with placeholder 'Select Phone Type'.
- Phone Carrier:** Drop-down menu with placeholder 'Select Phone Carrier'.
- Begin Date:** Text input field with placeholder 'Begin Date (MM/DD/YYYY)' and a calendar icon.
- End Date:** Text input field with placeholder 'End Date (MM/DD/YYYY)' and a calendar icon.
- Status:** Drop-down menu with placeholder 'Select EVV Location Status'.
- Primary:** Check box.

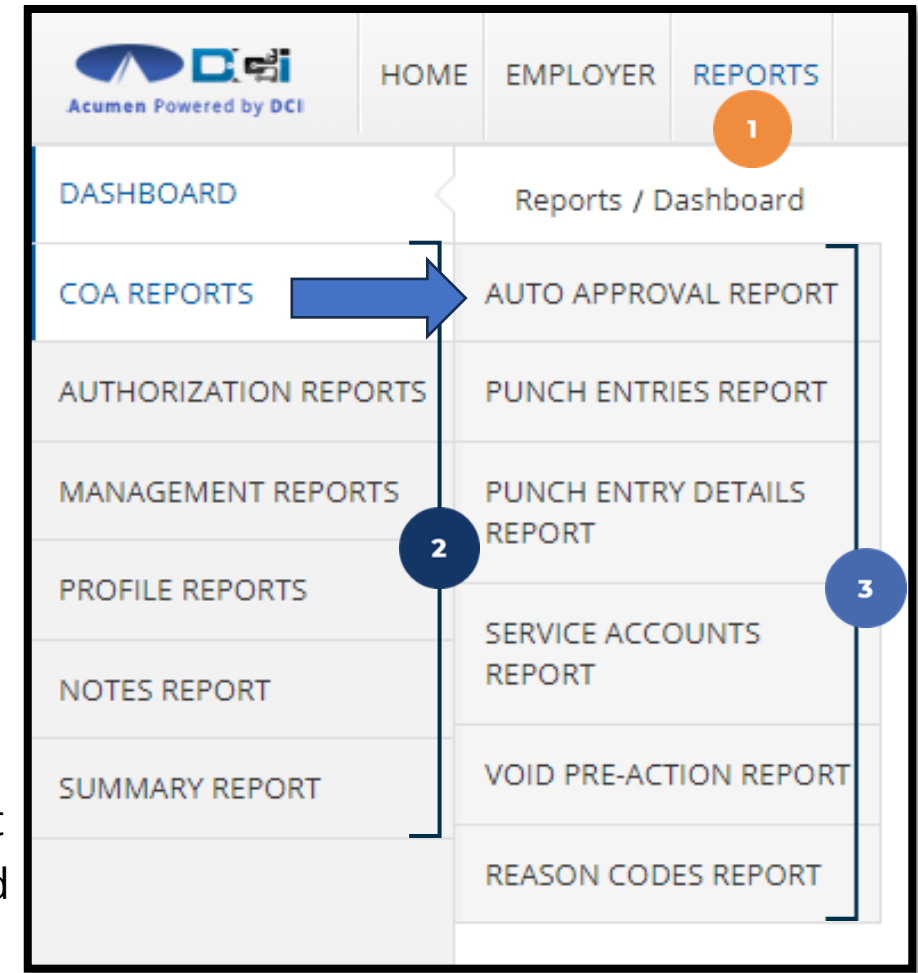
At the bottom right, there are 'Cancel' and 'Save' buttons.

Using Reports

1. Select **Reports** on the main menu
2. Hover over a report category on the submenu
3. Select a report from the flyout menu

*Popular reports include:

- ✓ **COA Reports** (Chart of Account)
 - Punch Entries Report – Use the filters to locate specific entries
- ✓ **Authorization (Budget) Reports**
 - Authorization Run Rate Report – View the budget 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 budget remaining

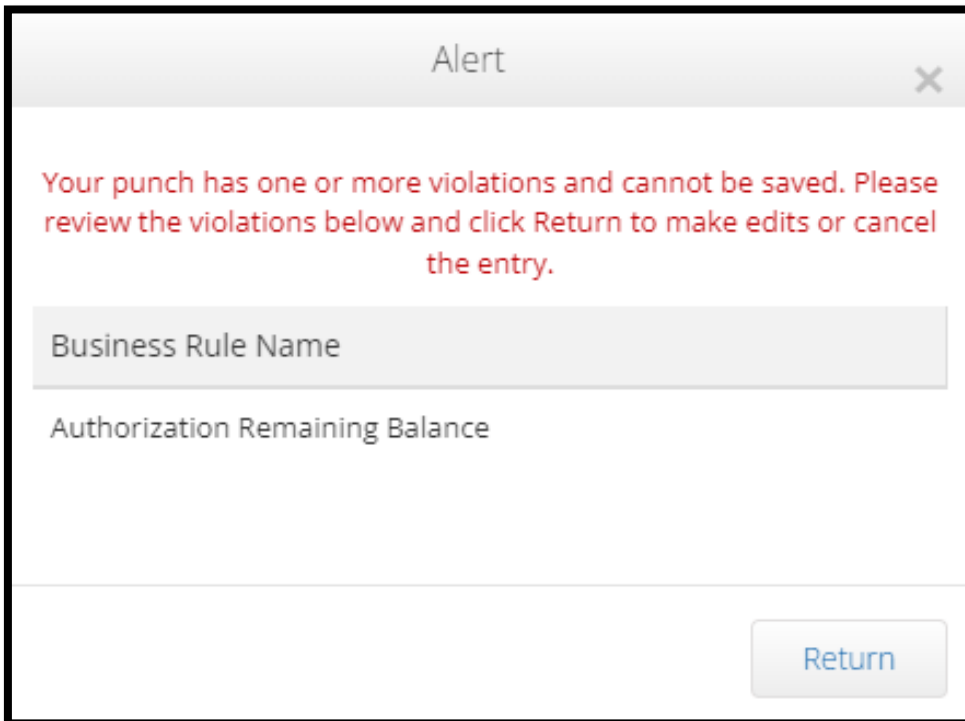


Troubleshooting

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, 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.



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.

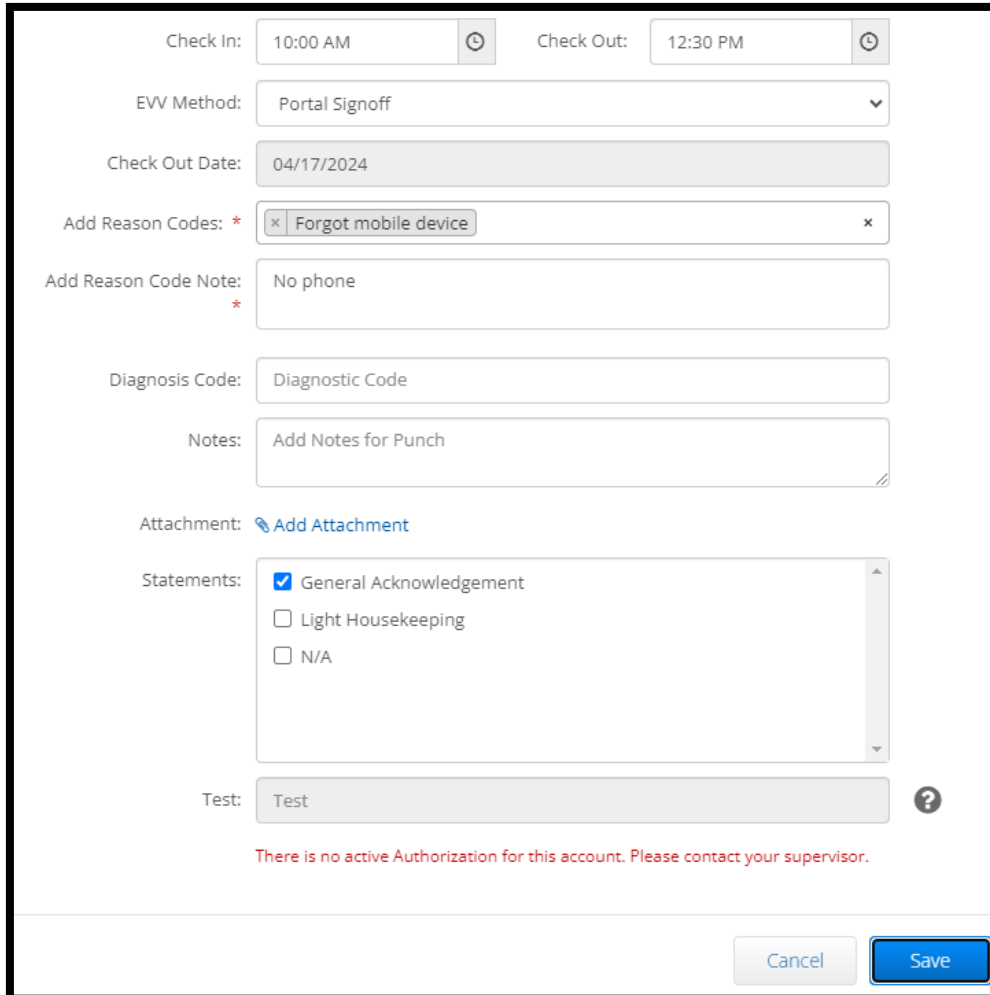
Business Rule Name
Authorization Remaining Balance

Return

- 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.

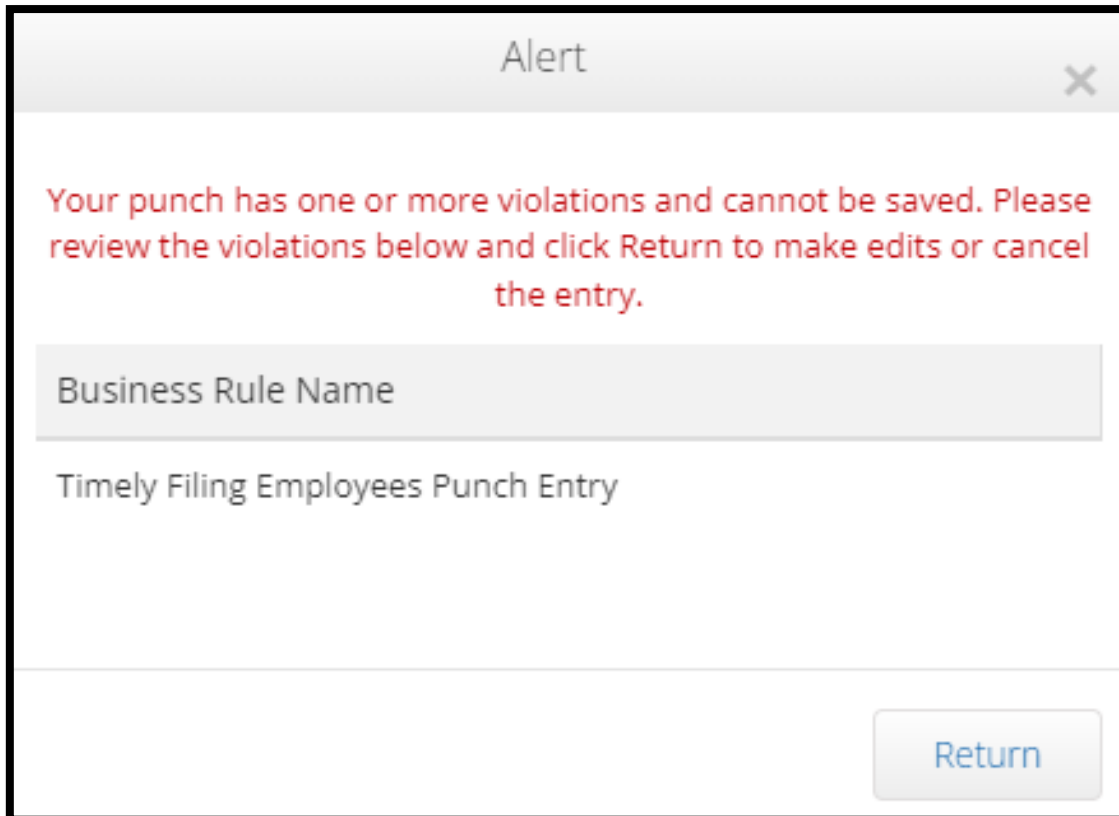


The screenshot displays a web-based punch clock interface. At the top, there are fields for 'Check In' (10:00 AM) and 'Check Out' (12:30 PM). Below these is a dropdown for 'EVV Method' set to 'Portal Signoff'. The 'Check Out Date' is 04/17/2024. Under 'Add Reason Codes', a code 'Forgot mobile device' 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'. 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.

- 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

Alerts

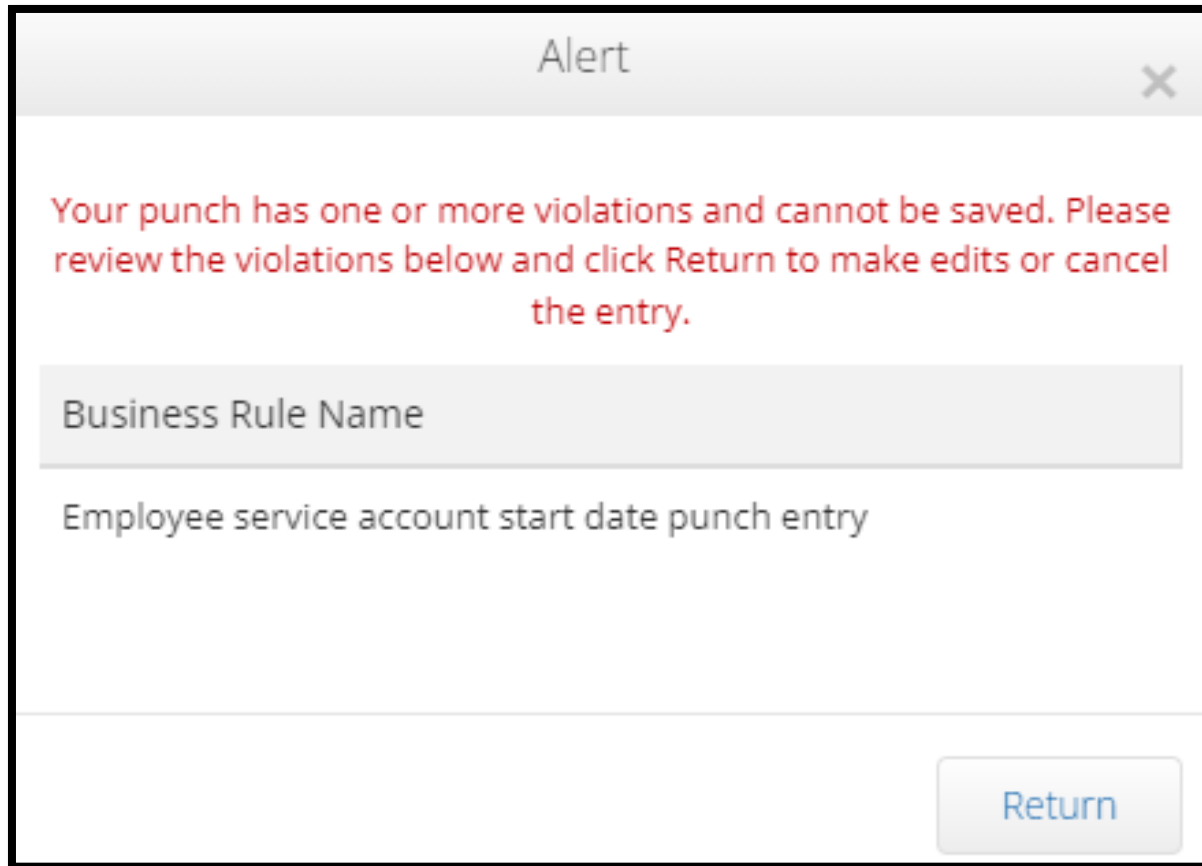
Punches must be **entered AND approved** within a certain number of days of the date of service (program-determined). After that number of days has passed, the **Timely Filing Employees Punch Entry** or the **Timely Filing Employee Punch Approval** rules will prohibit the punch from being saved.



- The employee 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.
- The employee 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 the employee attempts to enter a punch before the start date or after the end date of the service account, they 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

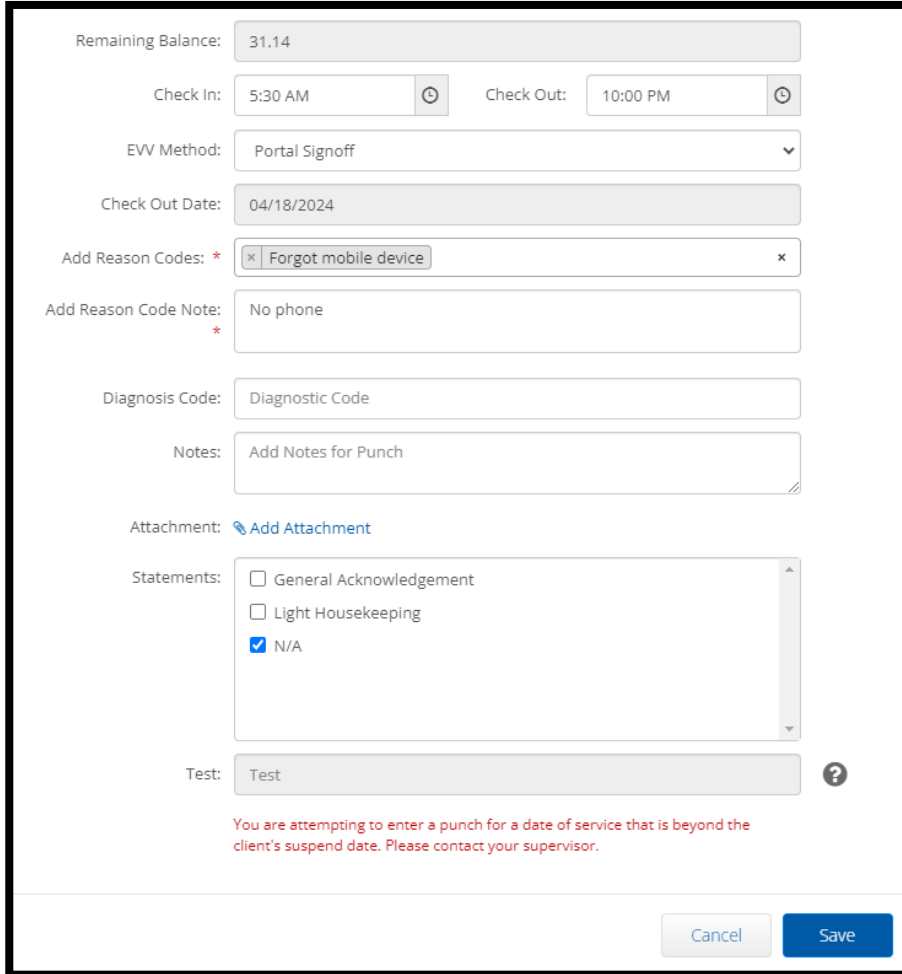
Employee service account start date punch entry

Return

- The employee cannot save the punch
- Ensure the correct dates have been entered for the punch
- The employee should contact the 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
- Check Out: 10:00 PM
- EW Method: Portal Signoff
- Check Out Date: 04/18/2024
- Add Reason Codes: * Forgot mobile device
- 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

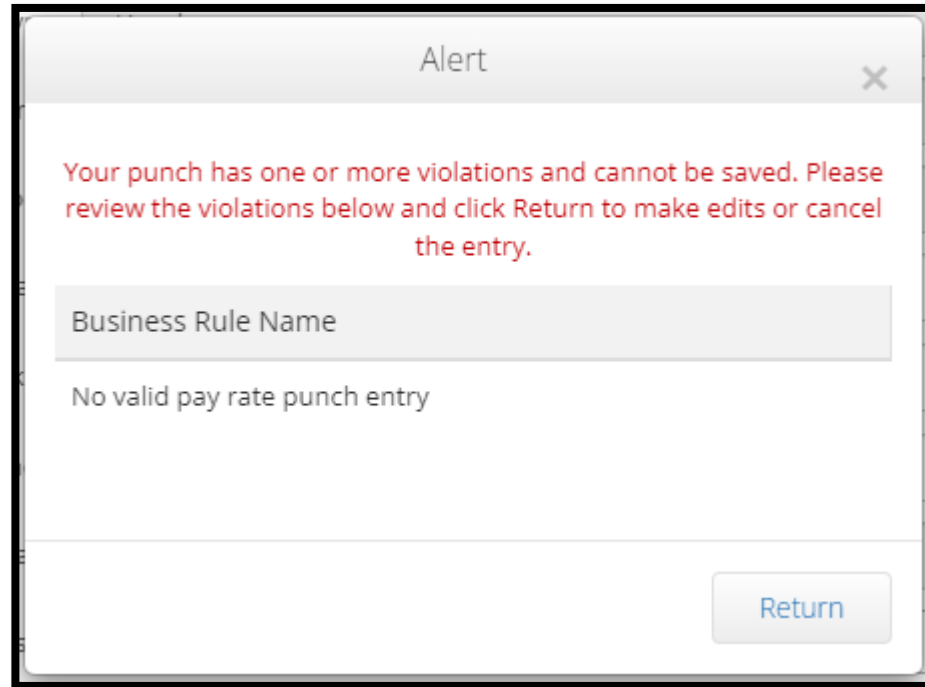
A red error message at the bottom states: "You are attempting to enter a punch for a date of service that is beyond the client's suspend date. Please contact your supervisor."

Buttons: Cancel, Save

- The employee cannot save the punch
 - While the system allows the employee to log in on the mobile app, they cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

Alerts

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



- The employee cannot save the punch
 - While the system allows the employee to clock in on the mobile app, they cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

Alerts

If the punch causes the authorization remaining balance to drop below 75% of the initial balance, an alert displays at the time of approval. It does not stop the punch from being approved.

Alert

×

Are you sure you want to approve the punch for **0:23:00** hour(s) for **Steph Employee3** for **Steph Client3-7726** for **Aug 25, 2024**? By clicking Yes, you are confirming you have reviewed this punch and all required elements.

Business Rule Name	Message
Authorization Remaining Balance Threshold Alert	Warning: Authorization remaining balance has dropped below 75% of the initial balance

Cancel

Yes

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

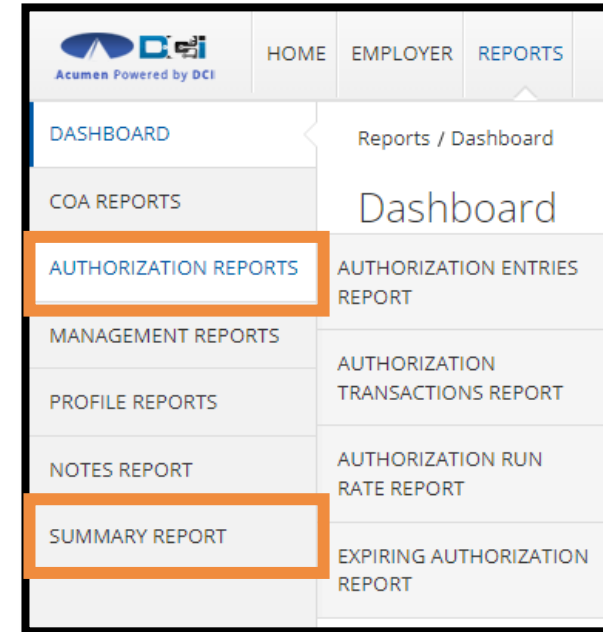
Business Rule Name	Business Rule Result
Employee service account start date punch entry	Pass
Authorization Weekly Max	Fail
Max Hours Per Week Per Client Per Funding Source	Pass
Authorization Expiration Date	Pass

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

Alerts in Review

- Employees and employers should communicate as needed regarding alerts and the client's authorization/budget
- To review the authorization/budget for the client:
 - ✓ Run the Summary Report and/or Authorization Reports
 - ✓ Use the Authorizations widget on the Dashboard
- Use the tools in DCI to stay informed



Authorizations									
<div>Steph Client - 125 ✕ <input type="text" value="Date of Service"/> 📅 Search Reset Display as Time</div>									
Authorization for Client: Steph Client									
Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
SDFSS	09/01/2024	09/06/2025	1000.00 Dollars	1000.00 Dollars	706.21 Dollars	293.79 Dollars	1000.00 Dollars	1000.00 Dollars	1000.00 Dollars
PCS	02/01/2024	02/27/2029	1000.00 Units	1000.00 Units	60.00 Units	940.00 Units	1000.00 Units	40.00 Units	24.00 Units

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