

MA DCI

Champions

Training

Caseworker Reports

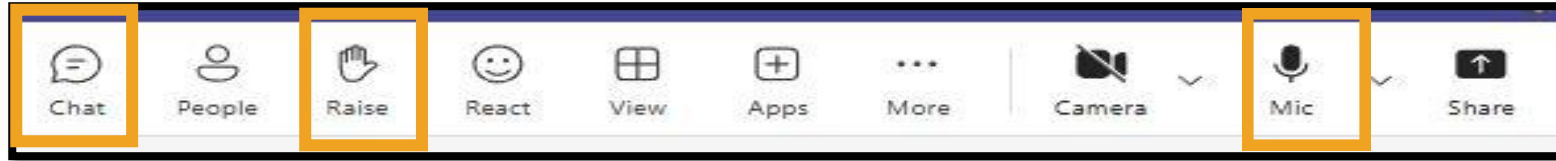
August 5, 2025

Welcome to Acumen!
Thank you for joining the Acumen Family!



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

Using Microsoft Teams



- Chat is enabled for this meeting. If you have a question, you are more than welcome to click the Chat Icon and type it there.
- Raise hand feature is available if you would like to come off mute and ask your question.
- The Mic icon will allow you to mute and unmute yourself. Clicking this icon will toggle between the two states. A slash through the icon is muted. No slash your mic is live.

Agenda



Caseworker Report Basics



Summary Report



Authorization Run Rate Report



Punch Entries Report



Resources/Demo/Q&A

Case Worker Report Basics

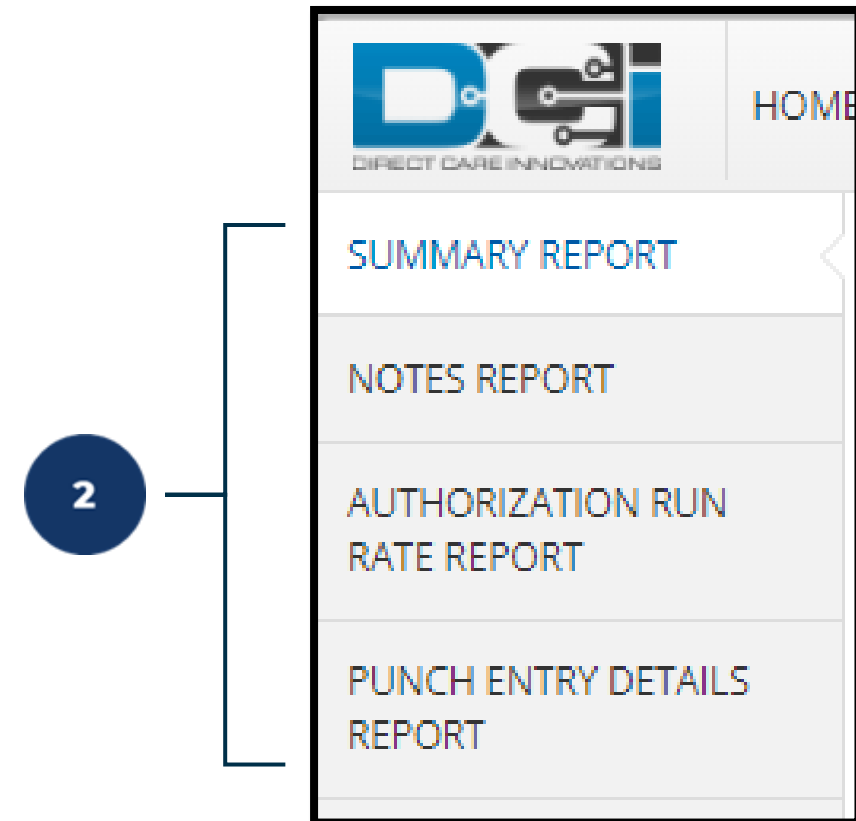
Report Basics



- Reports allow Caseworkers to view important details in DCI
- Can only be found on the full desktop site (Computer/Laptop)
 - Click **“Go to Full Site”** on mobile device!
- Multiple categories to select from to help stay organized
 - Punch Entry Details, Authorization Run Rate and the Summary Report!

Using Reports

1. Select **Reports** on the main menu
 2. Hover over a report category on the submenu and select the type of report you would like to use
- **Summary Report**
 - **Authorization Run Rate Report** – Shows actual versus projected budget usage
 - **Punch Entry Details Report** – View all punch entries for associated clients based on selected filters. Report column options include who created the punch, status, date of service, start and end times, and service code.



Summary Report

The default and most popular report for case workers which provides authorization and utilization information

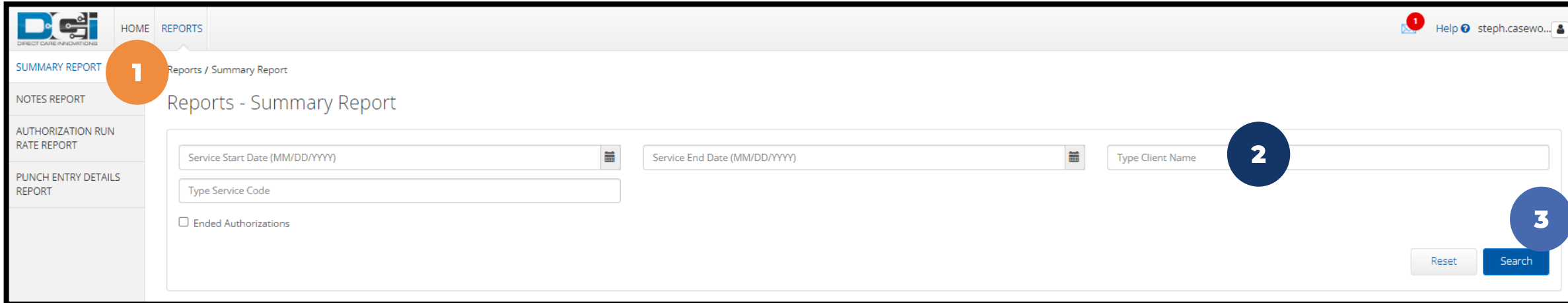
Summary Report

1. Select **Summary Report**

1. Type Client Name

- Type 3 letters > Select Name

3. Click **Search**



The screenshot shows the 'Summary Report' page in the Acumen Fiscal Agent system. The interface includes a top navigation bar with 'HOME' and 'REPORTS' tabs, and a left sidebar with a menu containing 'SUMMARY REPORT', 'NOTES REPORT', 'AUTHORIZATION RUN RATE REPORT', and 'PUNCH ENTRY DETAILS REPORT'. The main content area is titled 'Reports - Summary Report' and contains several input fields: 'Service Start Date (MM/DD/YYYY)', 'Service End Date (MM/DD/YYYY)', 'Type Client Name', and 'Type Service Code'. There is also a checkbox for 'Ended Authorizations'. At the bottom right, there are 'Reset' and 'Search' buttons. Three numbered callouts are present: a blue circle with '1' points to the 'SUMMARY REPORT' menu item; a blue circle with '2' points to the 'Type Client Name' input field; and a blue circle with '3' points to the 'Search' button.

Summary Report

Once Results are Listed

1. Client/Program info
2. Budget Period
3. Budget Balances (\$\$)
4. Budget Time Remaining (%)
5. Punches made by Employee
6. Download to PDF button to save the report

Spending Summary as of: 03/12/2024 6

Client Name: Steph Client1 1

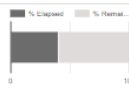
Participant Number: 76123 Case Manager: Steph Case Worker1

Phone: (817) 453-8852

[Download To PDF](#)

Steph Funding Source

2 4

Auth	Start 08/01/2022	End 07/31/2026	% Time Elapsed 40		
Dollars (Dollar Based Programs)					
Authorization Name	Initial Balance	Used YTD 3	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
RESPITE (Dollars)	\$5616.00	\$255.00	\$220.00	\$5361.00	95 %
Units (Unit Based Programs)					
Authorization Name	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
RESPITE (Hourly)		14.16	18.95	99985.84	99 %

Client Name: Steph Client1 / Employee Name: Steph Employee1
Authorization Name : RESPITE (Hourly) (ID : 57934) : From 08/01/2022 To 07/31/2026

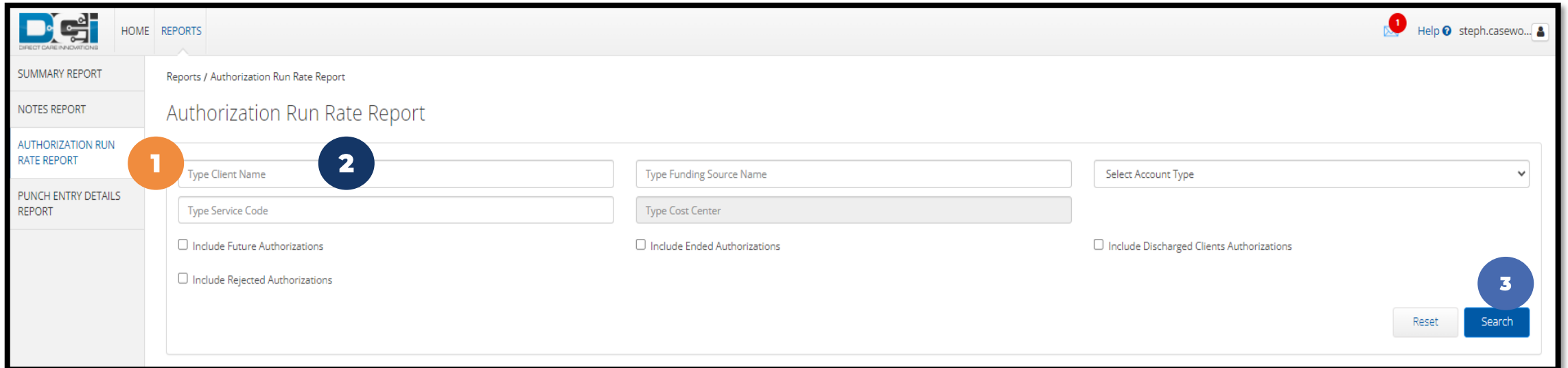
Service Code	Cost Center	Entry ID	Entry Type	Acc Type 5	Employee / Program Name	Date of Service	Amount	Bill Rate
RESPITE (Hourly)	Steph Cost Center test	70232	Punch	Hourly	Steph Employee1	03/11/2024	-0.03	15.00
RESPITE (Hourly)	Steph Cost Center test	70044	Punch	Hourly	Steph Employee1	02/10/2024	-1.50	15.00

Authorization Run Rate Report

Shows actual versus *projected*
budget usage

Authorization Run Rate Report

1. Select **Authorization Run Rate Report** from the submenu
2. Type and select the client's name in the filter
3. Click the blue **Search** button



The screenshot displays the Acumen Fiscal Agent web application interface. On the left, a sidebar contains a menu with the following items: SUMMARY REPORT, NOTES REPORT, AUTHORIZATION RUN RATE REPORT (highlighted with a blue bar and an orange callout '1'), and PUNCH ENTRY DETAILS REPORT. The top navigation bar includes 'HOME' and 'REPORTS' tabs, with 'REPORTS' being the active tab. The main content area is titled 'Reports / Authorization Run Rate Report' and 'Authorization Run Rate Report'. It features several input fields: 'Type Client Name' (with a blue callout '2'), 'Type Funding Source Name', 'Type Service Code', and 'Type Cost Center'. A dropdown menu for 'Select Account Type' is also present. Below these fields are three checkboxes: 'Include Future Authorizations', 'Include Ended Authorizations', and 'Include Discharged Clients Authorizations'. At the bottom right, there are 'Reset' and 'Search' buttons, with the 'Search' button highlighted by a blue callout '3'. The user's name 'steph.casewo...' is visible in the top right corner.

Authorization Run Rate Report



1. Results will appear
2. Use the Download Wizard to Download the Results
3. Export into PDF to see the project

2

1

Showing 1 out of 1 record

 Download

Authori...	Client Name	Service Code	Cost Center	Region Name	Start Date	End Date	Initial Balance	Remaining ...	Holds	Projected W...	Current We...	Projected # ...	Projected M...	Current
150840194	MCLAURIN T...	BGC	GA-050 PARK...	GA COMP	01/01/2025	12/31/2025	5.00	5	0.00	0.1	0	0	0.41	0

Download Report Wizard



1. After clicking the download button, the Download Report Wizard opens.
2. Select all desired columns in Available Columns to download
3. Click the > **single right arrow** to add to Selected Columns
4. Alternatively, click the >> **double right arrows** to add all Available Columns to Selected Columns.
5. Click the < **single left arrow** to remove the column from the Selected Columns
6. Alternatively, click the << **double left arrows** to remove all columns from the Selected Columns.
7. Reorder selected column items by dragging and dropping into the preferred order
8. Click **Next**

The screenshot shows the "Download Report Wizard" window. It has two tabs: "Columns" (active) and "Options". Under "Columns", there are two lists: "Available Columns" and "Selected Columns". The "Available Columns" list contains: Punch ID, Reference Punch ID, Date of Service, Employee/Vendor Name, and Client/ Residential/ Day Program Name. The "Selected Columns" list contains: Client/ Residential/ Day Program Name, Service Code, Start Date, End Date, and Statements. Between the lists are four arrow buttons: a single right arrow (labeled 4), a double right arrow (labeled 1), a single left arrow (labeled 5), and a double left arrow (labeled 6). There are also "Undo" and "Redo" buttons. At the bottom right, there are "Cancel" and "Next" buttons. Numbered callouts are placed as follows: 1. Wizard title bar; 2. Available Columns header; 3. Single right arrow button; 4. Double right arrow button; 5. Single left arrow button; 6. Double left arrow button; 7. Start Date item in Selected Columns; 8. Next button.

Download Report Wizard



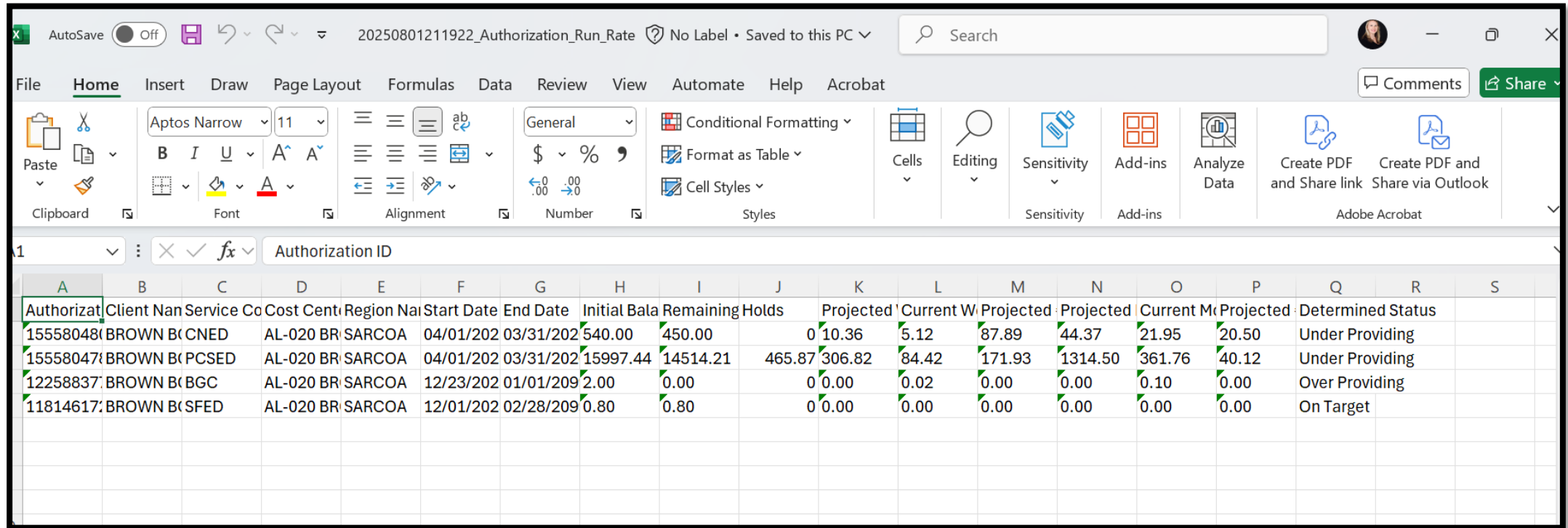
1. Click the Format field drop-down to choose the download file format. Choices include Excel, PDF, CSV, and Tab Delimited.
 1. PDFs have a 10-column limitation for report downloads
 2. The Summary Report download is preformatted as a PDF
 3. Excel is the recommended format for the Punch Entry Details Report
2. If PDF is selected, the Orientation field will become available. Select Portrait or Landscape.
3. Save as Report Download Preference box – If checked, DCI will save the format and orientation preferences for subsequent downloads.
4. Click the blue Download button
5. Click the blue Yes button to confirm

This screenshot shows the "Options" tab of the "Download Report Wizard". It contains two dropdown menus: "Format" (set to PDF) and "Orientation" (set to Select Orientation). A checkbox labeled "Save as Report Download Preference" is checked. At the bottom are "Back", "Cancel", and "Download" buttons. Numbered callouts indicate: 1. Format dropdown, 2. Orientation dropdown, 3. Save as Report Download Preference checkbox, and 4. Download button.This screenshot shows an "Alert" dialog box asking, "Are you sure you want to download the report - Punch Entry Details Report?". It has "No" and "Yes" buttons. A numbered callout 5 points to the "Yes" button.

The report downloads to your computer. Check your download folder to open and view.

Authorization Run Rate Report

The report downloads to your computer. Check your download folder to open and view!



The screenshot shows a Microsoft Excel spreadsheet titled "20250801211922_Authorization_Run_Rate". The spreadsheet contains a table with 17 columns: Authorization ID, Client Name, Service Code, Cost Center, Region Name, Start Date, End Date, Initial Balance, Remaining Balance, Holds, Projected Current Balance, Projected Current Balance, Projected Current Balance, Projected Current Balance, Projected Current Balance, Projected Current Balance, Projected Current Balance, and Determined Status. The data is organized into four rows, each representing a different authorization ID and its associated details.

Authorization ID	Client Name	Service Code	Cost Center	Region Name	Start Date	End Date	Initial Balance	Remaining Balance	Holds	Projected Current Balance	Projected Current Balance	Projected Current Balance	Projected Current Balance	Projected Current Balance	Projected Current Balance	Determined Status
15558048	BROWN B	CNED	AL-020 BR	SARCOA	04/01/202	03/31/202	540.00	450.00	0	10.36	5.12	87.89	44.37	21.95	20.50	Under Providing
15558047	BROWN B	PCSED	AL-020 BR	SARCOA	04/01/202	03/31/202	15997.44	14514.21	465.87	306.82	84.42	171.93	1314.50	361.76	40.12	Under Providing
12258837	BROWN B	BGC	AL-020 BR	SARCOA	12/23/202	01/01/209	2.00	0.00	0	0.00	0.02	0.00	0.00	0.10	0.00	Over Providing
11814617	BROWN B	SFED	AL-020 BR	SARCOA	12/01/202	02/28/209	0.80	0.80	0	0.00	0.00	0.00	0.00	0.00	0.00	On Target

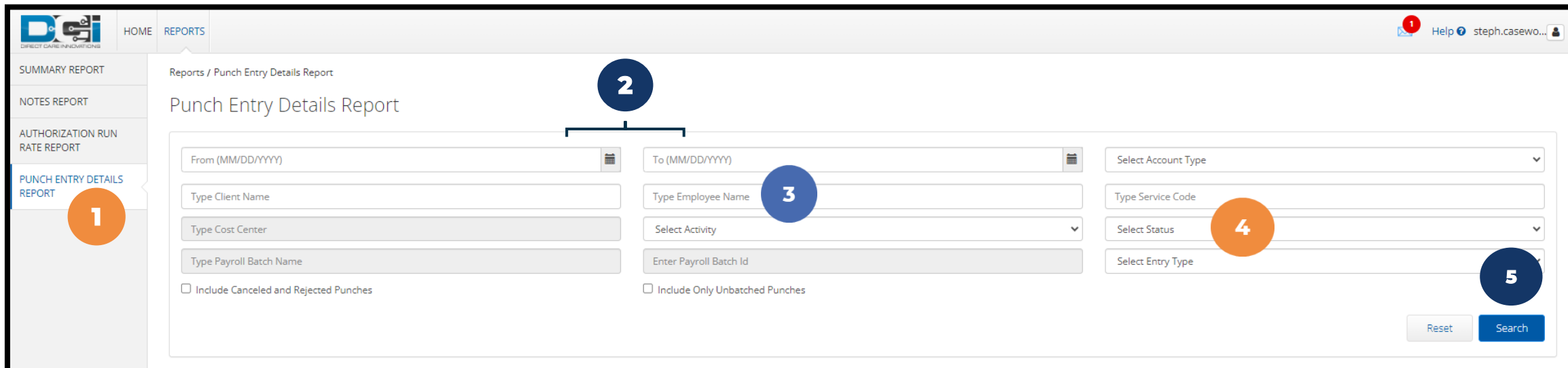
Punch Entry Details Report

View all punch entries for associated clients based on selected filters.
Report column options include who created the punch, status, date of service, start and end times, and service code.

Punch Entry Details Report

1. Select **Punch Entry Details Report** from the submenu
2. Filter by date range
3. Filter by employee
4. Filter by punch status
5. Click **Search** for report

Please note! Searching without filters will pull ALL punch entries for all associated clients in DCI



The screenshot displays the DCI Reports / Punch Entry Details Report interface. The left sidebar contains a menu with the following items: SUMMARY REPORT, NOTES REPORT, AUTHORIZATION RUN RATE REPORT, and PUNCH ENTRY DETAILS REPORT (highlighted with a blue circle and the number 1). The main content area is titled "Reports / Punch Entry Details Report" and "Punch Entry Details Report". It features a form with the following fields and controls:

- From (MM/DD/YYYY)** and **To (MM/DD/YYYY)** date range filters (highlighted with a blue circle and the number 2).
- Type Client Name** and **Type Employee Name** text input fields (highlighted with a blue circle and the number 3).
- Type Cost Center** and **Select Activity** dropdown menus.
- Type Payroll Batch Name** and **Enter Payroll Batch Id** text input fields.
- Select Account Type**, **Type Service Code**, **Select Status**, and **Select Entry Type** dropdown menus (highlighted with an orange circle and the number 4).
- ☐ Include Canceled and Rejected Punches and ☐ Include Only Unbatched Punches checkboxes.
- Reset** and **Search** buttons (highlighted with a blue circle and the number 5).

Punch Entry Details Report



- 1. Report results (for all reports except the Summary Report) populate in the results table
- 2. Optionally, drag and drop column headers into the desired order before downloading.
- 3. Click **Download**

1

2

3

Employee N... ≡

Download

Showing 2 out of 2 records

Punch ID	Date of Serv...	Account Type	Employee N...	Employee N...	Client Name	Service Code	Cost Center	Start Date	End Date	Statements	Canned Statements	Entry Type
68976	01/02/2024	Client Transpo...	Steph Employ...	945	Steph Client1	Client Transpo...	Steph Cost Ce...			1:-Forgot device		Punch
68904	01/02/2024	Hourly	Steph Employ...	945	Steph Client1	RESPITE (Ho...	Steph Cost Ce...	01/02/2024 07...	01/02/2024 01...	1:-Forgot device		Punch

Download Report Wizard



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4. Alternatively, click the >> **double right arrows** to add all Available Columns to Selected Columns.
5. Click the < **single left arrow** to remove the column from the Selected Columns
6. Alternatively, click the << **double left arrows** to remove all columns from the Selected Columns.
7. Reorder selected column items by dragging and dropping into the preferred order
8. Click **Next**

A screenshot of the "Download Report Wizard" window. The window has a title bar with a close button and a tab labeled "Columns". Below the title bar are two tabs: "Columns" (active) and "Options". The "Columns" tab contains two search boxes labeled "Search Column" and "Search". Below these are two lists: "Available Columns" and "Selected Columns". The "Available Columns" list contains "Punch ID", "Reference Punch ID", "Date of Service", "Employee/Vendor Name", and "Client/ Residential/ Day Program Name". The "Selected Columns" list contains "Client/ Residential/ Day Program Name", "Service Code", "Start Date", "End Date", and "Statements". Between the lists are four arrow buttons: a single right arrow (labeled 4), a double right arrow (labeled 2), a single left arrow (labeled 5), and a double left arrow (labeled 6). There are also "Undo" and "Redo" buttons. At the bottom right are "Cancel" and "Next" buttons. Numbered callouts are placed throughout the interface: 1 points to the window title, 2 points to the "Available Columns" list, 4 points to the single right arrow, 5 points to the single left arrow, 6 points to the double left arrow, 7 points to the "Start Date" item in the "Selected Columns" list, and 8 points to the "Next" button.

Download Report Wizard



1. Click the Format field drop-down to choose the download file format. Choices include Excel, PDF, CSV, and Tab Delimited.
 1. PDFs have a 10-column limitation for report downloads
 2. The Summary Report download is preformatted as a PDF
 3. Excel is the recommended format for the Punch Entry Details Report
2. If PDF is selected, the Orientation field will become available. Select Portrait or Landscape.
3. Save as Report Download Preference box – If checked, DCI will save the format and orientation preferences for subsequent downloads.
4. Click the blue Download button
5. Click the blue Yes button to confirm

Download Report Wizard

Columns Options

Format: * PDF

Orientation: * Select Orientation

3 ☒ Save as Report Download Preference

Back Cancel Download

Alert

Are you sure you want to download the report - Punch Entry Details Report?

No Yes

The report downloads to your computer. Check your download folder to open and view.



Live Demonstration

Let's check out Reports in the system!

Resources

Helpful Resources

Utilize our Websites

-  [Massachusetts- Training Materials](#) for more help
 - This will give you a full list of Training Materials for DCI
-  [Massachusetts State Page](#)
 - This will give you MA specific details with Acumen Fiscal Agent

Contact the Acumen Support Team

Reach out to Your assigned MA Agent!

If you are unsure of who your agent is, reach out customer service team at:

 [Contact Us](#) form at www.acumenfiscalagent.com/contact

 Email us at: customerservice@acumen2.net

 By Phone: (833) 892-0413





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