MA DCI Champions Training

Caseworker Reports

August 5, 2025

Welcome to Acumen!

Thank you for joining the Acumen Family!

Acumen Fiscal Agent
Innovation · Opportunity · Freedom
DIRECT CARE INNOVATIONS

Acumen powered by DCI

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

Using Microsoft Teams

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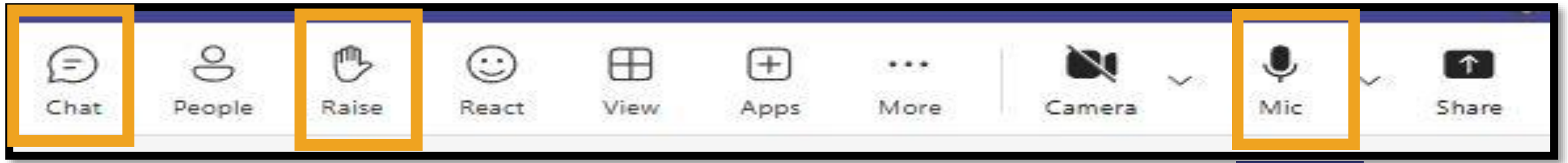

- Chat is enabled for this meeting. If you have a question, you are more than welcome to click the Chat Icon and type it there.

- 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

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Case Worker Report Basics

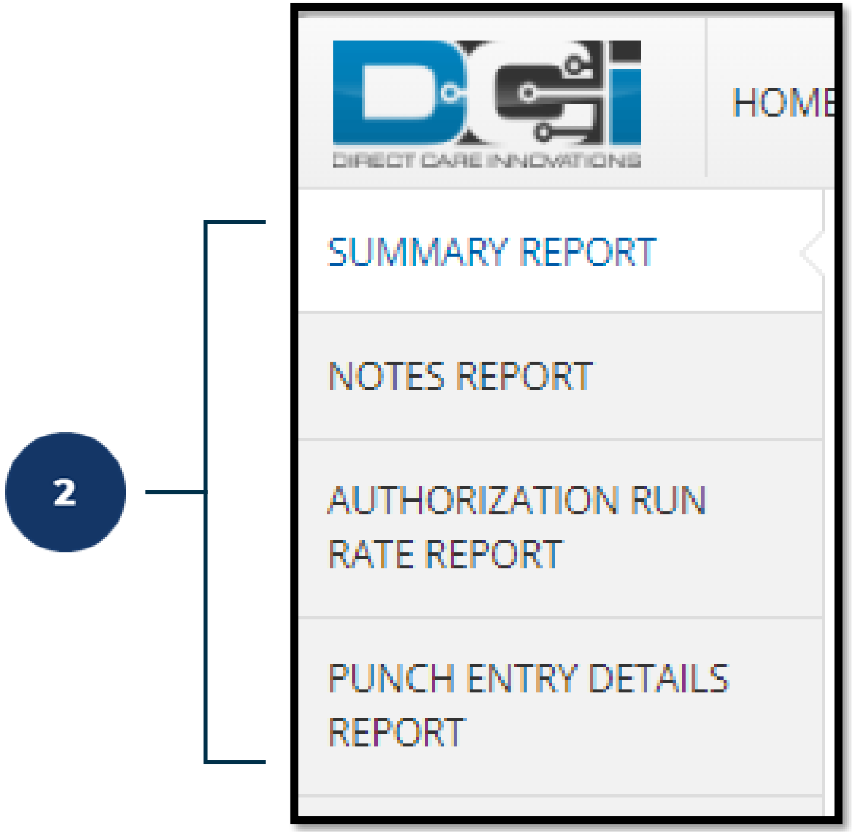
Report Basics

- 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

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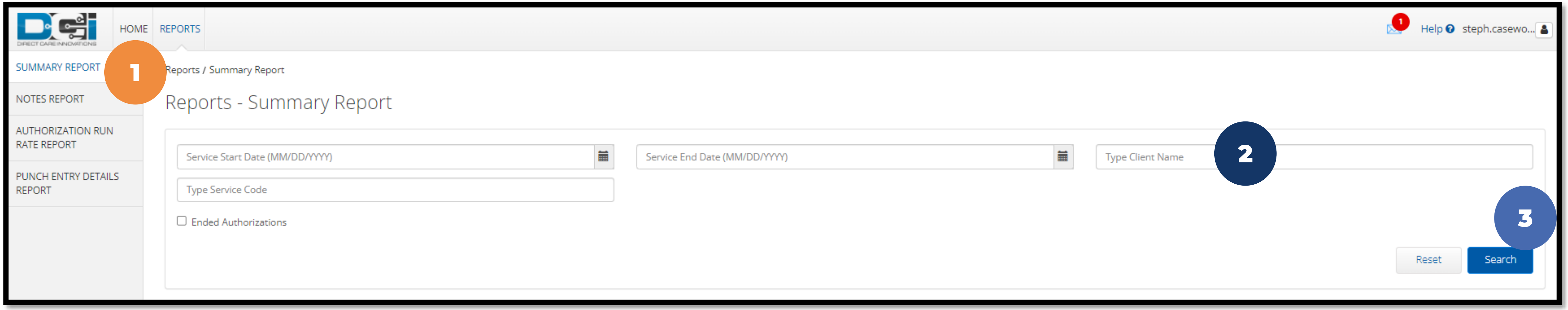
1. Select **Summary Report**

1. Type Client Name
   - Type 3 letters > Select Name

3. Click **Search**



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 Download To PDF

Client Name: Steph Client1

Participant Number 76123 | Case Manager Steph Case Worker1

Phone: (817) 453-8852

1

Steph Funding Source

2 4

Auth	Start	End	% Time Elapsed
	08/01/2022	07/31/2026	40

Dollars (Dollar Based Programs)

3

Authorization Name	Initial Balance	Used YTD	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

5

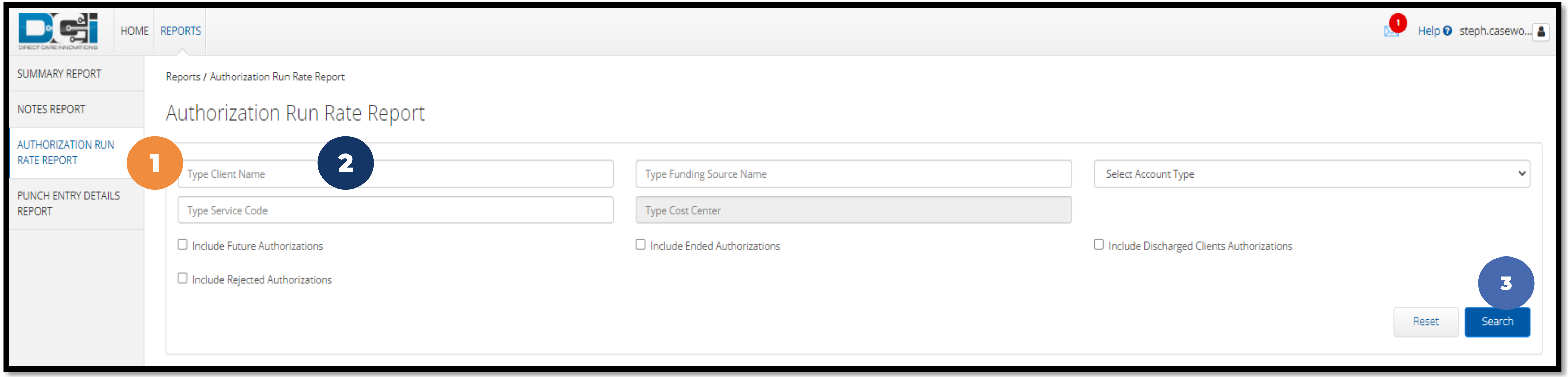
Service Code	Cost Center	Entry ID	Entry Type	Acc Typ	Employee / Program Name	Date of Service	Amount	Bill Rate
RESPITE (Hourly)	Steph Cost Center test	70232	Punch	Hourly	Steph Employee1	03/11/2024	-0.03	15.00
RESPITE (Hourly)	Steph Cost Center test	70044	Punch	Hourly	Steph Employee1	02/10/2024	-1.50	15.00

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



Authorization Run Rate Report

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

Download

Showing 1 out of 1 record

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

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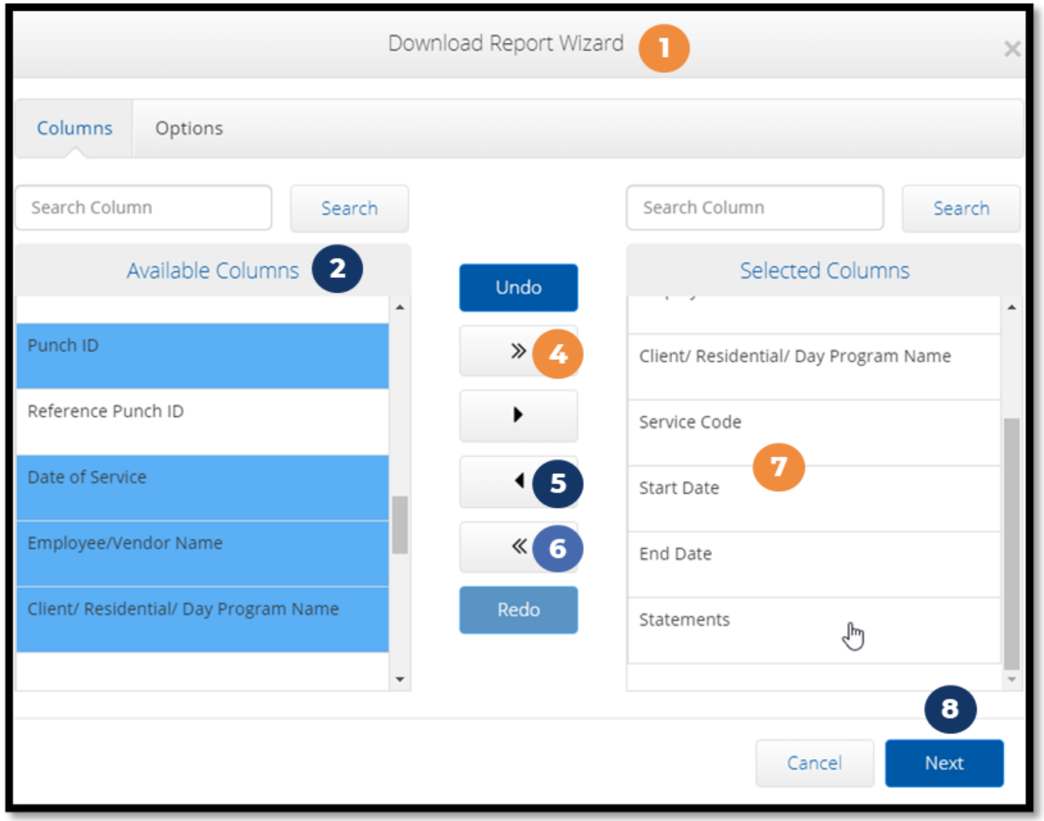
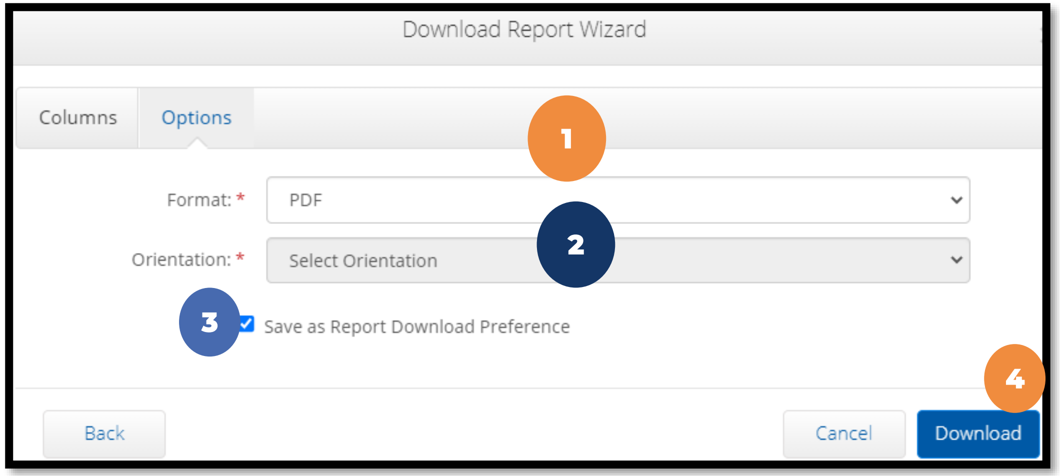
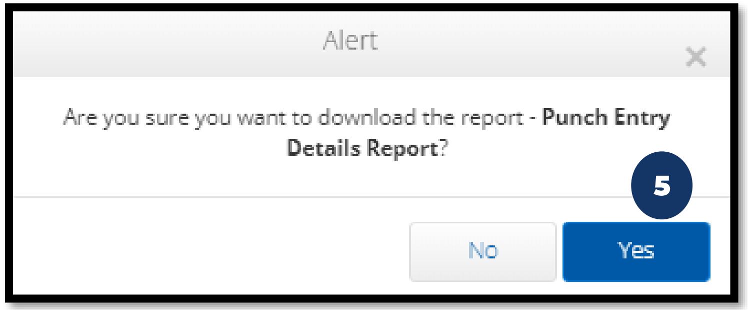
1. After clicking the download button, the Download Report Wizard opens.
2. Select all desired columns in Available Columns to download
3. Click the > **single right arrow** to add to Selected Columns
4. Alternatively, click the >> **double right arrows** to add all Available Columns to Selected Columns.
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**



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





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

Authorization Run Rate Report

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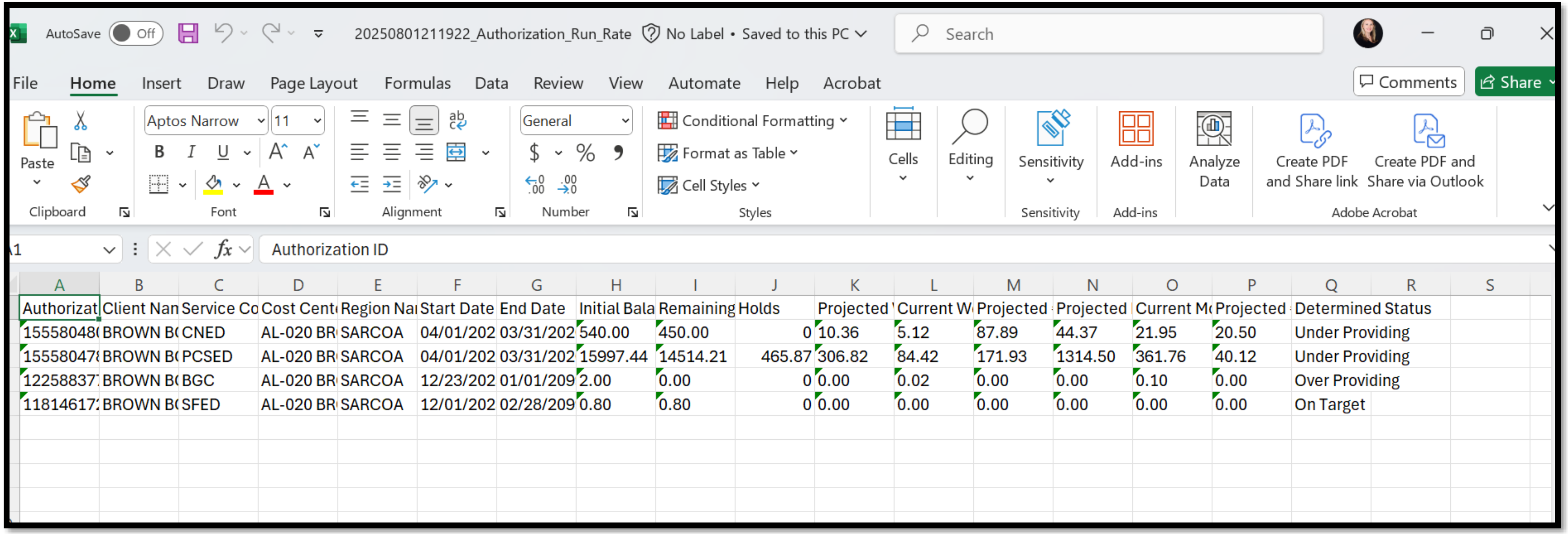


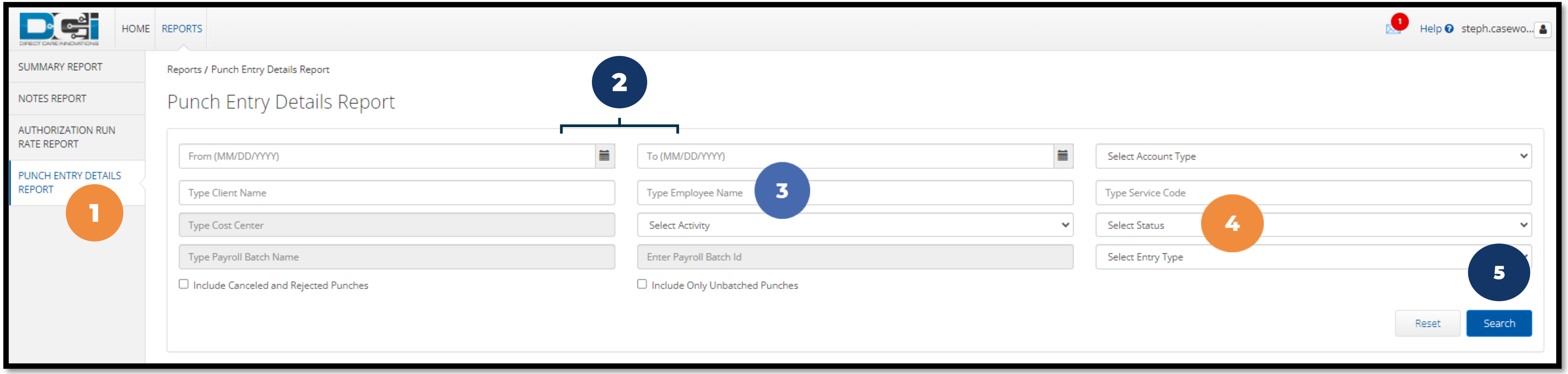
Punch Entry Details Report

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



Punch Entry Details Report

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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**

2

1 Employee N...

3 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

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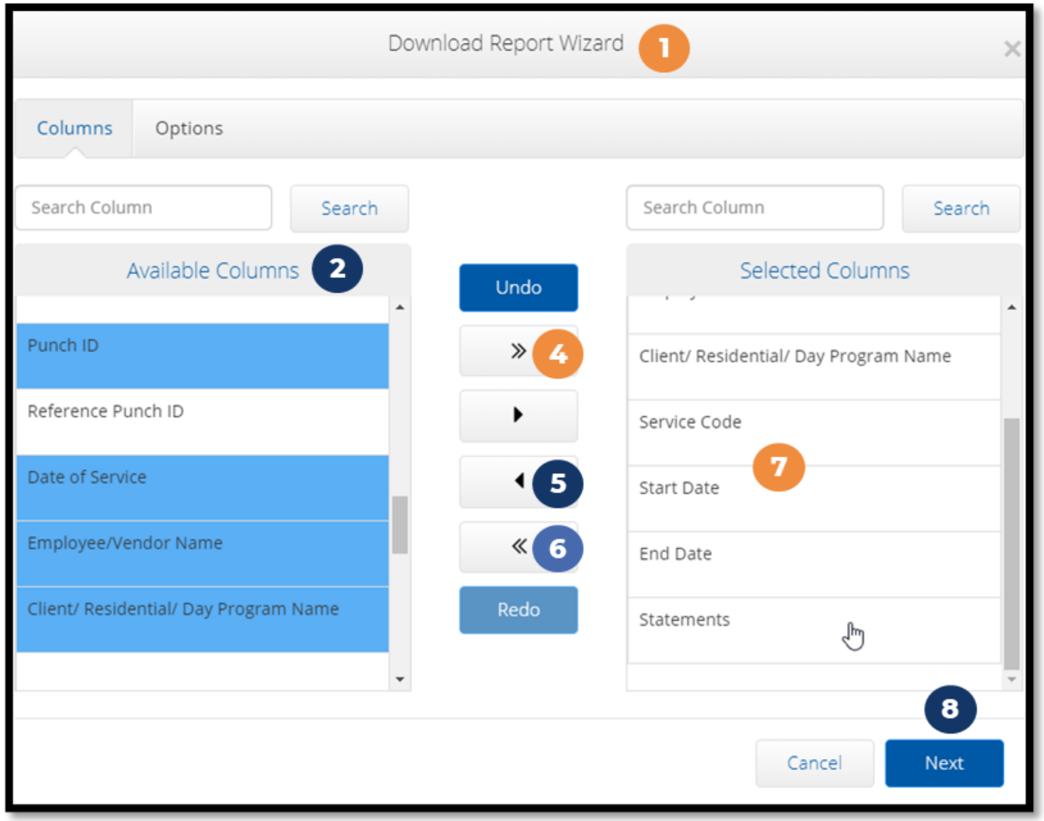

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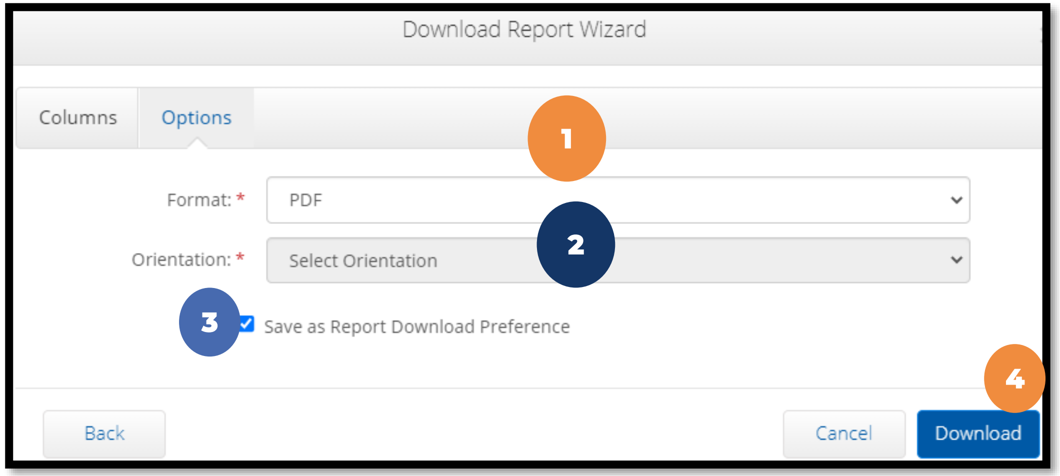
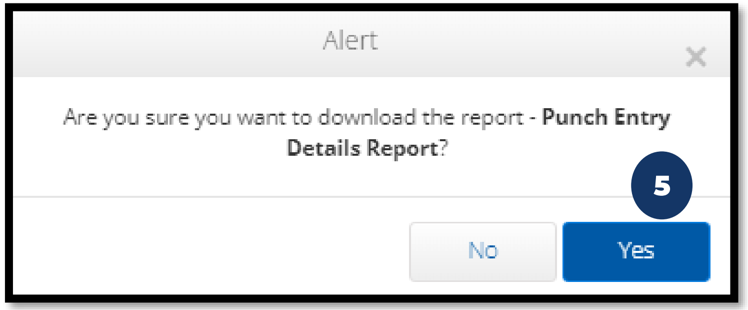
    1. PDFs have a 10-column limitation for report downloads
    2. The Summary Report download is preformatted as a PDF
    3. Excel is the recommended format for the Punch Entry Details Report
2. If PDF is selected, the Orientation field will become available. Select Portrait or Landscape.
3. Save as Report 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





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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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THANK YOU!

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