

New Jersey DDD DCI Systems Training for Self-Directed Employees

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



Why You Are Here & Acumen/DCI Overview



Mobile App - Clocking In & Out



Web Portal – Add, Edit, Reject, Review Historical Entry



Mobile Web Entry – Add, Reject, Review



Phone EVV (IVR) Resource



Troubleshooting



Payroll Schedule + Resources

Quick Resources

- View short step-by-step resource documents on the [New Jersey - Training Materials](#) page providing instructions for the punch entry process.
 - ✓ Download the DCI Mobile EVV App & Log In
 - ✓ Logging into the Web Portal or the Mobile App
 - ✓ Mobile App Entries
 - ✓ Web Portal Entries
 - ✓ Phone EVV IVR Real Time & Historical Entries
 - ✓ Business Rule Alerts – Quick Reference



Critical Information



This training is specifically for **Self-Directed Employees**. If you are a *Vendor, Authorized Representative* or *Employer*, please refer to our training flyer for those training dates.

- Time must be entered and approved online by the due date, even if it falls on a weekend or holiday.
 - ❖ Time entries approved after the due date will be processed on the following pay period's pay date
- After 60 days the entry will be prohibited as it will violate the timely filing business rule
 - ❖ All time entries must be entered and approved within 60 days of the date of service

Why Are You Here?

Why Are You Here?



As you may know, the Division of Developmental Disabilities (DDD) Vendor Fiscal/Employer Agent Model is transitioning Fiscal Intermediary (FI) services from Public Partnerships, LLC (PPL) to Acumen Fiscal Agent (**Acumen**), this transition started in *early June*. Acumen will help manage both Community Vendor Services and Self-Directed Employee (SDE) Services in this model.

Transition enrollments with Acumen will happen at staggered intervals over the summer of 2025, with groups of participants called **cohorts** assigned to enroll within a specific window of time. Using this approach will help ensure a smooth and organized transition for everyone.

In this training, We will review the specific details to our training sessions for the **New Jersey DDD program**. We will also review the process flow, so you have a good comprehension of what comes next.

Overview

Who is Acumen?



- One of the largest, most experienced fiscal management entities in the U.S.
- Servicing multiple states across the country
- Over 30 years of experience
- Customized approach for your needs

Why DCI?

- 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



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



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

DCI Mobile App

***Preferred Time Entry Method**

Proprietary: For Acumen and Customer Use Only



DCI Mobile App Basics

- Used for clocking in and out for real-time entries
- Preferred, EVV-compliant method
- Can be downloaded on a mobile device or tablet
- View all entries including status & details



DCI Mobile App

Download & Login

Download DCI Mobile EVV

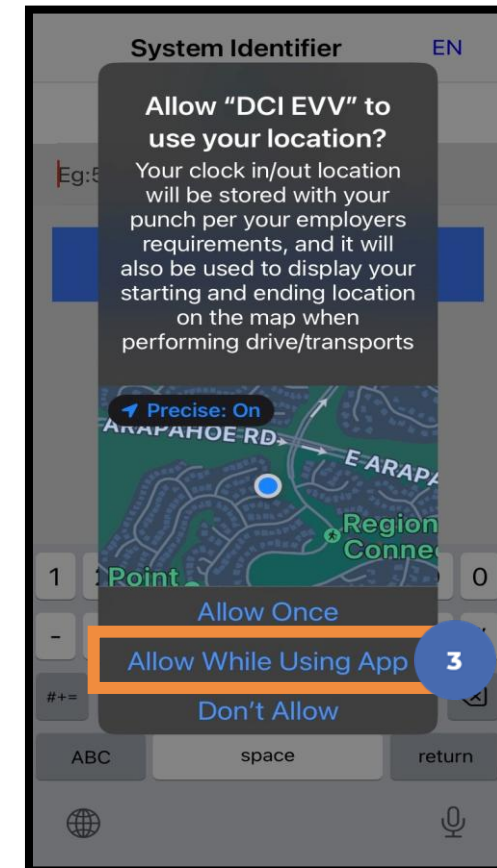
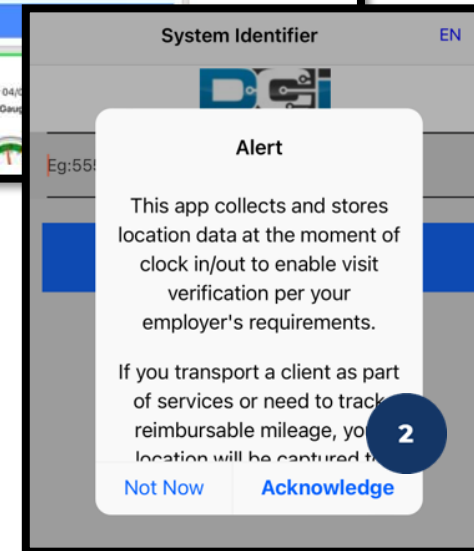
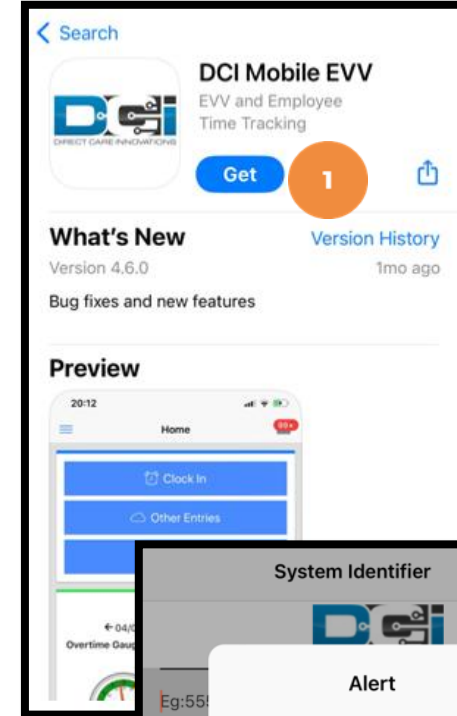
1. [Download](#) the **DCI Mobile EVV** App



2. Select Acknowledge on the Alert
 - The alert states the app collects and stores location data at clock in and clock out, if you transport a client as part of services and/or need to track reimbursable mileage
3. Select **Allow While Using App** only when accessing the app for the first time or after a new download to give the app access to the device's location
 - Location is only captured at clock in & out

***Please note!**

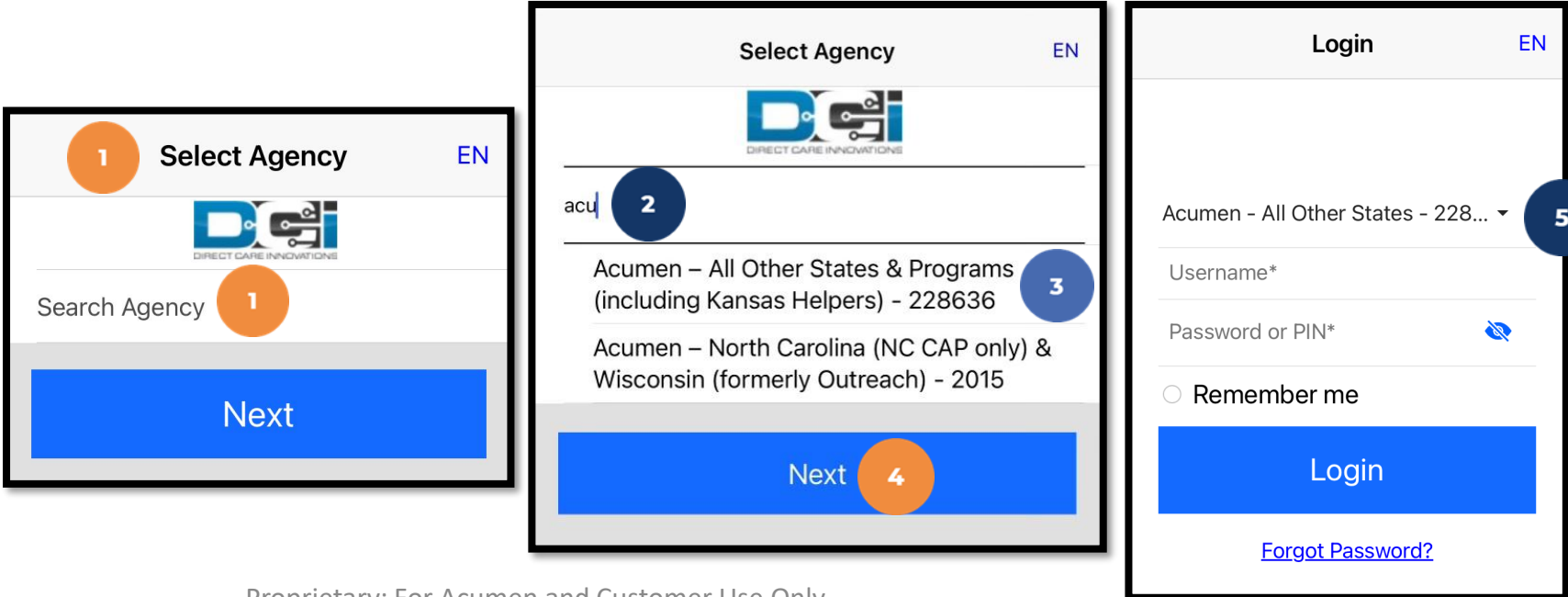
- There is more than one DCI app available. Please be sure to select the one labeled **DCI Mobile EVV**.
- Users may need to set app permissions. Media access is not necessary.



Initial Agency Selection

1. After downloading the app, the Select Agency screen appears with a Search Agency field.
2. Type at least three consecutive characters of the agency name OR the system identifier in the Search Agency field
 - ❖ The Acumen system identifier for All Other States & Programs (including Kansas Helpers) is **228636 – NJ DDD**
 - ❖ The consecutive characters can be located anywhere in the agency name or system identifier

3. Select the agency from the list
4. Click the blue **Next** button
5. The agency is now selected and appears on the login screen



The first screenshot shows the 'Select Agency' screen with a search field and a 'Next' button. The second screenshot shows the search results for 'acu' with the first option selected. The third screenshot shows the 'Login' screen with the selected agency name in the dropdown.

Select Agency EN

Search Agency

Next

Select Agency EN

acu

Acumen – All Other States & Programs (including Kansas Helpers) - 228636

Acumen – North Carolina (NC CAP only) & Wisconsin (formerly Outreach) - 2015

Next

Login EN

Acumen – All Other States - 228... ▾

Username*

Password or PIN*

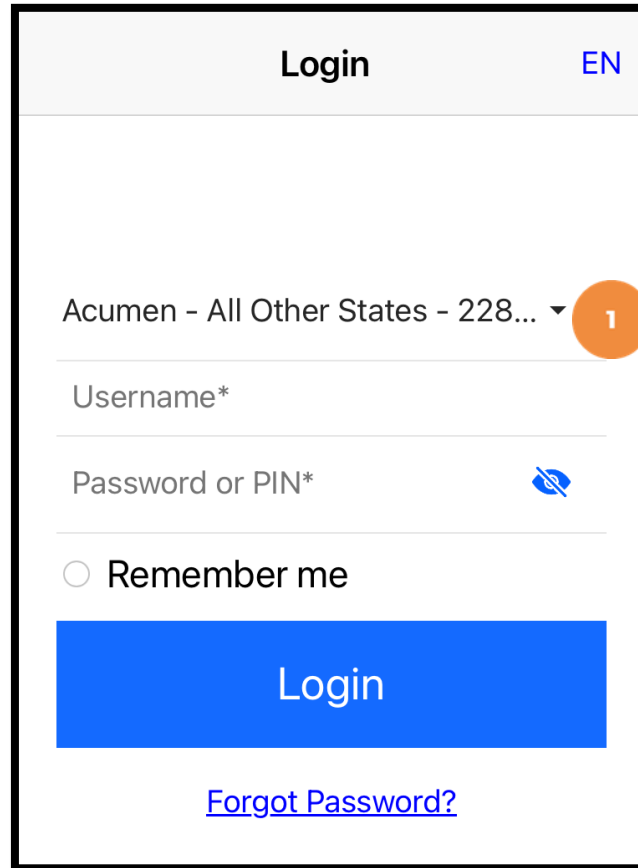
☐ Remember me

Login

[Forgot Password?](#)

Add More Agencies


1. To add more agencies, click the **drop-down** on the agency field.
2. If the desired agency is not listed, click **Add New** on the Agency results list.



EN

Acumen - All Other States - 228... ▾

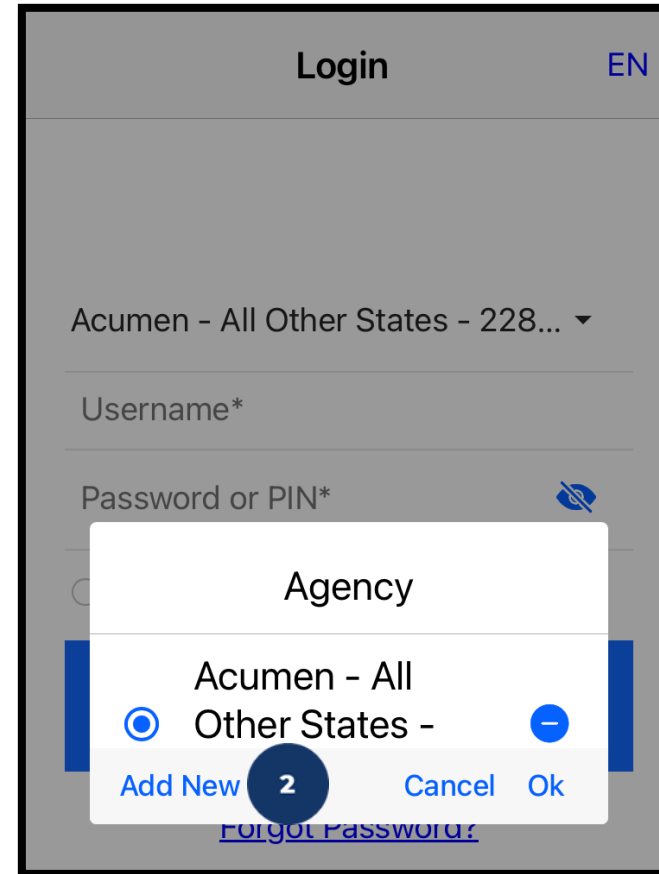
Username*

Password or PIN* 

☐ Remember me

Login


[Forgot Password?](#)




EN


Acumen - All Other States - 228... ▾

Username*

Password or PIN* 

Agency

☒ Acumen - All Other States - 

[Add New](#)  Cancel Ok

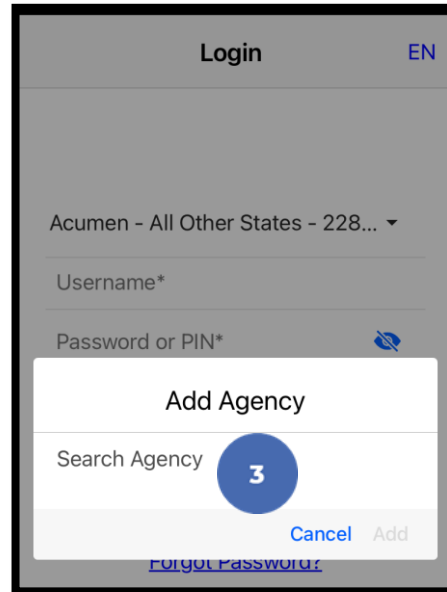
[Forgot Password?](#)

Add More Agencies

3. On the Add Agency window, type at least three consecutive characters of the agency name OR the system identifier in the Search Agency field.

❖ The consecutive characters can be located anywhere in the agency name or system identifier


4. Select the agency from the list
5. Click Add



Login EN

Acumen - All Other States - 228... ▾

Username*

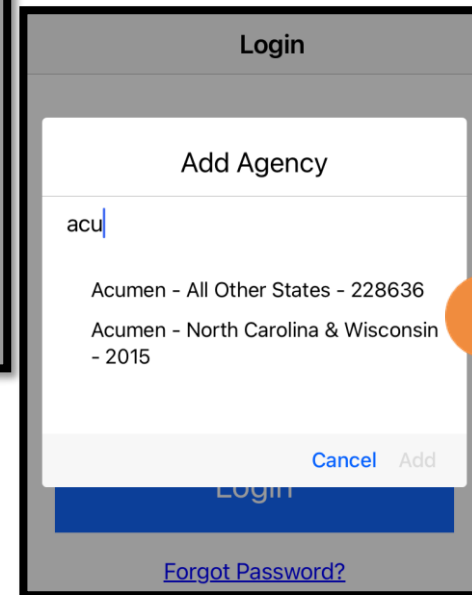
Password or PIN* 

Add Agency

Search Agency **3**

Cancel Add

[Forgot Password?](#)



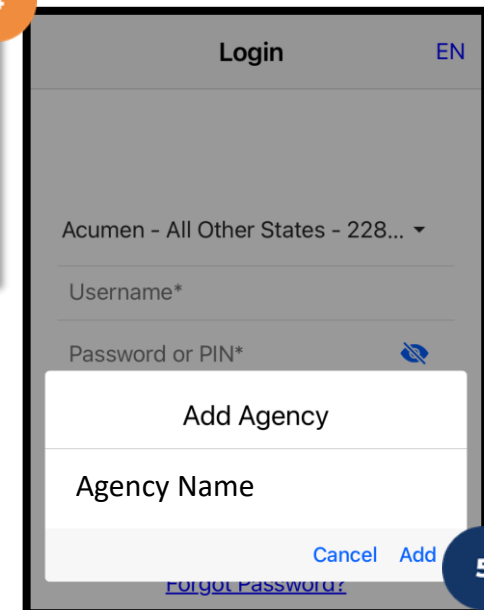
Add Agency

acu

Acumen - All Other States - 228636

Acumen - North Carolina & Wisconsin - 2015


Cancel Add



Login EN

Acumen - All Other States - 228... ▾

Username*

Password or PIN* 

Add Agency

Agency Name

Cancel Add **5**

[Forgot Password?](#)

The agency is now added and displays on the agency drop-down menu.
At each log in, select the appropriate agency.

Log into the DCI Mobile App



1. Enter Self-Directed Employee credentials
 - ✓ This was created by **you** during your electronic enrollment process
 - ✓ Optionally, select "Remember Me" to save the username

***Please note:** Do not use on a shared device
2. Click the blue **Login** button to access the mobile app
 - ✓ The **Forgot Password** link is available if necessary but requires a valid email address to be on file

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

A screenshot of the DCI Mobile App login interface. At the top, it says "Login" with a language selector "EN". Below is a dropdown menu showing "Acumen - All Other States - 228...". There are input fields for "Username*" and "Password or PIN*", with an orange circle containing the number "1" next to the password field. A "Remember me" option is below the password field. A large blue "Login" button with a dark blue circle containing the number "2" is at the bottom. A "Forgot Password?" link is at the very bottom.

Initial Log In



***Please note:** You must verify via the link in your email to login in for the first time

When logging in for the first time, you will be asked to change your password.

1. Hover over the circular “i” icon on the right to see the password requirements
2. Enter the same password in both password fields
3. Click the blue **Change Password** button

***Please note:** After changing the password, an email will be sent to you stating that you have changed your password.

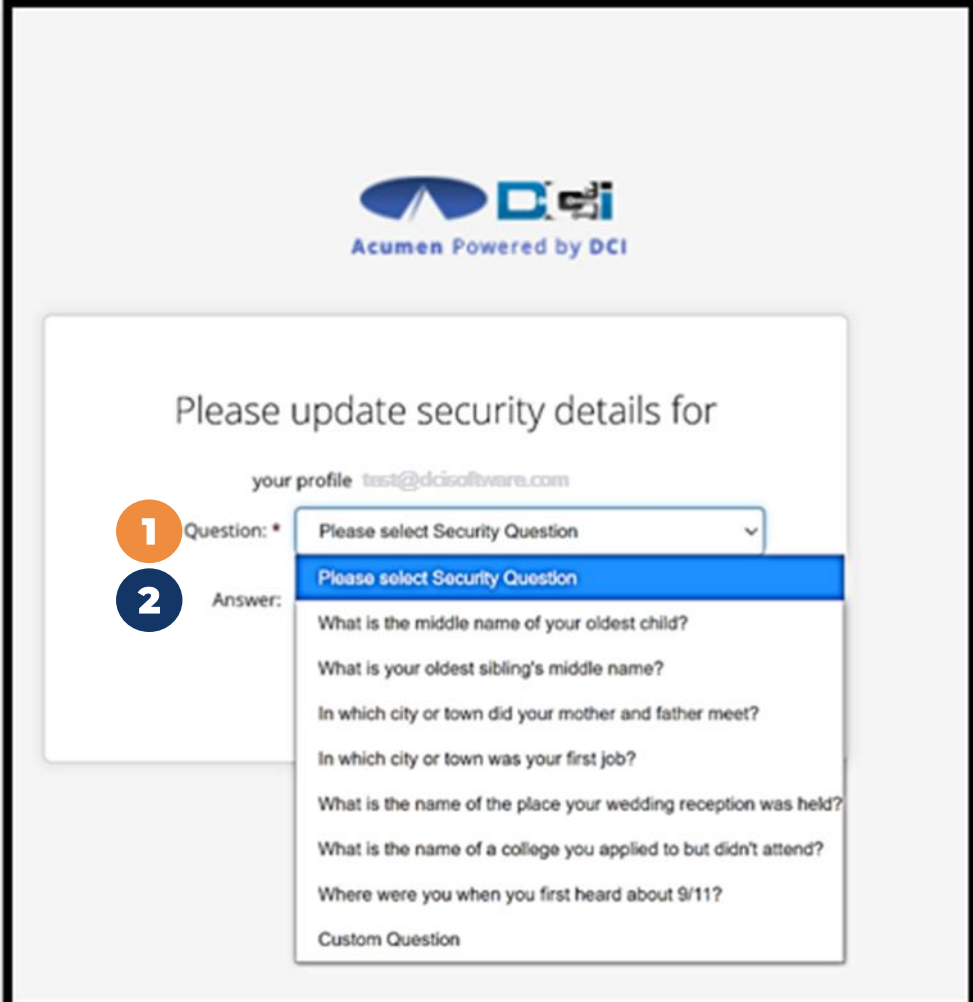
- Password Criteria**
- 1. Must be at least 10 characters.
 - 2. Must contain 1 uppercase letters, lowercase letters, numbers and special characters
 - 3. Must not contain more than two repeated characters in a row.
 - 4. The password should be different from the 3 previous passwords.

Security Question

To keep your profile safe, you will need to choose a security question the first time you log in.

1. Select a question from the drop-down menu
2. The answer must be at least five characters which cannot be repeated in a row

***Please note:** Remember the answer to the security question you chose, to reset your password in the future.



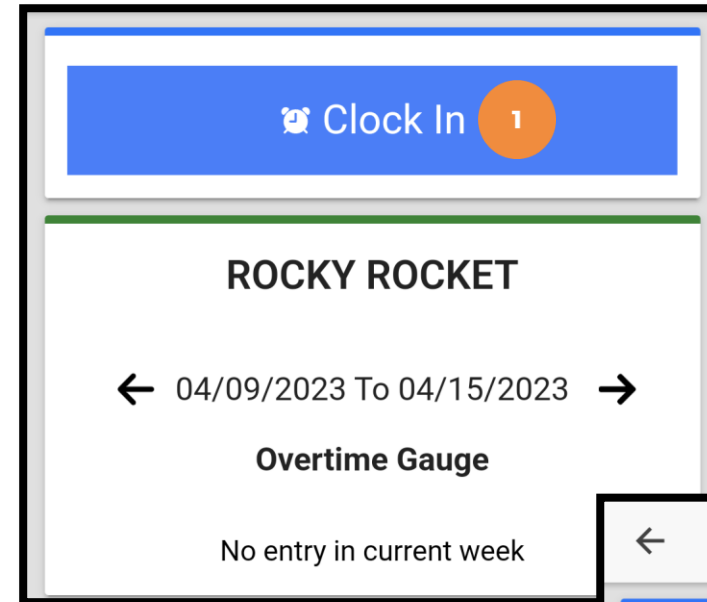
The screenshot shows the Acumen Powered by DCI logo at the top. Below it, a white box contains the text "Please update security details for" followed by "your profile test@dcisoftware.com". There are two numbered steps: 1. "Question: *" with a dropdown menu showing "Please select Security Question". 2. "Answer:" with a list of questions: "What is the middle name of your oldest child?", "What is your oldest sibling's middle name?", "In which city or town did your mother and father meet?", "In which city or town was your first job?", "What is the name of the place your wedding reception was held?", "What is the name of a college you applied to but didn't attend?", "Where were you when you first heard about 9/11?", and "Custom Question".

DCI Mobile App

Clock In/Out Process

Clock In on Mobile App

1. Click the blue **Clock In** Button
2. Select the Individual/Client's Name
 - Auto-fills for a single client
3. Select the Service Code
 - Auto-fills for a single service
4. Cost Center is always auto-filled
5. Click the blue **Continue** button



1

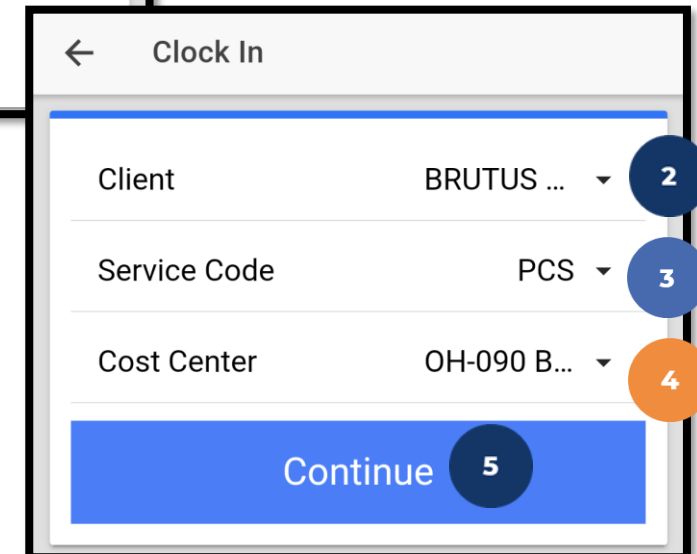
Clock In

ROCKY ROCKET

← 04/09/2023 To 04/15/2023 →

Overtime Gauge

No entry in current week



← Clock In

Client BRUTUS ... 2

Service Code PCS 3

Cost Center OH-090 B... 4

Continue 5

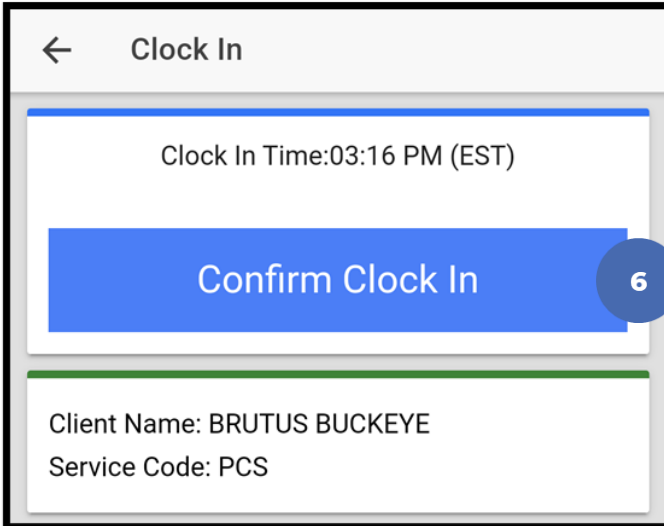
Clock In on Mobile App (cont.)

6. Select Confirm Clock In

* *This will start the time for the shift*

7. Select EVV Location (from drop-down)

- Home
- Community

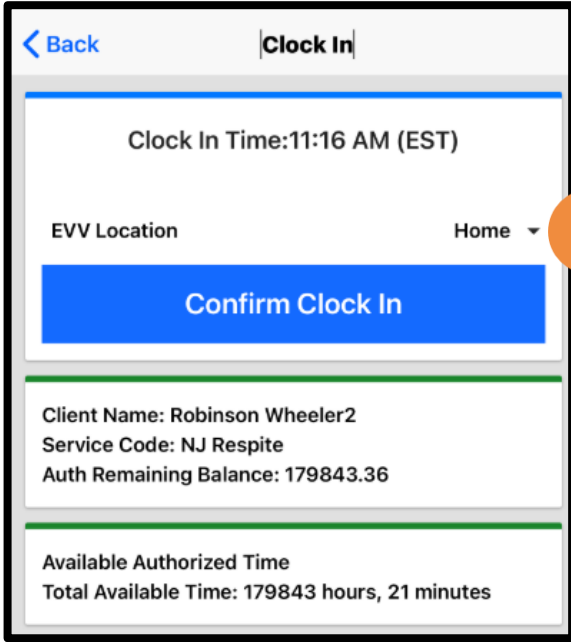


← Clock In

Clock In Time: 03:16 PM (EST)

Confirm Clock In

Client Name: BRUTUS BUCKEYE
Service Code: PCS



< Back | Clock In

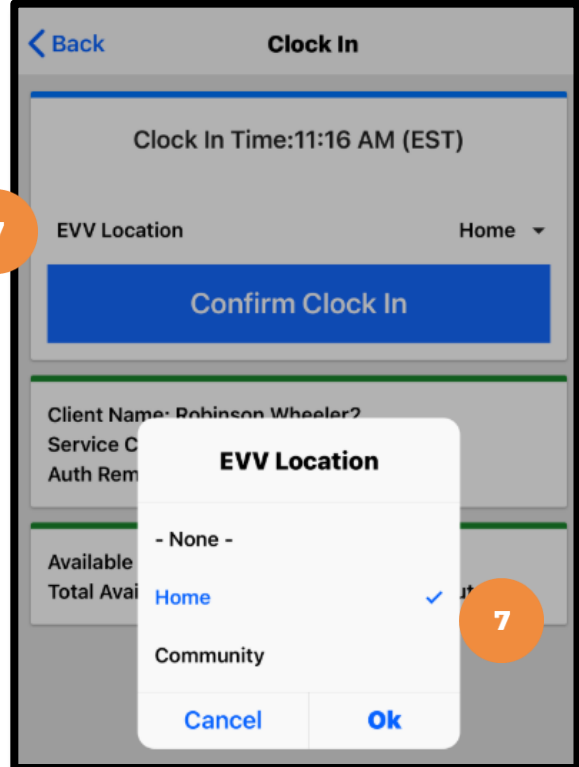
Clock In Time: 11:16 AM (EST)

EVV Location Home ▾

Confirm Clock In

Client Name: Robinson Wheeler2
Service Code: NJ Respite
Auth Remaining Balance: 179843.36

Available Authorized Time
Total Available Time: 179843 hours, 21 minutes



< Back | Clock In

Clock In Time: 11:16 AM (EST)

EVV Location Home ▾

Confirm Clock In

Client Name: Robinson Wheeler2
Service Code: NJ Respite
Auth Remaining Balance: 179843.36

Available Authorized Time
Total Available Time: 179843 hours, 21 minutes

EVV Location

- None -

Home ✓

Community

Cancel Ok

Clock In on Mobile App (cont.)

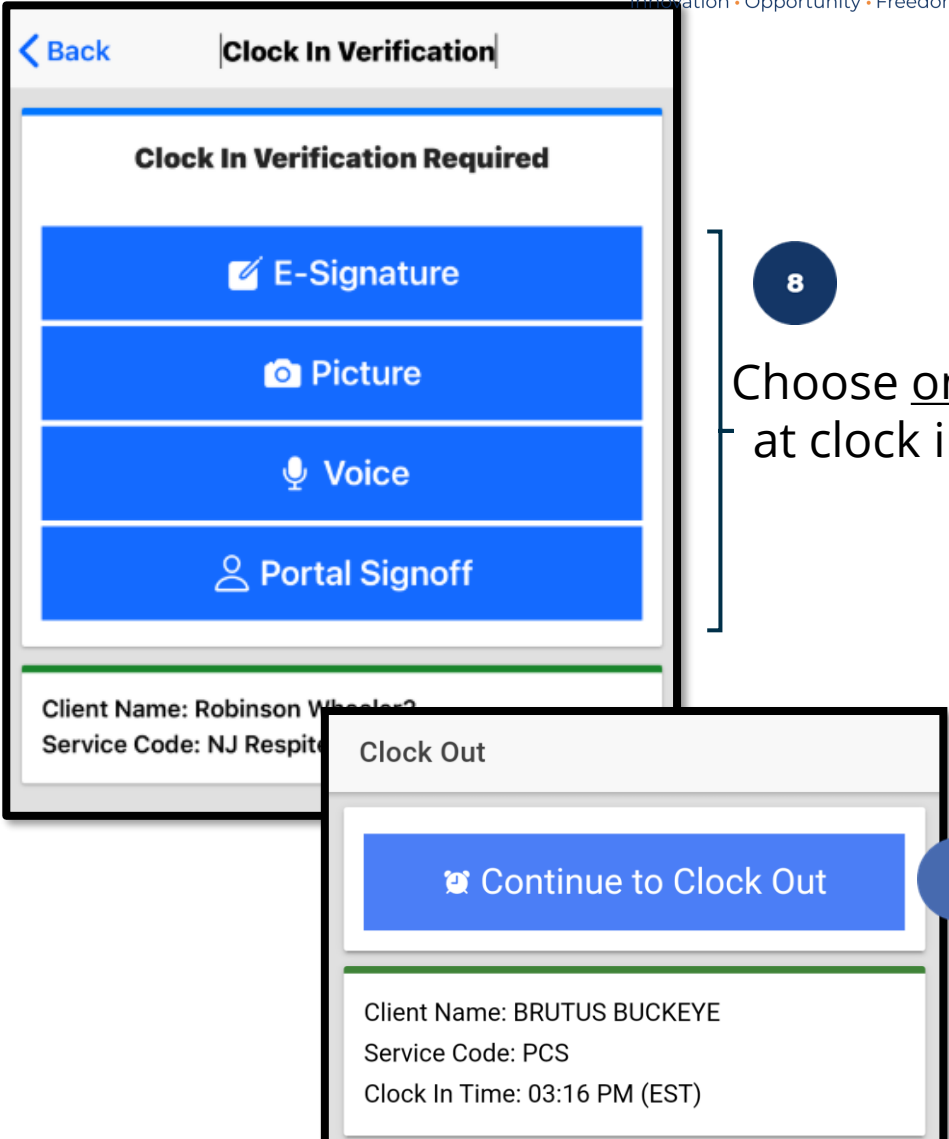
8. EVV (client attestation) options are visible. They allow the client/employer to verify that they received service.

- ✓ Choose only **one** option per shift (each clock in)
 - Client attestation is an extra layer of protection against potential fraud because the client/employer is “signing off” on the punch in real time

9. Clock in is successful when the **Continue to Clock out** button displays

- Clock in details display in summary form

***Please note:** Users do not need to stay logged into the mobile app during their shift and cannot take any other action until clocked out.

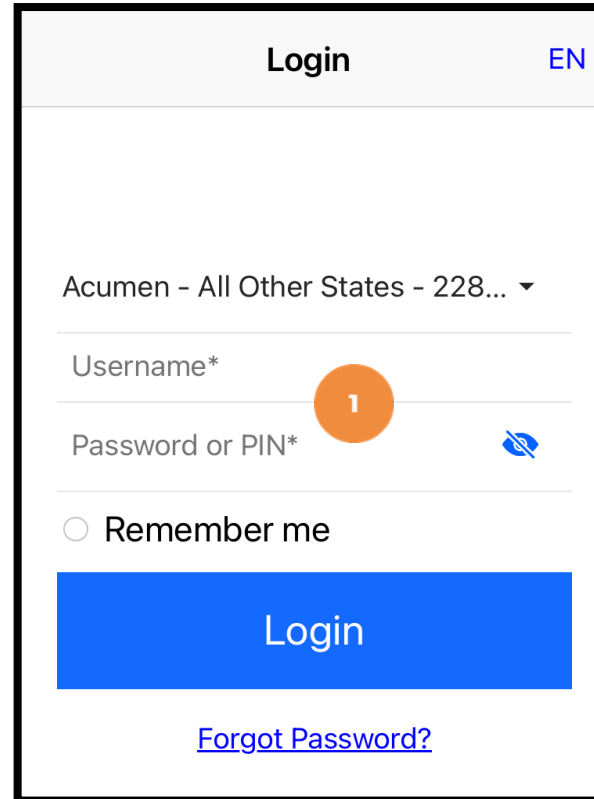


The image displays two screenshots from a mobile application. The top screenshot, titled 'Clock In Verification', shows a 'Back' button and a list of four verification options: 'E-Signature', 'Picture', 'Voice', and 'Portal Signoff'. A bracket on the right side of this list is labeled with a circled '8' and the text 'Choose one at clock in'. The bottom screenshot, titled 'Clock Out', shows a 'Continue to Clock Out' button. Below this button, it displays summary information: 'Client Name: BRUTUS BUCKEYE', 'Service Code: PCS', and 'Clock In Time: 03:16 PM (EST)'. A circled '9' is placed next to the 'Continue to Clock Out' button.

Initial Clock Out Process

***The first three steps in the clock out process are the same regardless of the EVV (client attestation) option selected**

1. At the end of the shift, log in to the mobile app.
2. Click the blue **Continue to Clock Out** button
3. Select **Confirm** to proceed with clocking out



EN

Acumen - All Other States - 228... ▼

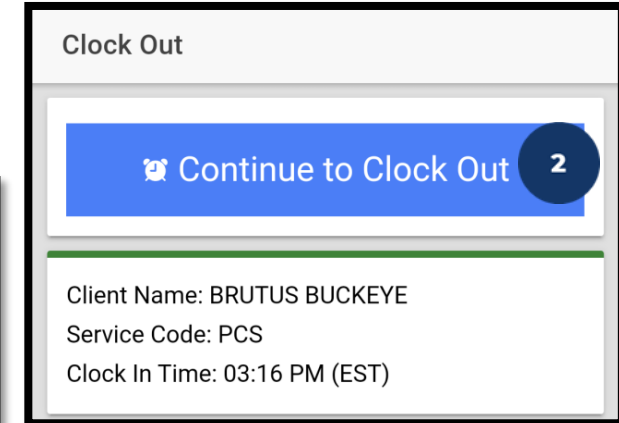
Username*

Password or PIN*


☐ Remember me

Login

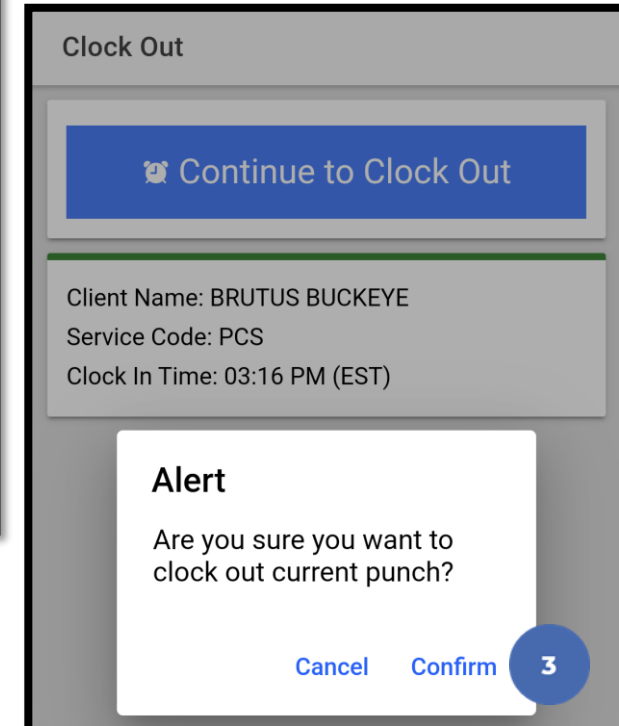
[Forgot Password?](#)




Clock Out

 Continue to Clock Out 2

Client Name: BRUTUS BUCKEYE
Service Code: PCS
Clock In Time: 03:16 PM (EST)



Clock Out

 Continue to Clock Out

Client Name: BRUTUS BUCKEYE
Service Code: PCS
Clock In Time: 03:16 PM (EST)

Alert

Are you sure you want to clock out current punch?

Cancel Confirm 3

Clock Out – EVV Options

- EVV (client attestation) options are visible if required by the program. They allow the client to verify that they received service.
 - ✓ Choose only **one** option per shift (each clock out)
- Client attestation is an extra layer of protection against potential fraud because the client/employer is “signing off” on the punch in real time

***Please note:** The employer must still review and may need to approve punch entries in their Pending Entries tab each pay period.



Back Clock Out Verification

Clock Out Verification Required

E-Signature

Picture

Voice

Portal Signoff

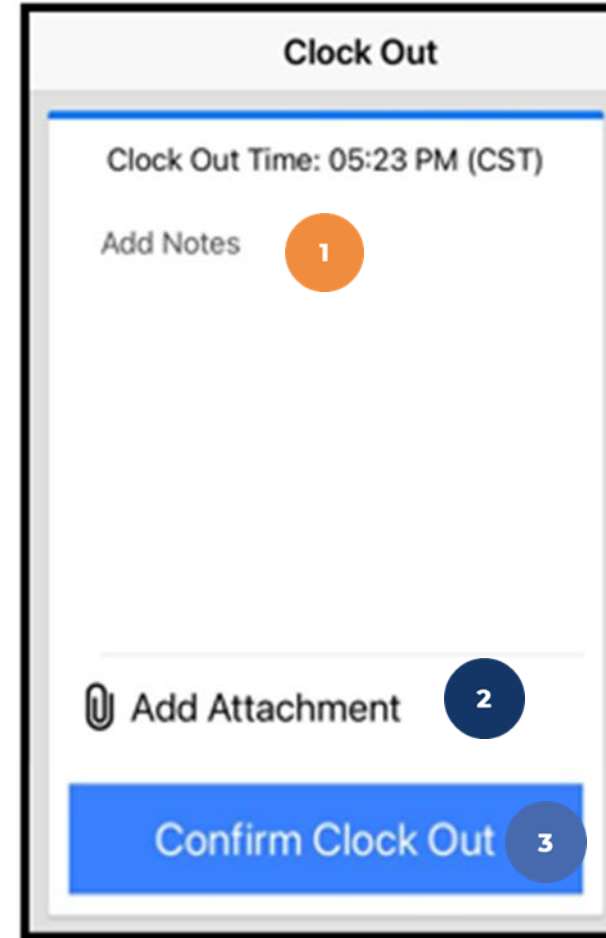
Client Name: Steph Client1
Service Code: RESPITE (Hourly)
Clock In Time: 01:42 PM (CST)

Choose one
at clock out

Clock Out Process After the EVV (Client Attestation) Option is Selected

The employee:


1. Enters any notes for the punch. Add an attachment for the punch (optional)
2. Click the blue **Confirm Clock Out** button when ready
 - ✓ *This will stop the time for the shift*
3. Punch Confirmation
 - ✓ Punch details, including verification option selected, will display.
 - ✓ Optionally, click the blue **Home** button to return to the dashboard.



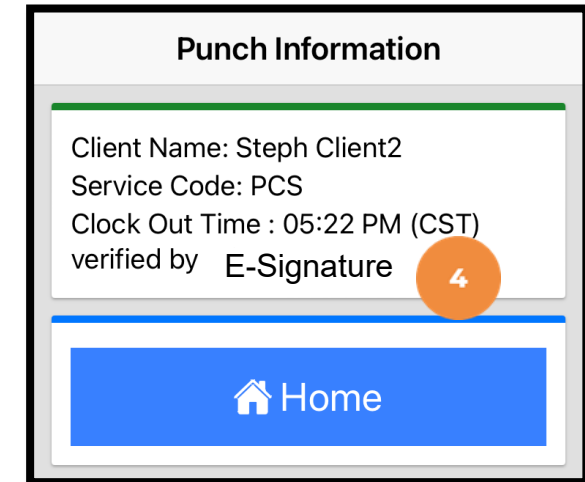
Clock Out

Clock Out Time: 05:23 PM (CST)

Add Notes **1**


 Add Attachment **2**

Confirm Clock Out **3**



Punch Information

Client Name: Steph Client2
Service Code: PCS
Clock Out Time : 05:22 PM (CST)
verified by E-Signature **4**

 Home

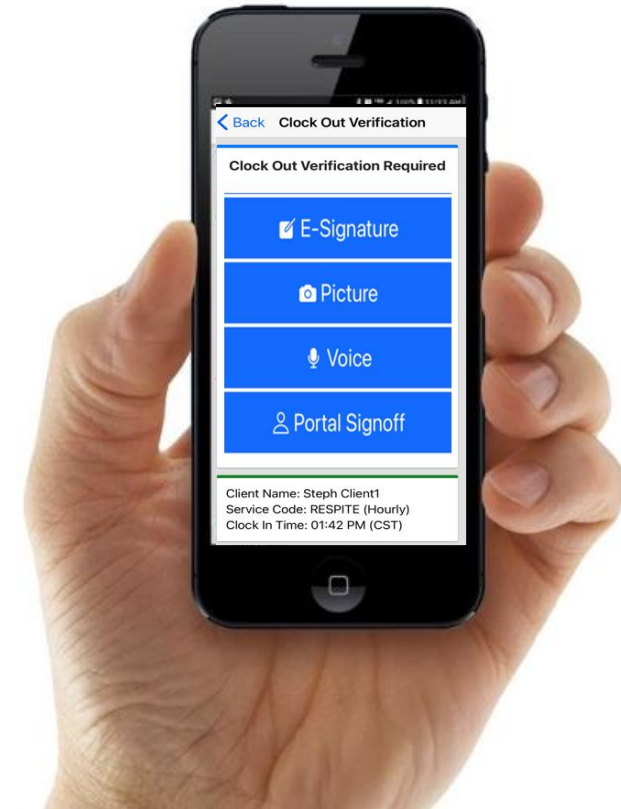
DCI Mobile App

EVV or Client/Employer Attestation Options

EVV Options (Client/Employer Attestation)

Choose only one at clock out:

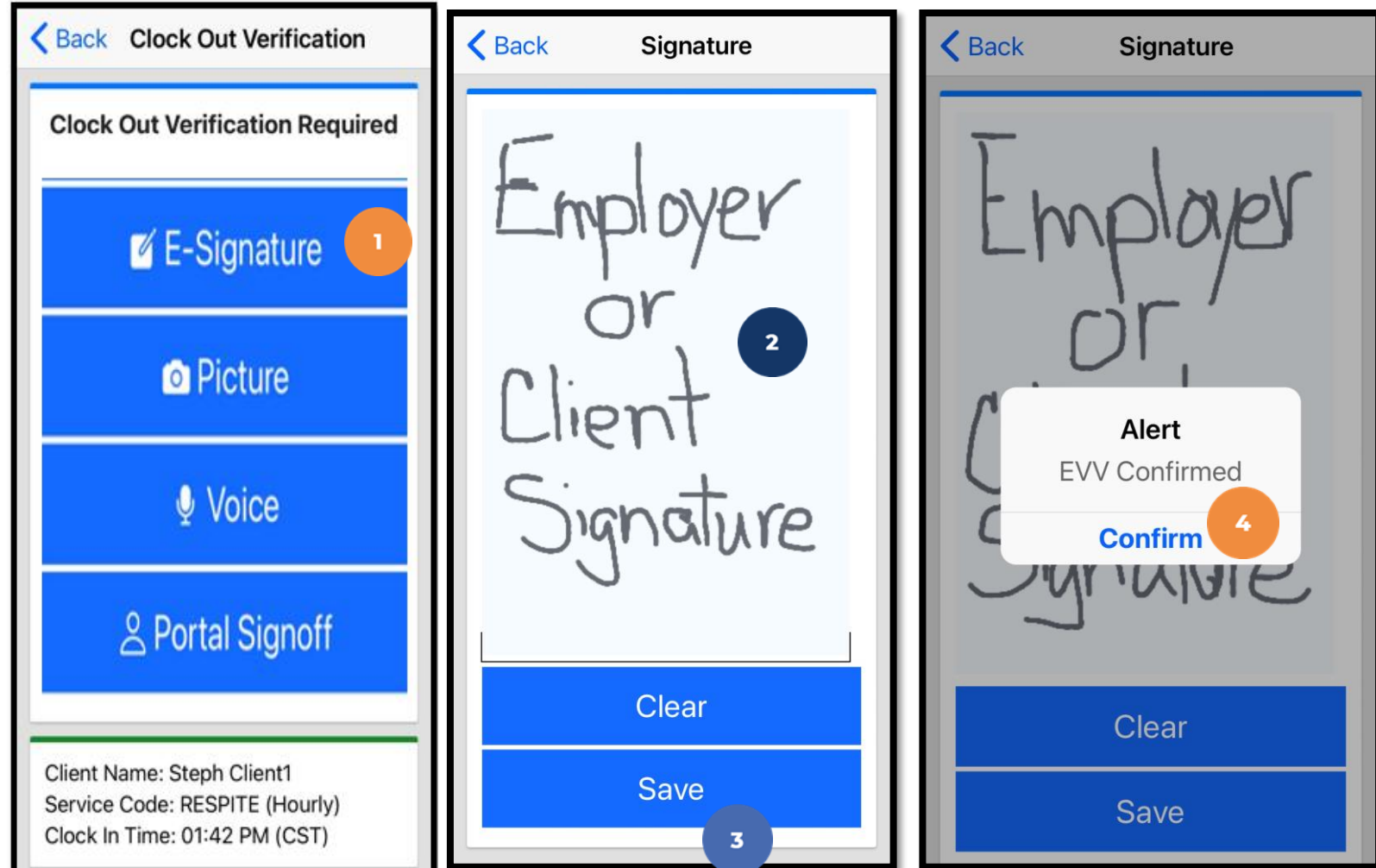
- E-Signature
- Picture
- Voice
- Portal Signoff



Clock In/Out - EVV Option #1

E-Signature

1. Select the clock in/out verification type:
 - ✓ E-Signature
2. Hand the mobile device to the client or employer, who signs their name on the device screen.
3. The client or employer clicks **Save** to accept the signature
 - ✓ Optionally, they may click **Clear** to rewrite their signature.
4. The client or employer clicks **Confirm** to validate the signature and hands the mobile device back to the employee



The image displays three sequential screenshots of a mobile application interface for clocking in/out using an E-Signature option.

Screenshot 1: Clock Out Verification
The screen shows a list of verification options: E-Signature (marked with a red circle 1), Picture, Voice, and Portal Signoff. At the bottom, client information is displayed: Client Name: Steph Client1, Service Code: RESPITE (Hourly), and Clock In Time: 01:42 PM (CST).

Screenshot 2: Signature
The screen shows a large text area where the signature "Employer or Client Signature" has been written (marked with a blue circle 2). Below the text area are "Clear" and "Save" buttons. The "Save" button is marked with a blue circle 3.

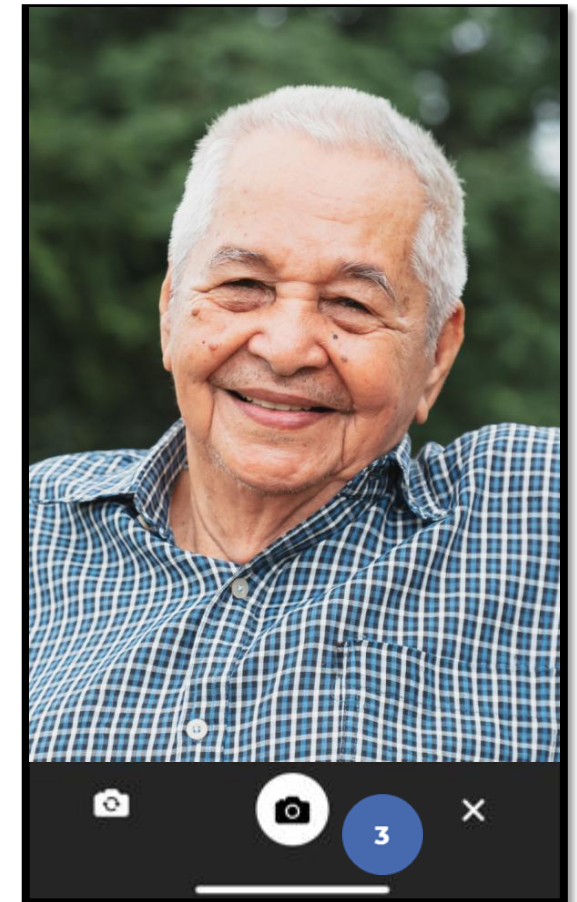
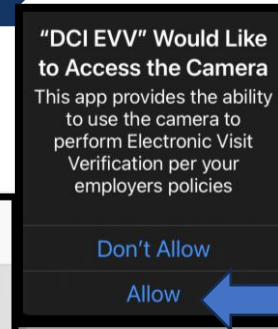
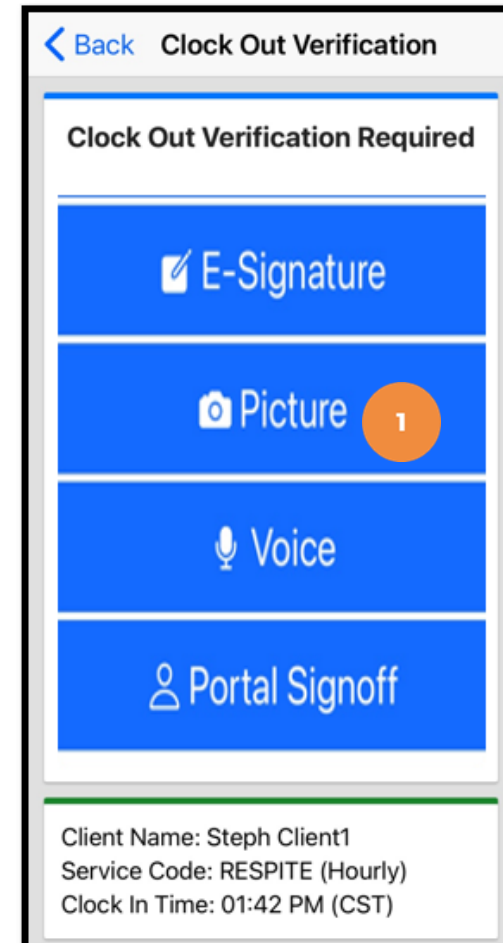
Screenshot 3: Signature
The screen shows the same signature, but an "Alert" dialog box is displayed in the center, stating "EVV Confirmed" and providing a "Confirm" button (marked with a red circle 4). Below the alert are "Clear" and "Save" buttons.

Clock /inOut - EVV Option #2

Picture

1. Select the clock in/out verification type:
✓ Picture
2. A pop-up stating "DCI EVV" Would Like to Access the Camera appears. Select Allow.
3. Click the **camera** icon to take a picture of the client

***Please note:** Client photos taken by the employee for electronic visit verification (EVV) are never stored on the employee's cell phone when using the DCI Mobile App

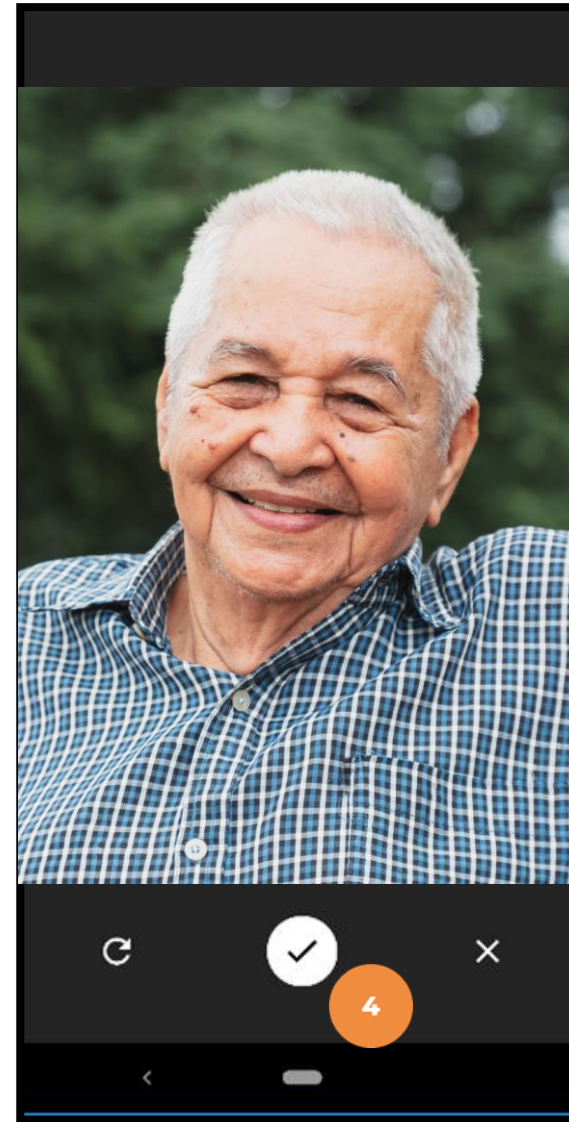


Clock In/Out - EVV Option #2

Picture

4. Click the **checkmark** to accept the picture, the X to cancel, or the circular arrow to retake the picture.
5. Click **Confirm** in the alert pop-up box to confirm the punch

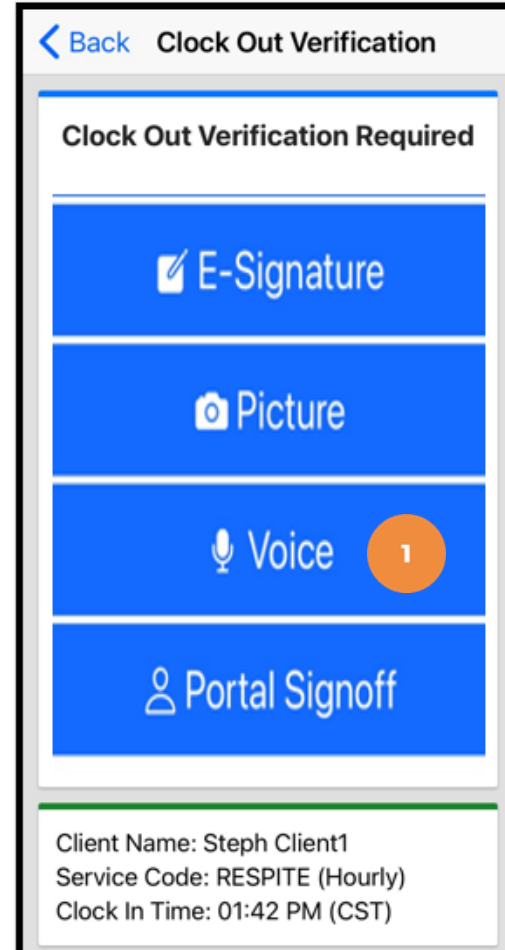
***Please note:** Client photos taken by the employee for electronic visit verification (EVV) are never stored on the employee's cell phone when using the DCI Mobile App



Clock In/Out - EVV Option #3

Voice

1. Select the clock in/out verification type:
 - ✓ Voice
2. Hand the device to the client or employer. A pop-up stating “DCI EVV” Would Like to Access the Microphone appears. The client or employer selects **Allow**.



< Back Clock Out Verification

Clock Out Verification Required

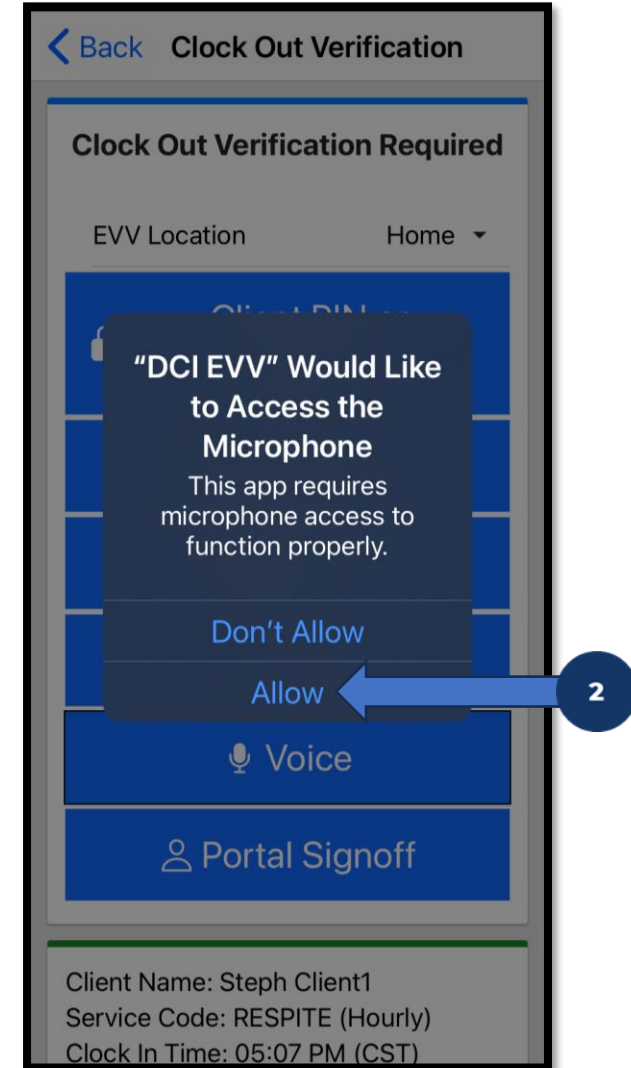
E-Signature

Picture

Voice 1

Portal Signoff

Client Name: Steph Client1
Service Code: RESPITE (Hourly)
Clock In Time: 01:42 PM (CST)



< Back Clock Out Verification

Clock Out Verification Required

EVV Location Home

“DCI EVV” Would Like to Access the Microphone
This app requires microphone access to function properly.

Don't Allow

Allow 2

Voice

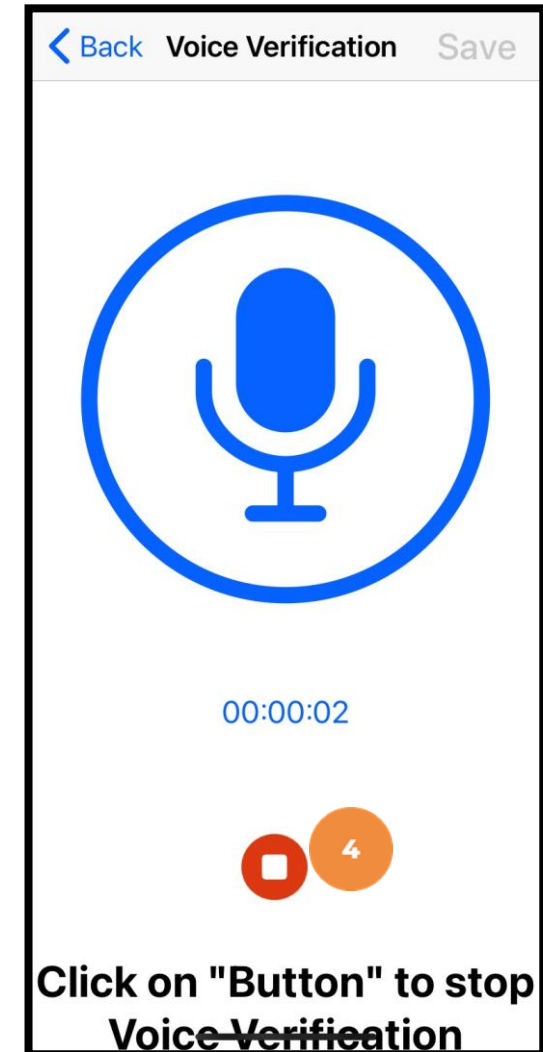
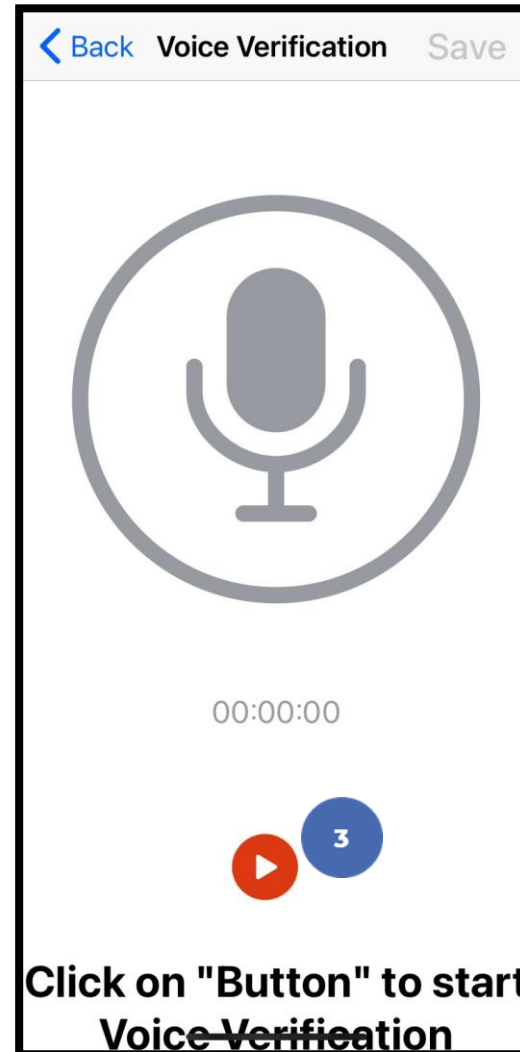
Portal Signoff

Client Name: Steph Client1
Service Code: RESPITE (Hourly)
Clock In Time: 05:07 PM (CST)

Clock In/Out - EVV Option #3

Voice

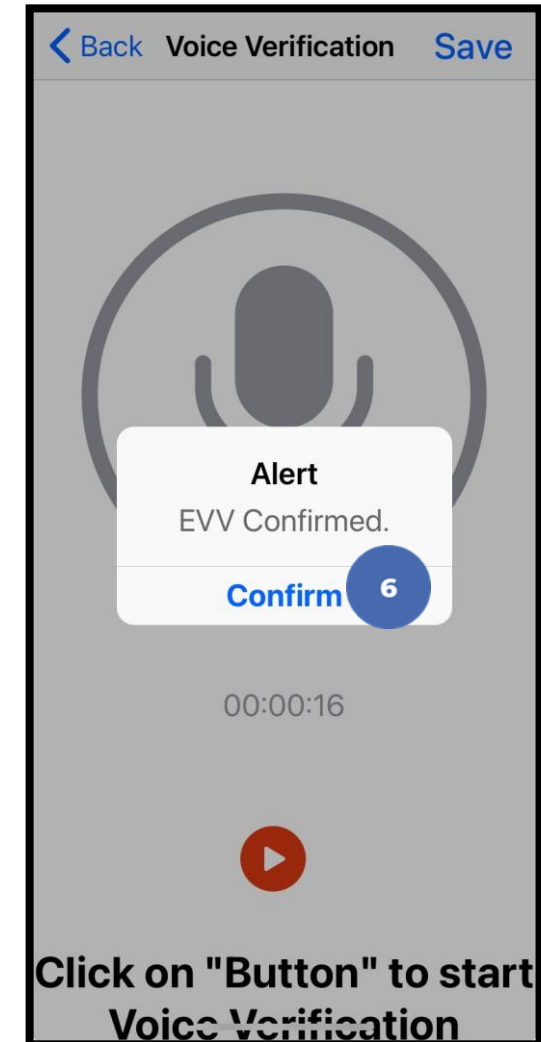
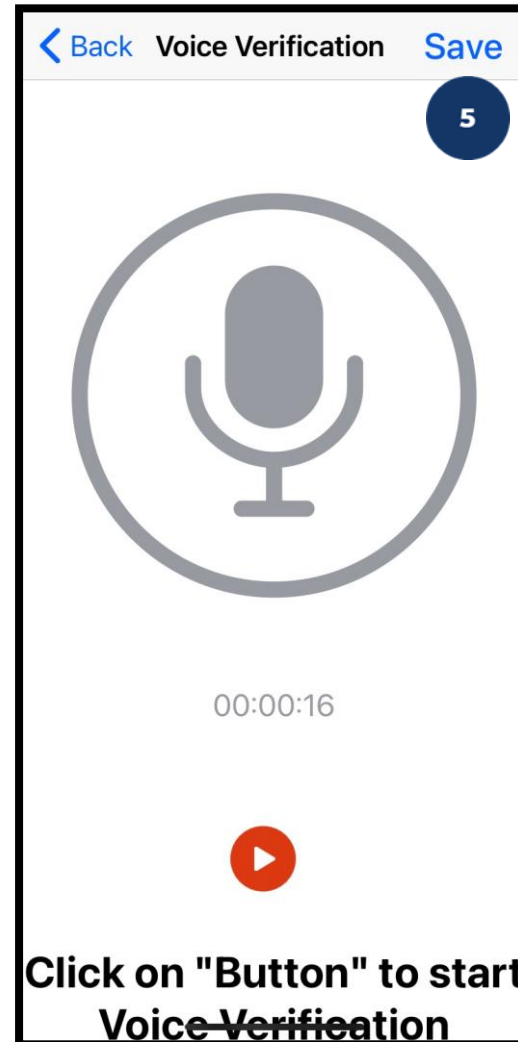
3. The client or employer clicks the **red play** button to start the voice verification
 - ✓ An automated voice will say "Please repeat after me. My name is (client name) and I am verifying this visit."
4. The client or employer states "My name is (client or employer name) and I am verifying this visit." When finished, they press the **red stop** button to stop the voice verification.



Clock In/Out - EVV Option #3

Voice

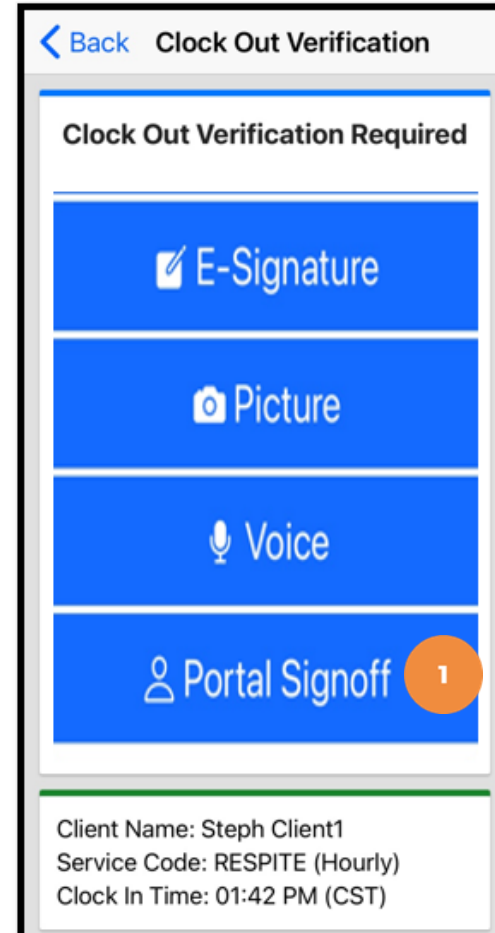
5. The client or employer clicks the blue **Save** button in the upper right corner to accept the voice verification, or the blue **<Back** button in the upper left corner to re-record it.
6. The client or employer clicks **Confirm** to validate the voice recording and hands the mobile device back to the employee



Clock In/Out - EVV Option #4

Portal Signoff

1. Select the clock in/out verification type:
 - ✓ Portal Signoff
2. An alert will appear stating that EVV is confirmed, but manual verification will be required prior to approval. Click **Confirm**.



< Back Clock Out Verification

Clock Out Verification Required

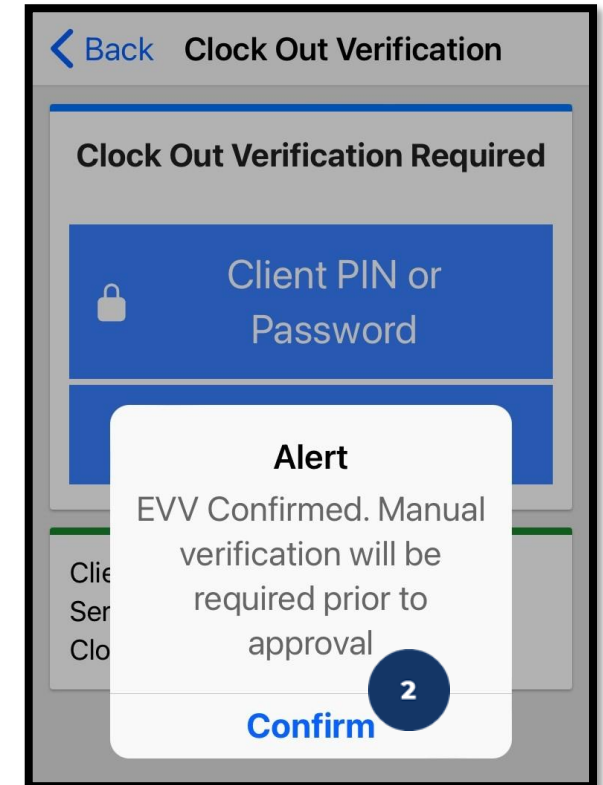
E-Signature

Picture

Voice

Portal Signoff 1

Client Name: Steph Client1
Service Code: RESPITE (Hourly)
Clock In Time: 01:42 PM (CST)



< Back Clock Out Verification

Clock Out Verification Required

Client PIN or Password

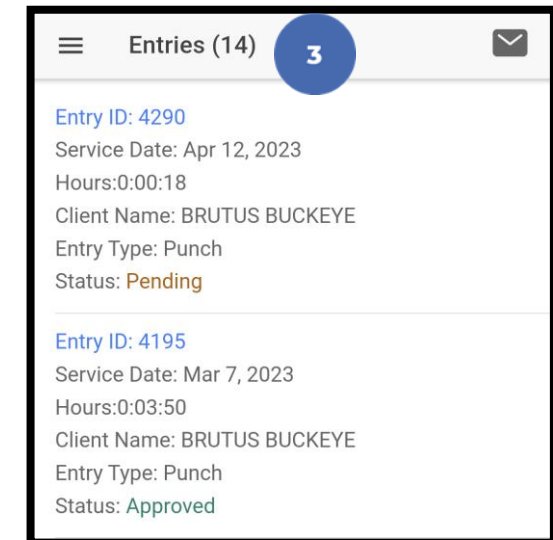
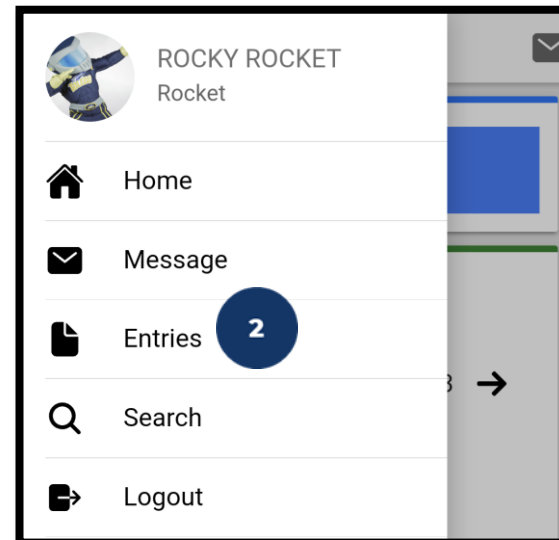
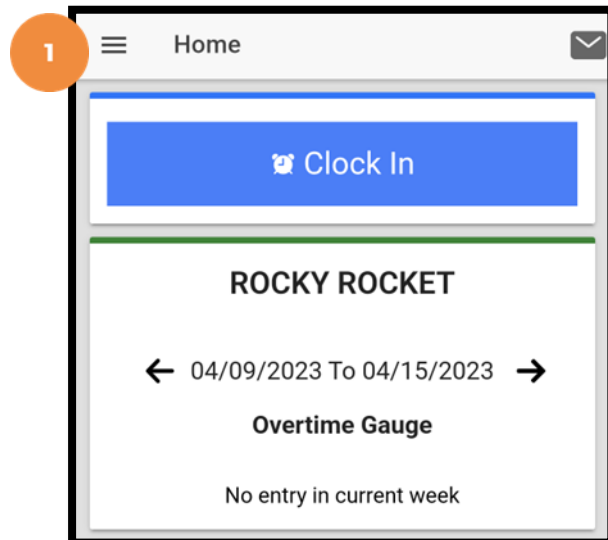
Alert
EVV Confirmed. Manual verification will be required prior to approval

Confirm 2

Review Entries

1. Click the **Menu** in the top left corner of the screen
2. Select **Entries** on the submenu
3. View the complete list of entries
 - Verify that all time is submitted
 - The employer approves the time as needed

***Please note:** Punches cannot be edited in the mobile app. Please edit the punch via the web portal.



Mobile App Offline Mode

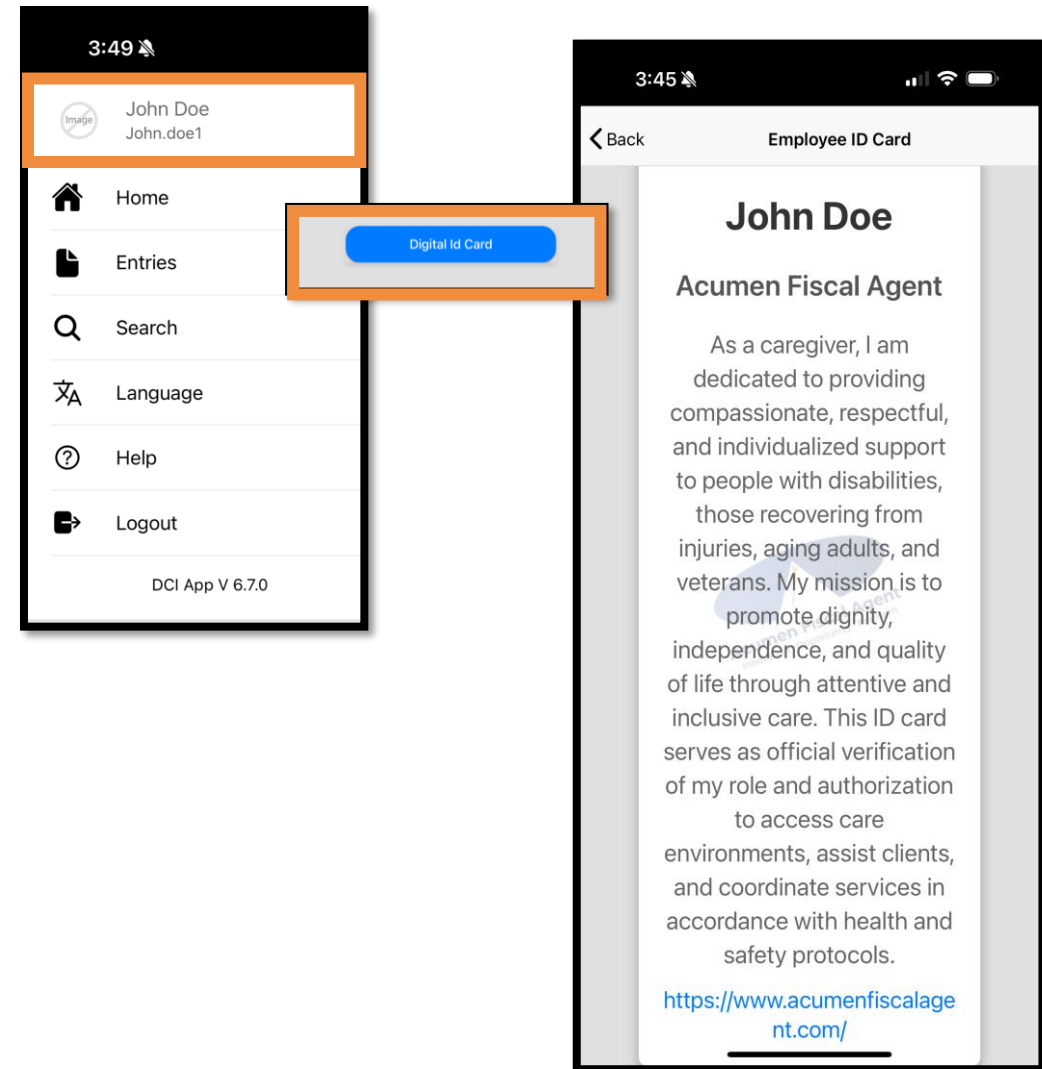


- Offline mode allows the employee to use the mobile app on a **registered device** when the device is not connected to the internet or loses connection while the app is in use
 - ✓ **Please note:** A device is registered automatically the first time the user logs into the mobile app while connected to a cellular network or internet
 - ✓ A user can only have one registered device
- Useful when there is limited or no cellular or Wi-Fi connection at the service location
- Limits users to only clock in and clock out
- Offline mode status is indicated by a red **"Offline" bar** at the top of the dashboard
- Punches made in offline mode are saved in the mobile app as offline punches, will automatically upload when the user connects to a cellular or wireless network, and will be listed under Entries.

Mobile App Digital ID Card

A Digital ID Card is now available so that employees can quickly and easily show their credentials via the mobile app if needed. This quick communication tool includes:

- The Employee's name
- Acumen Fiscal Agent
- Acumen's Website
- Statement explaining their role as a self-directed employee



DCI Web Portal

***Accessed on a Desktop or Laptop Computer**

DCI Web Portal

Logging In, Profile Settings & Messaging

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
 - This feature is only available for employees
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



The screenshot shows the login interface of the DCI Web Portal. At the top, a blue box with a white '1' contains the URL **acumen.dcisoftware.com**. On the right, a language drop-down menu with a white '2' shows 'English' selected, with other options like 'عربي', '中文', 'Русский', 'Soomaali', 'Español', and 'Tiếng Việt' listed below. The main sign-in form has a title 'Sign In'. It includes a 'Username' field with a blue '3' and a 'Password' field with a blue '3'. Below the password field is a checkbox for 'Remember me' and a link for 'Forgot your password?' with an orange '4'. A blue 'Sign In' button with a white '5' is centered below the fields. Below the button is a horizontal line with a circle containing 'Or' in the center. At the bottom, there is a link for 'Create a profile'.

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

Initial Log In



***Please note:** You must verify via the link in your email to login in for the first time

When logging in for the first time, you will be asked to change your password.

1. Hover over the circular “i” icon on the right to see the password requirements
2. Enter the same password in both password fields
3. Click the blue **Change Password** button

***Please note:** After changing the password, an email will be sent to you stating that you have changed your password.

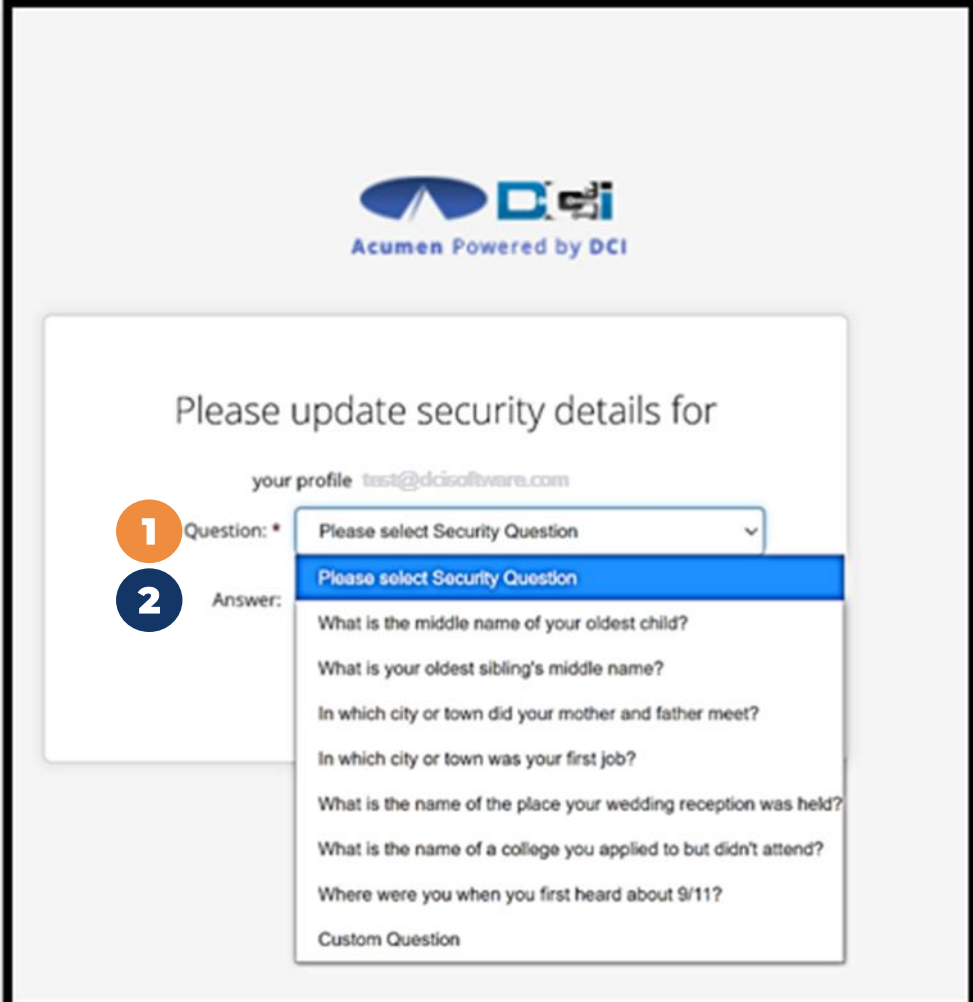
- Password Criteria**
- 1. Must be at least 10 characters.
 - 2. Must contain 1 uppercase letters, lowercase letters, numbers and special characters
 - 3. Must not contain more than two repeated characters in a row.
 - 4. The password should be different from the 3 previous passwords.

Security Question

To keep your profile safe, you will need to choose a security question the first time you log in.

1. Select a question from the drop-down menu
2. The answer must be at least five characters which cannot be repeated in a row

***Please note:** Remember the answer to the security question you chose, to reset your password in the future.

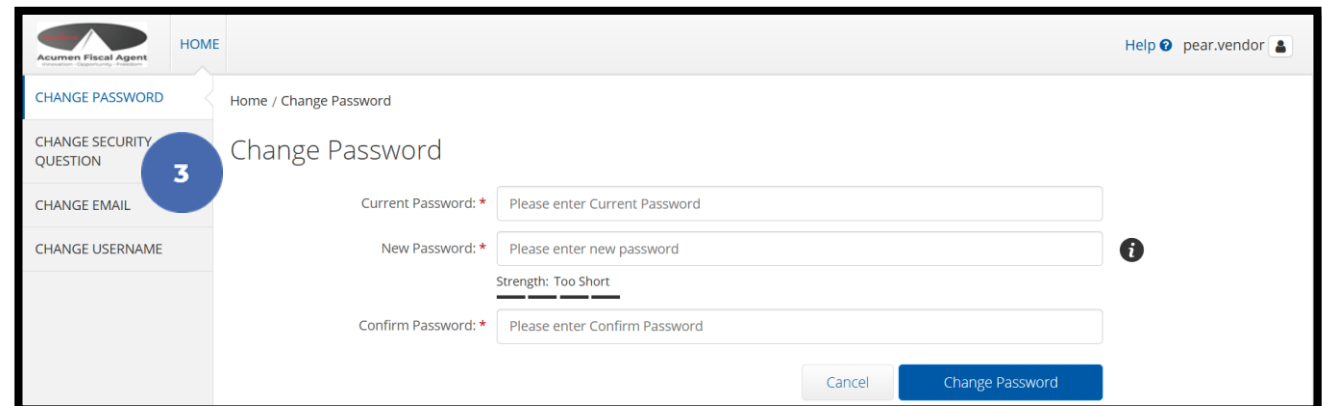
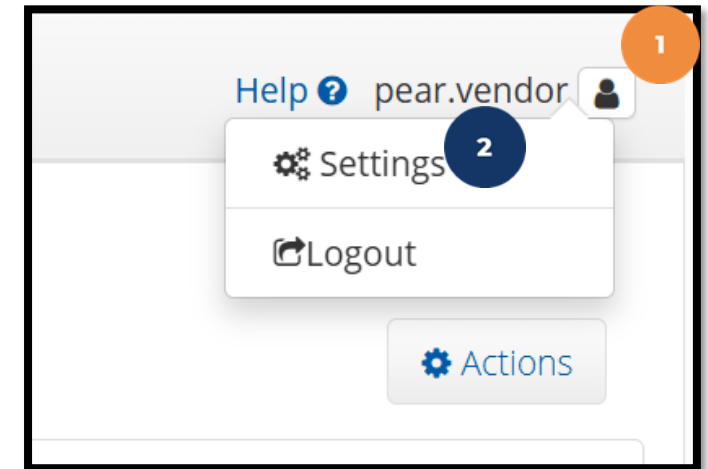


The screenshot shows the Acumen Powered by DCI logo at the top. Below it, a white box contains the text "Please update security details for" followed by "your profile test@dcisoftware.com". A numbered list on the left indicates the steps: 1. Question: * and 2. Answer:. The "Question:" step shows a dropdown menu with "Please select Security Question" selected. The "Answer:" step shows a list of security questions: "What is the middle name of your oldest child?", "What is your oldest sibling's middle name?", "In which city or town did your mother and father meet?", "In which city or town was your first job?", "What is the name of the place your wedding reception was held?", "What is the name of a college you applied to but didn't attend?", "Where were you when you first heard about 9/11?", and "Custom Question".

Profile Settings

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 Security Question
 - Change Email – A valid and correct email address is required for password recovery
 - Change Username – Used for login

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



Add / Change PIN

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

1. Log in to the DCI portal
2. Click the username in the top right corner of the main menu
3. Click **Settings** from the drop-down menu
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



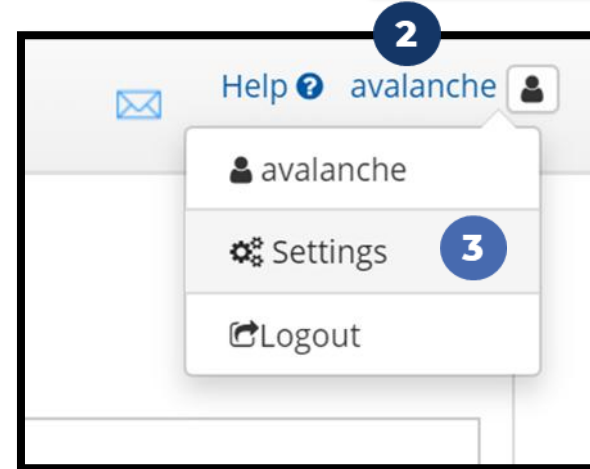
Sign In

Username **1**

Password

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

Sign In




Help ? avalanche **2**

avalanche

3 Settings

Logout



HOME

CHANGE PASSWORD

4 CHANGE PIN

CHANGE SECURITY QUESTION



Password: * Please enter password **5**

Cancel **6** Verify

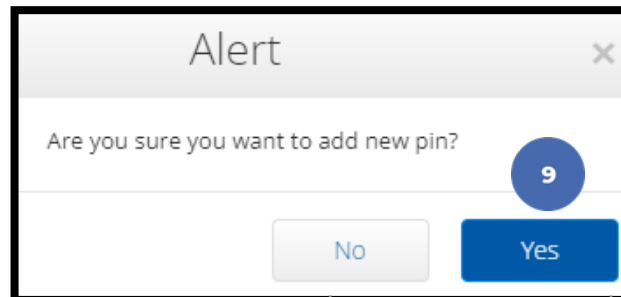
Add / Change PIN (cont.)

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: *" and "Confirm Pin: *". Both fields contain the placeholder text "Please enter New Pin" and "Please Confirm Pin" respectively. An orange circle with the number 7 is positioned over the "New Pin" field. A blue circle with the number 8 is positioned over the "Change Pin" button. The "Change Pin" button is blue, while the "Cancel" button is light gray.

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



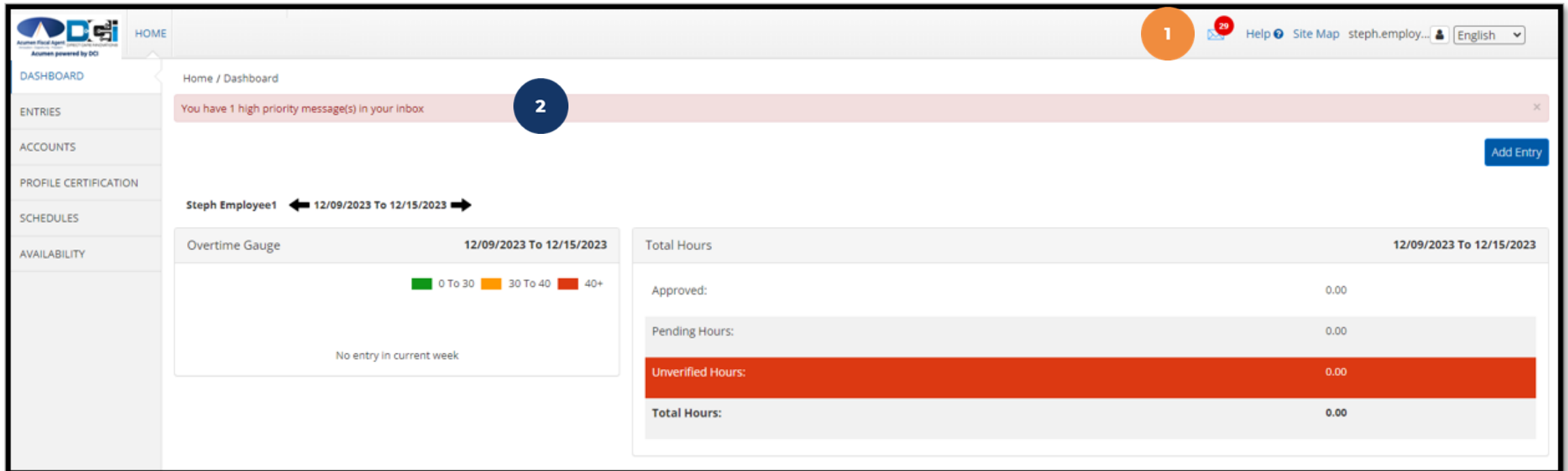
The screenshot shows a confirmation dialog box titled "Alert". It contains the text "Are you sure you want to add new pin?". There are two buttons: "No" (light gray) and "Yes" (blue). A blue circle with the number 9 is positioned over the "Yes" button.



The screenshot shows a green success message bar with the text "Pin Changed Successfully!". An orange circle with the number 10 is positioned over the right side of the bar.

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.



HOME

Acumen Fiscal Agent
powered by DCI

DASHBOARD

ENTRIES

ACCOUNTS

PROFILE CERTIFICATION

SCHEDULES

AVAILABILITY

Home / Dashboard

You have 1 high priority message(s) in your inbox

Steph Employee1 12/09/2023 To 12/15/2023

Overtime Gauge 12/09/2023 To 12/15/2023

0 To 30 30 To 40 40+

No entry in current week

Total Hours 12/09/2023 To 12/15/2023

Approved:	0.00
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	0.00

Add Entry

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 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
	Dec 08, 2023	Paystub.pdf		2554.02 KB	Kristen Ziegler	 	Active

DCI Web Portal

Adding a New 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.

Add New Entry

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



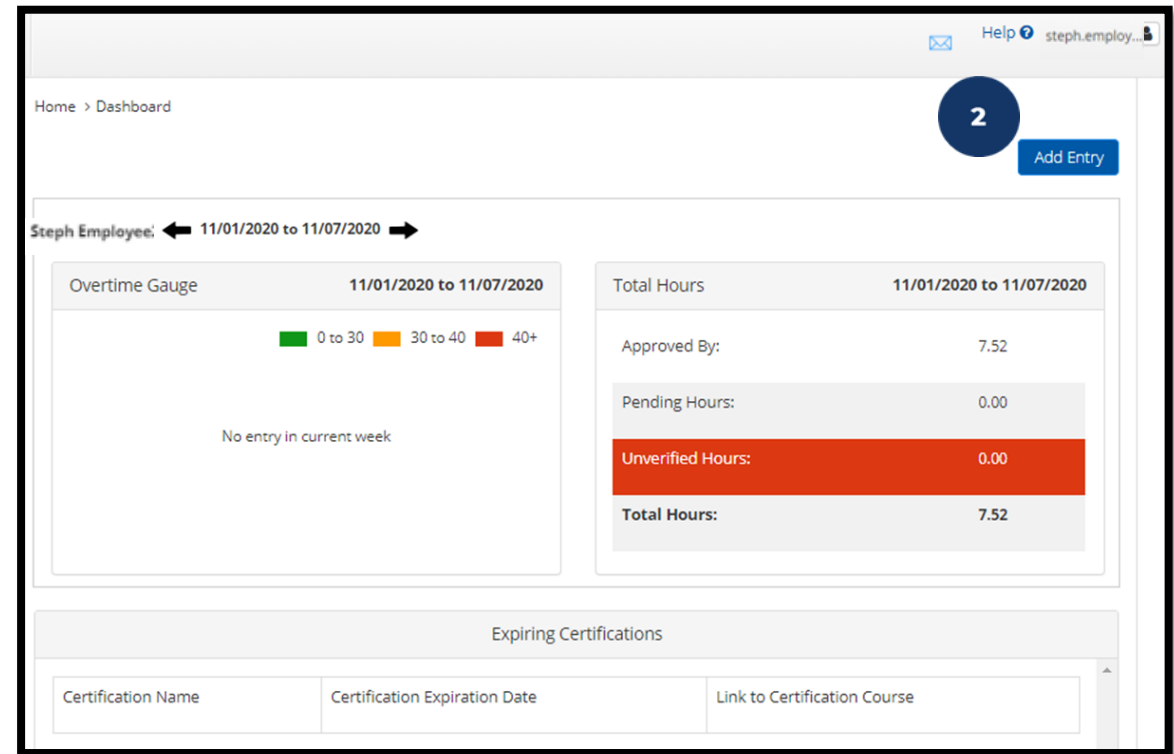
Sign In

Username

Password

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

Sign In



Home > Dashboard

Help steph.employ...

2 Add Entry

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

Overtime Gauge 11/01/2020 to 11/07/2020

0 to 30 30 to 40 40+

No entry in current week

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

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

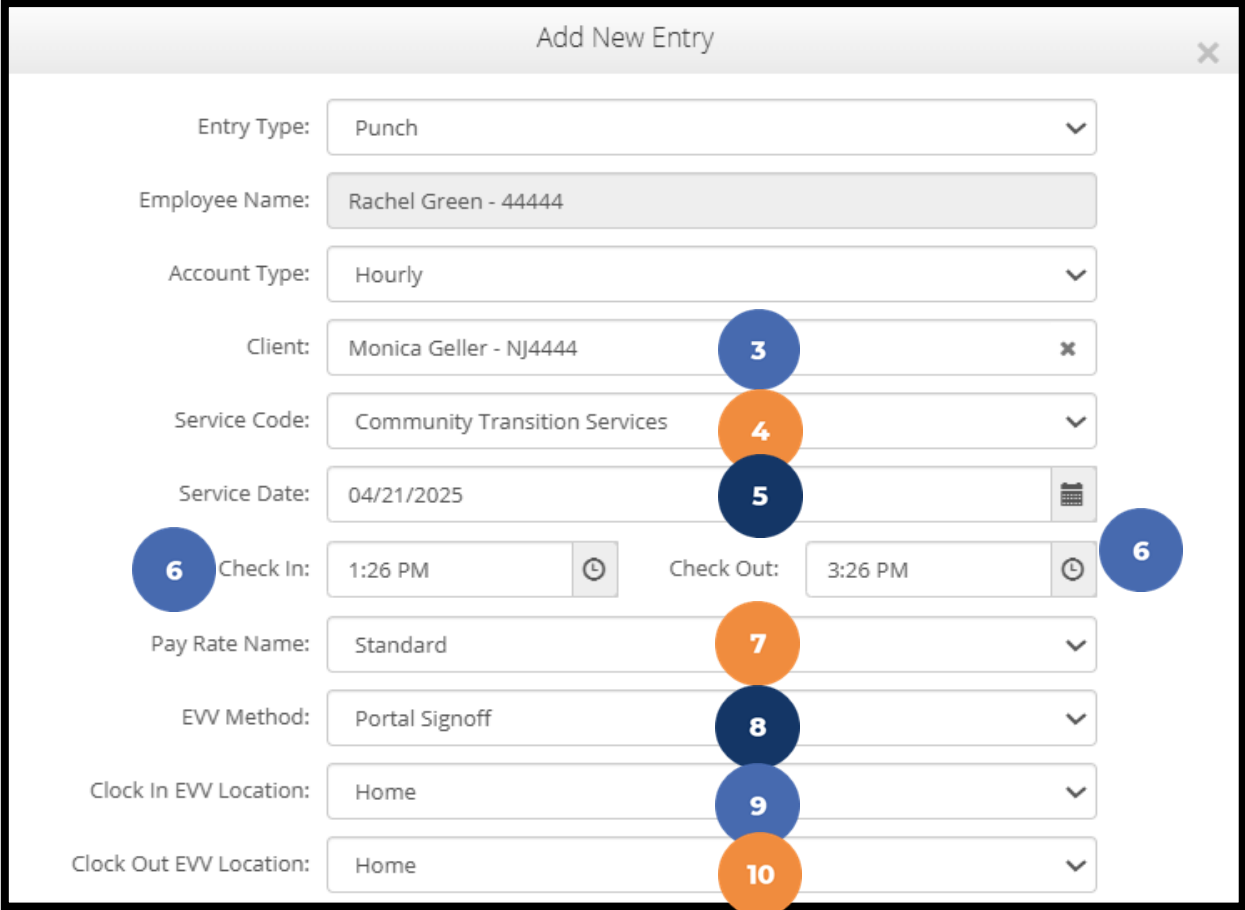
Expiring Certifications

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

Add New Entry (cont.)

Note: The first three boxes will autofill

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. Select the **Pay Rate Name**
8. Select **Portal Signoff** as the EVV Method
9. Select **Clock in EVV Location**
10. Select **Clock out EVV Location**



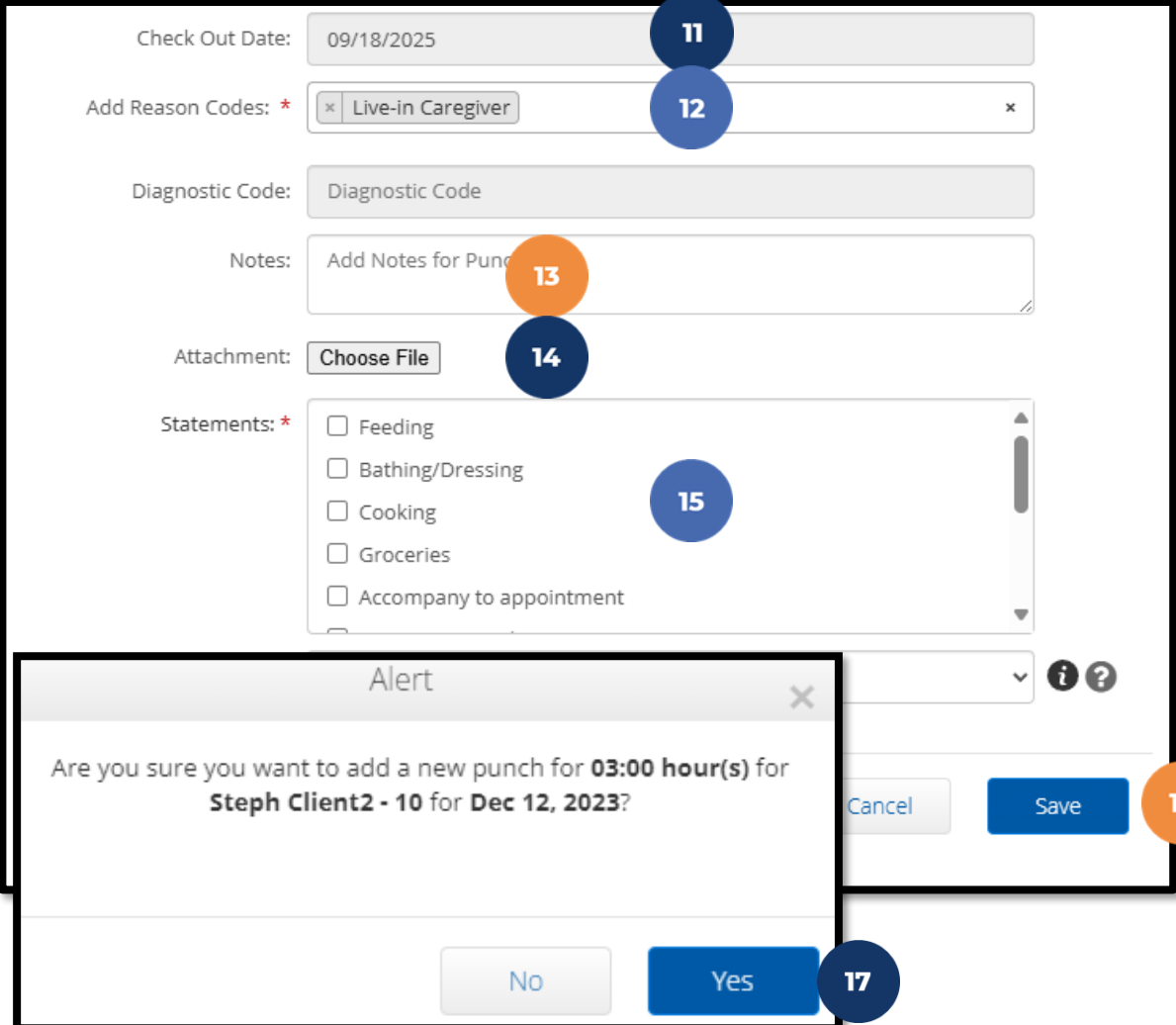
The screenshot shows the 'Add New Entry' form with the following fields and values:

- Entry Type: Punch
- Employee Name: Rachel Green - 44444
- Account Type: Hourly
- Client: Monica Geller - NJ4444
- Service Code: Community Transition Services
- Service Date: 04/21/2025
- Check In: 1:26 PM
- Check Out: 3:26 PM
- Pay Rate Name: Standard
- EVV Method: Portal Signoff
- Clock In EVV Location: Home
- Clock Out EVV Location: Home

Numbered callouts (3-10) are placed over the Client, Service Code, Service Date, Check In, Check Out, Pay Rate Name, EVV Method, Clock In EVV Location, and Clock Out EVV Location fields respectively.

Add New Entry (cont.)

11. Check Out Date is Auto Selected
12. Add Reason Codes (required) - *We will review on the next slide*
13. Add Service Documentation Notes (required) (Ex. A short description of the services provided during the visit/service)
14. Click the **Choose File** button to select and upload Attachments (optional)
15. Select at least one **statement/task** that occurred on the shift (Ex: Personal Care, Meal Preparation, Housework, Dressing, etc.) – *We will review on the next slide*
16. Click **Save** to save the Entry
17. Click **Yes** to submit



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

- 11**: Check Out Date: 09/18/2025
- 12**: Add Reason Codes: * [x] Live-in Caregiver [x]
- 13**: Diagnostic Code: Diagnostic Code
- 13**: Notes: Add Notes for Punch
- 14**: Attachment: Choose File
- 15**: Statements: *
 - ☐ Feeding
 - ☐ Bathing/Dressing
 - ☐ Cooking
 - ☐ Groceries
 - ☐ Accompany to appointment
- 16**: Save button
- 17**: Yes button (in the confirmation alert)

Alert

Are you sure you want to add a new punch for **03:00 hour(s)** for **Steph Client2 - 10** for **Dec 12, 2023**?

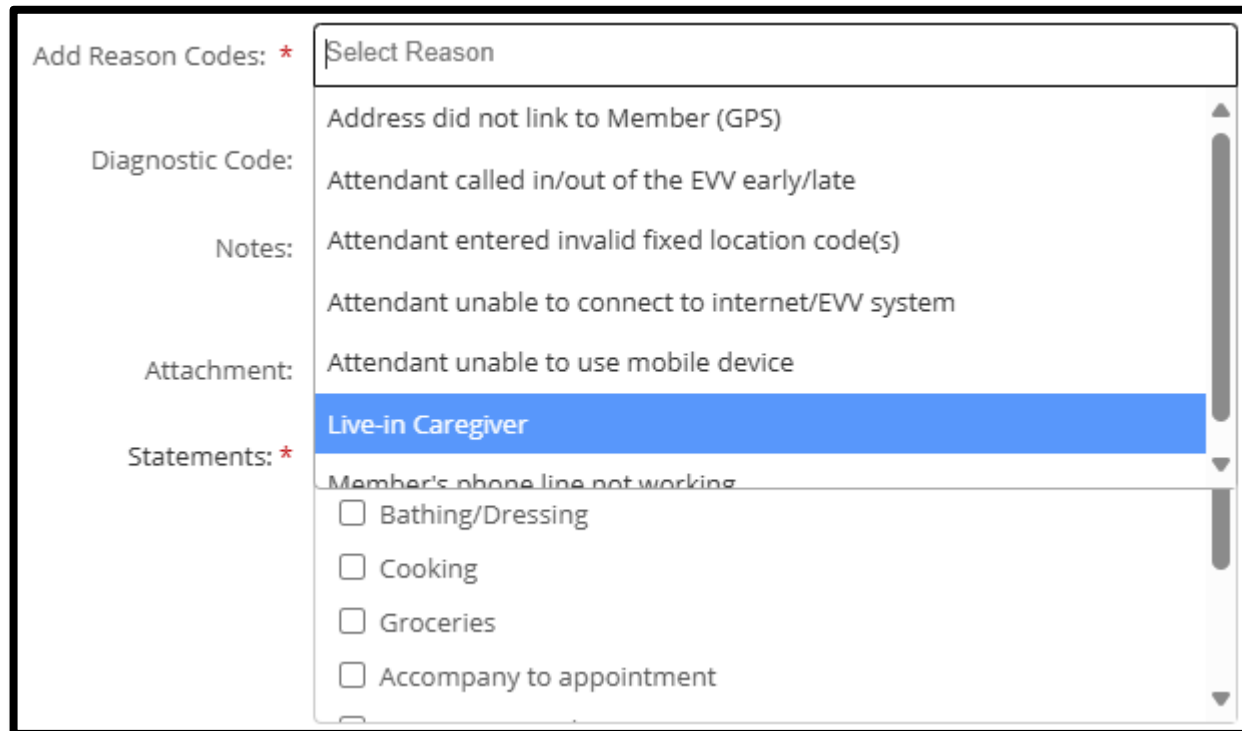
Cancel Save

Add Reason Codes

❖ Add Reason Codes is a required field

Select the appropriate Reason Code as to why the entry was not entered in real time in the mobile app for EVV compliance.

For EVV exempt Employees, there would be an option to identify the SDE as a **Live-in Caregiver**.



Add Reason Codes: *

Select Reason

Diagnostic Code:

Notes:

Attachment:

Statements: *

- Address did not link to Member (GPS)
- Attendant called in/out of the EVV early/late
- Attendant entered invalid fixed location code(s)
- Attendant unable to connect to internet/EVV system
- Attendant unable to use mobile device
- Live-in Caregiver**
- Member's phone line not working
- ☐ Bathing/Dressing
- ☐ Cooking
- ☐ Groceries
- ☐ Accompany to appointment

Canned Statements/Tasks



Must select at least one canned statement/task from the list, per shift (more than one can be selected if more than one were completed on the shift).

Canned Statements/Tasks
Meal Preparation
Assistance With Feeding
Housework/Chore
Dressing
Transportation
Personal Care (Shaving, Grooming, Etc.)
Shopping (Grocery, Supplies, Personal Items, Etc.)
Housekeeping/Cleaning
Accompany to Medical Appointment(s)
Accompany to Classes
Accompany to Recreational Activity
Community Outting
Mobility and Transfer Assistance
Educational Activities (Reading, Writing, etc)
Laundry
Interpreter Service
Individual Service Plan or Related Work
Service Procurement/Planning
Respite

DCI Web Portal

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

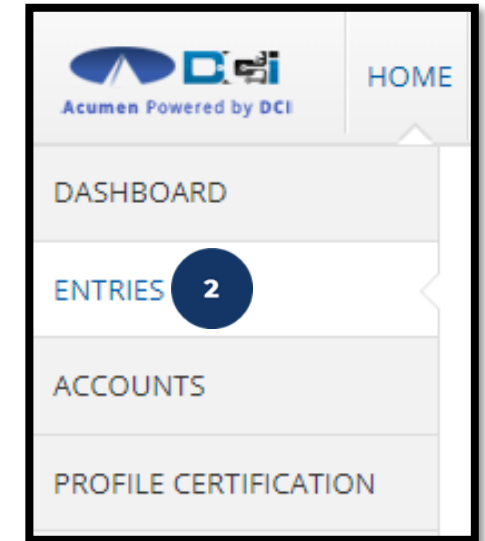
Sign In

Username

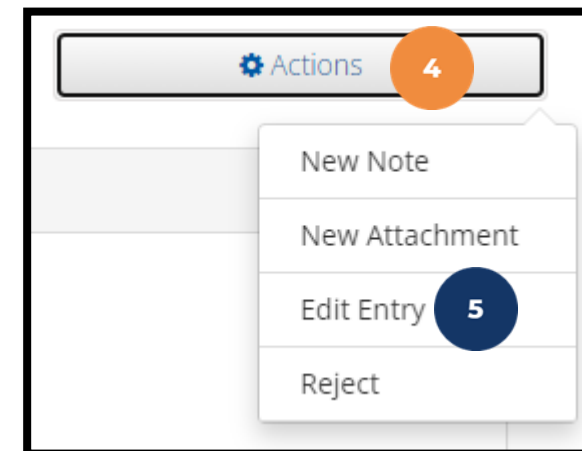
Password

☐ 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



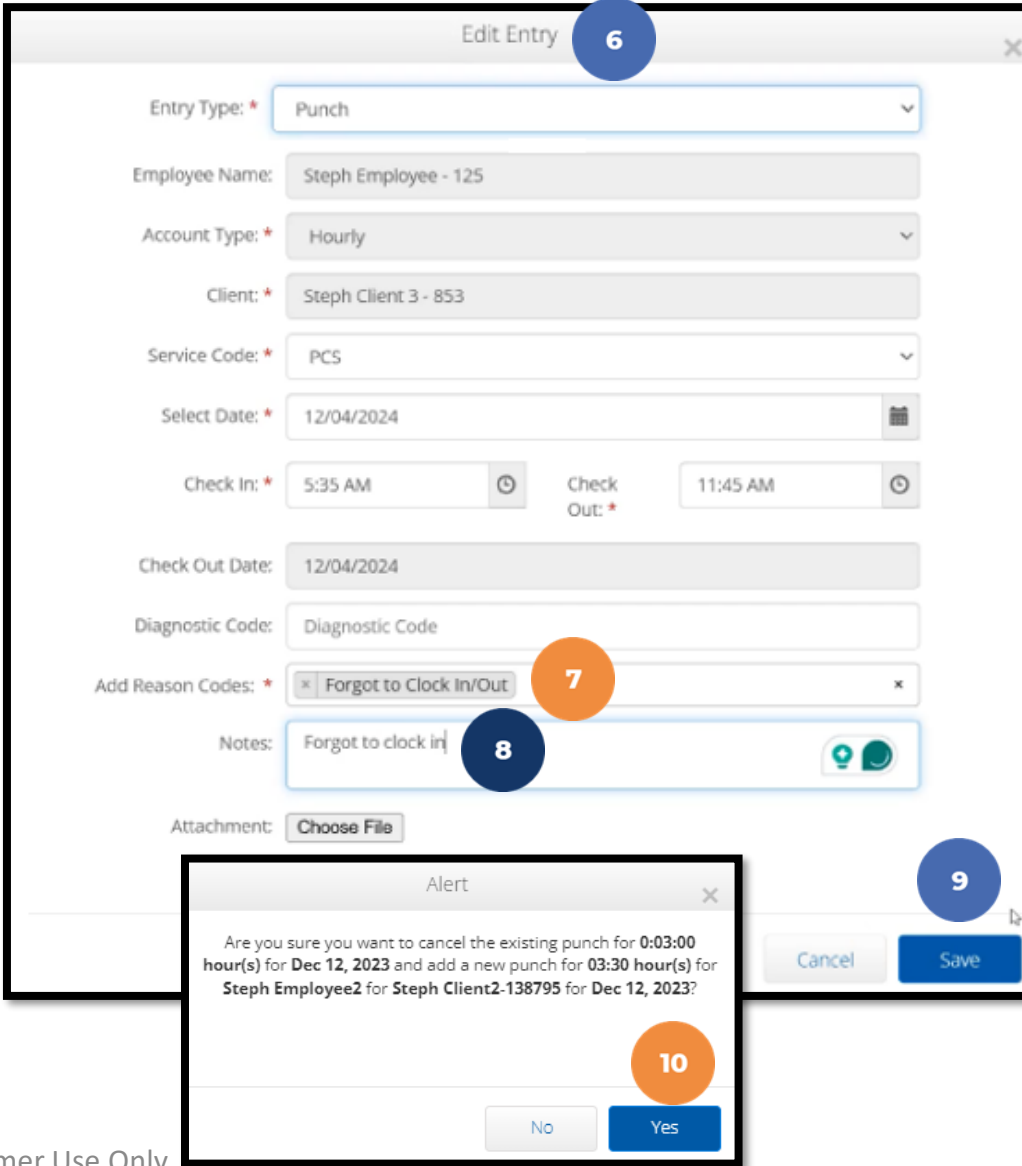
***Please note!** To reject an entry, select **Reject** from the drop-down menu. Click **Yes** to confirm rejecting the entry.

Edit Entry (cont.)

***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. Select a Reason Code from the drop-down list
8. Add 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 displays the 'Edit Entry' form and an 'Alert' dialog box. The form is titled 'Edit Entry' and contains the following fields:

- Entry Type: * Punch
- Employee Name: Steph Employee - 125
- Account Type: * Hourly
- Client: * Steph Client 3 - 853
- Service Code: * PCS
- Select Date: * 12/04/2024
- Check In: * 5:35 AM
- Check Out: * 11:45 AM
- Check Out Date: 12/04/2024
- Diagnostic Code: Diagnostic Code
- Add Reason Codes: * Forgot to Clock In/Out
- Notes: Forgot to clock in
- Attachment: Choose File

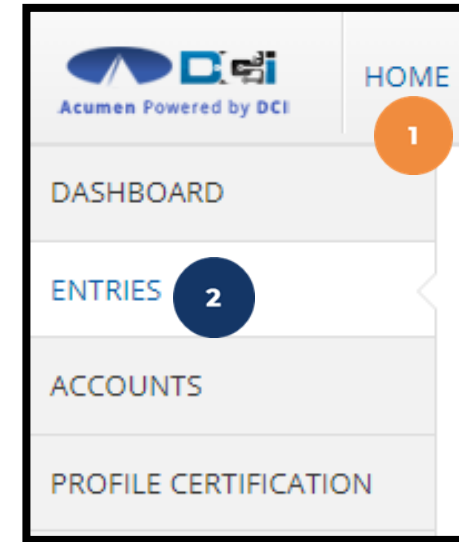
The 'Alert' dialog box is displayed over the form, asking: 'Are you sure you want to cancel the existing punch for 0:03:00 hour(s) for Dec 12, 2023 and add a new punch for 03:30 hour(s) for Steph Employee2 for Steph Client2-138795 for Dec 12, 2023?'. The dialog has 'Cancel' and 'Save' buttons.

DCI Web Portal

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 Statuses to Watch



- Self-Directed Employees will see their submitted time entries move into a **"Pending"** status, once the entry is submitted.
- Once the entry is approved for payroll by the Employer or Authorized Representative, it will move to a **"Approved"** status.
- If the entry is **"Rejected"** reach out to your Individual or Employer to review the entry.



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>


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

Mobile Web Portal*

***Web Browser on your mobile device**

Adding a New Entry

Add New Entry - Mobile Web



EN

Username/ Email

Password/ Pin

☐ Remember me

[Forgot your password?](#)

[Sign In](#)

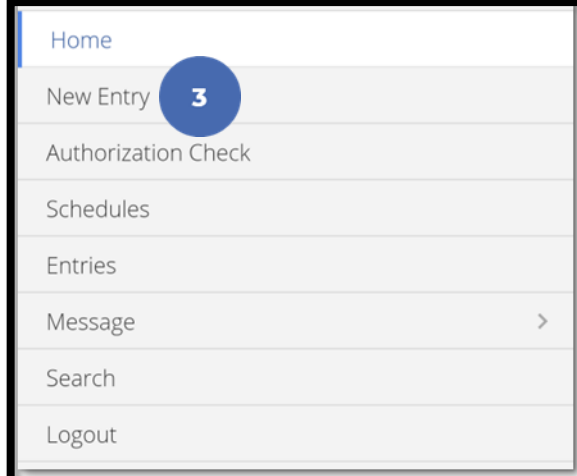
[Go to Full Site](#)

1. On a mobile device, open an internet browser & Log in to the DCI Web Portal
2. Click the **Menu** in the top right corner of the screen
3. Select the **New Entry** tab from the submenu



News Posts

No records to display



Home

New Entry

Authorization Check

Schedules

Entries

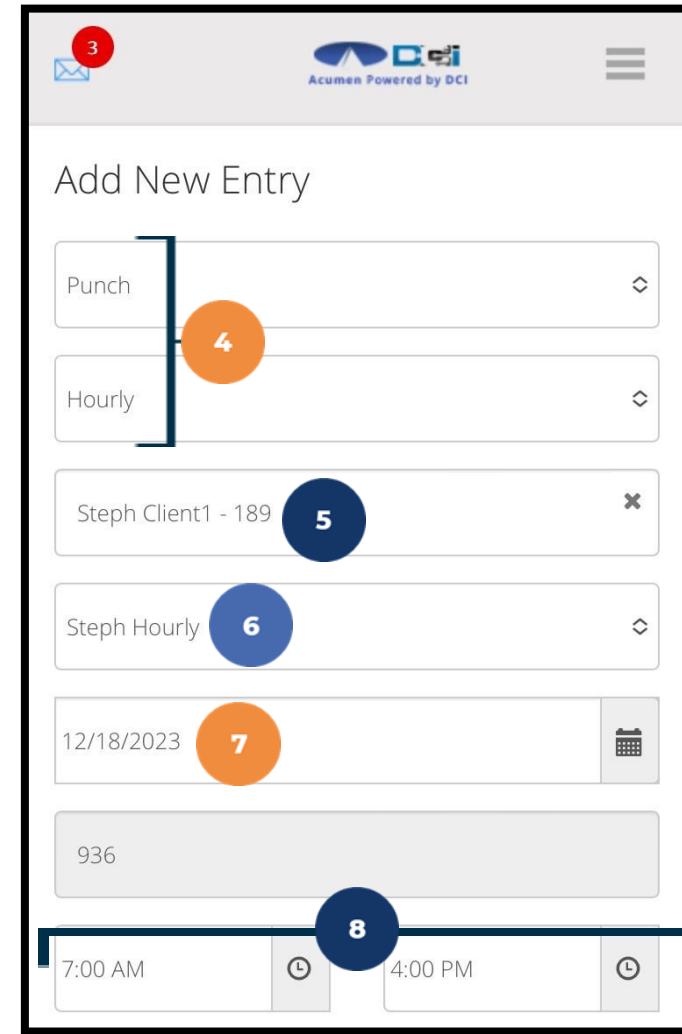
Message

Search

Logout

Add New Entry - Mobile Web (cont.)

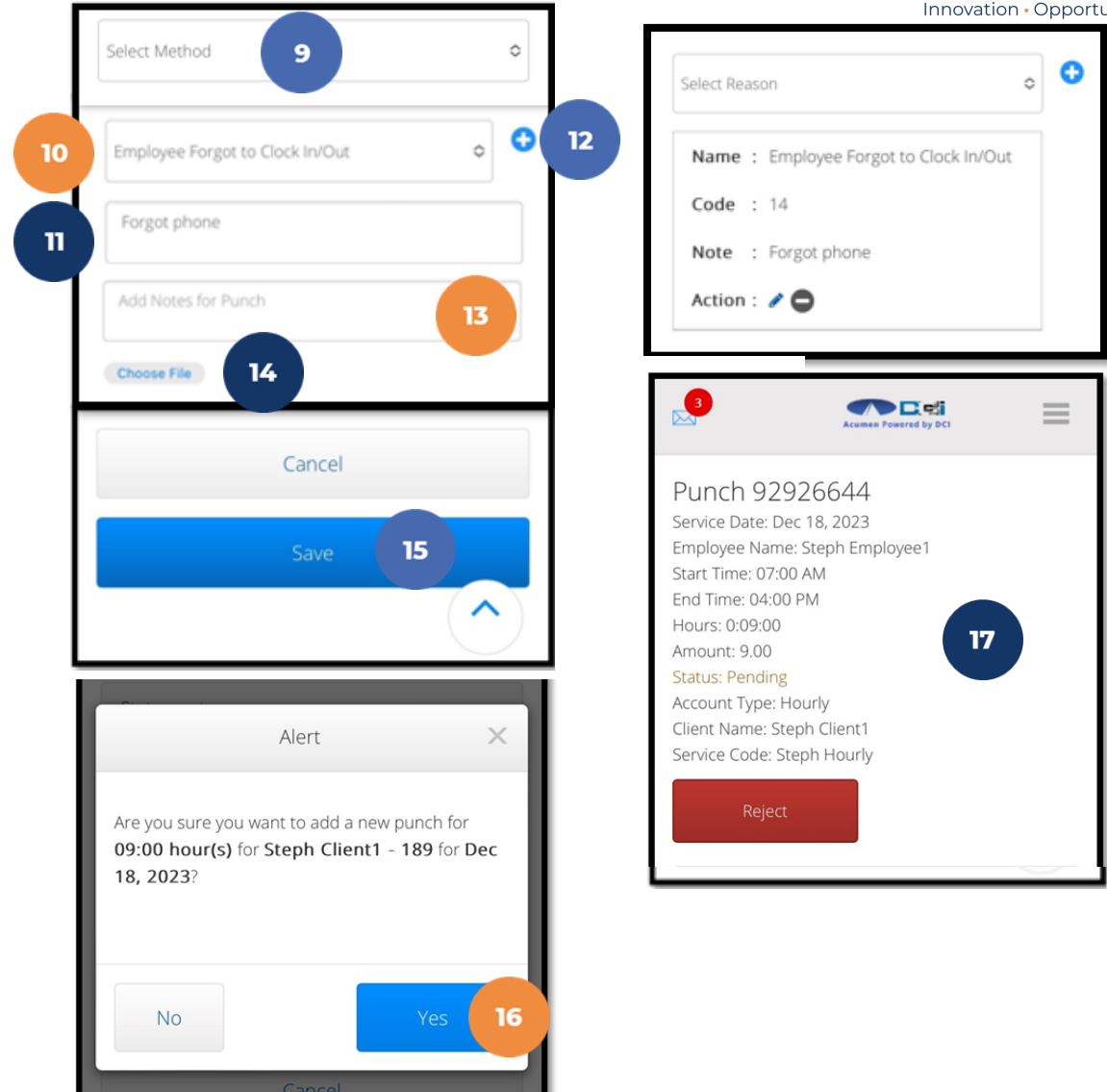
4. The first two fields are prefilled
5. Type a minimum of three characters to generate results and select the **Client's name** from the list
6. Select the **Service Code** from the drop-down
7. Select the **Service Date**
8. Enter the **Check In** (start) and **Check Out** (end) times



The image shows a mobile web interface for adding a new entry. The header includes a notification icon with a red circle containing the number 3, the Acumen logo, and a menu icon. The title is "Add New Entry". The form contains several fields: a "Punch" dropdown menu, an "Hourly" dropdown menu, a text field with "Steph Client1 - 189" and a close icon, a "Steph Hourly" dropdown menu, a date field with "12/18/2023" and a calendar icon, a text field with "936", and a time range field with "7:00 AM" and "4:00 PM" and clock icons. Numbered callouts 3 through 8 are placed over the interface to indicate the steps: 3 is over the notification icon, 4 is over the "Punch" dropdown, 5 is over the "Steph Client1 - 189" text field, 6 is over the "Steph Hourly" dropdown, 7 is over the "12/18/2023" date field, and 8 is over the "7:00 AM" time field.

Add New Entry - Mobile Web (cont.)

9. Select Portal Signoff as the Method
10. Select a Reason Code from the drop-down list
11. Add a Reason Code Note
12. Click the blue plus sign (+) to populate the reason code details
13. Enter Notes for the punch (optional)
14. Click the **Choose File** button to select and upload Attachments (optional)
15. Click **Save**
16. Click **Yes** to submit
17. The punch has been submitted



The image displays a mobile web interface for adding a new punch entry, with numbered callouts (9-17) indicating the steps:

- 9:** Select Method (Portal Signoff)
- 10:** Select a Reason Code from the drop-down list (Employee Forgot to Clock In/Out)
- 11:** Add a Reason Code Note (Forgot phone)
- 12:** Click the blue plus sign (+) to populate the reason code details
- 13:** Enter Notes for the punch (optional) (Add Notes for Punch)
- 14:** Click the **Choose File** button to select and upload Attachments (optional)
- 15:** Click **Save**
- 16:** Click **Yes** to submit
- 17:** The punch has been submitted

The interface shows the following details for the punch entry:

- Select Reason:** Employee Forgot to Clock In/Out
- Name:** Employee Forgot to Clock In/Out
- Code:** 14
- Note:** Forgot phone
- Action:** [Edit] [Delete]

The punch entry details are displayed as follows:

- Punch:** 92926644
- Service Date:** Dec 18, 2023
- Employee Name:** Steph Employee1
- Start Time:** 07:00 AM
- End Time:** 04:00 PM
- Hours:** 0:09:00
- Amount:** 9.00
- Status:** Pending
- Account Type:** Hourly
- Client Name:** Steph Client1
- Service Code:** Steph Hourly

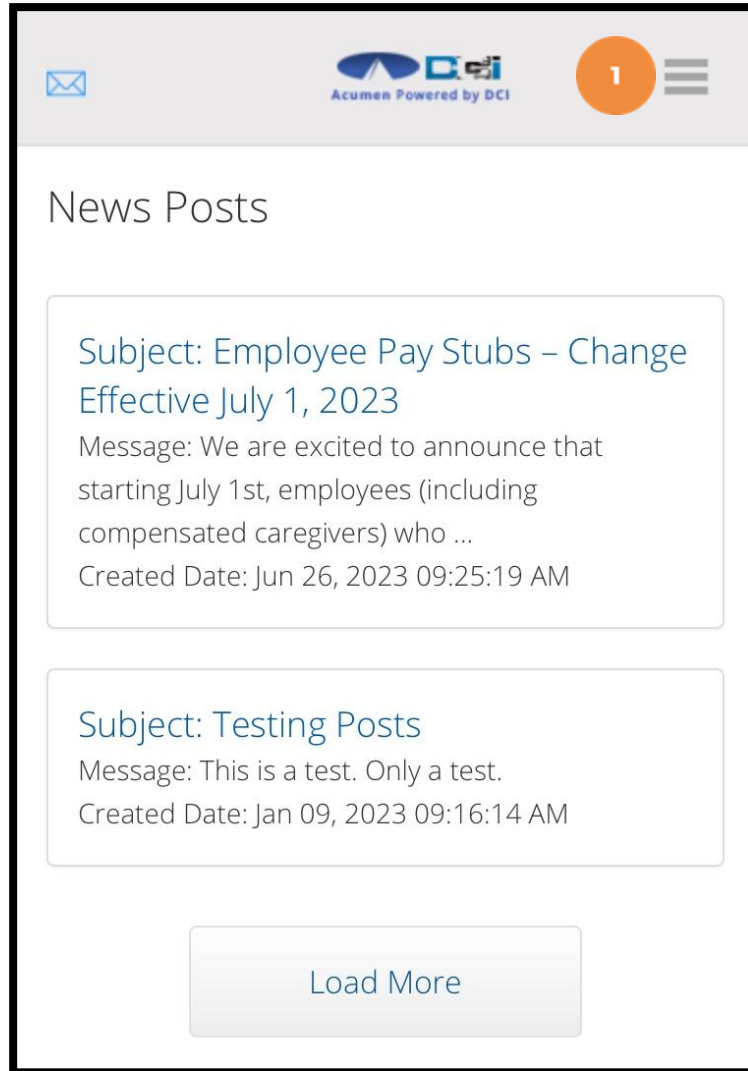
The interface also includes a **Reject** button and an **Alert** dialog box asking for confirmation to add a new punch.

Mobile Web Portal*

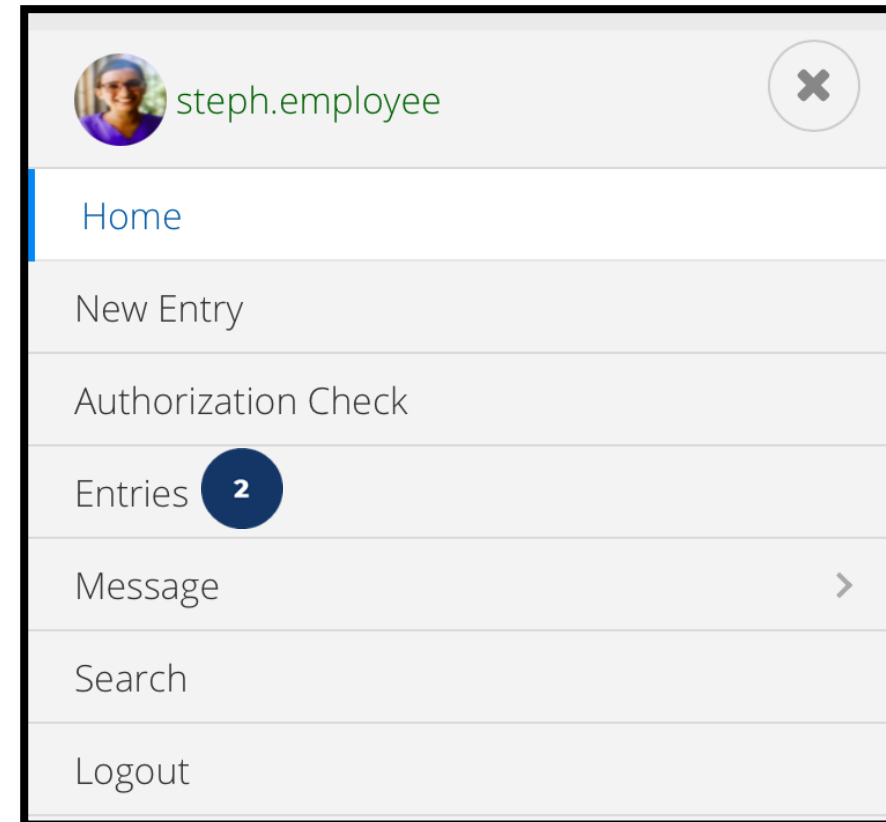
***Web Browser on your mobile device**

Reviewing Entries

Review Entries

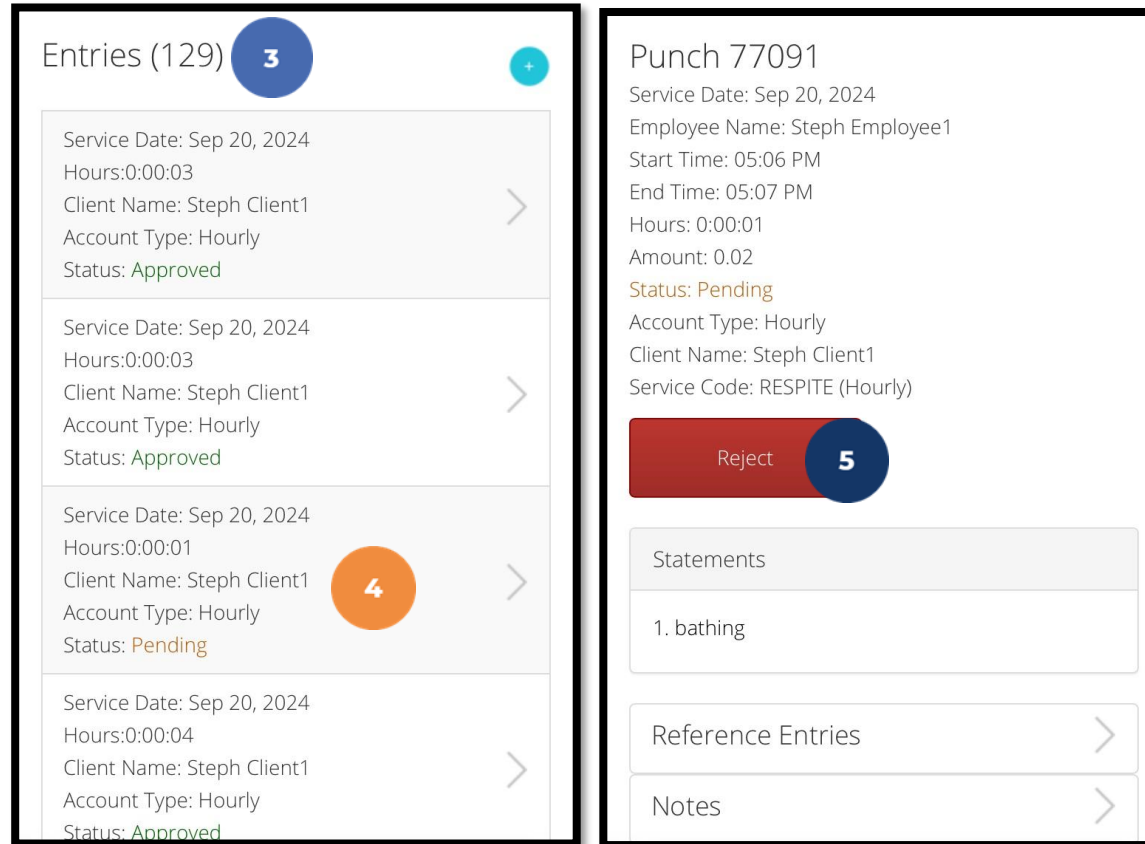


1. Click the **Menu** in the top right corner of the screen
2. Select the **Entries** tab from the submenu



Review & Reject Entry

3. View the list of entries
4. Click on an entry to view the punch details
 - **Please note:** Entries in a Pending status will not be paid until approved
5. If needed, an entry in Pending status may be rejected. Click the red **Reject** button.
6. Click **Yes** to confirm the punch rejection



Entries (129) 3

Service Date: Sep 20, 2024
Hours: 0:00:03
Client Name: Steph Client1
Account Type: Hourly
Status: Approved

Service Date: Sep 20, 2024
Hours: 0:00:03
Client Name: Steph Client1
Account Type: Hourly
Status: Approved

Service Date: Sep 20, 2024
Hours: 0:00:01
Client Name: Steph Client1
Account Type: Hourly
Status: Pending 4

Service Date: Sep 20, 2024
Hours: 0:00:04
Client Name: Steph Client1
Account Type: Hourly
Status: Approved

Punch 77091
Service Date: Sep 20, 2024
Employee Name: Steph Employee1
Start Time: 05:06 PM
End Time: 05:07 PM
Hours: 0:00:01
Amount: 0.02
Status: Pending

Account Type: Hourly
Client Name: Steph Client1
Service Code: RESPITE (Hourly)

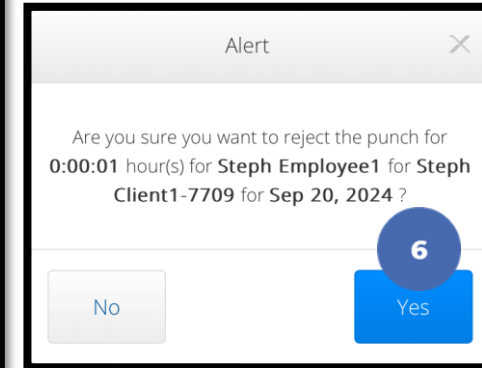
Reject 5

Statements

1. bathing

Reference Entries

Notes



Alert

Are you sure you want to reject the punch for 0:00:01 hour(s) for **Steph Employee1** for **Steph Client1-7709** for Sep 20, 2024 ?

No 6 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. 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

3

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

Phone IVR (Interactive Voice Response)

***Option if you do not have access to a mobile device or tablet.
The Client must have a landline phone.**

Phone EVV Basics

- Employer - Confirm the landline phone number on file with Acumen is for the client
 - ✓ Employees must call from a recognized number only
 - ***Please note!** If calling from a number not associated with the client, the employee will receive an error message.
- Employee - Will be asked to validate the following information:
 - ✓ Last four digits of their social security number
 - ✓ PIN (add in the web portal under user settings)
 - ✓ MMDD of their birthday
 - ✓ Client Name & Service Code for the shift
- Client or Employer – Need client PIN for historical (non-EVV-compliant) phone entries
 - ✓ Client PIN is on the Employer Good To Go letter



Phone EVV (IVR)

Real-Time Entry

Clock In: Real-Time Entry

1. Sign in:
 - ✓ Call (855) 807-9595 from the client's landline to start the shift
 - ✓ Enter the last four digits of the social security number
 - ✓ Enter PIN
 - ✓ Enter month/day of birth (MMDD)
2. Press 1 for hourly
3. Confirm the client's name with the prompt given
4. Press 1 for real time entry
5. Select the service code with the prompts given
6. Depending on program settings, the available balance may be announced. Press 1 to continue.
7. Select "none" for the clock in EVV location
8. Press 1 to confirm and save the punch
9. The recording will read back the punch details and then disconnect



Clock Out: Real-Time Entry

1. Sign in:
 - ✓ Call (855) 807-9595 from the client's landline to end the shift
 - ✓ Enter the last four digits of the social security number
 - ✓ Enter PIN
 - ✓ Enter month/day of birth (MMDD)
2. The system announces that there is an open punch. When prompted, press 1 to confirm closing the punch.
4. Select "none" for the clock out EVV location
5. The punch is now closed, and the employee is clocked out. Press 2 to disconnect or 1 to open a new punch.



Phone EVV (IVR)

Historical Entry (Not EVV Compliant)

Historical Entry

***Please note!** 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 to maintain EVV compliance.

The client or employer must be present at the end of this process.

1. Sign in:
 - ✓ Call (855) 807-9595 from the client's landline to enter the shift
 - ✓ Enter the last four digits of the social security number
 - ✓ Enter PIN
 - ✓ Enter month/day of birth (MMDD)
2. Press 1 for hourly
3. Confirm the client's name with the prompt given
4. Press 2 for historical entry
5. Select the service code with the prompts given
6. Depending on program settings, the available balance may be announced. Press 1 to continue.



Historical Entry (cont.)

7. Enter the date of service in MMDDYYYY format (i.e., September 18, 2024 = 09182024)
8. Enter the clock-in time in HH:MM (i.e., 0830)
9. Select 1 for AM or 2 for PM
10. Enter the clock-out time in HH:MM (i.e., 0530)
11. Select 1 for AM or 2 for PM
12. Select "none" for the clock in EVV location
13. Select "none" for the clock out EVV location
14. The system will read back the punch details. Press 1 to confirm or 2 to edit.



Historical Entry (cont.)

***Please Note!** The client or employer must be present for the following final steps:

15. Hand the phone to the client/employer who presses 1 when ready
16. The client/employer reviews the punch details and presses 1 to accept or 2 to reject the entry
17. The client/employer will validate the call using the client PIN
18. The punch is created
19. The phone disconnects and the shift is recorded



Troubleshooting

Proprietary: For Acumen and Customer Use Only



Phone EVV (IVR)

Troubleshooting

Phone EVV Troubleshooting



- Is the employee having trouble signing in?
 - ✓ PIN not working? Update under profile settings
 - ✓ Employee can call Acumen to confirm their date of birth & last four digits of their social security number on their profile
- Is the employee having trouble clocking in?
 - ✓ Only call from the client's landline
 - Call Acumen to confirm the client's number
- Is the employee having trouble adding historical entries?
 - ✓ Enter the date & time in the correct format (MM/DD/YYYY & HH:MM)
 - ✓ Do not overlap with other employee's shifts
- Is the client having trouble validating the entry?
 - ✓ Employer calls Acumen to reset their client PIN
- Does the employee need to edit or reject an entry?
 - ✓ Entries cannot be edited or rejected using Phone EVV. The employee must use the web portal instead.



Business Rule Alerts

Troubleshooting

Alerts

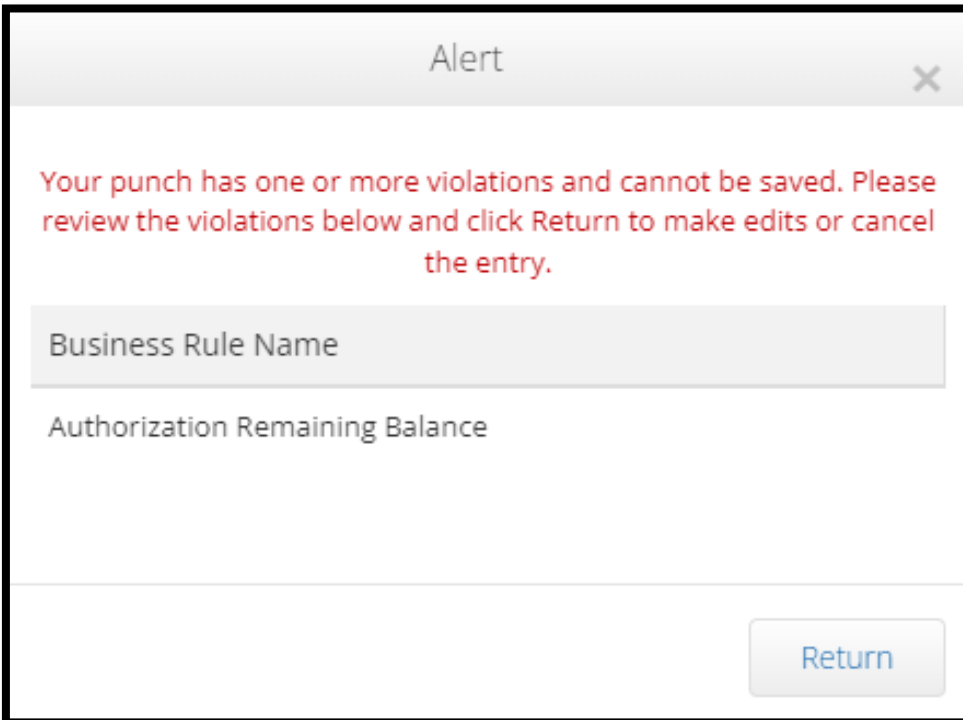
- Access the **Business Rule Alerts** article on the training page to learn more about alerts you may receive
- Many of these alerts pertain to the authorization (budget)
- Please reach out to your Employer for guidance

Alert	Business Rule Name	Reason	How to Proceed
"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."	Authorization Remaining Balance	There are not enough funds available in the authorization to cover the hours submitted	The entry cannot be saved. Ask the employer to review their budget utilization. Adjust entry as needed.
"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."	No valid pay rate punch entry	There is no pay rate for this employee for the punch date of service and service code.	Ensure the employee is submitting for the correct service and date, If the entry is correct, contact the employer.
"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."	Timely Filing Employees Punch Entry	Punches must be submitted within the number of days determined by the program, of the date of service.	The issue cannot be resolved. Ensure time is submitted promptly. Acumen cannot pay out hours that are submitted beyond the number of days past the date of service.

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/budget 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.

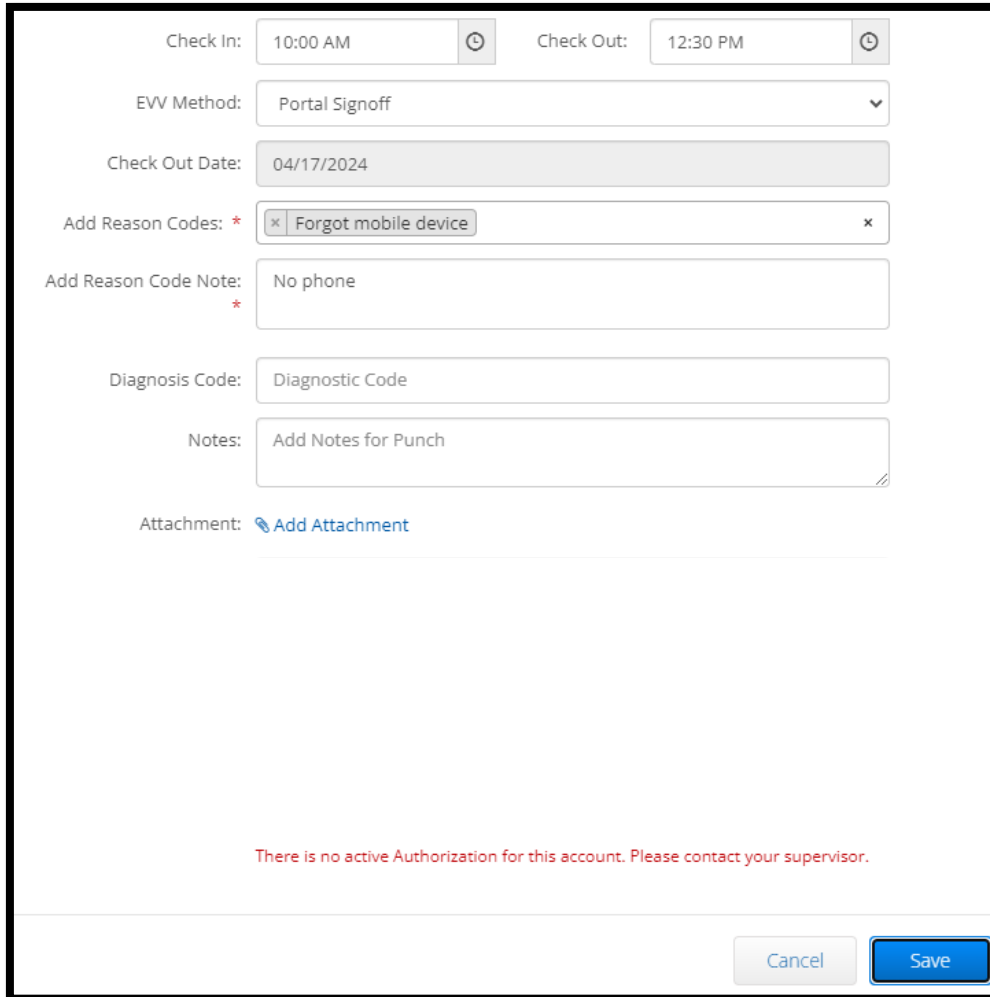
Business Rule Name
Authorization Remaining Balance

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 punch clock interface with the following fields and options:

- Check In:** 10:00 AM
- Check Out:** 12:30 PM
- EVV Method:** Portal Signoff
- Check Out Date:** 04/17/2024
- Add Reason Codes:** * Forgot mobile device *
- Add Reason Code Note:** * No phone *
- Diagnosis Code:** Diagnostic Code
- Notes:** Add Notes for Punch
- Attachment:** Add Attachment

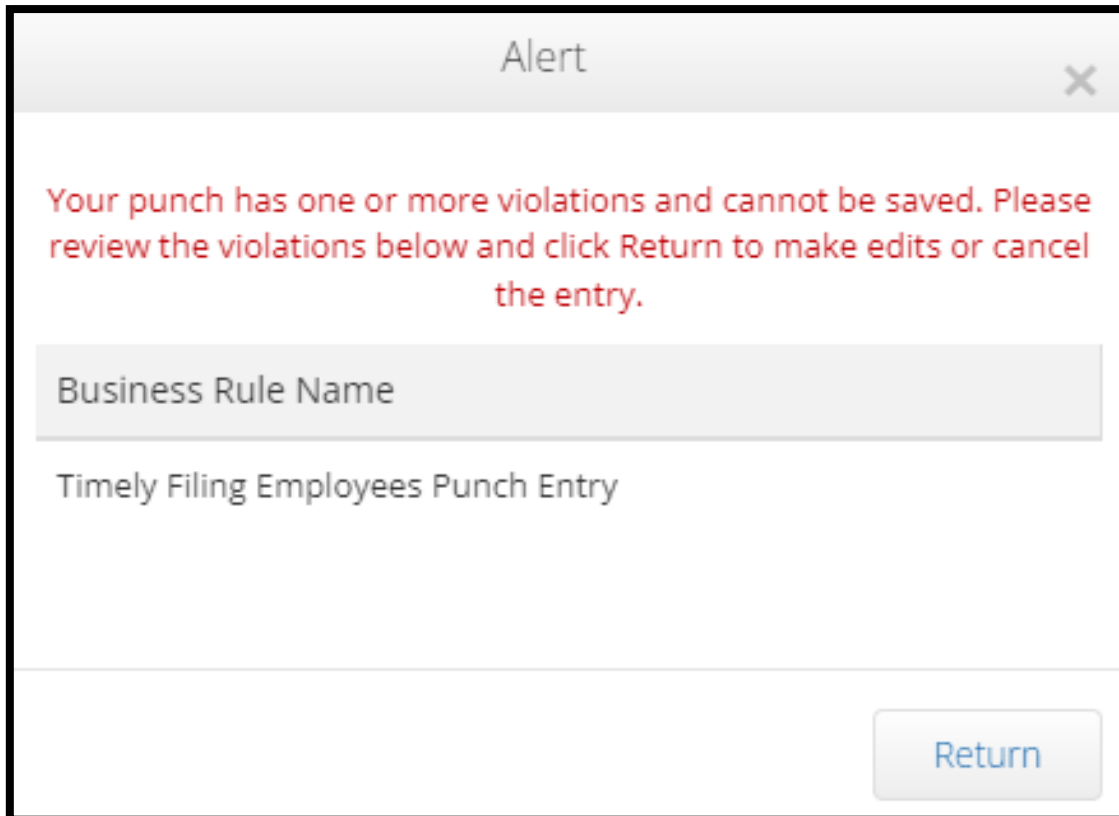
A red error message at the bottom states: "There is no active Authorization for this account. Please contact your supervisor."

Buttons at the bottom: Cancel, Save

- 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

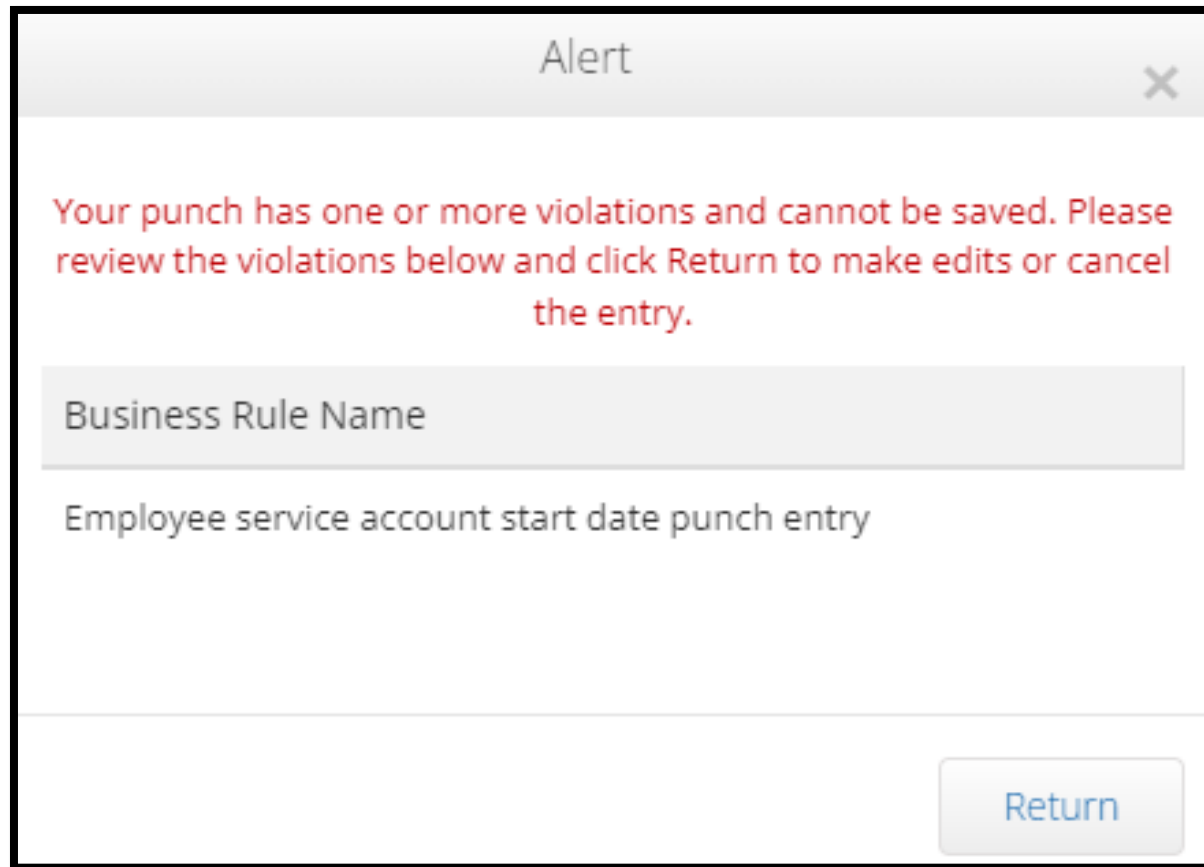
Punches must be **entered AND approved** within 30 days of the date of service. After 30 days the **Timely Filing Employees Punch Entry** or the **Timely Filing Employee Punch Approval** rules will prohibit the punch from being saved.



- The employee will receive this alert when attempting to punch for a date that is more than 30 days after the date of service
 - 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 more than 30 days after the date of service.
- 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

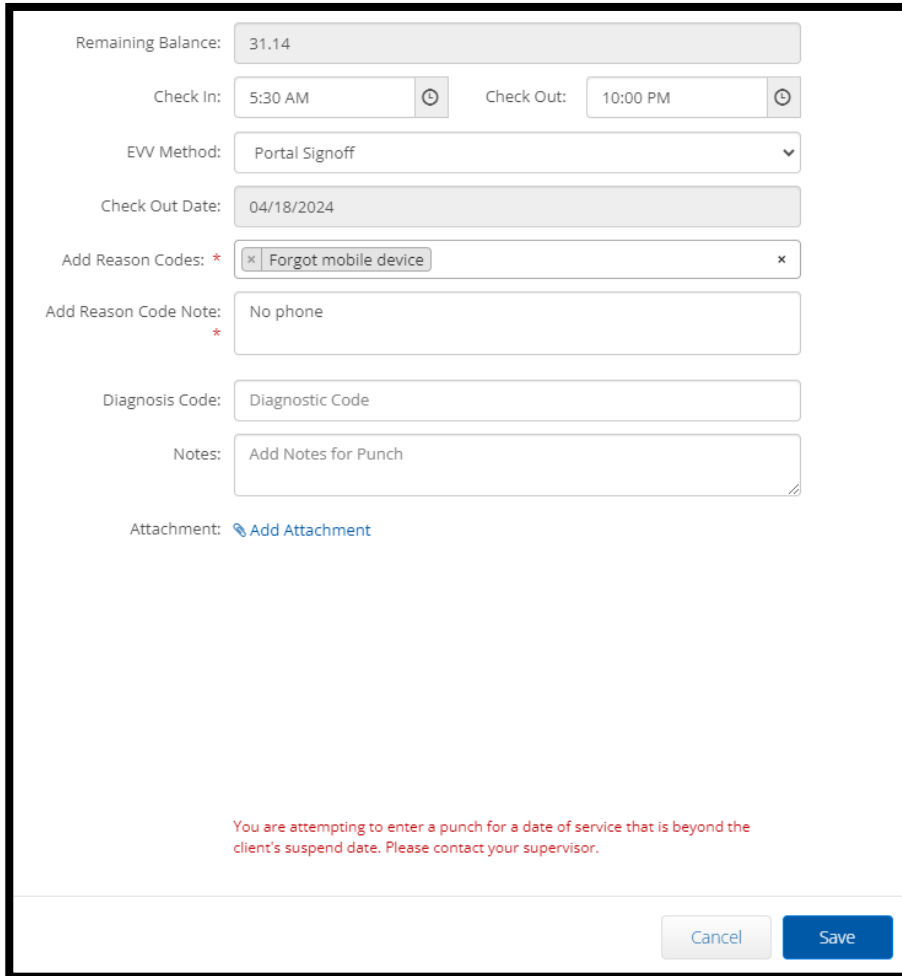
Employee service account start date punch entry

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](#)

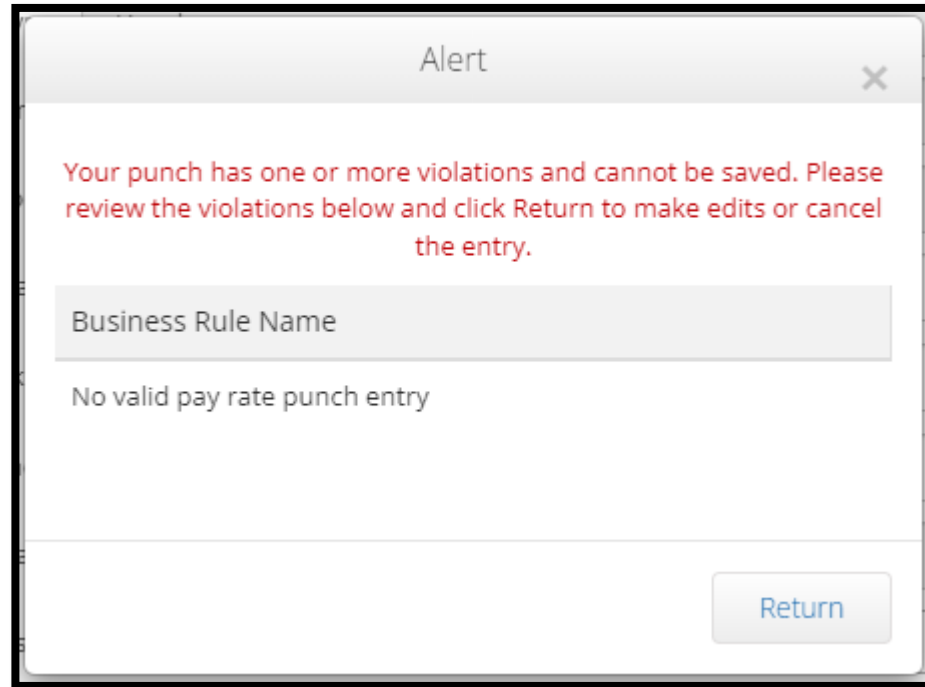
A red error message at the bottom states: "You are attempting to enter a punch for a date of service that is beyond the client's suspend date. Please contact your supervisor."

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

SDE's Frequently Asked Questions

Self-Directed Employee FAQ's



What is DCI and why do I need to use it?

DCI (Direct Care Innovations) is the platform you'll use to log work hours, submit them for payroll, and ensure your employer approves them. It replaces the old paper timesheets.

How do I clock in and out for work?

You can:

- Use the [DCI Mobile App](#) for real-time clock-in/out at the beginning and end of your shift.
- Use the [DCI Web Portal](#) to enter shifts manually after your shift is over (historical entries, **not** EVV-compliant).

Where can I find the DCI login page?

Go to: <https://acumen.dcisoftware.com>

What if I forget my password or PIN?

Use the password reset option on the login screen in the [Profile Settings](#). If needed, contact Acumen Customer Service at (833) 892-0413.

Can I use both the app and the website?

Yes. The app is best for real-time entries; the web portal is best for manual (historical) entries after a shift is done.

Self Directed Employee FAQ's



How does my employer approve my time?

Your employer must log into DCI and approve your submitted shifts before the payroll deadline.

What happens if my employer doesn't approve my time?

Your hours will not be processed for payroll. Always remind your employer to approve your shifts on time.

Where can I find training if I missed the virtual session?

Log in to [DCI Web Portal](#) and click "**Help**" in the upper-right corner. Look for New Jersey training materials page.

When will I get paid?

Payments follow the Acumen payroll schedule. Refer to the payment calendar sent to you or visit www.acumenfiscalagent.com under your state's section.

Who do I contact if I have issues with DCI or payroll?

- Phone: **(833) 892-0413**
- Email: customerservice@acumen2.net

Self Directed Employee FAQ's



If a Self-Directed Employee is a live-in caregiver, will they be exempt from Electronic Visit Verification (EVV)?

A SDE can be eligible for an exemption from EVV due to live-in caregiver status, if they reside on the same premises as the Client to whom services are provided. They must live in the premises seven days per week and have no home of their own or live-in for extended periods of time of at least five days per week (120 hours).

How does a Self-Directed Employee apply for the live-in caregiver exemption to EVV?

The employee needs to provide documentation of live-in status to the individual's Support Coordinator. For employees eligible for the live-in exemption, completion of the EVV Live-In Caregiver Attestation is required at plan development and annually thereafter, as well as any time there is a change in live-in caregiver status.

How do I enter my time if I am EVV exempt?

The employee does not need to use the mobile app to clock-in or clock-out during their shift, however, they need to enter their time within 24 hours of the service provided in the DCI web portal for approval. They will need to enter their service code (the service provided during the shift).

Payroll Schedule & Resources

Proprietary: For Acumen and Customer Use Only



NJ DDD Payment Schedule



- Ensure payment requests are received by the Submissions Due Date
- Requests submitted after the due date will be handled in the following pay period
- First paycheck from Acumen will be **10/10/2025**
- Pay day is every other Friday
- Employee's time must be entered and approved within 60 days of the date of service

SEPT	09/14/25	09/27/25	Mon, 09/29/25	Fri, 10/10/25
	09/28/25	10/11/25	Mon, 10/13/25	Fri, 10/24/25
OCT	10/12/25	10/25/25	Mon, 10/27/25	Fri, 11/07/25
	10/26/25	11/08/25	Mon, 11/10/25	Fri, 11/21/25
NOV	11/09/25	11/22/25	Mon, 11/24/25	Fri, 12/05/25
	11/23/25	12/06/25	Mon, 12/08/25	Fri, 12/19/25
DEC	12/07/25	12/20/25	Mon, 12/22/25	Fri, 01/02/26
	12/21/25	01/03/26	Mon, 01/05/26	Fri, 01/16/26
	01/04/26	01/17/26	Mon, 01/19/26	Fri, 01/30/26
JAN	01/18/26	01/31/26	Mon, 02/02/26	Fri, 02/13/26
	02/01/26	02/14/26	Mon, 02/16/26	Fri, 02/27/26
FEB	02/15/26	02/28/26	Mon, 03/02/26	Fri, 03/13/26
	03/01/26	03/14/26	Mon, 03/16/26	Fri, 03/27/26
MAR	03/15/26	03/28/26	Mon, 03/30/26	Fri, 04/10/26
	03/29/26	04/11/26	Mon, 04/13/26	Fri, 04/24/26
APR	04/12/26	04/25/26	Mon, 04/27/26	Fri, 05/08/26
	04/26/26	05/09/26	Mon, 05/11/26	Fri, 05/22/26
MAY	05/10/26	05/23/26	Mon, 05/25/26	Fri, 06/05/26
	05/24/26	06/06/26	Mon, 06/08/26	Thu, 06/18/26



Resources

Helpful Resources

Utilize our Websites



[New Jersey - Training Materials](#) for more help

- This will give you a full list of Training Materials for DCI



[New Jersey State Page](#)

- This will give you New Jersey specific details with Acumen Fiscal Agent

Contact the Acumen Support Team

For help with enrollment questions, DCI system questions, or payment issues



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



Email us at: **customerservice@acumen2.net**



By Phone: (833) 892-0413





Acumen Fiscal Agent

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THANK YOU!

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