

# New Jersey DDD - DCI Systems Training for Individuals and Authorized Representatives

## Welcome to Acumen!

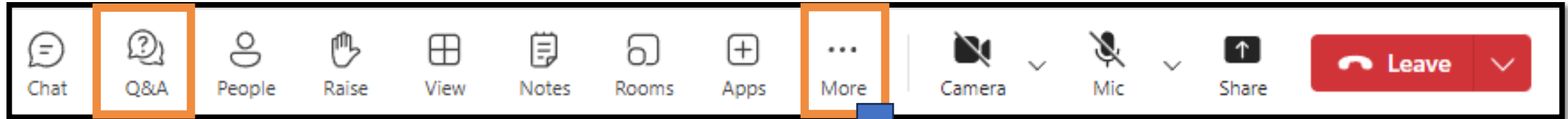
Thank you for joining the Acumen Family!



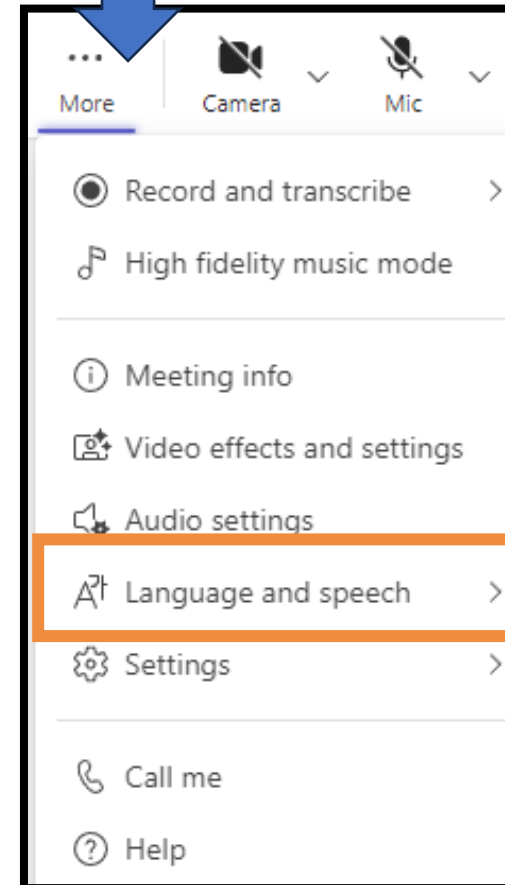
**Acumen powered by DCI**

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

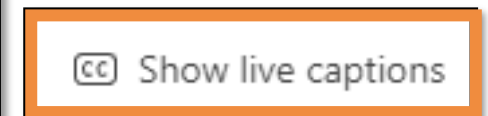
# Using Microsoft Teams



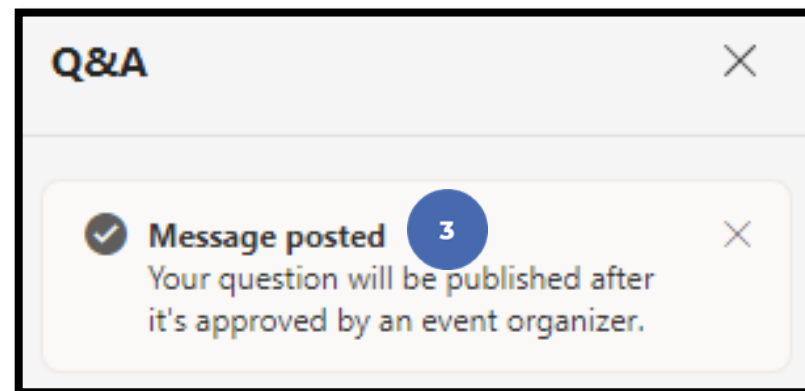
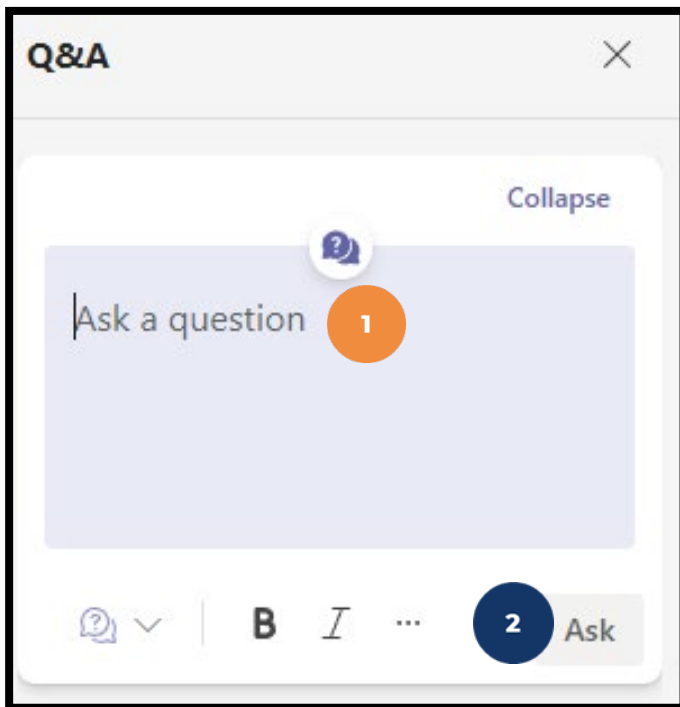
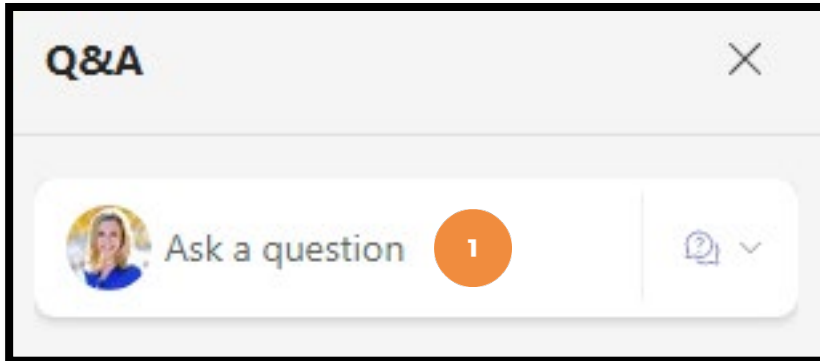
- Ensure the Camera is disabled (as pictured above with a line through them)
- Your Microphone will be on mute, please remain on mute until the questions and answers section at the end.
- Today we will not be using the Chat (disabled) or Raise hand features
- Click the **Q&A** button to type & send your question during the meeting



- To enable closed captioning:
  - ✓ Click the **More** button (three dots)
  - ✓ Select **Language and speech**
  - ✓ Click **Show live captions**
- OR press **ALT+Shift+C** on your keyboard



# Using the Q&A button



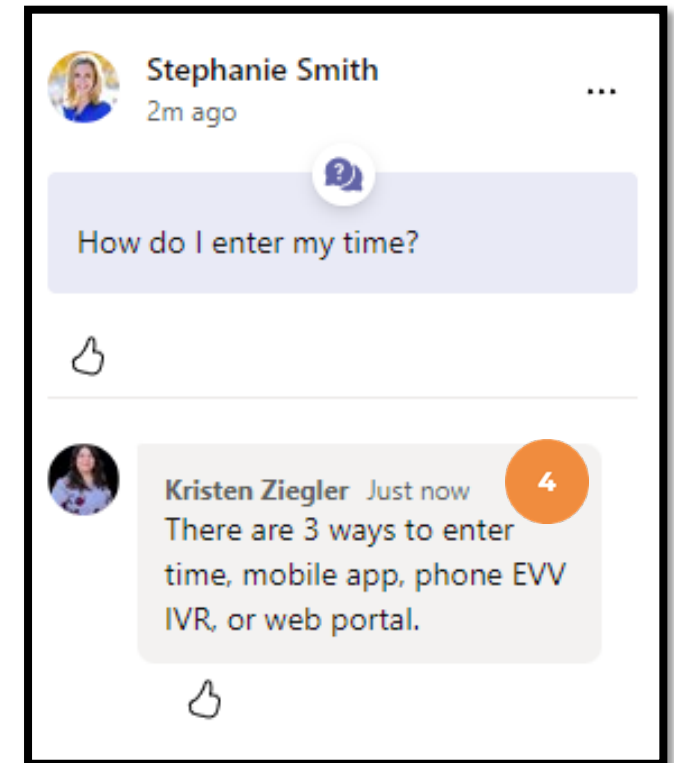
1. After clicking the Q&A button, **type your question** in the Ask a question field

❖ Please do not include any confidential information or the question cannot be published & answered

2. Click the **Ask** button

3. Message posted displays

4. Moderators review, approve & post your question.



# Agenda



**Acumen Fiscal Agent**  
Innovation • Opportunity • Freedom



**Why You Are Here/Acumen & DCI**



**DCI Web Portal & Profile Settings**



**Vendor Lists, Sign off/Reject Payment Entries**



**Clients, Reports & Submitting Vendor Entries in DCI**



**FAQ's, Resources & Q/A**

# Why Are You Here?

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# 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.

# Training Sessions



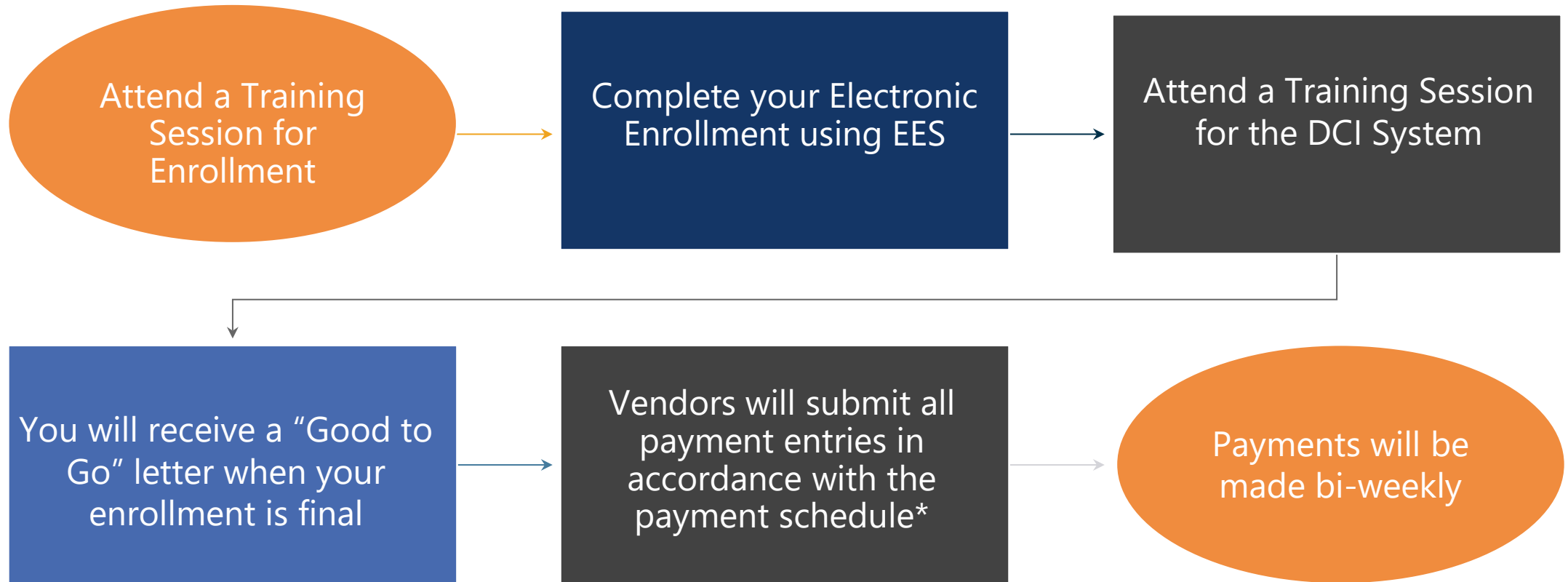
## **Enrollment**

In Enrollment training, you'll learn how to create an account in Acumen's electronic enrollment system, complete all required enrollment information, and electronically sign enrollment packets. The session will include a live demonstration, and you'll have the chance to ask questions along the way. By the end of the training, you'll feel confident navigating the system and completing the enrollment process smoothly.

## **DCI System**

In DCI System training, you'll learn how to navigate the DCI system using the web version to complete the essential tasks required for your role. These sessions will include a live demonstration, and you'll have the opportunity to ask questions in real time. By the end of the training, you'll be comfortable using DCI to manage your responsibilities efficiently.

# Overview of NJ DDD Enrollment Process



**Note:** \*Submit and approve all time entries and vendor/reimbursement requests by 9pm EST of the due date, **even if it falls on a weekend or holiday.** Those received *after* 9pm EST of the due date will be processed in the following payment period.



# Acumen & DCI

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# 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

# What is DCI?

DCI is the electronic invoicing system that allows community vendors to securely submit supporting documentations for payment approval by the individual or their authorized representative.

## Web Browsers

- ✓ Google Chrome (DCI Preferred)
- ✓ Firefox
- ✓ Edge
- ✓ Safari



# DCI Terms

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# DCI Terms



**Client:** The Individual receiving services

**Authorized Representative:** An individual who is allowed to represent a Client, manage the Client's care, and manage the Client's enrollment.

- **Note:** The Authorized Representative and the Client can be the same person. For Client's receiving vendor only services, an employer is **NOT** required. Authorized Representatives who completed the electronic enrollment in EES will be referred to as Employers in DCI.

# DCI Web Portal

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Accessed on a laptop or desktop computer

# Accessing the DCI Web Portal

1. Open an internet browser on a computer (Google Chrome is preferred) and navigate to the [DCI Web Portal](https://acumen.dcisoftware.com)
2. Enter the **Auth Rep Username** (created during enrollment)
3. Enter the **Auth Rep Password** (created during enrollment)
4. Utilize the **"Forgot your password?"** link if needed
5. Click the blue **Sign In** button

1 [acumen.dcisoftware.com](https://acumen.dcisoftware.com)



The screenshot shows the 'Sign In' page of the DCI Web Portal. It features a 'Sign In' heading at the top. Below it are two input fields: 'Username' and 'Password'. The 'Username' field is marked with a blue circle containing the number 2. The 'Password' field is marked with a blue circle containing the number 3. Below the password field is a checkbox labeled 'Remember me' and a link labeled 'Forgot your password?' which is marked with an orange circle containing the number 4. At the bottom is a blue 'Sign In' button marked with a blue circle containing the number 5.

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

# Initial Log In



**\*Please note:** You must verify your account 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.

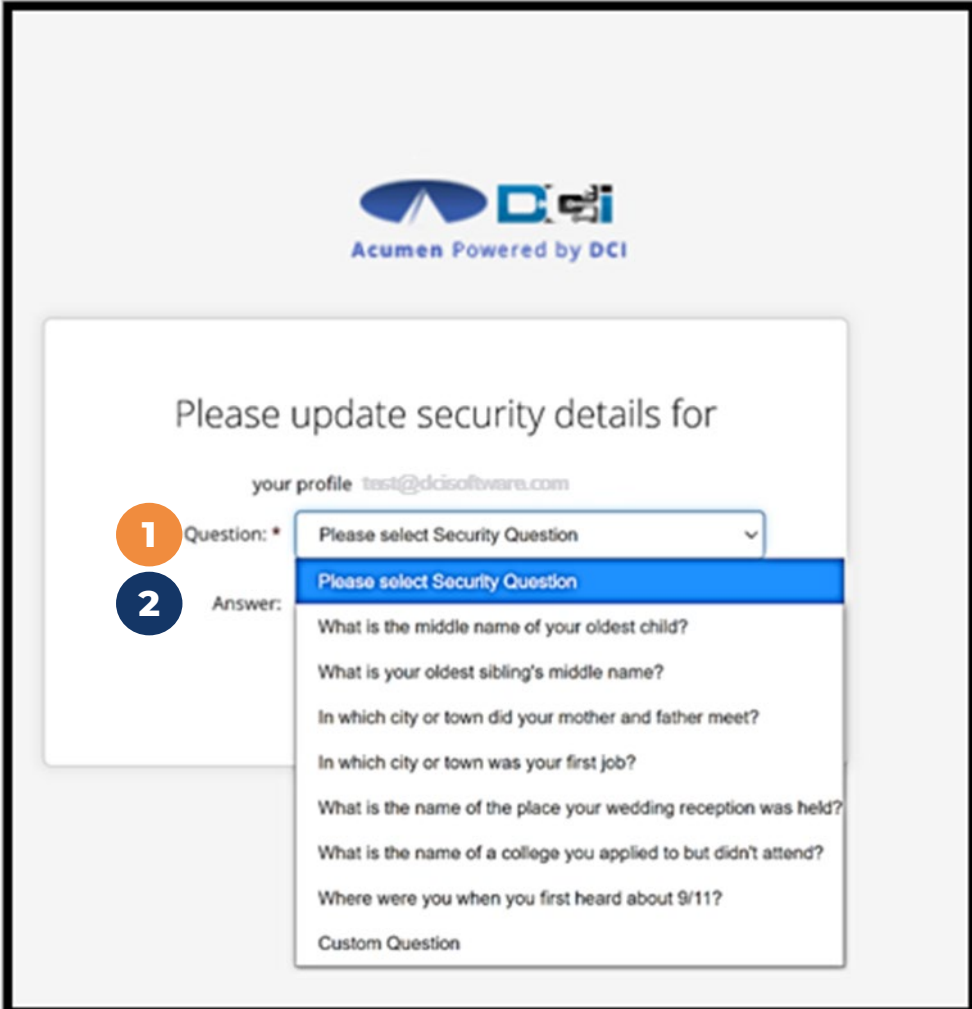


# Security Question

**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

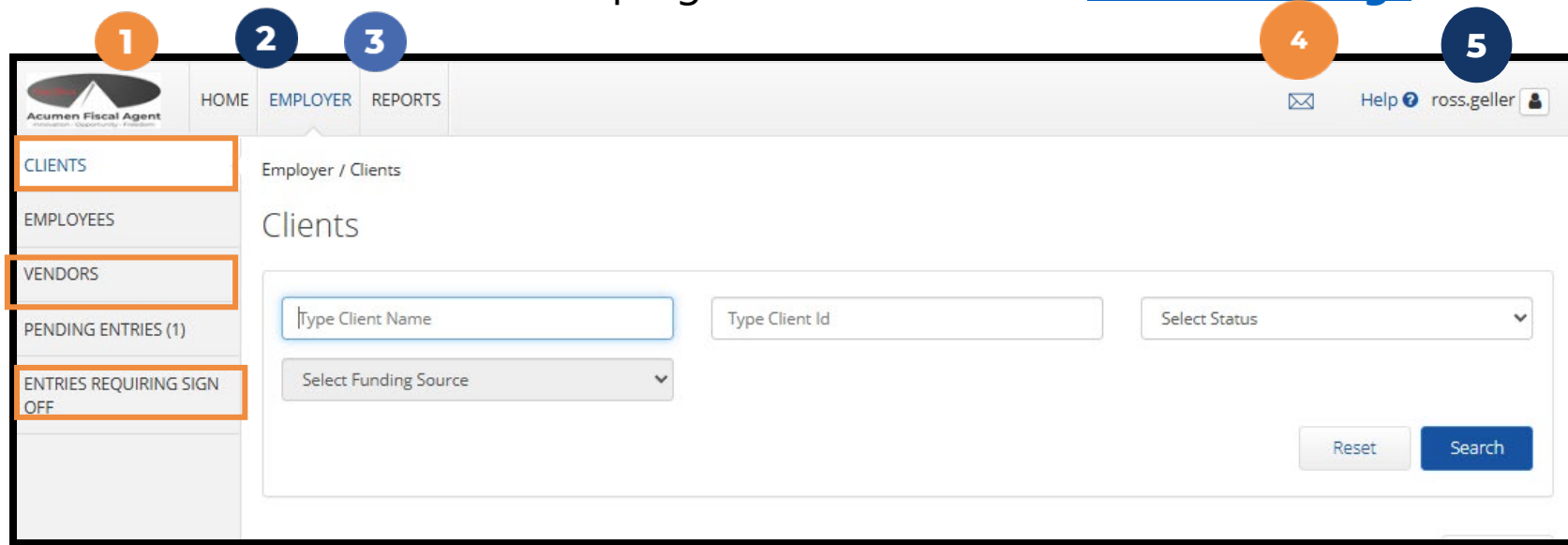
**\*Please note:** Remember the answer to the security question you chose, to reset your password in the future.



The screenshot shows the Acumen Powered by DCI logo at the top. Below it, the text "Please update security details for" is displayed, followed by "your profile test@dcisoftware.com". The interface includes two numbered steps: 1. "Question: \*" with a dropdown menu labeled "Please select Security Question", and 2. "Answer:" with a text input field. A list of security questions is shown below the input field, including: "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".

# Home/Dashboard

1. Select the **Home** or Acumen Icon to view your home page/dashboard
2. Select **Employer** to see your Employer submenu
  - You can view your Clients, Vendors, and Vendor Entries Requiring Sign Off
3. Select **Reports** to show the Reports available
4. The envelope icon will open your [Messaging Module](#)
5. Click on the **username** in the top right corner to access [Profile Settings](#)



The screenshot shows the Acumen Fiscal Agent dashboard. The top navigation bar includes the Acumen Fiscal Agent logo, tabs for HOME, EMPLOYER, and REPORTS, and a top right corner with an envelope icon, a Help link, and a user profile for 'ross.geller'. The left sidebar contains a menu with items: CLIENTS, EMPLOYEES, VENDORS, PENDING ENTRIES (1), and ENTRIES REQUIRING SIGN OFF. The main content area is titled 'Employer / Clients' and 'Clients', featuring search filters for 'Type Client Name', 'Type Client Id', 'Select Status', and 'Select Funding Source', along with 'Reset' and 'Search' buttons. Numbered callouts are placed over the interface: 1 (Acumen icon), 2 (EMPLOYER tab), 3 (REPORTS tab), 4 (envelope icon), and 5 (user profile).

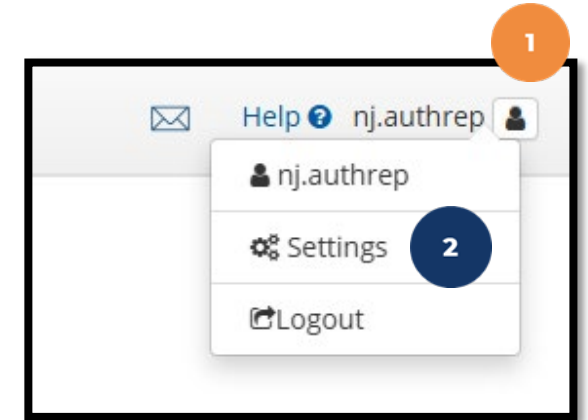
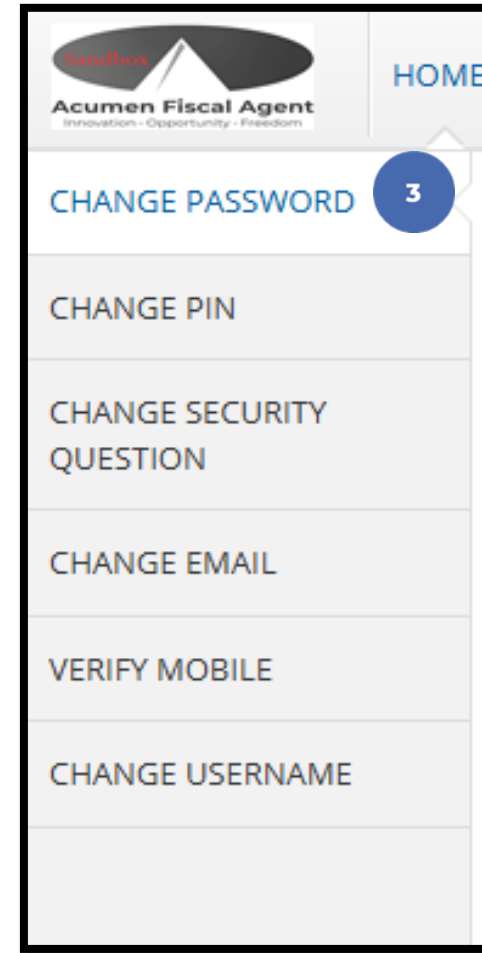
**Note:** You will **not** need to use the Employee and the Pending Entries on the submenu

# Profile Settings

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



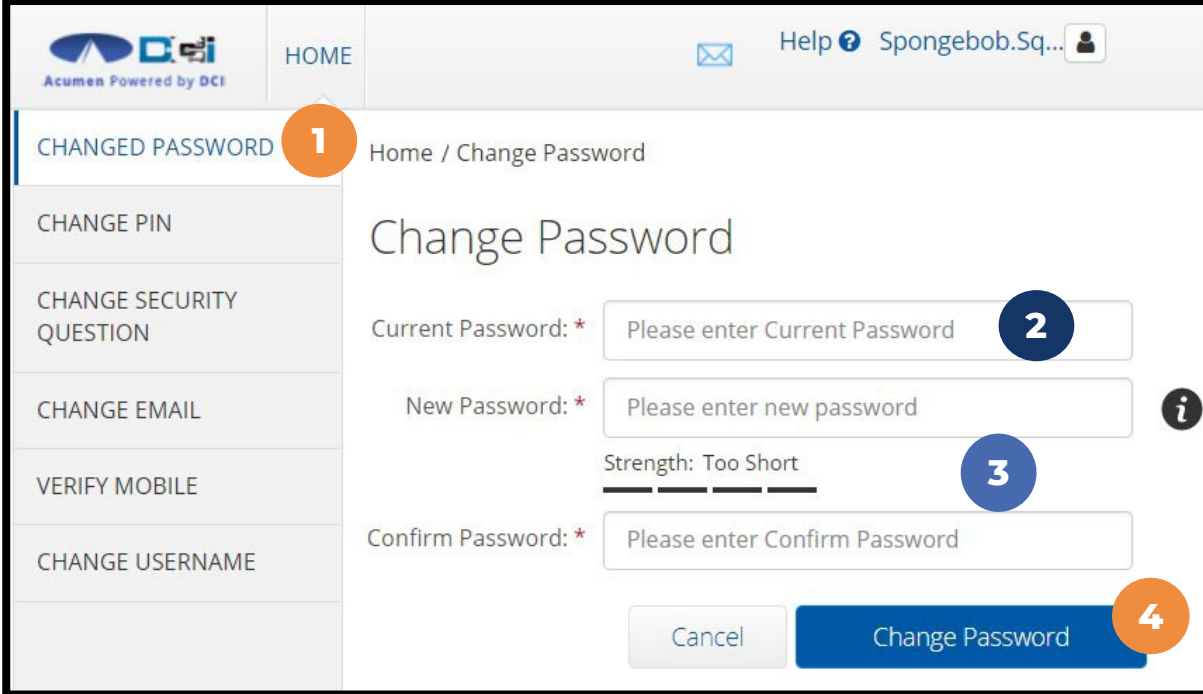
1. Click the **username** in the top right corner of the main menu
2. Click **Settings**
3. Select a submenu tab to update:
  - **Change Password** – Used for login
  - **Change Security Question**
  - **Change Email** – A valid and correct email address is required for password recovery
  - **Verify Mobile**
  - **Change Username** – Used for login



# Change Password

## Once Profile Settings are open

1. Select Change Password from the sub menu
2. Enter current password
3. Enter new password twice
4. Select Change Password and Confirm



### Pro Tip:

Be sure to follow Password Criteria.  
Make it secure & easy to remember.



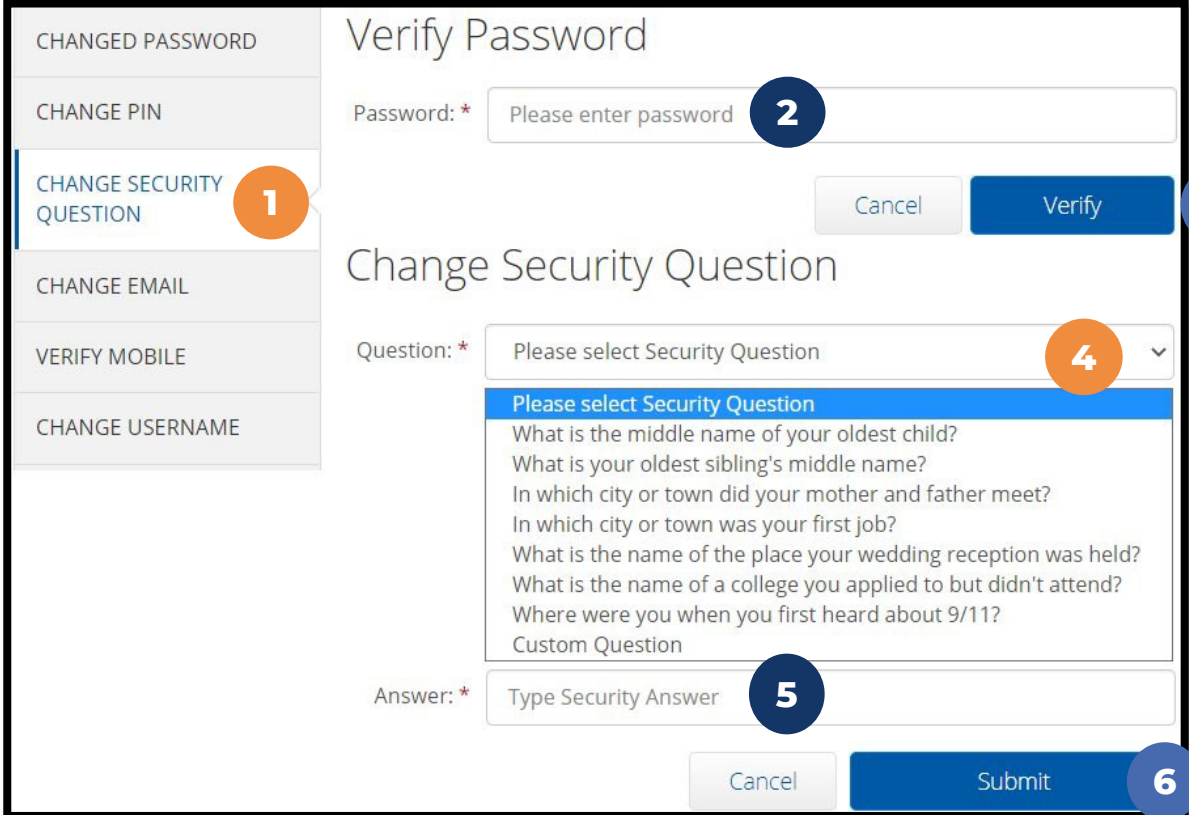
### Password Criteria

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.

# Change Security Question

## Once Profile Settings are open

1. Select Change Security Question
2. Enter current password
3. Select Verify
4. Select question from list
5. Type answer to question
6. Select submit and confirm



The screenshot shows a web interface for changing a security question. On the left is a sidebar menu with options: CHANGED PASSWORD, CHANGE PIN, CHANGE SECURITY QUESTION (highlighted with a blue bar and an orange circle with the number 1), CHANGE EMAIL, VERIFY MOBILE, and CHANGE USERNAME. The main content area is titled 'Verify Password' and contains a 'Password: \*' field with a placeholder 'Please enter password' (circled with a blue circle and the number 2). Below this are 'Cancel' and 'Verify' buttons (the 'Verify' button is circled with a blue circle and the number 3). The section below is titled 'Change Security Question' and features a 'Question: \*' dropdown menu with a placeholder 'Please select Security Question' (circled with an orange circle and the number 4). The dropdown is open, showing 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'. Below the dropdown is an 'Answer: \*' field with a placeholder 'Type Security Answer' (circled with a blue circle and the number 5). At the bottom are 'Cancel' and 'Submit' buttons (the 'Submit' button is circled with a blue circle and the number 6).

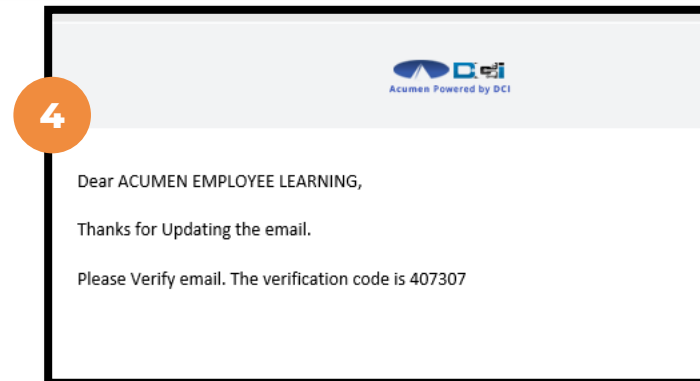
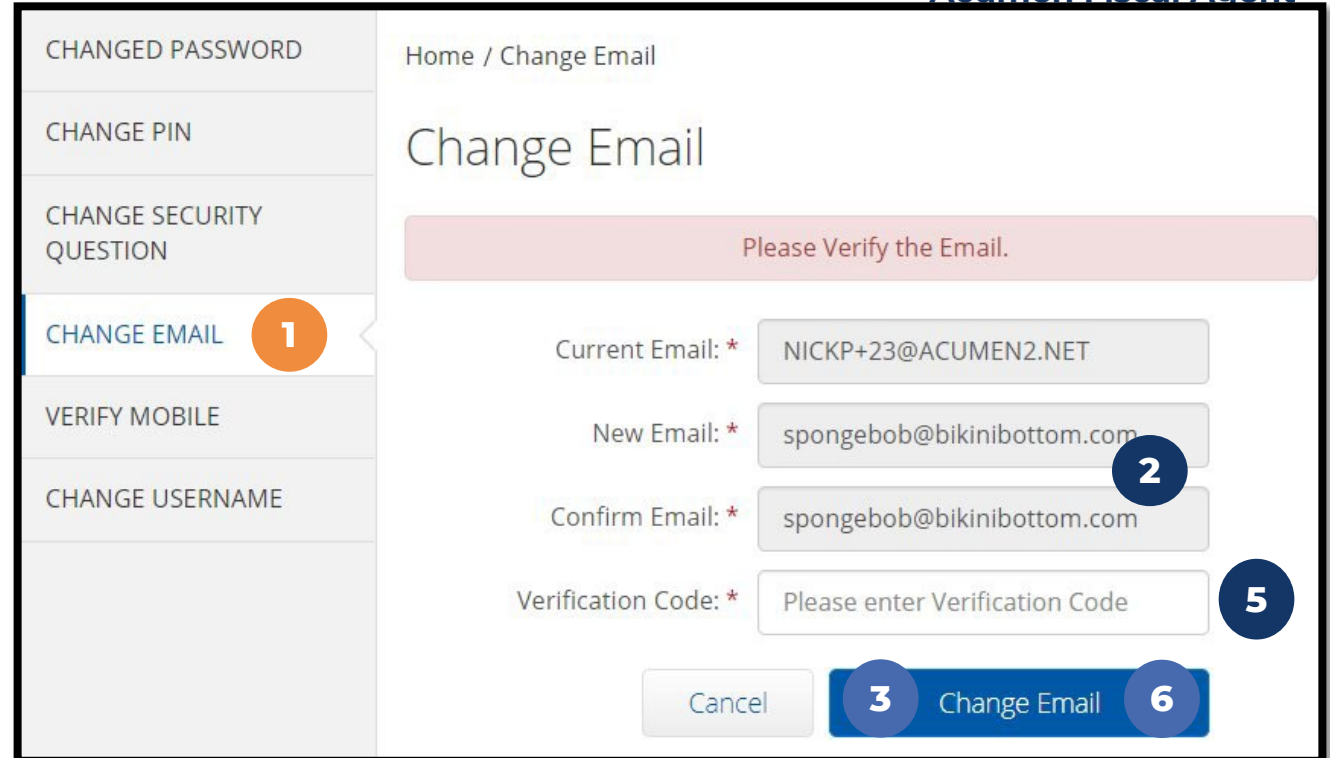
# Change Email

## Once Profile Settings are open

1. Select Change Email from the menu
2. Enter new email twice to confirm
3. Select Change Email
4. Check email for verification code
5. Enter code from email
6. Select Change Email and confirm

### Pro Tip:

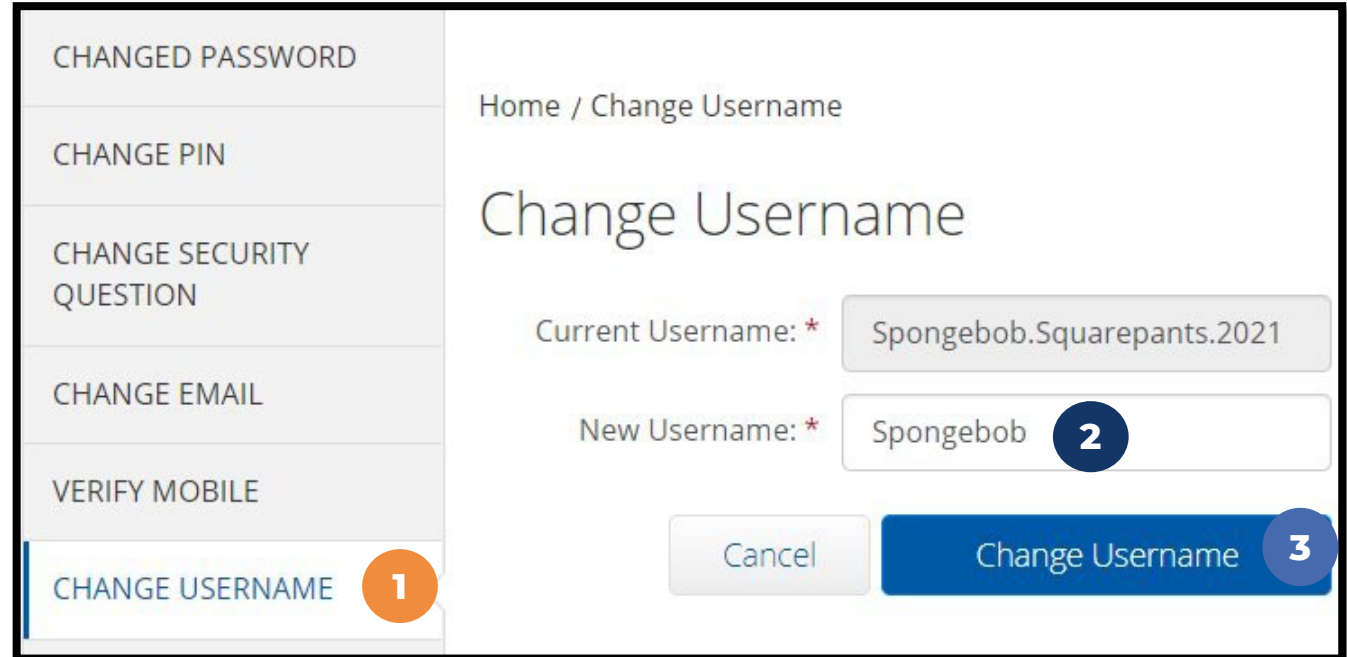
Emails will help you reset passwords on your own.



# Change Username

## Once Profile Settings are open

1. Select Change Username
2. Enter new Username
3. Select Change Username and confirm



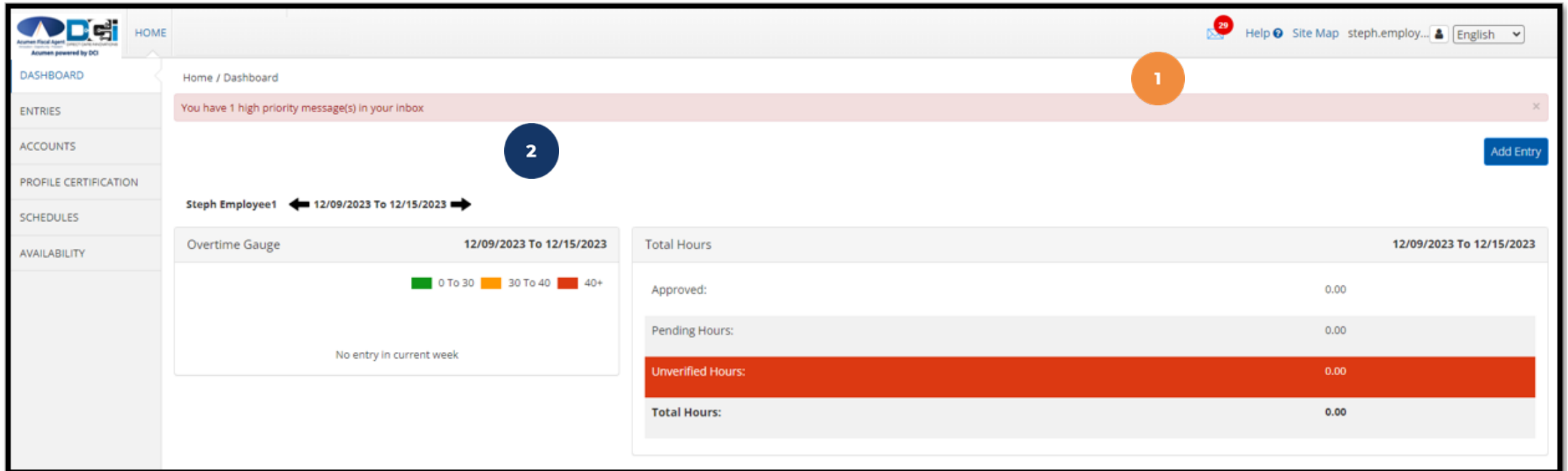
### **Pro Tip:**

*Create a Username that is both secure & easy to remember*



# 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  
Acumen 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	Account Statement	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 Messages via Messaging Module

1. Locate messages to read 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 account statements or the **download** icon to download it

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>	★		DCI Support	Account Statement	07:13 PM	 

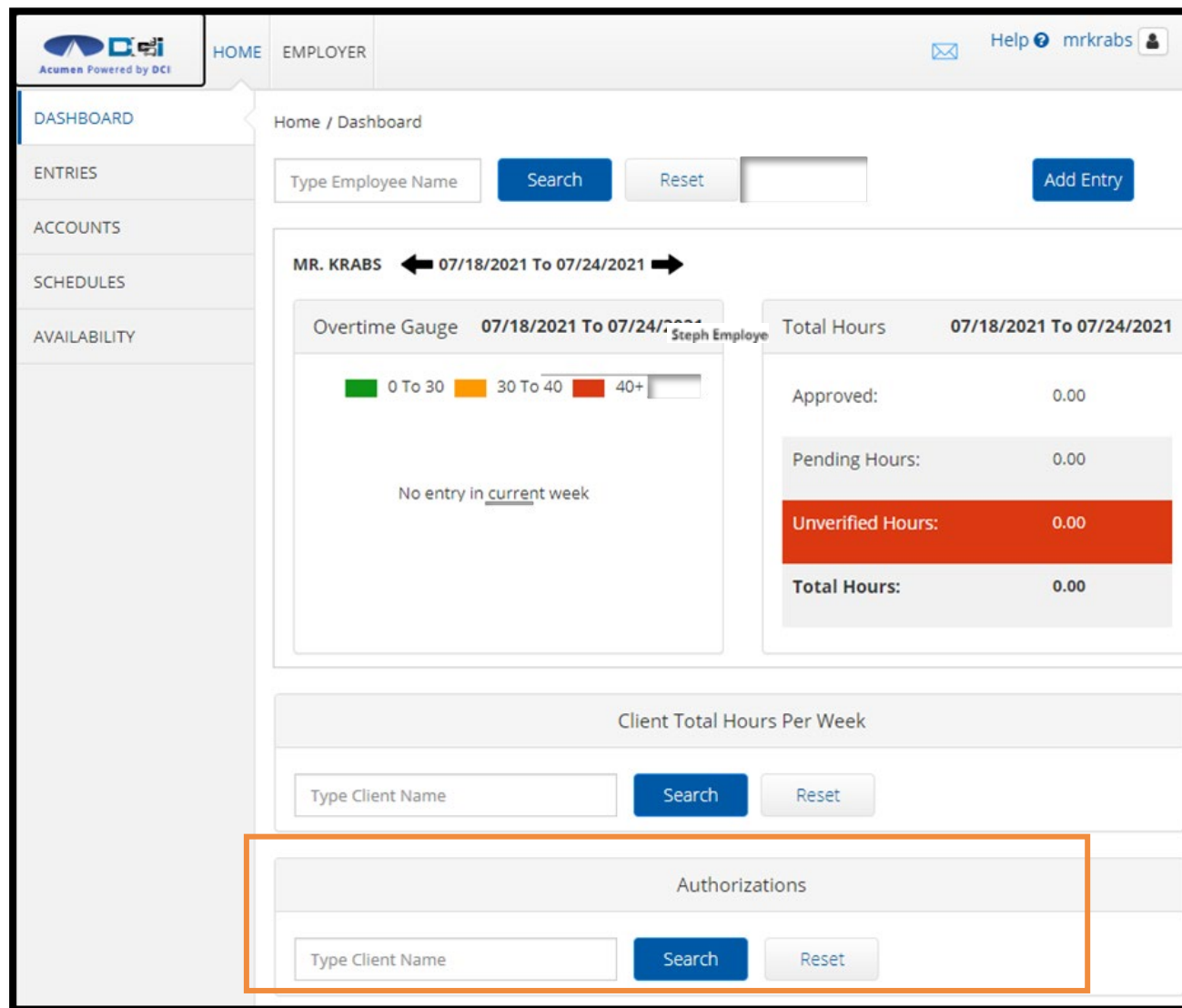
Notes **Attachments**

<input type="checkbox"/>	Date	File Name	File Type	File Size	Added By	Download	Status
<input type="checkbox"/>	Dec 08, 2023	Account Statement		2554.02 KB	Kristen Ziegler	 	Active

# Authorization Widget on Home Page

Let's take a moment to talk about an additional resources you can find, right on the home page.

It is the Authorization widget!



The screenshot shows the Acumen Fiscal Agent home page. The left sidebar contains navigation links: DASHBOARD, ENTRIES, ACCOUNTS, SCHEDULES, and AVAILABILITY. The main content area displays the 'Home / Dashboard' view. At the top, there's a search bar for 'Type Employee Name' with 'Search' and 'Reset' buttons, and an 'Add Entry' button. Below this, a section for 'MR. KRABS' shows a date range of '07/18/2021 To 07/24/2021'. An 'Overtime Gauge' is present, with a legend: 0 To 30 (green), 30 To 40 (yellow), and 40+ (red). The gauge shows 'No entry in current week'. To the right, a 'Total Hours' summary for the same date range shows: Approved: 0.00, Pending Hours: 0.00, Unverified Hours: 0.00, and Total Hours: 0.00. Below this, a 'Client Total Hours Per Week' section has a search bar for 'Type Client Name' with 'Search' and 'Reset' buttons. At the bottom, an 'Authorizations' widget is highlighted with an orange border, containing a search bar for 'Type Client Name' with 'Search' and 'Reset' buttons.

# Authorizations (Budget) Widget



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

Authorizations

KZ Client2 - T45158

Date of Service

Search

Reset

Display as Time

Authorization for Client: KZ Client2

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

1. Initial Balance - Total amount of authorization
2. Remaining Balance - Amount remaining after pre-authorization holds have been processed for billing and payment
3. Pre-Authorization Holds - Amount deducted from the authorization that has not yet been processed for billing and payment
4. Current Available Balance - The total of the remaining balance minus any pre-authorization holds

# Sign Off or Reject Vendor Payment Entries

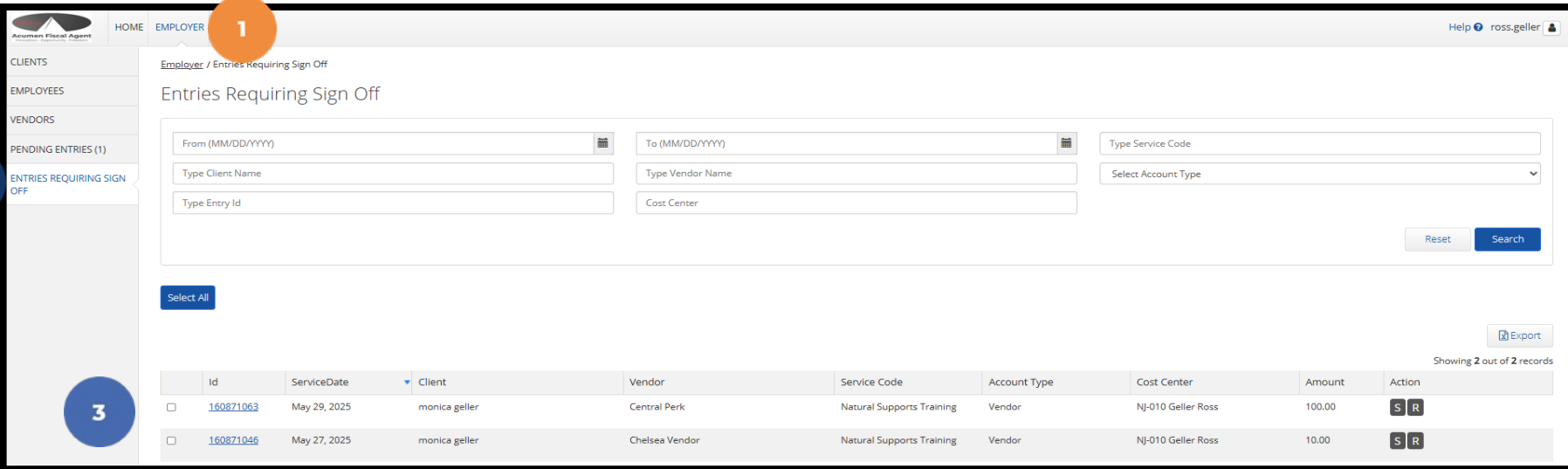
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**Please note:** This functionality is now available on the mobile app as well!

# Sign Off or Reject Payment Entries

1. Click **Employer** on the main menu
2. Select **Entries Requiring Sign Off** on the submenu
  - ✓ All entries/invoices requiring review/action appear in the table
3. All vendor payments requiring sign off will be listed at the bottom of the page

Important: To prevent any disruption in vendor payments, all vendor payment entries must be signed off by the timesheet due date listed on the payroll schedule.



	Id	ServiceDate	Client	Vendor	Service Code	Account Type	Cost Center	Amount	Action
<input type="checkbox"/>	160871063	May 29, 2025	monica geller	Central Perk	Natural Supports Training	Vendor	NJ-010 Geller Ross	100.00	S R
<input type="checkbox"/>	160871046	May 27, 2025	monica geller	Chelsea Vendor	Natural Supports Training	Vendor	NJ-010 Geller Ross	10.00	S R

# Sign Off or Reject Payment Entries

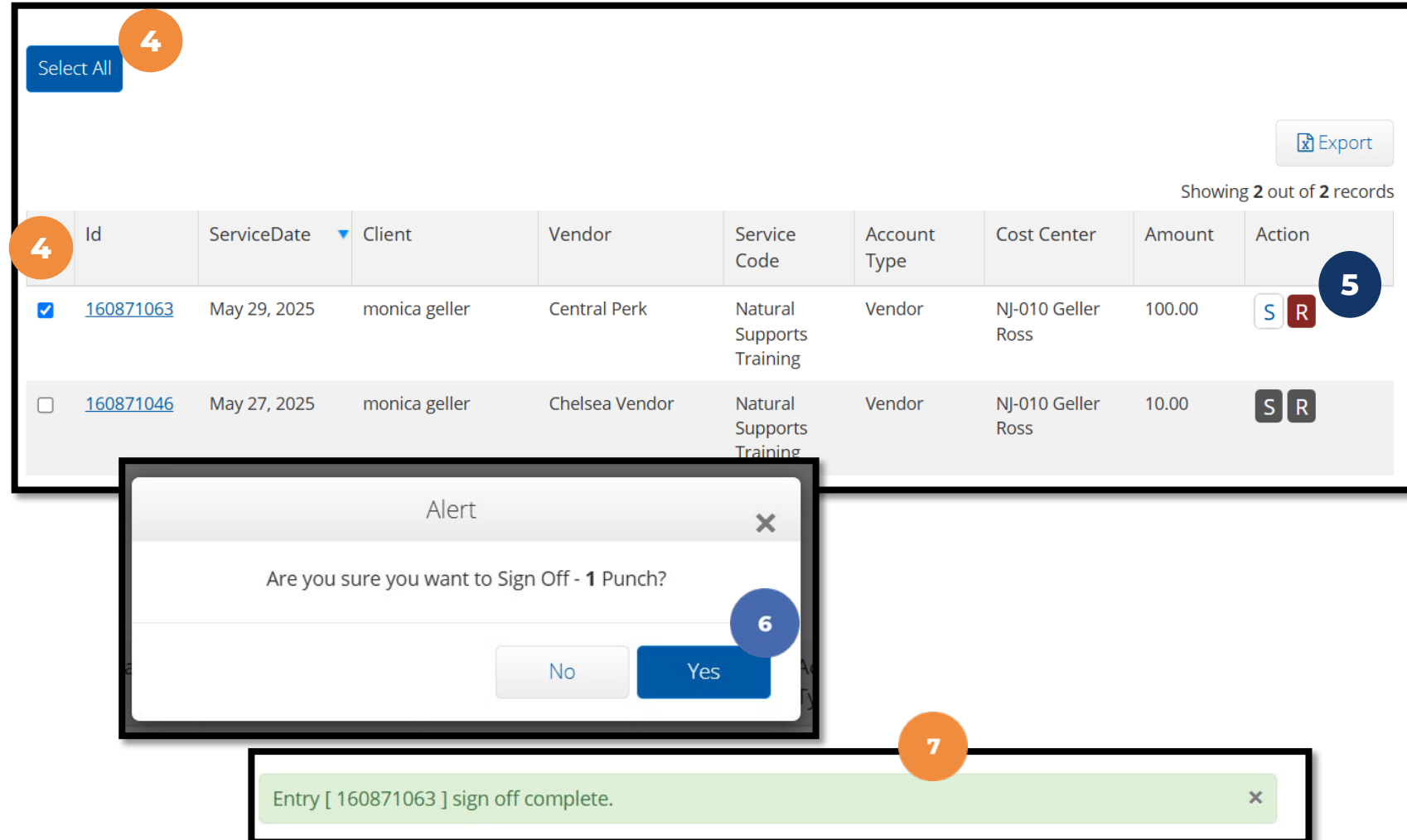
4. Check the box for the entry to sign off on (you can **select all** to sign off or reject on all entries)

5. Select "S" to Sign Off or "R" to Reject the Vendor Entry

- Select the "S" to SIGN OFF on the invoice (after you confirmed everything is correct)
- Select the "R" to reject the entry.  
**Note:** If you reject an entry, please reach out to the vendor so they can resubmit the payment entry correctly.

6. An alert will ask to confirm you would like to Sign off on or Reject the entry. Select Yes to Confirm.

7. A green bar will appear confirming the sign off.



The screenshot displays the Acumen Fiscal Agent interface. At the top left, there is a blue button labeled "Select All" with an orange circle containing the number 4. Below this is a table with columns: Id, ServiceDate, Client, Vendor, Service Code, Account Type, Cost Center, Amount, and Action. The table shows two records. The first record has Id 160871063, ServiceDate May 29, 2025, Client monica geller, Vendor Central Perk, Service Code Natural Supports Training, Account Type Vendor, Cost Center NJ-010 Geller Ross, Amount 100.00, and Action buttons S and R. The second record has Id 160871046, ServiceDate May 27, 2025, Client monica geller, Vendor Chelsea Vendor, Service Code Natural Supports Training, Account Type Vendor, Cost Center NJ-010 Geller Ross, Amount 10.00, and Action buttons S and R. An orange circle with the number 4 is next to the first record's Id. An orange circle with the number 5 is next to the Action buttons of the first record. Above the table, it says "Showing 2 out of 2 records" and there is an "Export" button. Overlaid on the table is an "Alert" dialog box with the text "Are you sure you want to Sign Off - 1 Punch?". It has "No" and "Yes" buttons. An orange circle with the number 6 is next to the "Yes" button. Below the alert box is a green bar with the text "Entry [ 160871063 ] sign off complete." and a close button. An orange circle with the number 7 is next to this bar.

	Id	ServiceDate	Client	Vendor	Service Code	Account Type	Cost Center	Amount	Action
<input checked="" type="checkbox"/>	160871063	May 29, 2025	monica geller	Central Perk	Natural Supports Training	Vendor	NJ-010 Geller Ross	100.00	S R
<input type="checkbox"/>	160871046	May 27, 2025	monica geller	Chelsea Vendor	Natural Supports Training	Vendor	NJ-010 Geller Ross	10.00	S R

Alert

Are you sure you want to Sign Off - 1 Punch?

No Yes

Entry [ 160871063 ] sign off complete.

# DCI EVV Mobile App!

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**Sign Off or Reject Vendor Payment Entries on  
your phone or tablet!**



# Download DCI Mobile EVV

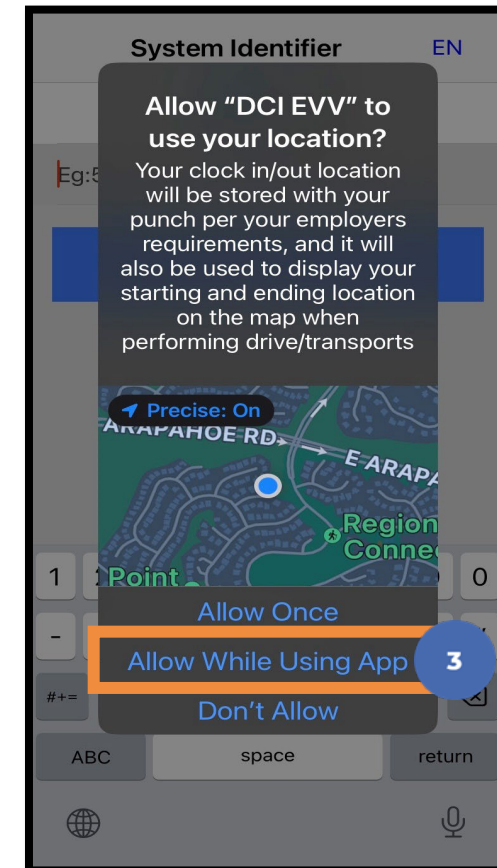
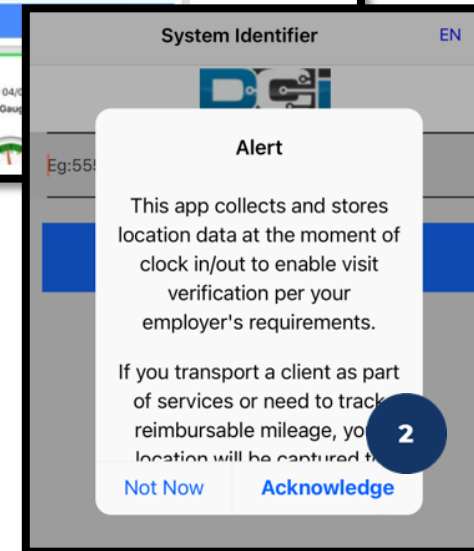
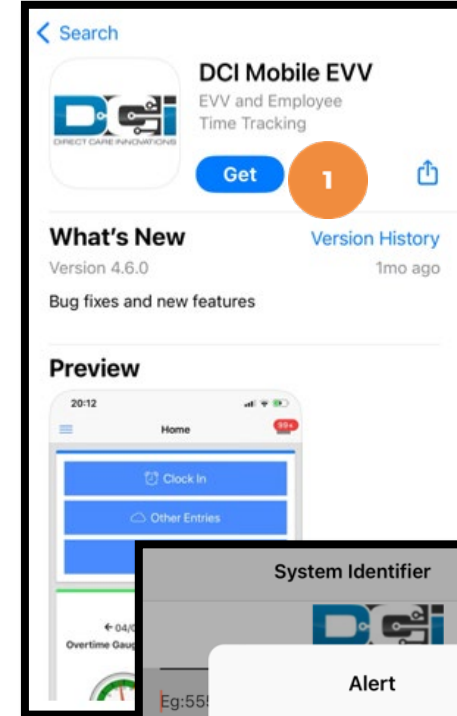
1. [Download](#) the **DCI Mobile EVV** App



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

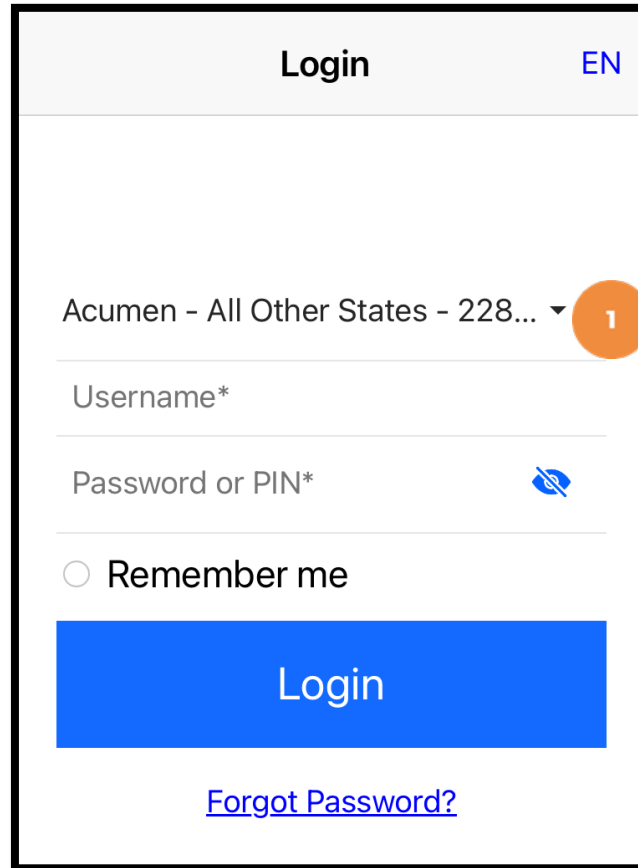
5. The agency is now selected and appears on the login screen

The image displays three sequential screenshots of the Acumen Fiscal Agent app interface, illustrating the initial agency selection process. Each screenshot is annotated with numbered circles (1-5) corresponding to the steps in the list.

- Screenshot 1 (Left):** The 'Select Agency' screen. It features a search bar with the text 'Search Agency' and a blue 'Next' button at the bottom. An orange circle with the number '1' is placed over the search bar.
- Screenshot 2 (Middle):** The search results screen. The search bar contains the text 'acu'. Below the search bar, a list of agencies is shown, with the first entry being 'Acumen – All Other States & Programs (including Kansas Helpers) - 228636'. A blue circle with the number '2' is placed over the search bar, and a blue circle with the number '3' is placed over the first search result. A blue circle with the number '4' is placed over the 'Next' button at the bottom.
- Screenshot 3 (Right):** The 'Login' screen. The top of the screen displays the selected agency name: 'Acumen - All Other States - 228...'. Below this are fields for 'Username\*' and 'Password or PIN\*', a 'Remember me' checkbox, and a blue 'Login' button. A blue circle with the number '5' is placed over the agency name at the top. A link for 'Forgot Password?' is visible at the bottom.

# 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.



Login EN

Acumen - All Other States - 228... ▼ 1

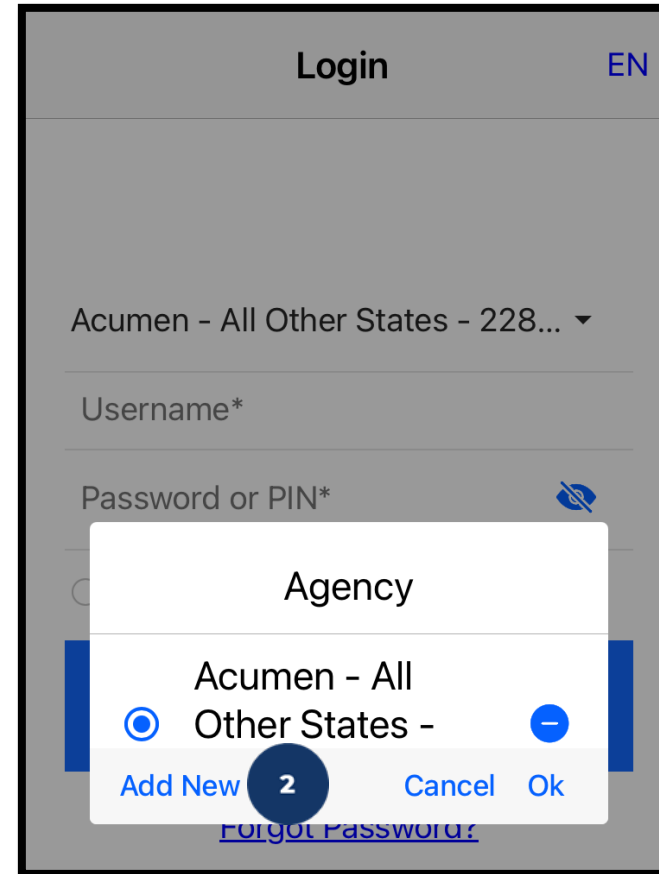
Username\*

Password or PIN\* 

☐ Remember me

Login


[Forgot Password?](#)




Login EN

Acumen - All Other States - 228... ▼

Username\*

Password or PIN\* 

Agency

☒ Acumen - All Other States - 

Add New 2 Cancel Ok

[Forgot Password?](#)

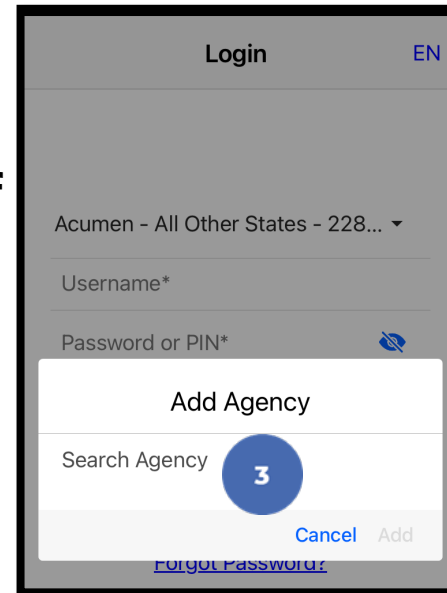
# Add More Agencies

- 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

- Select the agency** from the list
- Click **Add**


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



Login EN

Acumen - All Other States - 228... ▾

Username\*

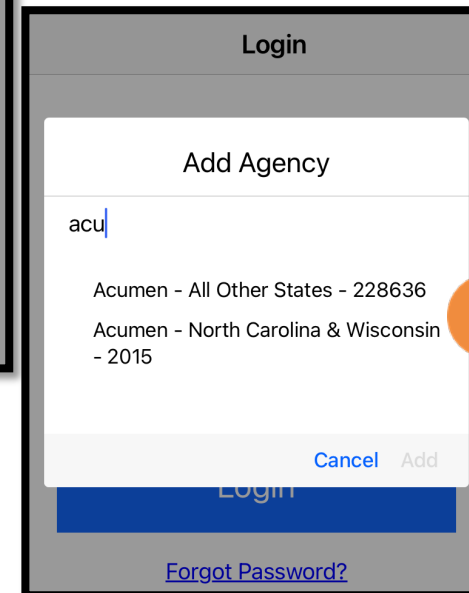
Password or PIN\* 

Add Agency

Search Agency 3

Cancel Add

[Forgot Password?](#)



Add Agency

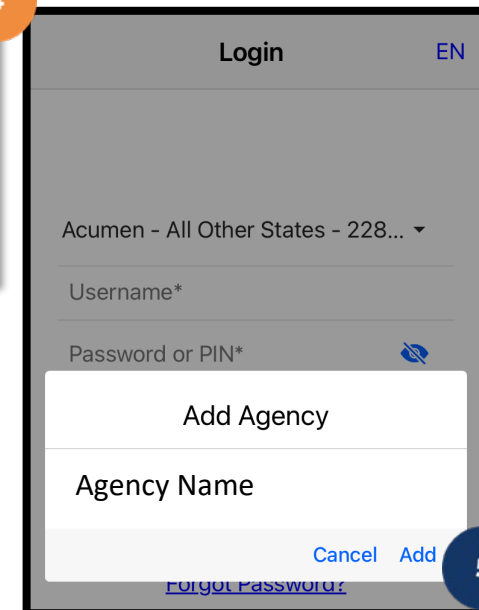
acu

Acumen - All Other States - 228636

Acumen - North Carolina & Wisconsin - 2015

Cancel Add


[Forgot Password?](#)



Login EN

Acumen - All Other States - 228... ▾

Username\*

Password or PIN\* 

Add Agency

Agency Name

Cancel Add

[Forgot Password?](#)

# Log into the DCI Mobile App



1. Enter DCI 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, the word "Login" is centered, and "EN" is in the top right corner. Below this is a dropdown menu showing "Acumen - All Other States - 228...". The "Username\*" field is highlighted with an orange circle containing the number "1". The "Password or PIN\*" field has a blue eye icon to its right. Below the password field is an unchecked radio button labeled "Remember me". A large blue "Login" button with a dark blue circle containing the number "2" is positioned below the "Remember me" option. At the bottom, there is a blue link that says "Forgot Password?".

Login EN

Acumen - All Other States - 228... ▾

Username\*

Password or PIN\*

☐ Remember me

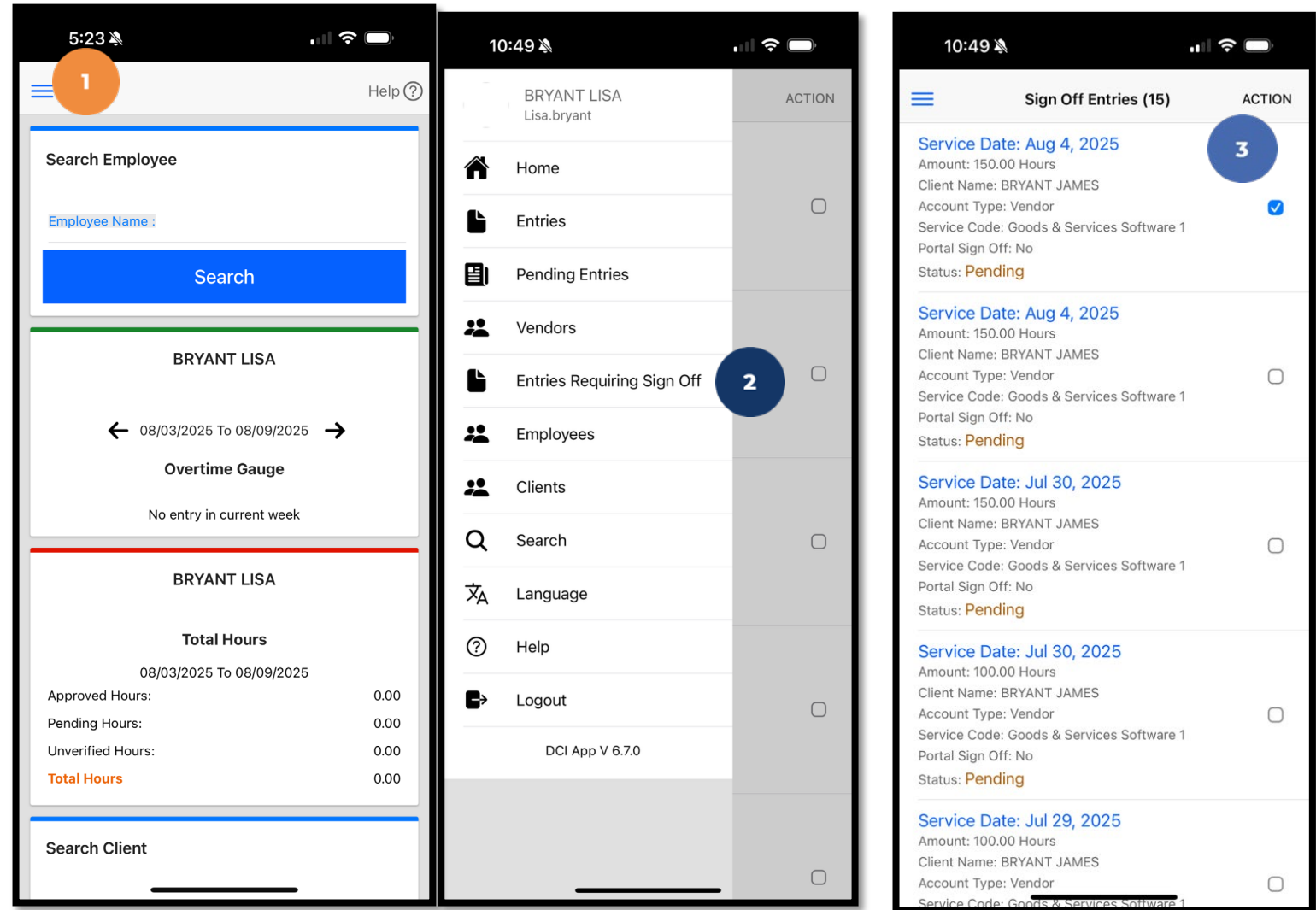
Login

[Forgot Password?](#)

# Sign Off or Reject Payment Entries (App)

Once you are logged into the Mobile App:

1. Select the menu in the upper left corner
2. Select **Entries Requiring Sign Off**
3. Find the vendor entry to sign off on and **select** the entry



# Sign Off or Reject Payment Entries (Mobile App)

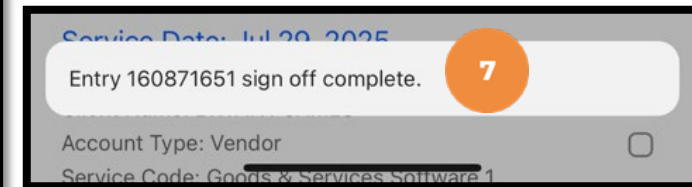
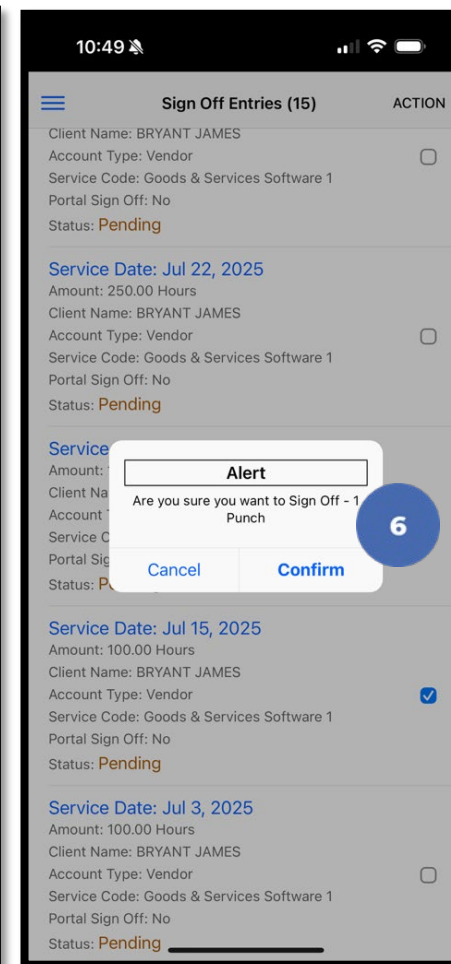
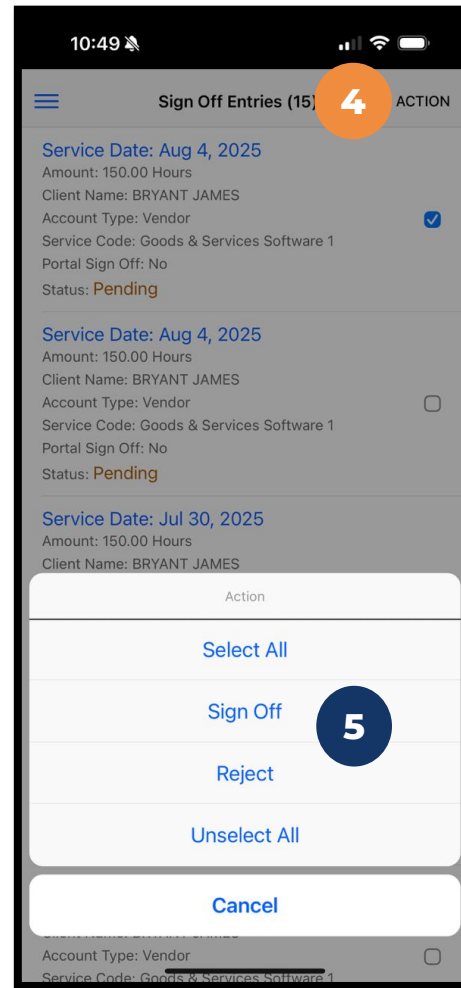
4. Select **Action** in the top right

5. Select **Sign Off** or **Reject**

**Note:** You can also select all or unselect all from here!

6. An Alert box appears to confirm. Press **Confirm** on the alert

7. Now the entry has been **signed off** and you will see a confirmation!



# **Update or Reinstall The App!**



## **Mobile App Note:**

The DCI EVV mobile app was updated on August 5<sup>th</sup>, 2025. To see "Entries Requiring Sign Off", ensure you are using the most up to date version of the app!



# Important Reminder!

## **\*Important!**

Vendor Payment Entries must be both entered AND approved within **60** days from the date of service!

Vendor's can *NOW* utilize the send sign off reminder button to remind Employers/Auth Reps to sign off on entries in a pending status!



Send Sign-Off Reminder

# Clients

As a reminder: Client is the **Individual receiving services**

# Client Details Page

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



Name	Client Id	Status
Steph Client	125	Active

# Client Details Page

4. View the client details page including widget boxes (Basic Demographics, Other Details) containing important information

Employer / Clients / Steph Client

Client Details - Steph Client 4 ⚙️ Actions

Basic Demographics

Client Id: 125

Address: 5416 E Baseline Road  
Mesa, AZ 85206-4700

GNIS: 04-013-7890

Phone: (222) 222-2222

Email: [stephanies+51@dcisoftware.com](mailto:stephanies+51@dcisoftware.com)

Date of Birth: May 01, 2001

Allow SSN Retrieval: No ⓘ

No. of Funding Accounts: 2

No. of Service Accounts: 4

Status: Active

Other Details

Cost Center: Steph Employer Cost Center

Username: steph.client

Client Status: Active

Authentication Status: Active

Email confirm: Yes

Photo Set: No

Signature Set: No

Enable Caregiver Rating Emails: No

Enable Vendor Payment: Yes

Enable Employer Reimbursement: Yes

Entries

Accounts

Certifications

EVV Locations

Diagnosis

Notes

Attachments

Custom Fields

History

# Client Details Page

5. Scroll beneath the widgets to the tabs:

- **Entries** – All entries associated with the client. Click the hyperlinked ID number to view entry details and use the Status column to ensure all entries for the pay period is entered and approved before the payroll deadline.
- **Accounts** - All accounts (connections) for the client and is useful for troubleshooting
- **EVV Locations** - All locations for the client, and which is primary (if applicable).
- **Diagnosis** – View client diagnosis information
- **Notes** – View notes regarding the client entered by the employer/authorized representative
- **Attachments** – View attachments pertaining to the client
- **History** – View modifications made to the client's profile

5



# Reports

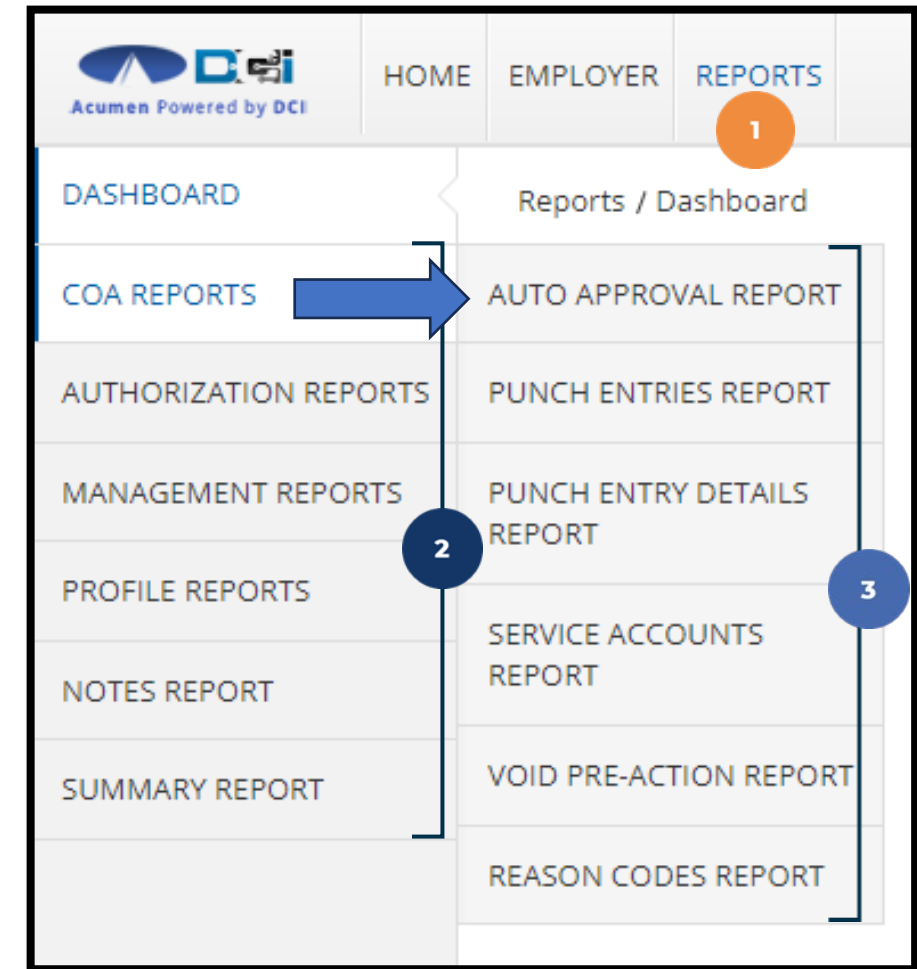
---

# Using Reports

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

\*Popular reports include:

- ✓ **COA Reports** (Chart of Account)
  - Punch Entries Report – Use the filters to locate specific entries
- ✓ **Authorization (Budget) Reports**
  - Authorization Run Rate Report – View the budget usage breakdown by client, account type, or service code.
- ✓ **Notes Reports**
  - Punch Entry Notes and Canned Statements (Tasks) Report - Pull service notes and canned statements (tasks) entered on punches
- ✓ **Summary Report** - Breakdown of punches and percentages of budget remaining



# DCI Reports - Authorization



## Most Common - Authorization Report

1. Type Client Name
  - Type 3 letters > Select Name
2. View other Authorizations (Not needed to view current Authorization)
3. Click **Search**

### ***Pro Tip:***

*Searching without filters will pull  
ALL Authorizations in DCI*

The screenshot shows a web form titled "Authorization Reports - Authorization Run Rate Report". It contains the following elements:

- A text input field labeled "Type Client Name" with an orange circle containing the number "1" next to it.
- A dropdown menu labeled "Select Account Type".
- A text input field labeled "Type Service Code".
- Four checkboxes for filtering:
  - ☐ Include Future Authorizations
  - ☐ Include Ended Authorizations
  - ☐ Include Discharged Clients Authorizations
  - ☐ Include Rejected Authorizations
- A dark blue circle containing the number "2" next to the "Include Rejected Authorizations" checkbox.
- A "Reset" button and a "Search" button.
- A dark blue circle containing the number "3" next to the "Search" button.

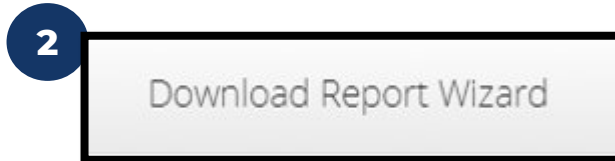


# DCI Reports - Authorization



## Once Results are Listed

1. Select Download button
2. Complete Download Wizard
  - Select Columns & Format



Authorization Reports - Authorization Run Rate Report

PATRICK - 171      Select Account Type      Type Service Code

☐ Include Future Authorizations    ☐ Include Ended Authorizations    ☐ Include Discharged Clients Authorizations

☐ Include Rejected Authorizations

Reset      Search

1      Download

Showing 2 out of 2 records

Authorization ID	CI	Service Code	Co:	Region Name	Start Date
1989	P/	PYRL2	OR...		04/01/2020
857	P/	PYRL	OR...		04/01/2020

# DCI Reports - Authorization



## Once Report Wizard is open

1. Select all desired columns
2. Click single arrow to add
3. Rearrange columns as needed
4. Select Next

### Recommended Columns

- |                    |                          |
|--------------------|--------------------------|
| • Client Name      | • Remaining Balance      |
| • Service Code     | • Holds                  |
| • Start & End Date | • Projected/Current Rate |
| • Initial Balance  | • Weekly & Monthly       |

# DCI Reports - Authorization



## Once Columns are Selected

1. Select File Format
  - PDF/Landscape is Recommended
2. Save Report Preferences
3. Click Blue Download button
4. View, Save & Print Report

### **Pro Tip:**

*Keep Current Rates slightly below Projected Rates to ensure proper budget usage*

Client Name	Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Holds	Projected Weekly Run Rate	Current Weekly Run Rate	Projected Monthly Run Rate	Current Monthly Run Rate
PATRICK	PYRL2	04/01/2020	05/31/2022	12000.00	12000.00	0.00	106.19	0.00	455.06	0.00
PATRICK	PYRL	04/01/2020	05/31/2021	10000.00	10000.00	6407.87	164.31	0.00	704.23	0.00

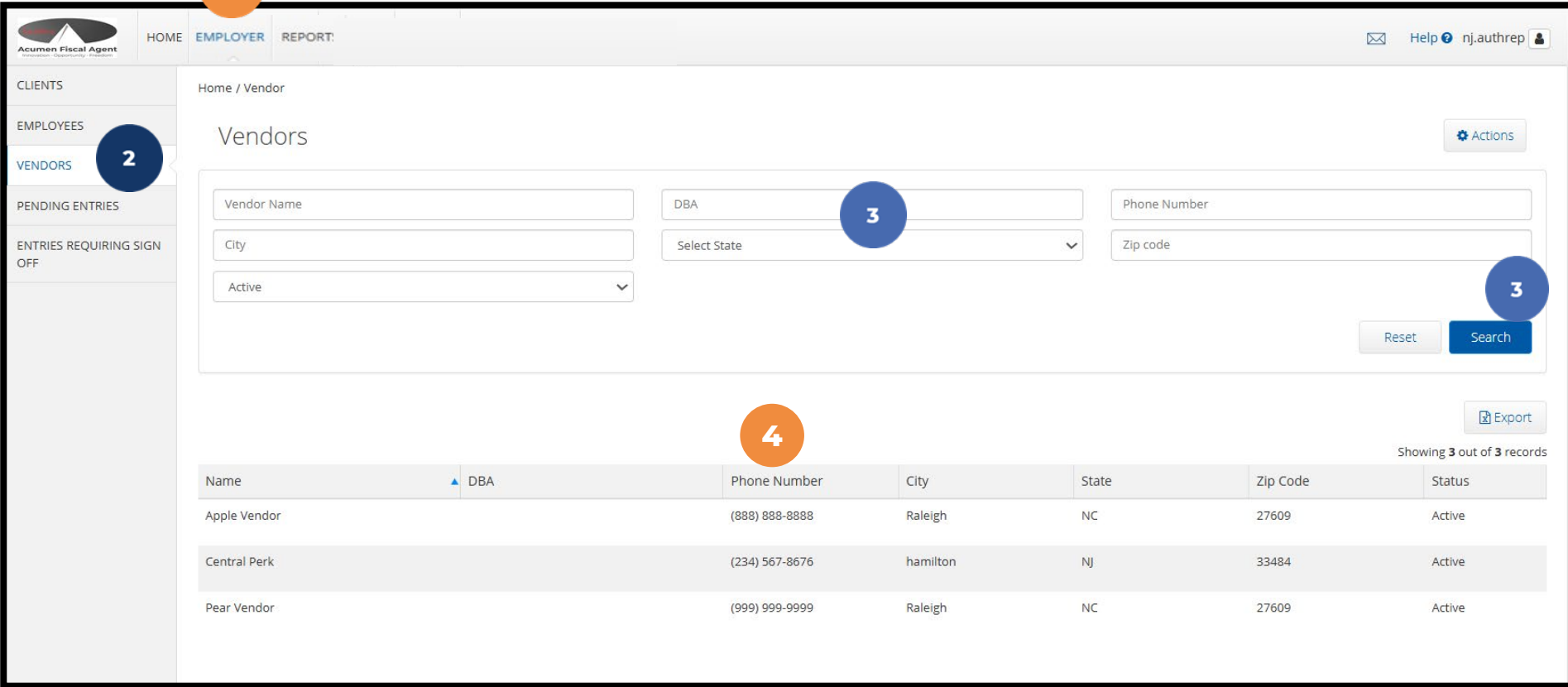
"Proprietary: For Acumen and Customer Use Only"

# **Review Community Vendor List**

---

# Review Community Vendor List

1. Select **Employer** on the Main Menu
2. Select **Vendors** on the submenu
3. You can use the search filters to find a specific vendor
4. Find the list of all the Vendors your client has authorizations for below the search filters



The screenshot shows the 'Vendors' page in the Acumen Fiscal Agent system. The interface includes a sidebar menu with 'EMPLOYERS' and 'VENDORS' (highlighted with a blue circle and number 2). The main area has a search filter section with fields for Vendor Name, DBA, Phone Number, City, Select State, and Zip code, along with an 'Active' dropdown and 'Reset' and 'Search' buttons. Below the search filters is a table of vendors. A table of 3 records is displayed, showing columns for Name, DBA, Phone Number, City, State, Zip Code, and Status. The vendors listed are Apple Vendor, Central Perk, and Pear Vendor.

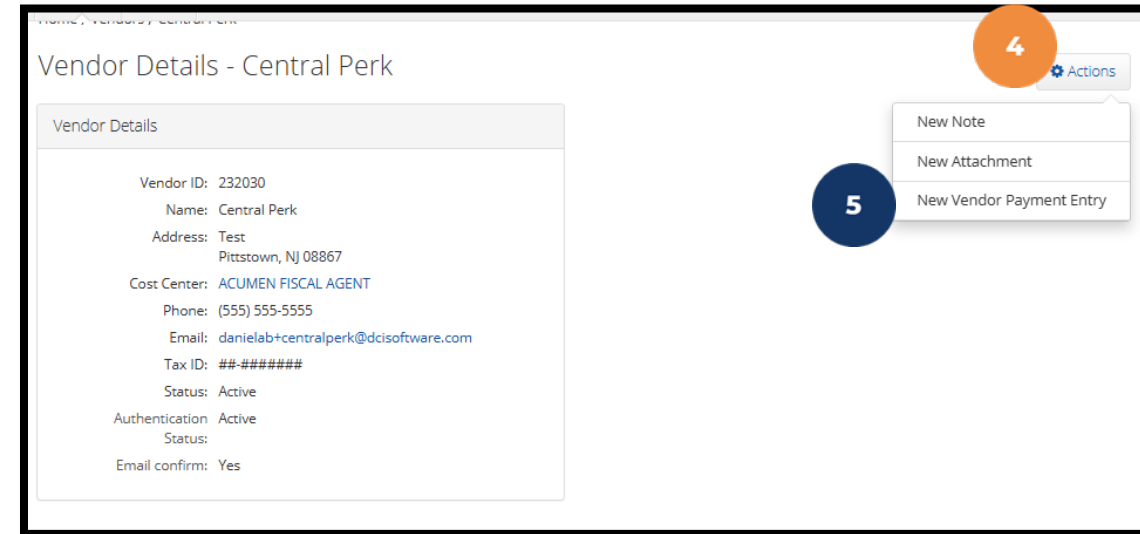
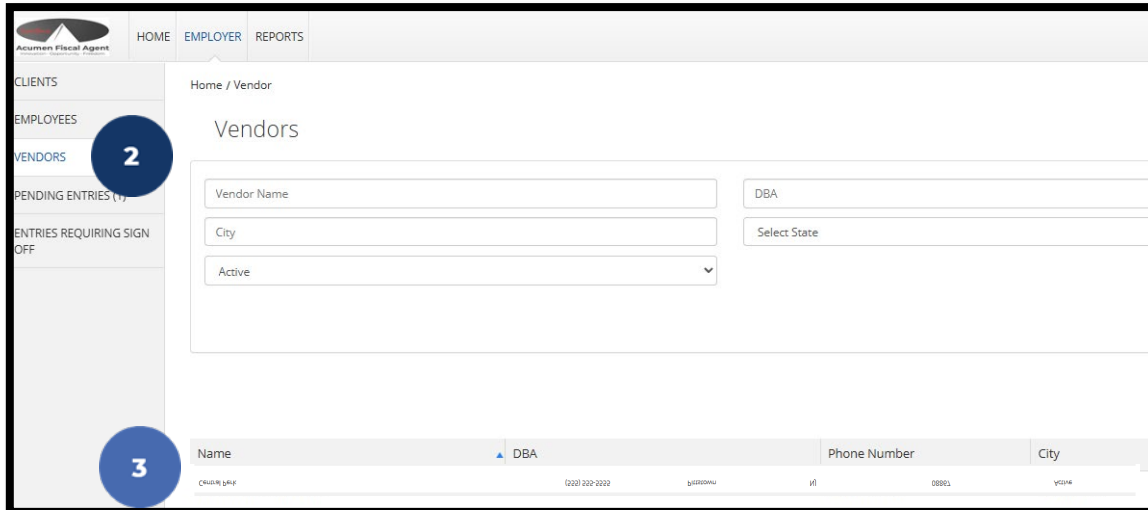
Name	DBA	Phone Number	City	State	Zip Code	Status
Apple Vendor		(888) 888-8888	Raleigh	NC	27609	Active
Central Perk		(234) 567-8676	hamilton	NJ	33484	Active
Pear Vendor		(999) 999-9999	Raleigh	NC	27609	Active

**\*Please note!** If you do not see a Vendor on this list, please reach out to the Acumen NJ Agent team

# New Vendor Payment Entry

# New Vendor Payment Entry

1. From your home page, Select **Employer**
2. Select **Vendor** from the submenu
3. Select **the Vendor you are submitting the payment entry for**
4. Select "Actions"
5. Select "Add New Vendor Payment"



# New Vendor Payment Entry

## Complete the form:

6. Entry Type (**required**): Vendor Payment
7. Account Type (**required**): Vendor
8. Client (**required**): Type the client's name and select it from the drop-down

Add New Vendor Payment Entry

Entry Type: \*

Vendor Payment

6

▼

Account Type: \*

Vendor

7

▼

Client: \*

Type Client Name

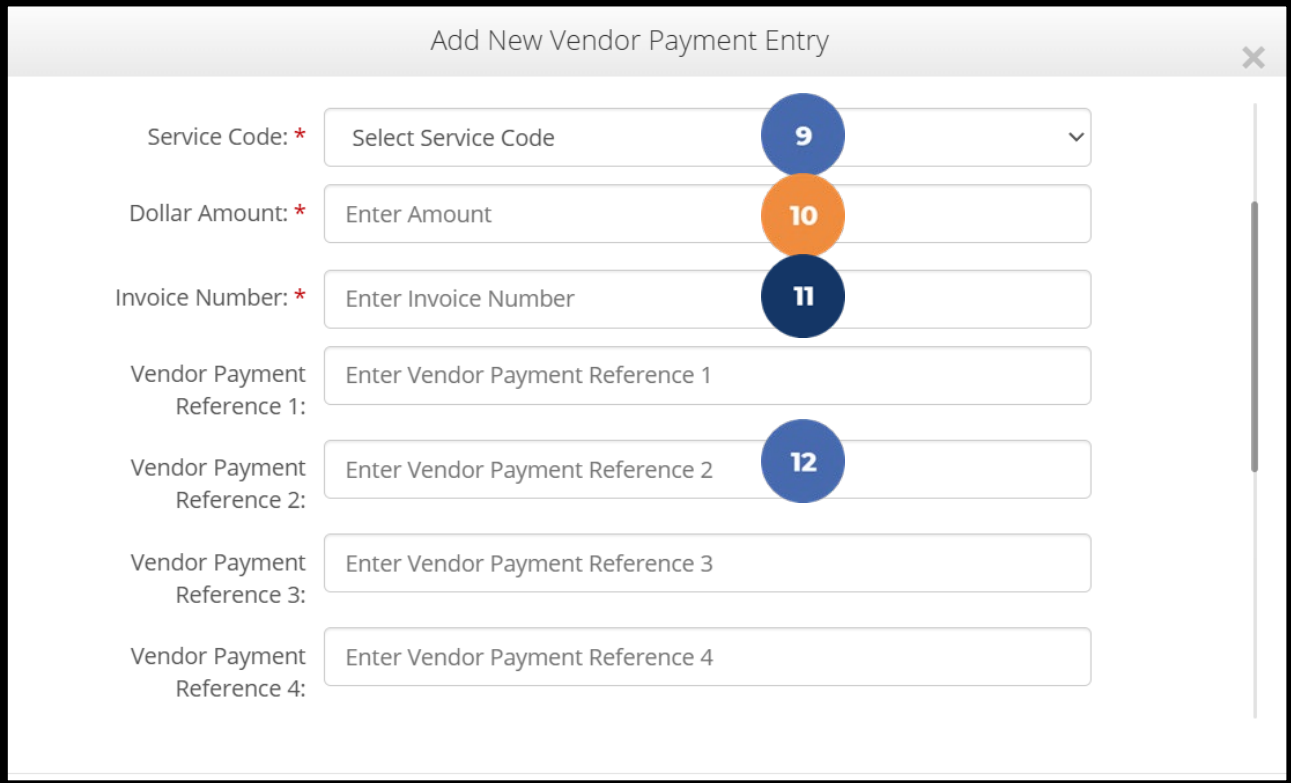
8

**Please note:** Only clients who have an active service account with you listed as the *vendor* will display. If you do not see your client's name appear in the drop down, please reach out to the **Acumen Support team**.



# New Vendor Payment Entry

9. Service code (**required**): Select from the drop-down
10. Dollar Amount (**required**): Enter the total amount for the invoice for all dates of service
11. Invoice Number (**required**): Enter the invoice number
12. Vendor Payment Reference Fields 1-5 (*optional*): Optionally add any additional information regarding the vendor payment



The screenshot shows a web form titled "Add New Vendor Payment Entry" with a close button (X) in the top right corner. The form contains the following fields:

- Service Code:** A required field (marked with a red asterisk) with a dropdown menu. A blue circle with the number 9 is positioned to the right of the dropdown.
- Dollar Amount:** A required field (marked with a red asterisk) with a text input. An orange circle with the number 10 is positioned to the right of the input.
- Invoice Number:** A required field (marked with a red asterisk) with a text input. A blue circle with the number 11 is positioned to the right of the input.
- Vendor Payment Reference 1:** A text input field.
- Vendor Payment Reference 2:** A text input field. A blue circle with the number 12 is positioned to the right of the input.
- Vendor Payment Reference 3:** A text input field.
- Vendor Payment Reference 4:** A text input field.

# New Vendor Payment Entry

13. Date(s) of Service (**required**): This may be one date or multiple dates. Enter the date and the amount for that date then click the blue **plus sign (+)** to add more as needed.

- **Please note:** The sum of the dates of service must match the dollar amount entered in the Dollar Amount field

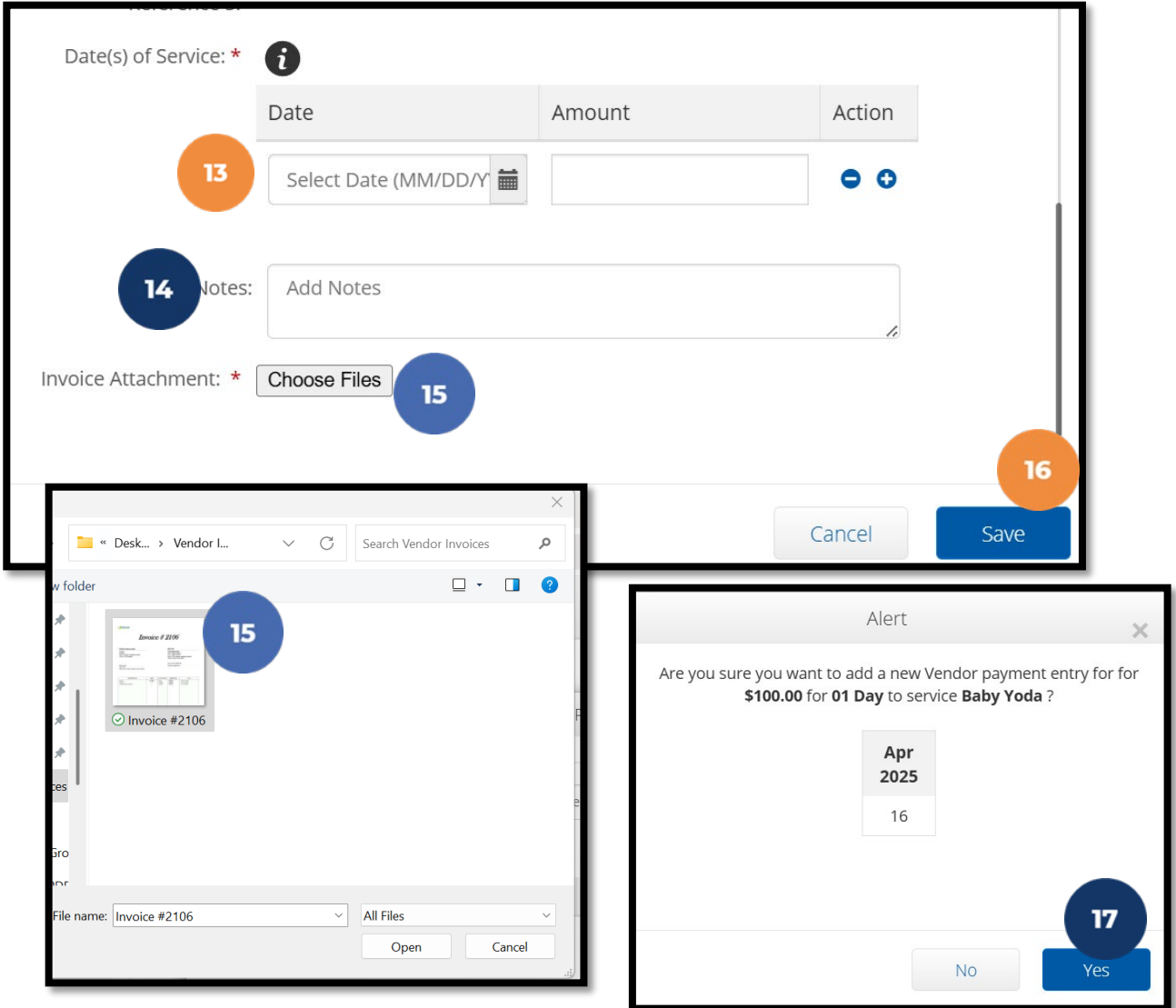
14. Notes (*optional*)

15. Supporting Documentation Attachment (**required**): Click the **Choose Files** button to select and upload the supporting documentation. Attachment must be in PDF, JPG, or PNG format.

16. Click **Save**

17. Click **Yes** to confirm

***The entry is now submitted!***



The screenshot shows the 'New Vendor Payment Entry' form. It includes a table for 'Date(s) of Service' with columns for Date, Amount, and Action. A 'Notes' field is present below the table. An 'Invoice Attachment' section with a 'Choose Files' button is also visible. At the bottom right, there are 'Cancel' and 'Save' buttons. An 'Alert' dialog box is shown in the foreground, asking for confirmation to add a new Vendor payment entry for \$100.00 for 01 Day to service Baby Yoda. The alert includes a date picker showing 'Apr 2025' and a '16' day selector. At the bottom of the alert are 'No' and 'Yes' buttons.

Date	Amount	Action
Select Date (MM/DD/YY)		- +

Notes: Add Notes

Invoice Attachment: Choose Files

Alert: Are you sure you want to add a new Vendor payment entry for for \$100.00 for 01 Day to service Baby Yoda ?

Apr 2025

16

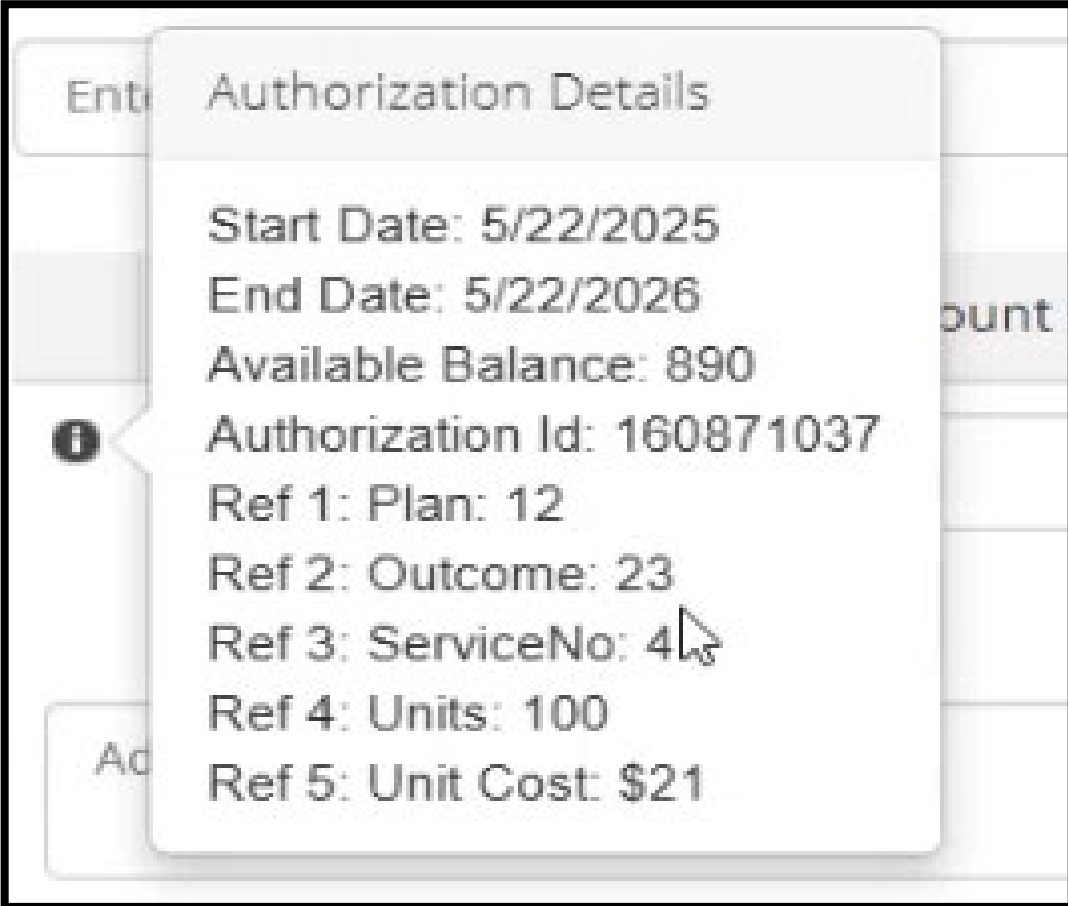
No Yes

# New Vendor Payment Entry

Hover over the “i” icon to see the authorization details!

Outcome Number and Service Number are related to the specific service code!

Refer to the SDR for the details on which service code to use!



The screenshot shows a software interface for 'New Vendor Payment Entry'. A table is partially visible with columns for 'Ent', 'Account', and 'Ad'. A row is highlighted with a mouse cursor over the 'i' icon in the 'Ent' column. A popup window titled 'Authorization Details' is displayed, showing the following information:

Authorization Details	
Start Date:	5/22/2025
End Date:	5/22/2026
Available Balance:	890
Authorization Id:	160871037
Ref 1: Plan:	12
Ref 2: Outcome:	23
Ref 3: ServiceNo:	4
Ref 4: Units:	100
Ref 5: Unit Cost:	\$21

# Frequently Asked Questions

# Auth Rep FAQ's



## What is my role in DCI?

As an Individual or Authorized Representative, you are responsible for reviewing and approving Community Vendor supporting documentation submitted through DCI. Your approval is required before payment is issued.

## How do I approve a Community Vendor supporting documentation?

Log into the DCI portal, navigate to the submitted invoice entry, review the attached documentation, and approve the supporting documentation if everything is correct.

## What if I see an error in the vendor invoice?

You can reject the supporting documentation and contact the Community Vendor to make corrections before resubmitting.

## Can I submit invoices on behalf of my vendor?

Yes. You may use DCI Web Portal create a Vendor Payment Entry, upload supporting documentations and receipts, and submit them for processing.

# Auth Rep FAQ's



## How do I know if all my vendors are in the system?

Review your vendor list upon logging into DCI. If someone is missing, reach out to your Agent immediately.

## Where can I find help using the DCI system?

Training materials are available on the DCI Web Portal. Go to the **'Help'** section and select NJ Training Materials.

## What happens if I miss an invoice approval deadline?

The supporting documentation will be processed in the next payment cycle. To avoid delays, be sure to approve entries before the listed deadline.

## What is the Individual PIN used for?

The PIN is used for time validation and client attestation as well as quick login to the mobile app. If you are not using the mobile app, you do not need a pin.

# Auth Rep FAQ's



## Would unused accrued units from the original PPL service automatically transfer to Acumen due to the transition?

No. For participants whose plans were revised due to the transition, the unused accrued units from the original PPL service line do not automatically transfer to the new Acumen service line.

## How can I request to rollover units that should be restored?

Please submit a request to the individual's Support Coordinator. The support Coordinator will then follow the formal process to request restoration.

## Where can my Support Coordinator find the request form and instructions?

The request form and instructions are available on the Division's Fiscal Intermediary Transition website under the section titled "**Restoration of Rollover Units Request.**"

[Division of Developmental Disabilities | 2025 Fiscal Intermediary Transition \(PPL to Acumen\)](#)

## Who should I contact if I have a question or issue?

Reach out to your Acumen Agent or contact Customer Service at **(833) 892-0413** or **customerservice@acumen2.net**.


# Auth Rep FAQ's



## When can I begin using DCI?

Once you receive your 'Good to Go' letter, you may begin using DCI on or after the stated start date. Do not approve or submit supporting documentations before this date.

**NJ DDD – Individual or Authorized Representative-  
Good to Go Notification**



**Date:** 6/20/2025  
**Authorized Representative Name:** Joseph AuthorizedRep  
**Participant Initials:** BB  
**Participant DDD ID #:** 45677789

Welcome to Acumen! It is our pleasure to inform you that all the required enrollment paperwork is complete. You (or your Community Vendor) may begin submitting requests for payment (invoices) in accordance with the "Community Vendor Start Date" and according to the participant's approved Individualized Service Plan (ISP).

Acumen will begin paying your Community Vendors after you receive this letter – on the vendor's designated start date, but not before June 7, 2025. Please refer to and keep handy the ***NJ DDD Payment Schedule*** enclosed separately in this communication. There you will find deadlines for Invoice submission and corresponding pay dates.

This "Good-to-Go" package includes the following information:

- Online Community Vendor Invoice Submission Powered by Direct Care Innovations (DCI)
- Paying Community Vendors
- Individual or Authorized Representative Resources

**Online Community Vendor Invoice Submission Powered by Direct Care Innovations (DCI)**

DCI is a secure cloud-based technology that allows you and your Community Vendor to submit, review, and approve invoices online. DCI is easy to use with any internet connection and is accessible from a computer or mobile device such as a tablet or smartphone. DCI eliminates the use of paper invoices, which means no faxing or mailing your Community Vendor's invoices.

Acumen will offer virtual DCI training. Keep an eye out for invitations and other communications from Acumen. If you are unable to attend a live session, the next page tells you how to find training materials within the DCI web portal, which you can access and view at your convenience.

You, as the Individual or Authorized Representative, must approve your Community Vendor's invoices by the invoice submission deadlines each pay period. If your Community Vendor is using electronic invoice submission through DCI, you will log into DCI to review and approve their invoices. When you approve a Community Vendor invoice submission in DCI, a report is automatically sent to Acumen Payroll for processing.

**When you login to DCI, please review your Community Vendors to ensure that you see each one that you use. If you notice that any Community Vendor is missing, please reach out to your Acumen Agent. Their contact information is at the end of this letter. If you do not get ahold of your Agent, please leave a voicemail and feel assured that you will receive a call back.**

**Individual or Authorized Representative Login Credentials for DCI**



# Resources

# NJ Payment Schedule

- Follow this payment schedule closely to ensure your vendors are always paid on time
- Approve and submit all vendor payment entries **by 9 PM EST of the Timesheets Due date even if it falls on a weekend or holiday\***
- Requests submitted after the due date will be handled in the following pay period
- Entries must be **entered and approved within 60 days of the date of service**



## NJ VF/EA Model Payment Schedule Effective June 8, 2025 – June 6, 2026

To ensure that your employees and/or vendors are always paid on time, please submit and approve all employee time entries and Community Vendor/reimbursement requests by 9pm EST of the due date, **even if it falls on a weekend or holiday (see dates with an \*)**. Those received after 9pm EST of that date will be processed in the following payment period. Employees are required to have a direct deposit unless special approval is given.

To help ensure that the time worked gets to our offices by the due date, please use our Web Time Entry system through DCI, or the Mobile App option. To access DCI, go to <https://acumen.dcisoftware.com/>. Employers must be sure all hours are entered accurately and approved by the employer by 9pm EST for them to be paid on the payment date.

Please contact Acumen Customer Service Call Center at 833-892-0414 to confirm that your time sheet has been received. Contact your Acumen Agent at (848)-400-5903 or [enrollment-nj@acumen2.net](mailto:enrollment-nj@acumen2.net) if you have any questions or concerns.

Month	Payroll Start	Payroll End	Timesheets Due (9pm EST)	Pay Date
JUN	06/08/25	06/21/25	Mon, 06/23/25	Thu, 07/03/25
	06/22/25	07/05/25	Mon, 07/07/25	Fri, 07/18/25
JUL	07/06/25	07/19/25	Mon, 07/21/25	Fri, 08/01/25
	07/20/25	08/02/25	Mon, 08/04/25	Fri, 08/15/25
AUG	08/03/25	08/16/25	Mon, 08/18/25	Fri, 08/29/25
	08/17/25	08/30/25	Mon, 09/01/25	Fri, 09/12/25
SEPT	08/31/25	09/13/25	Mon, 09/15/25	Fri, 09/26/25
	09/14/25	09/27/25	Mon, 09/29/25	Fri, 10/10/25
OCT	09/28/25	10/11/25	Mon, 10/13/25	Fri, 10/24/25
	10/12/25	10/25/25	Mon, 10/27/25	Fri, 11/07/25
NOV	10/26/25	11/08/25	Mon, 11/10/25	Fri, 11/21/25
	11/09/25	11/22/25	Mon, 11/24/25	Fri, 12/05/25
DEC	11/23/25	12/06/25	Mon, 12/08/25	Fri, 12/19/25
	12/07/25	12/20/25	Mon, 12/22/25	Fri, 01/02/26
JAN	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
FEB	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
MAR	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
APR	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
MAY	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
	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



IMPORTANT

# 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 Customer Service Team

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



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



**Email us at [customerservice@acumen2.net](mailto:customerservice@acumen2.net)**



**By Phone: (833) 892-0413**

**Or contact your Acumen New Jersey Client Services Agent!**





**Acumen Fiscal Agent**

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