

MA DCI Champions Training

Microsoft Authenticator and Sharepoint

October 16, 2025

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

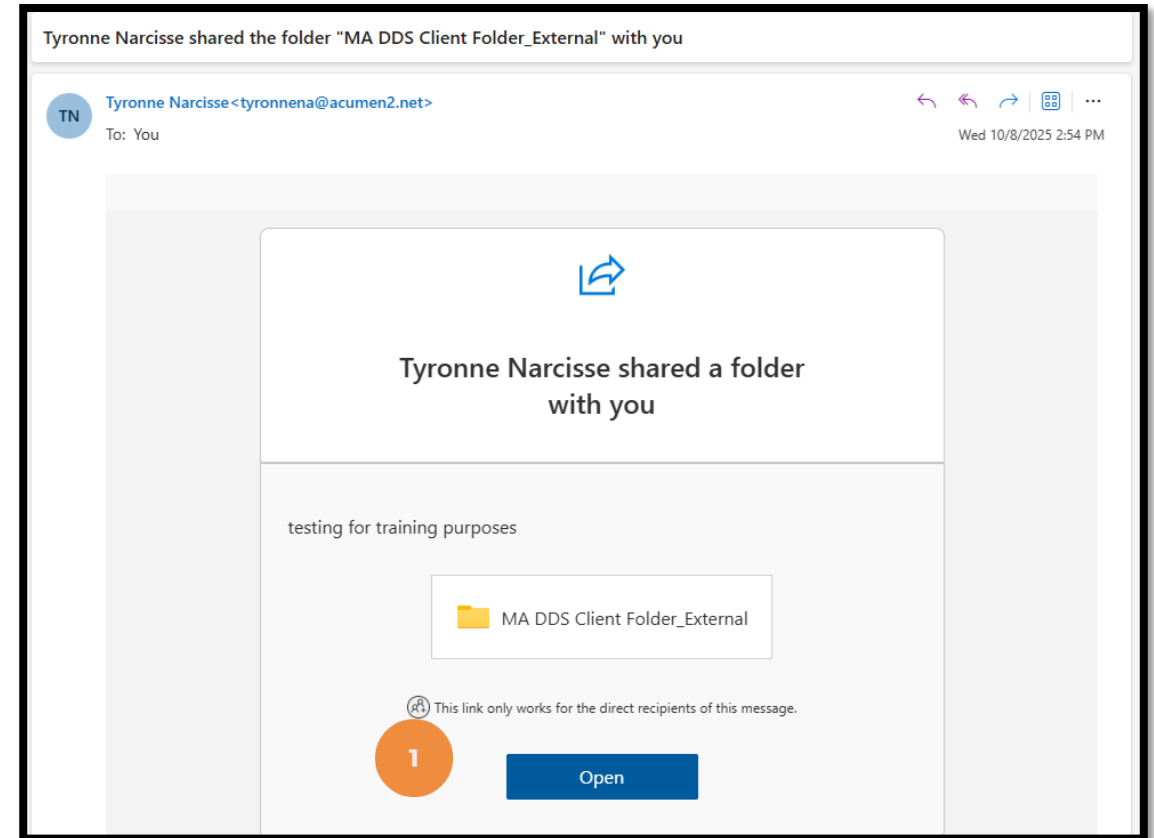


	Accepting the Invitation
	Verify your Identity
	Accessing Sharepoint
	Navigating Sharepoint
	Troubleshooting tips

Accepting the Invitation

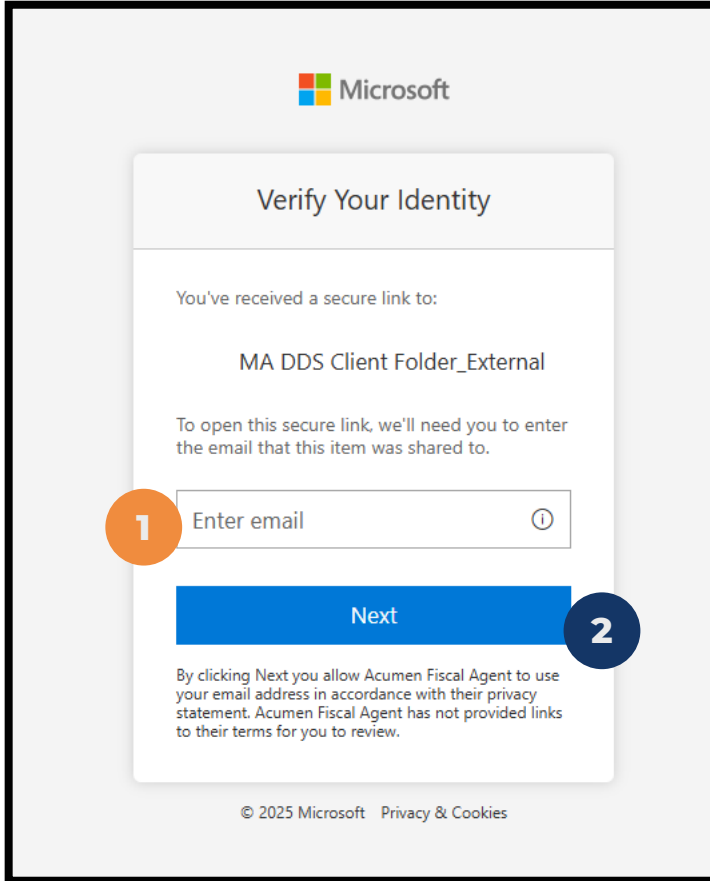
Accepting the Invitation

- Check your inbox for an  email invitation from Microsoft.
- Click the blue 'Open' button.



Verify Your Identity

- After selecting open a page to verify your identity will be Open
- Enter the email that the item was shared to.
- Click the blue “Next” button.



Microsoft

Verify Your Identity

You've received a secure link to:

MA DDS Client Folder_External

To open this secure link, we'll need you to enter the email that this item was shared to.

1 Enter email ⓘ

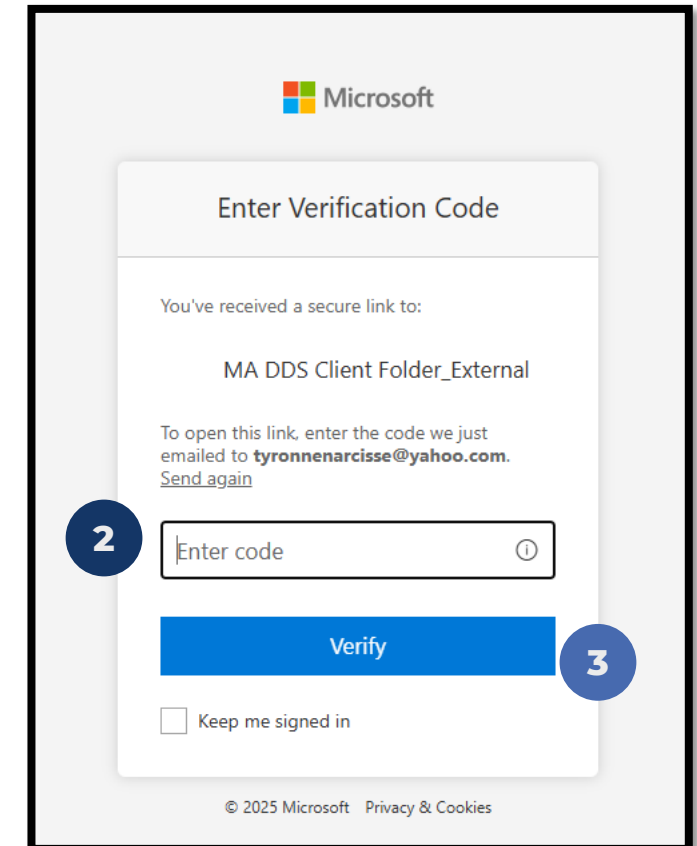
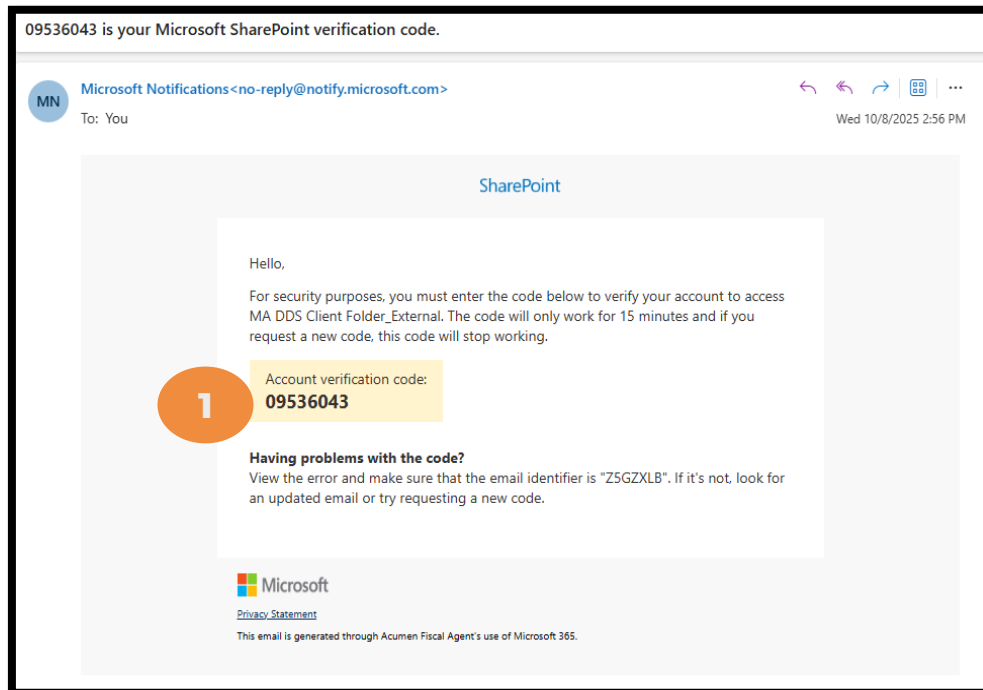
2 Next

By clicking Next you allow Acumen Fiscal Agent to use your email address in accordance with their privacy statement. Acumen Fiscal Agent has not provided links to their terms for you to review.

© 2025 Microsoft Privacy & Cookies

Enter Verification Code

- After verifying your identity, an 8-digit code will be emailed to you.
- Enter the 8-digit code and select the blue “Verify” button
- Optionally you can select “Keep me signed in”





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Sharepoint

Access the Shared Site



- After Invitation & Identity Verification
 - You'll be directed to the East Regional Site
- Access to folders will vary by role and permissions
 - Brokers, Case Managers, Regional Managers, Associate Managers.
- Visibility is role-based to protect sensitive information

A screenshot of the Microsoft SharePoint interface for the "East Regional" site. The breadcrumb path shows "ER" > "East Regional" with a blue arrow pointing to the site name. The left navigation pane includes "Home", "Pages", "Test", "Site contents", "Recycle bin", and "Edit". The top ribbon contains "New", "Upload", "Edit in grid view", "Add shortcut to OneDrive", "Pin to Quick access", "Export to Excel", and "Automate". The main content area displays "Documents" with a view selector. Under "In site library", a table lists folders:

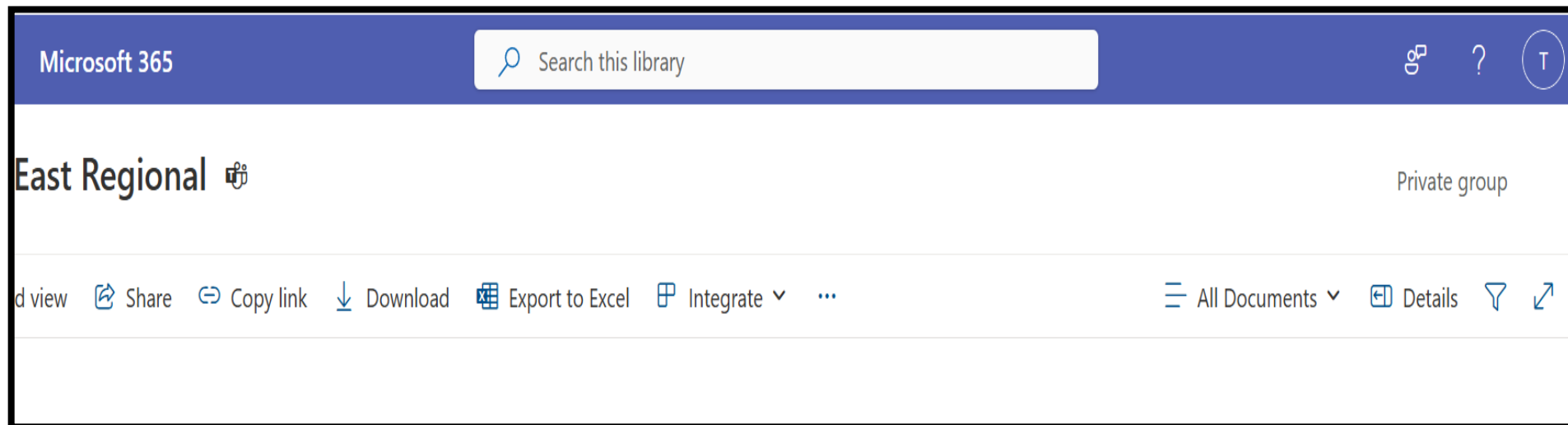
Name	Modified	
EES Issues and Questions	August 8	
General	October 11, 2022	
MA AWP ACM Documents	September 22	
MA DDS Client Folder_External	December 16, 2024	
MA Internal	January 29	
MA PDP Broker Documents	September 24	

The bottom of the list shows "Count 6".

Use the Search Bar



- Located at the top of the SharePoint page.
- Type in keywords related to the document or topic you're looking for.
- Press Enter to view results.
- Use filters (e.g., file type, date) to narrow down results.



Document types found in Sharepoint



- After selecting the folder, you want to access, there will be different type of document types located in the share point.
- All documents are allowed to view and download.

The screenshot shows a SharePoint document library interface. At the top, there are navigation options: "Edit in grid view", "Share", "Copy link", "Download", "Export to Excel", "Integrate", and a menu icon. On the right, there are filters: "All Documents", "Details", and a search icon. The breadcrumb path is "Documents > MA DDS Client Folder_External > Training". Below this, there is a table with two columns: "Name" and "Modified".

Name	Modified
FAQs_Feb 2025_post Liz.docx	February 6
MA Acumen DCI Authorization Role Tra...	January 22
MA Acumen DCI Case Worker Role & P...	December 12, 2024
MA AWP & DESE Acumen DCI Authoriz...	December 12, 2024

Document types found in Sharepoint



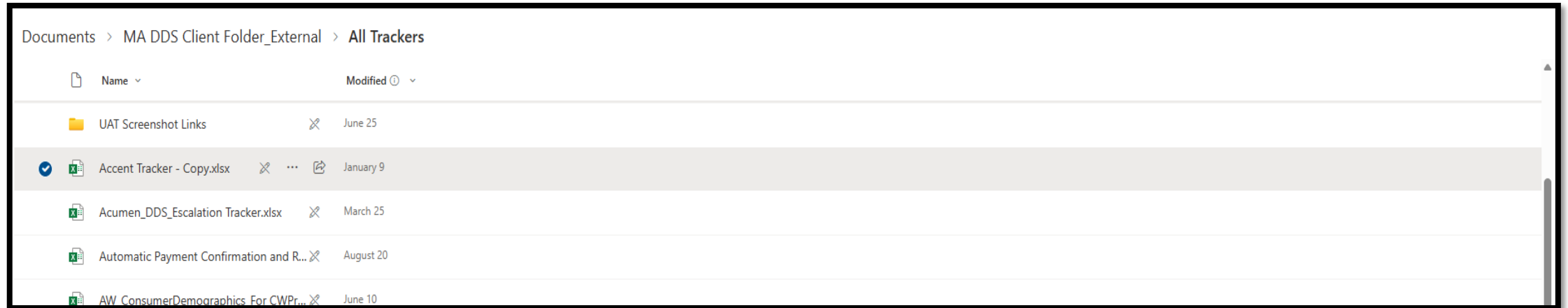
- After selecting the folder, you want to access, there will be different type of document types located in the share point.
- All documents are allowed to view and download.



Opening the File

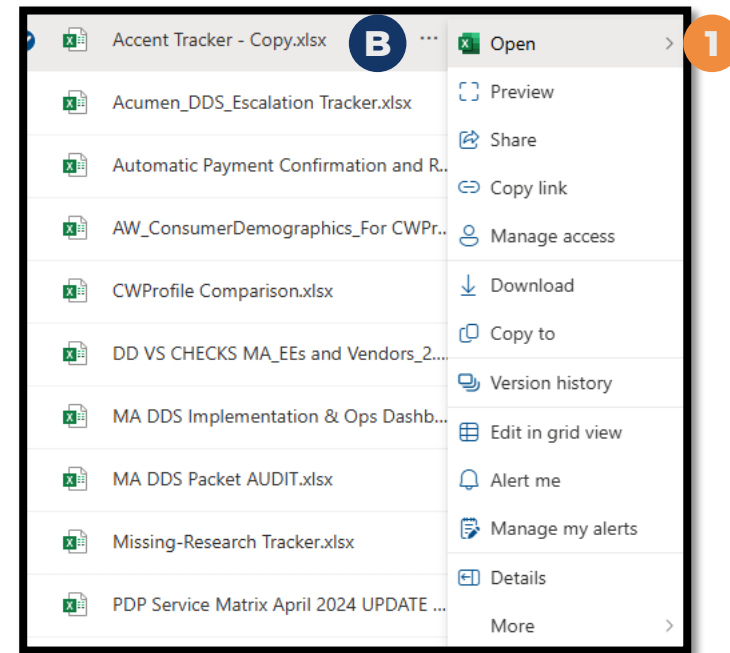
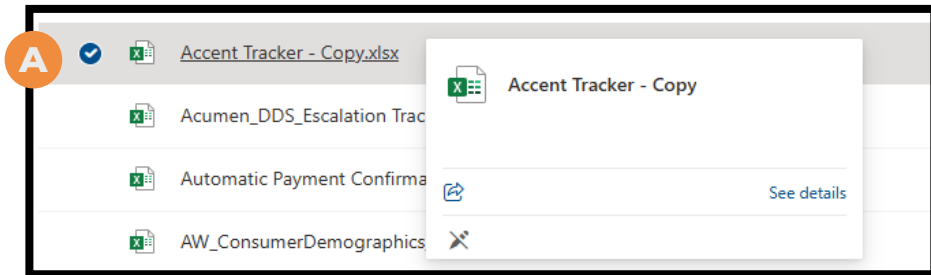


- After selecting locating the file you want to open.
- Click anywhere on that line to select the document



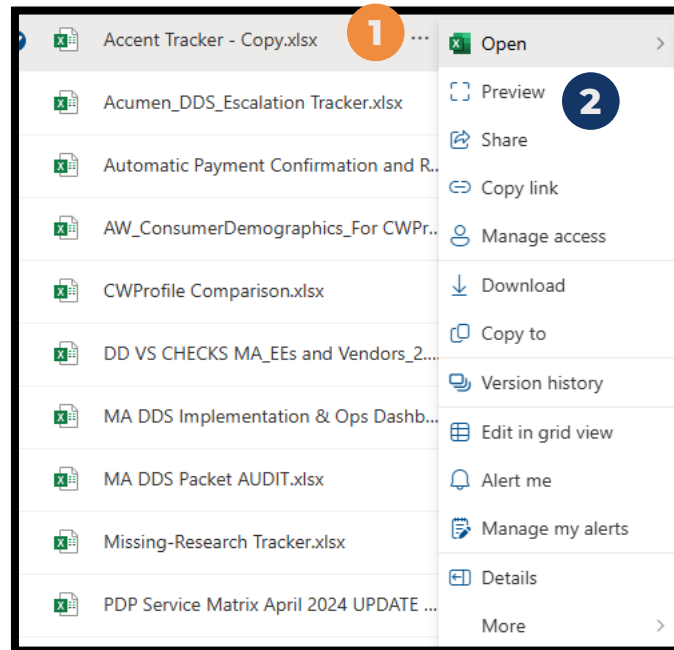
Opening the File

- Place mouse on hyper link to open the document
- Alternatively, you can select the “More Action” button next to the documents name, this will create a drop-down menu with the ability to Open the file.



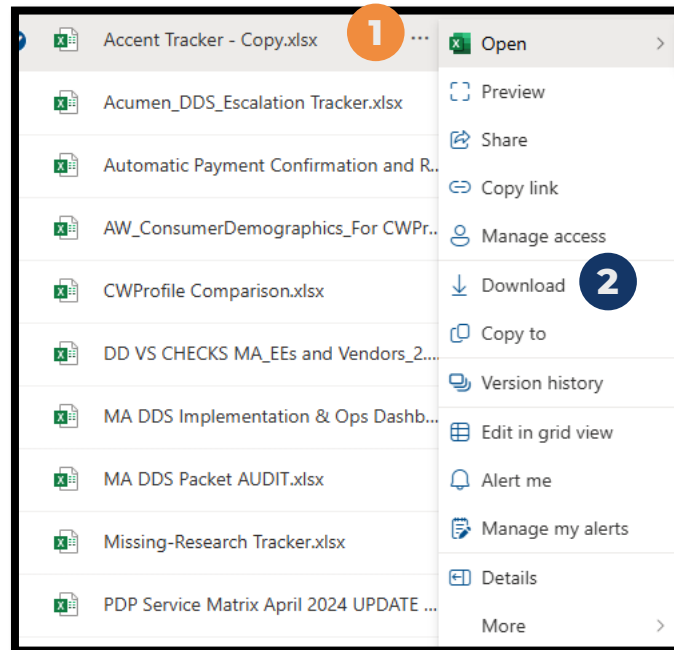
More Actions: Preview button

- Not sure if this is the correct file you need?
- Alternatively, you can select the “More Action” button next to the documents name, this will create a drop-down menu with the ability to Open the file.



More Actions: Download button

- If you need to download a file.
- Select the “More Action” button next to the documents name, this will create a drop-down menu with the ability to download the file.





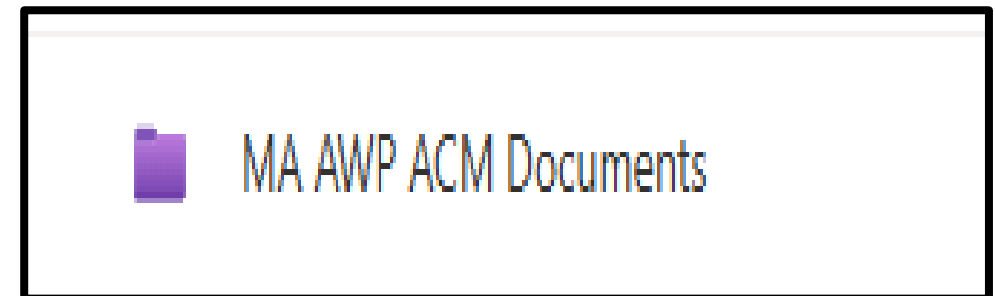
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Navigation

MA AWP ACM Documents Access Overview



- For Case Managers
- This folder is intended for **Case Managers** only
- Contains sensitive information — access restricted to authorized personnel
- Case Managers are responsible for sharing info with brokers
- If you are **AWP Brokers**
- You do not have access to this folder
- For any needed information, please follow up with your Case Manager



MA AWP ACM Documents Contents



- **Training Materials & Help Documents**
 - Guidance for Case Managers
 - Support resources for AWP processes
- **Live Spreadsheet of EORs with EINs**
 - Real-time tracking of Employer of Record registrations
 - EIN status updates
- **Check Reports for AWP Provider Payments**
 - Record of all payments issued
 - Used for reconciliation and tracking

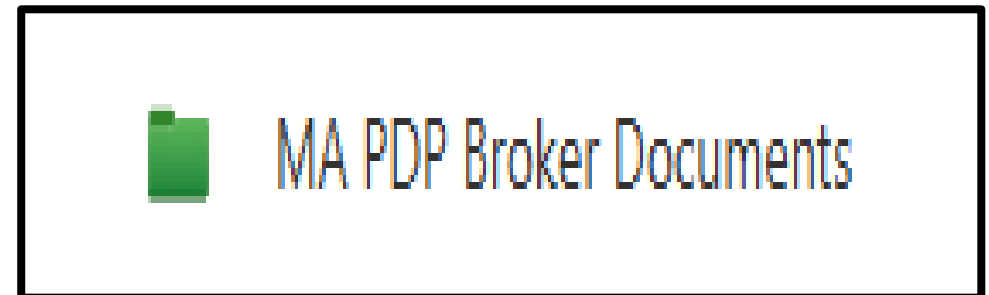
A screenshot of a document management system interface. The breadcrumb path is "Documents > MA AWP ACM Documents". The table below lists the contents of this folder.

Name	Modified
AWP	October 2
Check Run Reports	September 22
Copy of MA DDS Employee Pay Calculator_...	4 days ago
MA AWP - EORs with EINs.xlsx	October 1
MA AWP ENHANCED CW PRESENTATION...	September 22
MA AWP EVV Methods & Verification.docx	September 22
MA AWP Service Matrix.xlsx	September 23
New Agent Assignments.xlsx	October 6
Time Entry Statuses.pdf	September 22

MA PDP Broker Documents Access Overview



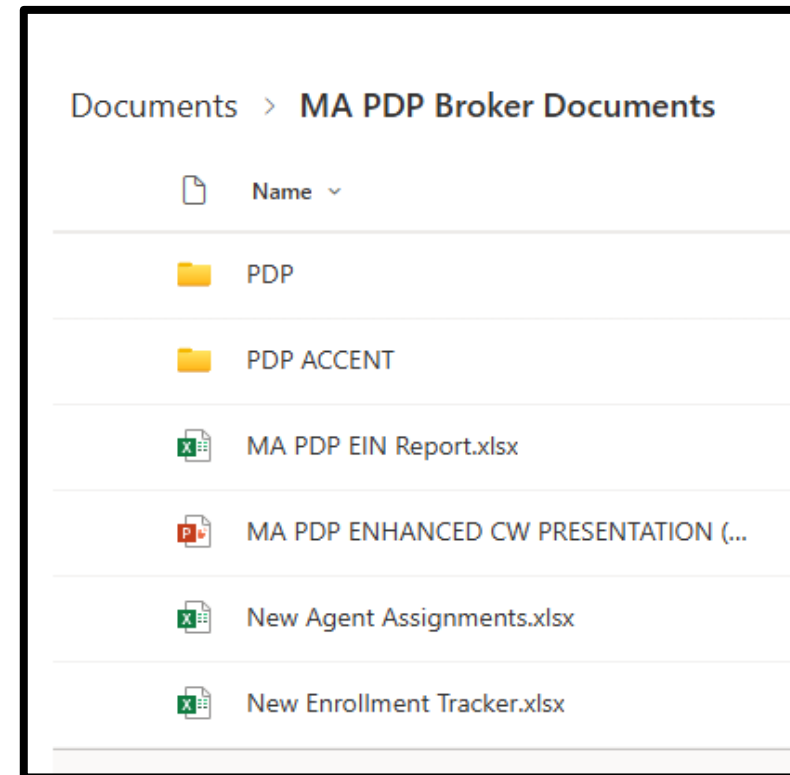
- For all **PDP state workers** (brokers, associate managers, regional managers) have access to this folder



MA PDP Documents Contents



- **Training Materials & Help Documents**
 - Guidance for PDP processes
 - Support resources for brokers
- **Live Enrollment Tracker**
 - Real-time updates on participant enrollment
 - Used for monitoring and planning



MA DDS CLIENT FOLDER Access Overview



- Only the regional managers & directors have access to this folder



Troubleshooting Tips



- Can't find invite? Check spam/junk folder.
- Access denied? Confirm correct email and permissions.
- Login loop? Clear browser cache or use incognito mode.

Support






- Contact your organization's support team for help.
- Provide screenshots or error messages if needed.
- Follow up with any unresolved access issues.



Resources

Helpful Resources

Utilize our Websites

-  [Massachusetts- Training Materials](#) for **more help**
 - This will give you a full list of Training Materials for DCI
-  [Massachusetts State Page](#)
 - This will give you MA specific details with Acumen Fiscal Agent
-  [Messaging Module/Account Statement Article](#)
 - This will give you specific details with about using the messaging module

Contact the Acumen Support Team

-  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





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QUESTIONS?

Thank you!

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