

Acumen VDC DCI Employer Time Approval Training

Welcome to Acumen!

Thank you for joining the Acumen Family!



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

Agenda



| | |
|--|--|
| | Overview |
| | Mobile App Download & Login |
| | Mobile App – Manage & View Entries |
| | Web Portal – Navigation & Dashboard |
| | Web Portal – Messaging |
| | Web Portal – Manage Entries |
| | Web Portal – Employees |

Overview

Ways Employers Approve Time

Web Portal



OR

Mobile App



- **Full access to Employer Account**
- **Acumen.dcisoftware.com**
- Time Management
- View all Historical Punches
- Manual Time Approval
- [Profile Settings](#)

- **Quick & Easy way to approve time**
- Limited functionality
- iPhone 6 or Newer running iOS 15+
- Android Phones 4.6 inches or larger running Android 8.0+

Mobile App Download & Login

- Used for approving time
- Can be downloaded on a mobile device or tablet
- View all entries including status & details

Download DCI Mobile EVV

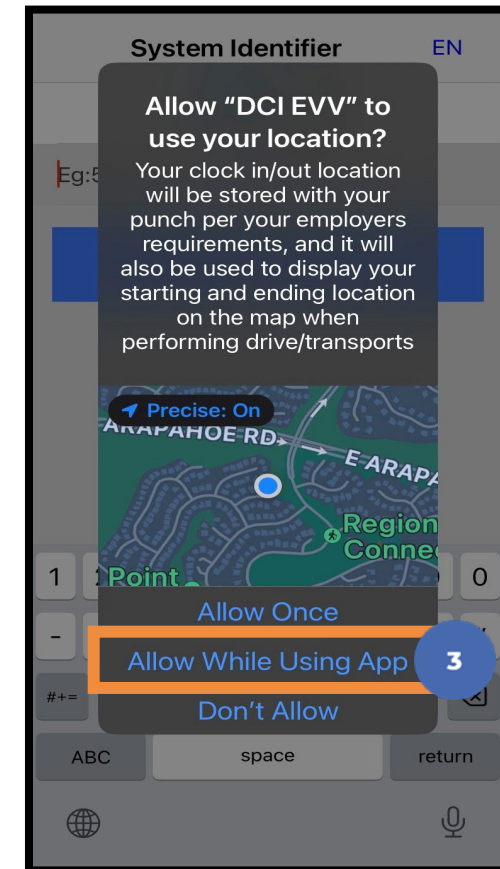
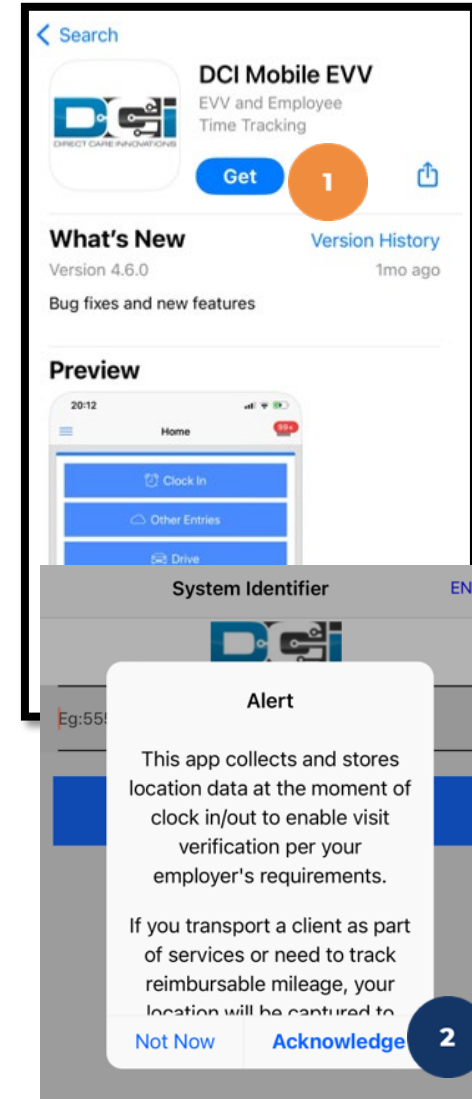
1. [Download](#) the **DCI Mobile EVV** App



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 is **228636**

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 mobile application interface, each with numbered callouts (1-5) indicating key steps:

- Screenshot 1 (Left):** Shows the 'Select Agency' screen. Callout 1 points to the 'Search Agency' text input field. A blue 'Next' button is at the bottom.
- Screenshot 2 (Middle):** Shows the 'Select Agency' screen with 'acu' entered in the search field (Callout 2). A list of agencies is shown below: 'Acumen – All Other States & Programs (including Kansas Helpers) - 228636' (Callout 3) and 'Acumen – North Carolina (NC CAP only) & Wisconsin (formerly Outreach) - 2015'. A blue 'Next' button is at the bottom (Callout 4).
- Screenshot 3 (Right):** Shows the 'Login' screen. Callout 5 points to the dropdown menu showing 'Acumen - All Other States - 228...'. Below are fields for 'Username*' and 'Password or PIN*', a 'Remember me' checkbox, a blue 'Login' button, and a '[Forgot Password?](#)' link.

Log into the DCI Mobile App



1. Enter employer credentials
 - ✓ Acumen provided a **username** and **password** on the Good To Go/Welcome letter
 - ✓ 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 mobile app's login screen. At the top, it says "Login" and "EN". Below that is a dropdown menu showing "Acumen - All Other States - 228...". There are two input fields: "Username*" and "Password or PIN*", with a callout "1" pointing to the Username field. Below the password field is a "Remember me" option with an unchecked radio button. At the bottom is a large blue "Login" button with a callout "2" pointing to it, and a "Forgot Password?" link below it.

Login EN

Acumen - All Other States - 228... ▾

Username*

1

Password or PIN* 

Remember me

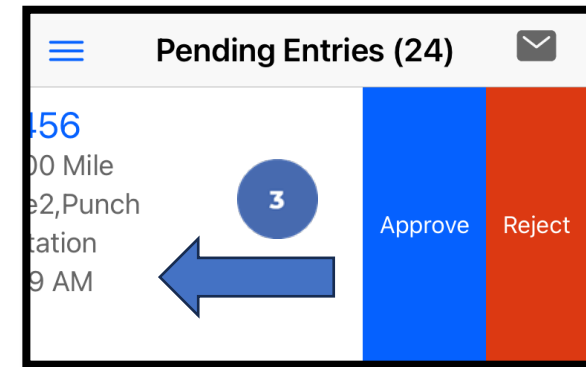
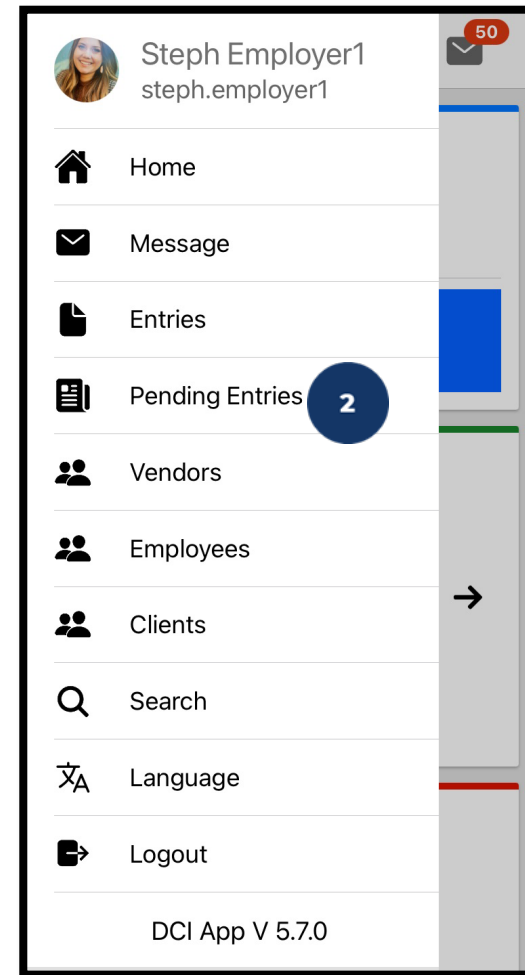
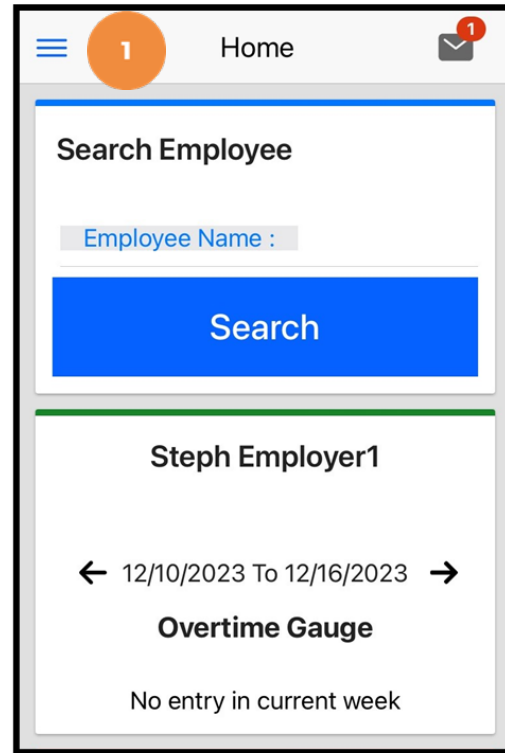
Login 2

[Forgot Password?](#)

Manage & View Entries

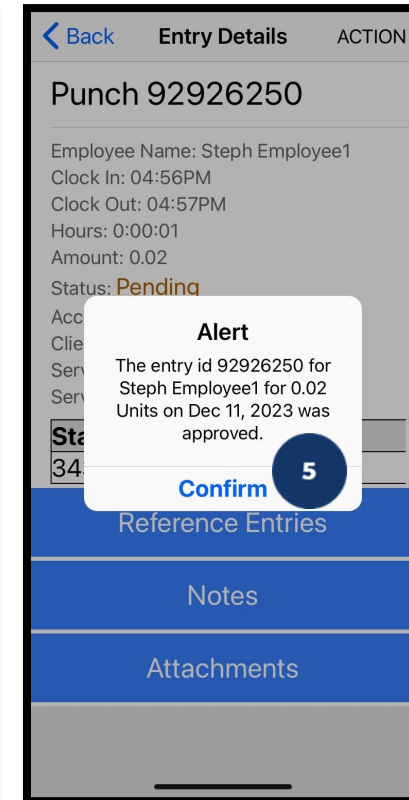
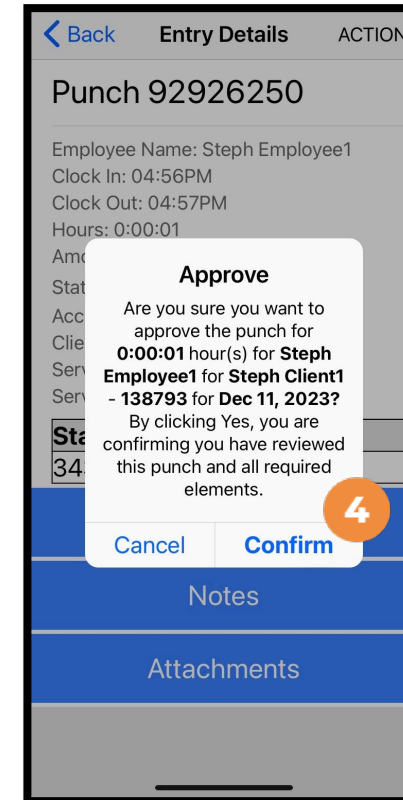
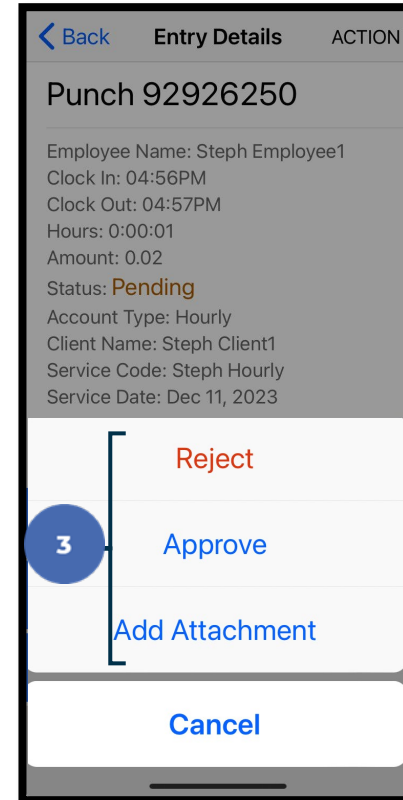
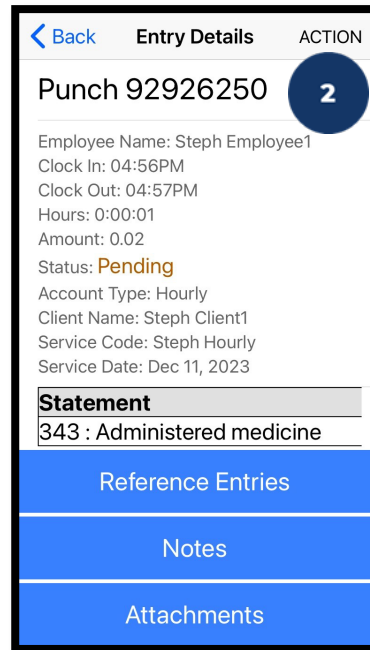
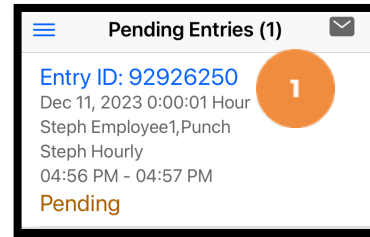
Review & Approve Entries

1. Click the **Menu** in the top left corner of the screen
2. Select **Pending Entries** on the submenu
3. **Swipe left** on the punch to select either the blue **Approve** button or the red **Reject** button



Review & Approve Entries (cont.)

1. Alternatively, click the blue **entry ID** hyperlink to open the entry details
2. Click **ACTION** in the top right corner
3. Select **Reject**, **Approve**, or **Add Attachment**.
4. On the pop-up alert window, view the punch details and Click **Confirm** to initiate the confirmation process.
5. On the pop-up alert window, click **Confirm** again to complete the confirmation process.



*Please note:

If the action taken was to approve the entry, the status changes to Approved and the entry will be processed for payment.

***The program may have a timely filing rule meaning that entries must be approved within a certain number of days from the date of service.**

Entry Status



- **Unverified:** Entries that the Employer or Admin (someone other than the employee) enters or edits on behalf of an employee. The employee must resolve the unverified entries so the employer can review.
- **Unvalidated:** Temporary status. Entries that are waiting for the business rule validation process to complete. This process runs multiple times an hour. Moves to pending or rejected status after processes run.
- **Pending:** Entries that are awaiting review and approval by the Employer. Display on the Pending Entries page.
- **Rejected:** Entries that have been rejected by the Employer or a system process
- **Approved:** Entries that have been approved by the Employer and are ready to be processed
- **Batched:** An approved entry that has been included in a pending payroll batch
- **Processed:** Entries that have been processed and are ready for payroll

Web Portal - Navigation, Profile Settings, Messaging & Dashboard

Full Site – Most compatible when accessed via desktop or laptop

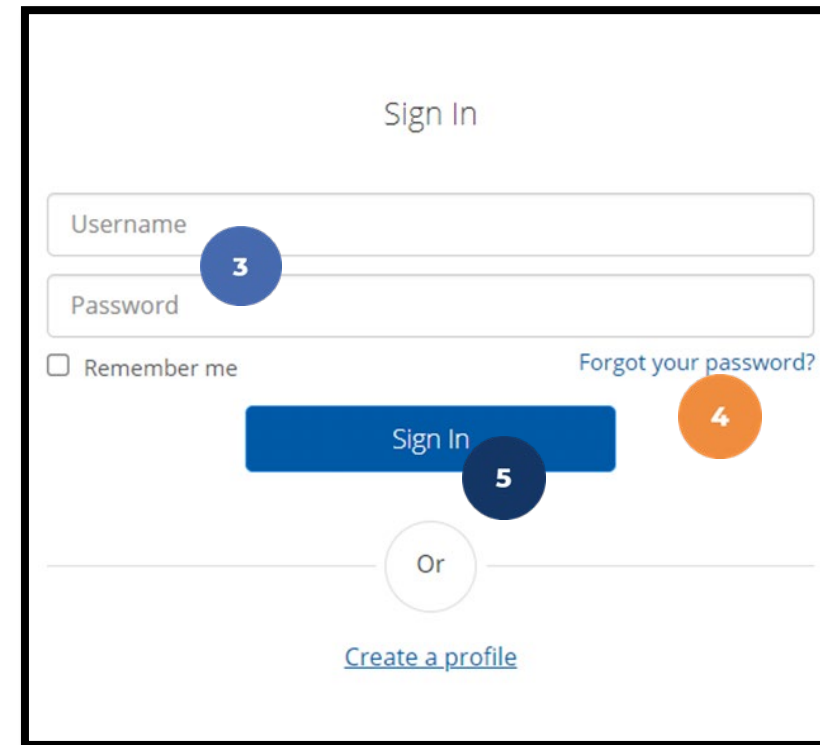
- The employer reviews and manages time
- Employees correct punches and/or enter historical time
- All users may update profile settings

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
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

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

1 acumen.dcisoftware.com



Sign In

Username **3**

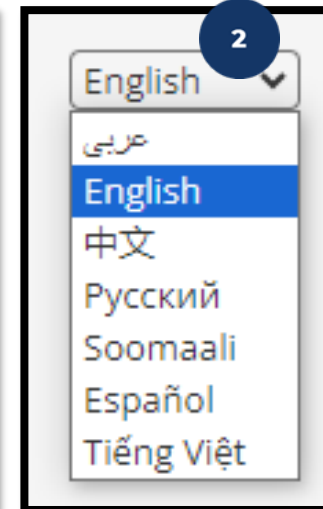
Password **3**

Remember me [Forgot your password?](#) **4**

5 Sign In

Or

[Create a profile](#)



2

English ✓

عربي

English

中文

Русский

Soomaali

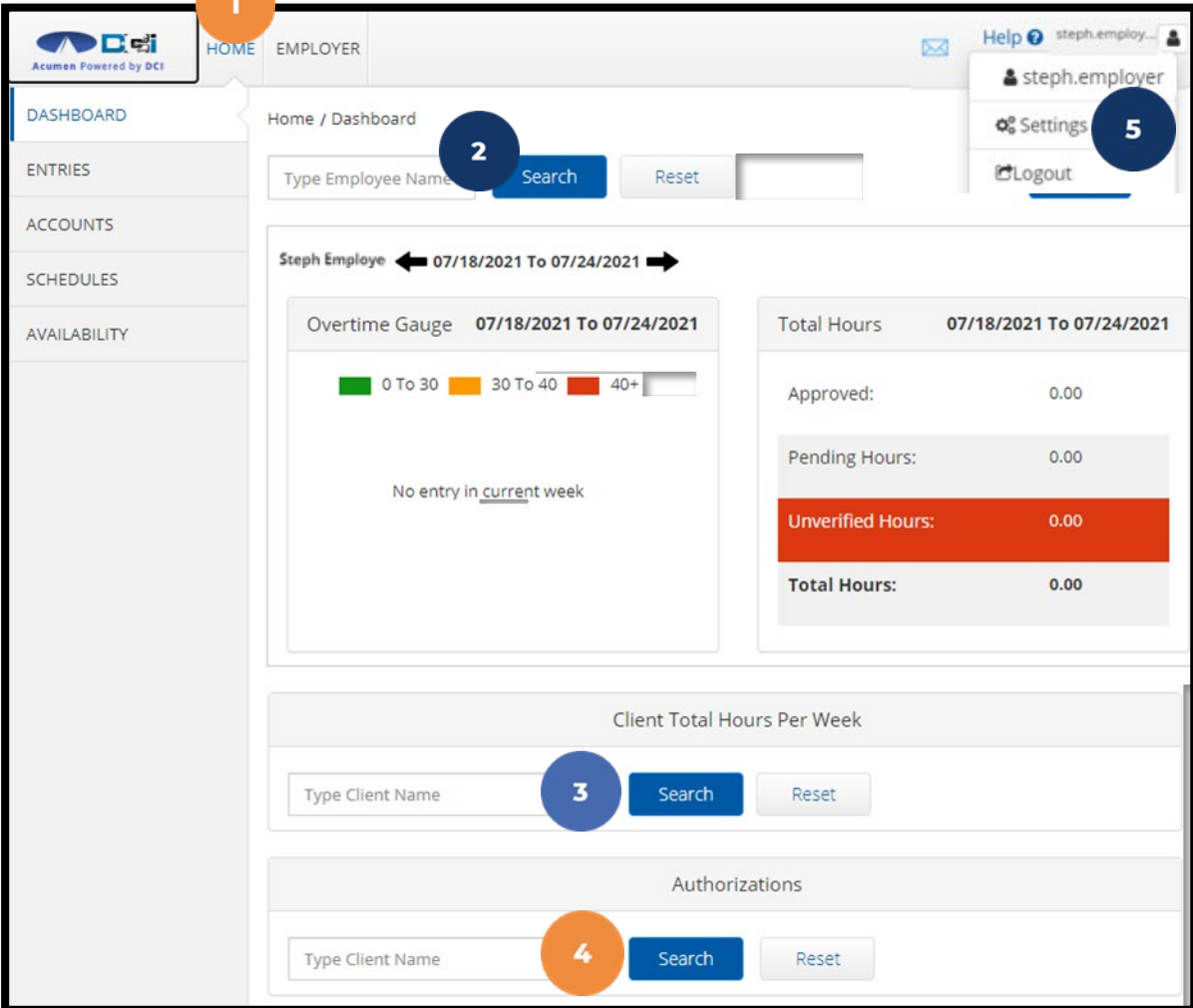
Español

Tiếng Việt

Dashboard

1. Select **Home** on the main menu
2. Enter an **employee name** and click the blue **Search** button to view the information below by week. Use the black arrows to toggle between weeks:
 - ✓ Overtime Gauge
 - ✓ Total Hours breakdown
3. Client Total Hours Per Week Widget
 - ✓ Enter the **client name** and click the blue **Search** button to view the total hours worked for the client by week
4. Authorizations (Budget) Widget
 - ✓ Enter the **client name** and click the blue **Search** button to view details of all active authorizations (budgets) detailed on next slide
5. Profile Settings

The **Dashboard** is the landing page



The screenshot shows the Acumen Fiscal Agent Dashboard interface. It features a sidebar menu on the left with options: DASHBOARD, ENTRIES, ACCOUNTS, SCHEDULES, and AVAILABILITY. The main content area is titled 'Home / Dashboard' and includes a search bar for 'Type Employee Name' with a blue 'Search' button and a 'Reset' button. Below the search bar, there is a section for 'Steph Employee' with a date range selector '07/18/2021 To 07/24/2021'. This section contains an 'Overtime Gauge' with a legend for '0 To 30', '30 To 40', and '40+' and a 'Total Hours' table. The table shows 'Approved: 0.00', 'Pending Hours: 0.00', 'Unverified Hours: 0.00', and 'Total Hours: 0.00'. Below the table, there is a 'Client Total Hours Per Week' section with a search bar for 'Type Client Name' and a blue 'Search' button. At the bottom, there is an 'Authorizations' section with another search bar for 'Type Client Name' and a blue 'Search' button. The interface also includes a top navigation bar with 'HOME' and 'EMPLOYER' tabs, and a user profile dropdown menu with options for 'steph.employee...', 'Settings', and 'Logout'. Numbered callouts (1-5) are overlaid on the image to highlight specific UI elements: 1 points to the 'HOME' tab, 2 points to the 'Search' button, 3 points to the 'Search' button in the 'Client Total Hours Per Week' section, 4 points to the 'Search' button in the 'Authorizations' section, and 5 points to the 'Settings' option in the user profile menu.

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 employees clock in and clock out, their 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.

The screenshot shows the 'Authorizations' widget interface. At the top, there is a search bar with 'KZ Client2 - T45158' entered, a 'Date of Service' dropdown, and buttons for 'Search', 'Reset', and 'Display as Time'. Below the search bar, the text 'Authorization for Client: KZ Client2' is displayed. A table below shows the authorization details for 'PCS' with columns for Service Code, Start Date, End Date, Initial Balance, Remaining Balance, Pre Authorization Holds, Current Available Balance, Monthly Max, Weekly Max, and Daily Max. Four numbered callouts (1, 2, 3, 4) are placed above the table columns: 1 above Initial Balance, 2 above Remaining Balance, 3 above Pre Authorization Holds, and 4 above Current Available Balance.

| 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

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.



The screenshot shows the web portal dashboard for 'Steph Employee1' from 12/09/2023 to 12/15/2023. A red banner at the top indicates 'You have 1 high priority message(s) in your Inbox'. The dashboard includes an overtime gauge showing 'No entry in current week' and a table of hours.











| Total Hours | 12/09/2023 To 12/15/2023 |
|---------------------|--------------------------|
| Approved: | 0.00 |
| Pending Hours: | 0.00 |
| Unverified Hours: | 0.00 |
| Total Hours: | 0.00 |

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

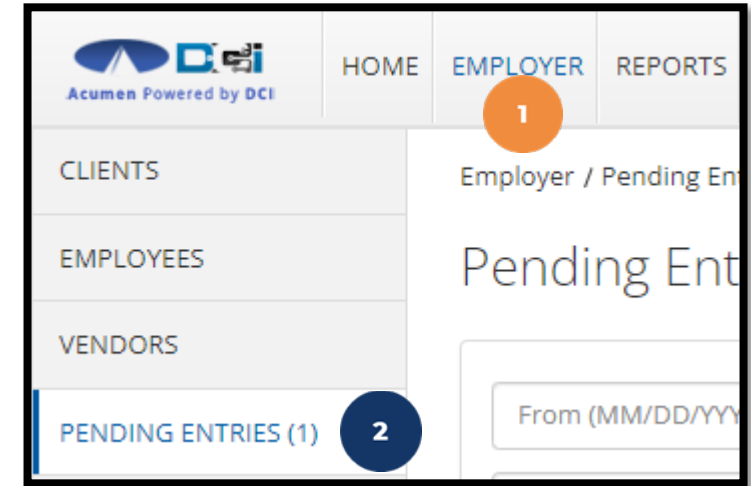


| <input type="checkbox"/> | ★ | Attachments | From | Subject | Date/Time | Action |
|--------------------------|---|---|-----------------|--|---------------------|---|
| <input type="checkbox"/> | ★ |  | DCI Support | Paystub for check date XX/XX/XXXX | 11/02/2023 02:00 AM |   |
| <input type="checkbox"/> | ★ |  | 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 |   |

Manage Pending Entries

Navigate to Pending Entries

1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
 - ✓ The number of pending entries displays in parenthesis on the submenu
 - ✓ All entries requiring review/action appear in the table
3. Hover over the icon in the Needs Review column to see what specifically requires review
 - ✓ Gray Question Mark indicates Portal Signoff Pending. The entry can be approved.
 - ✓ Red Eye indicates that action must be taken to resolve the issue before the punch can be approved



| Approve | Service Date | Start Time | End Time | Pay Rate | Amount | Cost To You (Estimate) | Client Name | Employee Name | Service Code | Account Type | Needs Review |
|------------|--------------|------------|----------|----------|---------|------------------------|---------------|-----------------|-------------------|--------------|--------------|
| A R | Sep 04, 2024 | 10:56 AM | 10:59 AM | 12.00 | 0:00:03 | | Steph Client1 | Steph Employee1 | RESPITE (Hourly) | Hourly | ? |
| A R | Jun 05, 2024 | 10:52 AM | 10:53 AM | 26.00 | 0.02 | 0.52 | Steph Client1 | Steph Employee4 | RESPITE (Dollars) | Hourly | ? |
| A R | Sep 25, 2024 | 01:11 PM | 01:13 PM | 12.00 | 0:00:02 | | Steph Client2 | Steph Employee1 | RESPITE (Hourly) | Hourly | 👁 |
| A R | Sep 25, 2024 | 01:09 PM | 01:10 PM | 12.00 | 0:00:01 | | Steph Client2 | Steph Employee1 | RESPITE (Hourly) | Hourly | 👁 |

Employees, Clients Details

Employee Details Page

1. Click **Employer** on the main menu
2. Select the **Employees** tab on the submenu
3. Click anywhere on the selected employee's row



| Name | Employee # | Phone # | Email | Time Zone | Type | Status |
|-----------------|------------|----------------|--------------------------------|-------------|-------------------|--------|
| Steph Employee1 | 721 | (222) 222-2222 | stephanies+320@dcisoftware.com | MT (UTC-07) | Hourly Non Exempt | Active |

Employee Details Page

4. View the employee details page including widget boxes (Basic Demographics, Other Details) containing important information
5. Unlock Employee Profile if needed

Home / Employees / Steph Employee1

Employee Details - Steph Employee1

[Actions](#)

Basic Demographics

Address: 100 Happy Jack Lane
Aurora, CO 80016-0000

GNIS: 08-005-204737

Phone: (222) 222-2222

Email: stephanies+68@dcisoftware.com

Username: steph.employee1

Time Zone: MT (UTC-07)

Type: Hourly Non Exempt

SSN: ###-##-#### [Show](#)

Allow SSN Retrieval: No [i](#)

Mobile Device Id: D43FFC8A-13A6-4088-ACDC-2FB7DFF59F8E

Status: Active

Other Details

Average Caregiver Rating: 0

Domestic Worker: No [i](#)

Domestic Worker 7 Day Exemption: No [i](#)

Domestic Worker Preferred Day of Rest: Sunday [i](#)

Employee Number: 216

Weekly Hours Available: 40.00

Holiday Schedule: [Default Holiday Schedule - 1](#)

Cost Center: [Steph Cost Center](#)

Custom Reports List: None

Employment Status: Active

Authentication Status: **Locked** [Unlock](#)

Photo Set: No

Signature Set: No

Email confirm: Yes

Employee Details Page



6. Scroll beneath the widgets to the tabs:

- **Entries** – All punch entries for the employee. Click the hyperlinked ID number to view entry details and use the Status column to ensure all time for the pay period is entered and approved before the payroll deadline.
- **Accounts** - All accounts (connections) for the employee and is useful for troubleshooting
- **Certifications** - All certifications the employee has on file
- **Notes** – View notes regarding the employee entered by the employer
- **Attachments** – View attachments pertaining to the employee
- **History** – View modifications made to the employee profile

6



Client Details Page

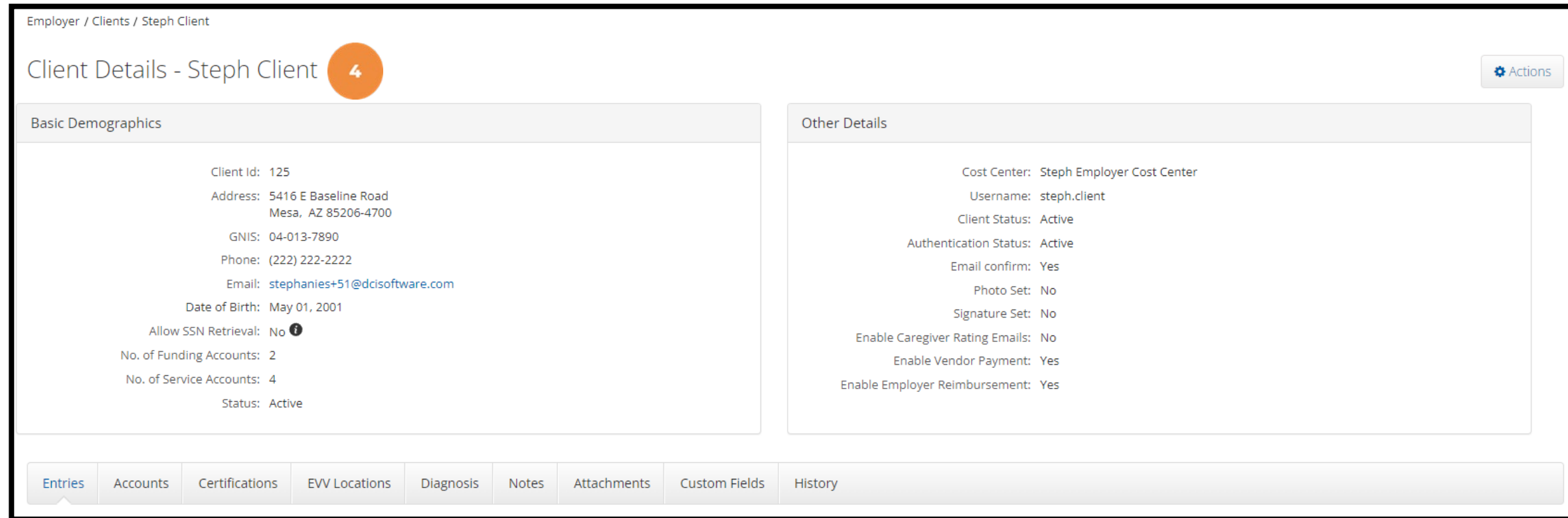
1. Click **Employer** on the main menu
2. Select the **Clients** tab from the submenu
3. Click anywhere on the selected client's row



| 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



The screenshot displays the 'Client Details - Steph Client' page. At the top, the breadcrumb 'Employer / Clients / Steph Client' is visible. The page title 'Client Details - Steph Client' is accompanied by a blue circular icon with the number '4'. An 'Actions' button is located in the top right corner. The page is divided into two main sections: 'Basic Demographics' and 'Other Details'. The 'Basic Demographics' section lists the following information: 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, Date of Birth: May 01, 2001, Allow SSN Retrieval: No, No. of Funding Accounts: 2, No. of Service Accounts: 4, and Status: Active. The 'Other Details' section lists: 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, and Enable Employer Reimbursement: Yes. At the bottom, a navigation bar contains tabs for 'Entries', 'Accounts', 'Certifications', 'EVV Locations', 'Diagnosis', 'Notes', 'Attachments', 'Custom Fields', and 'History'.

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
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

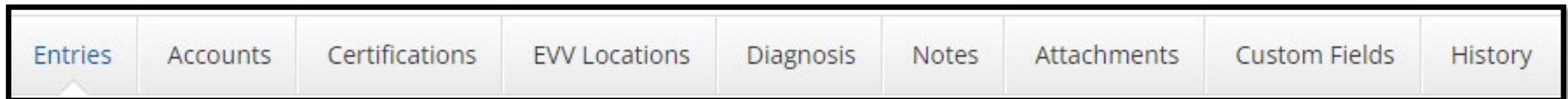
Entries Accounts Certifications EVV Locations Diagnosis Notes Attachments Custom Fields History

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 time 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
- **Attachments** – View attachments pertaining to the client
- **History** – View modifications made to the client profile

5





Acumen Fiscal Agent

Innovation • Opportunity • Freedom

THANK YOU!

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