There are three available Advanced Insights for Vendors:

- ✓ **Vendor Payment Activity & Entry Tracking Report** – allows Vendors to review aging Vendor Entries submitted for their Clients.
- ✓ **Vendor Authorization** – displays all the authorizations available for all Clients associated to the Vendor.
- ✓ **Vendor Authorization Accrual Balances** – displays the accruals schedule by Client. It provides visibility on accruals usage from week to week, to allow Vendors to work with the Employer on an updated schedule to best utilize the available accruals before they expire.

Vendor Payment Activity & Entry Tracking Report

1. Log into the DCI portal acumen.dcisoftware.com
2. Click the **Advanced Insights** button.
3. Click the **Vendor Payment Activity & Entry Tracking Report**.
   - The Vendor can narrow down the results using multiple filters:
     - **Client Name** – Select a specific Individual.
     - **Client DDDID** – Select an individual by their DDD ID.
     - **Status** – Approved, Canceled, Pending, Rejected.
     - **Aging Category** – A bucket of time (by days).
     - **Date of Service** – Use the slider or calendar picker to narrow down the date of service period.
   - The **Sum of Invoice Amount** will display the total amount for all Vendor Entries.
     - This will change depending on the filter(s) selected.
   - The **Invoice Count** is determined by each distinct Invoice Number.
     - This will change depending on the filter(s) selected.
   - The **Count by Aging Category** chart illustrates the amount due per aging period.
     - This will change depending on the filter(s) selected.
     - Hovering over each section, it will display the invoice count for each aging period.
   - The data can be sorted by clicking on each column header.
   - Click the three little dots **More Options**.
     - Click **Export Data**.

<u>Vendor Authorization</u>

1. Log into the DCI portal acumen.dcisoftware.com
2. Click the **Advanced Insights** button.
3. Click the **Vendor Authorization**.

- The Vendor can narrow down the data using multiple filters:
  - **Client Name** – Select a specific Individual.
  - **Client Number –** Select the Client number.
  - **Client DDDID –** Select an individual by their DDD ID.
  - **Service Code –** Select a specific service code.
  - **Status** – Approved, Pending.
- The data can be sorted by clicking on each column header.
- Click the three little dots **More Options**.
  - Click **Export Data**.

<u>Vendor Authorization Accrual Balances</u>

1. Log into the DCI portal acumen.dcisoftware.com
2. Click the **Advanced Insights** button.
3. Click the **Vendor Authorization Accrual Balances**.

- The data will be broken down by week to reflect each authorization per Client.
- The data will show Accrued amount by:
  - **Auth Schedule Amount** – The max accruals to be used for that week per the SDR.
  - **Accrued Auth Amount** – The total accruals for the week per the SDR.
  - **Weekly Paid** – The total accruals paid for the week.
  - **Cumulative Paid** – The sum of accruals paid from start of authorization to week noted.
  - **Weekly Pending** – The total accruals submitted but not yet paid for the week.
  - **Cumulative Pending –** The total accruals submitted but not yet paid up to date.
  - **Weekly Balance Estimate –** The estimated auth amount, less pending and paid Vendor Entries within the week.
- **Please note**: This report is designed to be used with **one** client selected at the time. Please be sure to adjust the authorization period date range as needed to ensure accurate results. For best performance and intended functionality, this report should be **viewed and interacted with in the UI** and **not exported**.