

# North Carolina

## EVV

# Compliance

# Training

## 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



**Overview of Acumen/DCI/EVV**



**Employees & EVV Compliance**



**Employers & EVV Compliance**



**Summary & Questions**



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

# Overview of Acumen, DCI & EVV

Proprietary: For Acumen and Customer Use Only



# Who is Acumen?



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

# Why DCI?

---



- DCI increases compliance with the 21<sup>st</sup> Century Cures Act by capturing real-time punch entries at Clock In/Out at the Start/End of the shift
- Greater accuracy in service tracking, reporting, and billing for in-home care workers
- Reduction of manual work needed with paper processes
- Faster corrections of pay issues ensuring timely payment





Acumen Fiscal Agent  
Innovation • Opportunity • Freedom

# What is EVV?

- The 21st Century Cures Act, signed into law December 13<sup>th</sup>, 2016, by President Obama, requires state agencies to use a system of **electronic visit verification** (EVV) for all Medicaid personal care services (PCS) and home health care services (HHCS) that require an in-home visit by a provider.
- EVV uses electronic devices to verify a provider's visit
- The following data is collected for each visit:
  - ✓ The date of the service
  - ✓ The location of the service
  - ✓ The time the service begins and ends
  - ✓ The individual receiving the service
  - ✓ The individual providing the service
  - ✓ The type of service performed



# Ways Employees Enter Time

## Only use one per shift (each clock in/out)

### Mobile App



- **\*Preferred Method**
- Real Time Entry – **EVV compliant**
- Quick & Easy
- [Mobile App Guide](#)

OR

### Phone EVV



- Landline
- Real Time Entry – **EVV compliant**
- Historical Entry – Non-EVV compliant
- Option when access to a mobile device or computer is limited

OR

### Web Portal



- **Only used for service interruptions**
- Time Management
- [Historical Entry](#) & Corrections – Non-EVV compliant
- Manual Time Approval
- [Profile Settings](#)
- **\*Includes Mobile Web Portal** – Mobile-friendly web portal version accessed via smartphone or tablet

# DCI Requirements

## Devices & Operating Systems (OS)

### Apple

- OS: iOS version 15.0 or later
  - Devices:
    - ✓ iPhone 6s or 6s Plus or later device
    - ✓ iPhone SE
    - ✓ iPod touch (7th generation)

### Android

- OS: Android version 8.0 or later
  - Devices:
    - ✓ 4.6" screen or larger
    - ✓ Due to the wide range of Android devices, we are unable to provide a device list.



## Web Browsers

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

# Employees & EVV Compliance

Proprietary: For Acumen and Customer Use Only

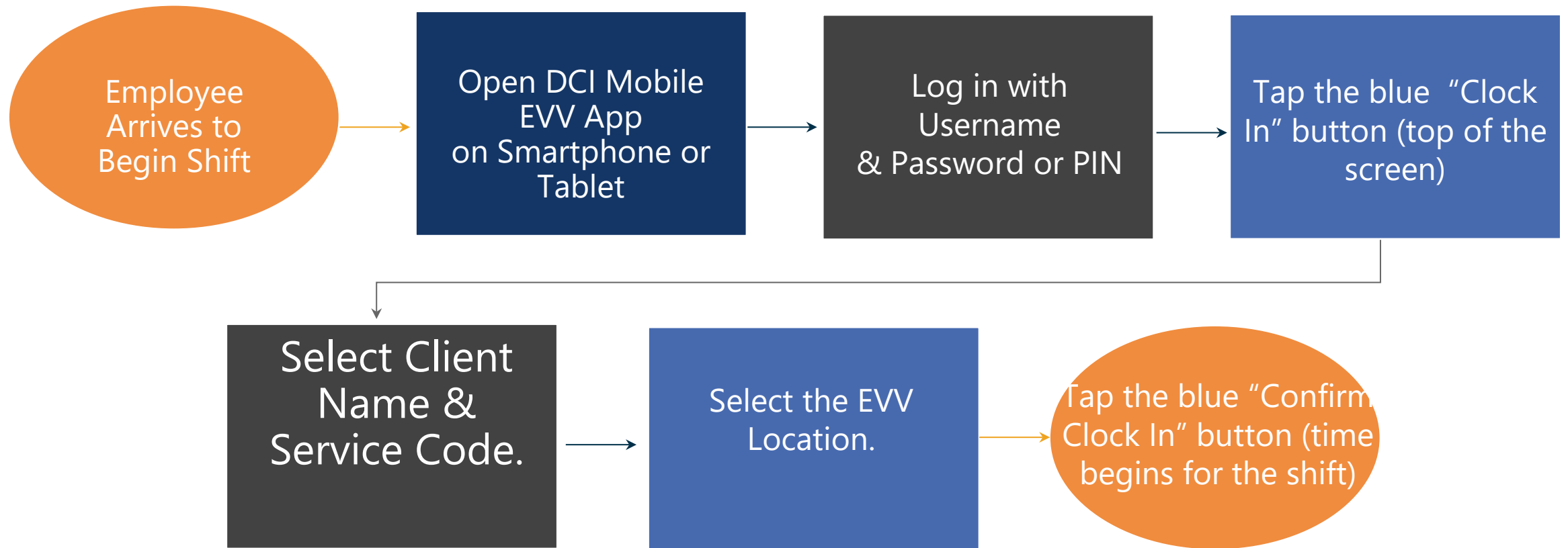


# Clock In/Out Process

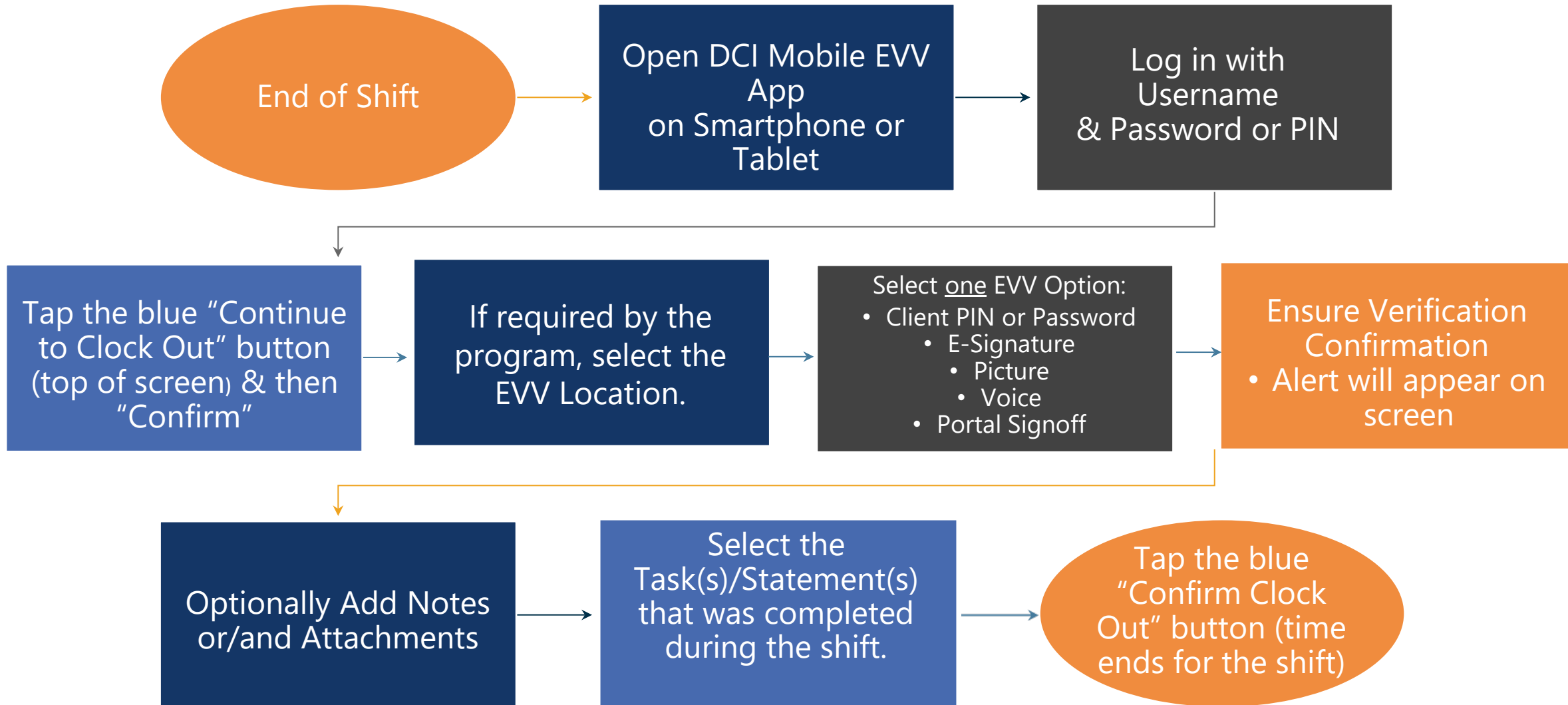
---



# Overview Mobile App Clock In



# Overview Mobile App Clock Out



# Download DCI Mobile EVV

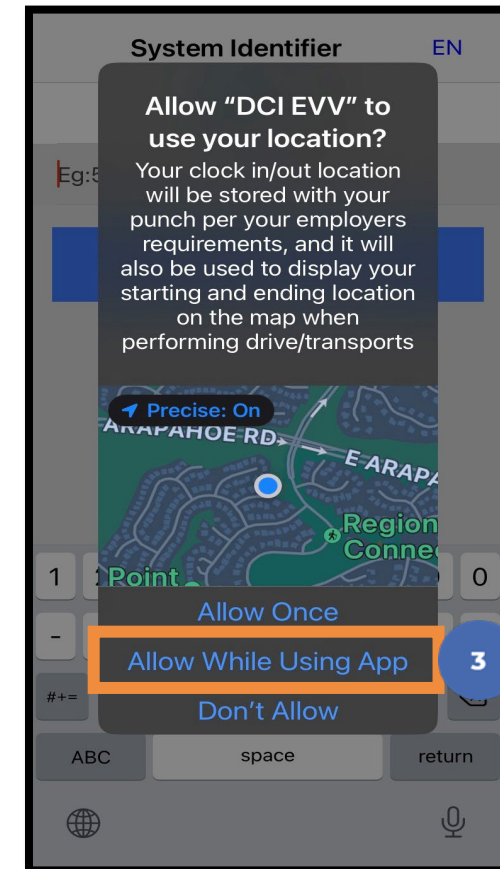
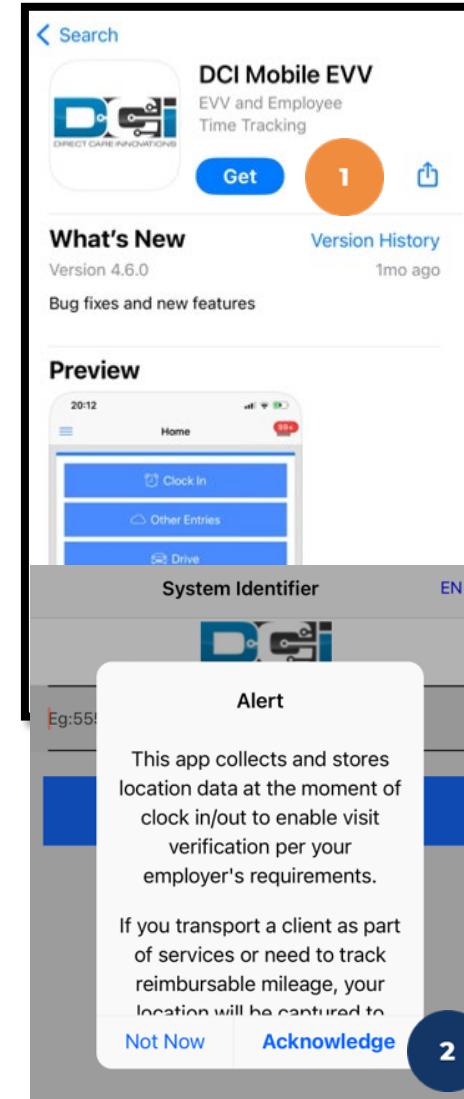
1. [Download](#) the **DCI Mobile EVV** App



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 North Carolina (NC CAP only) & Wisconsin (formerly Outreach) is 2015
  - ❖ 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**

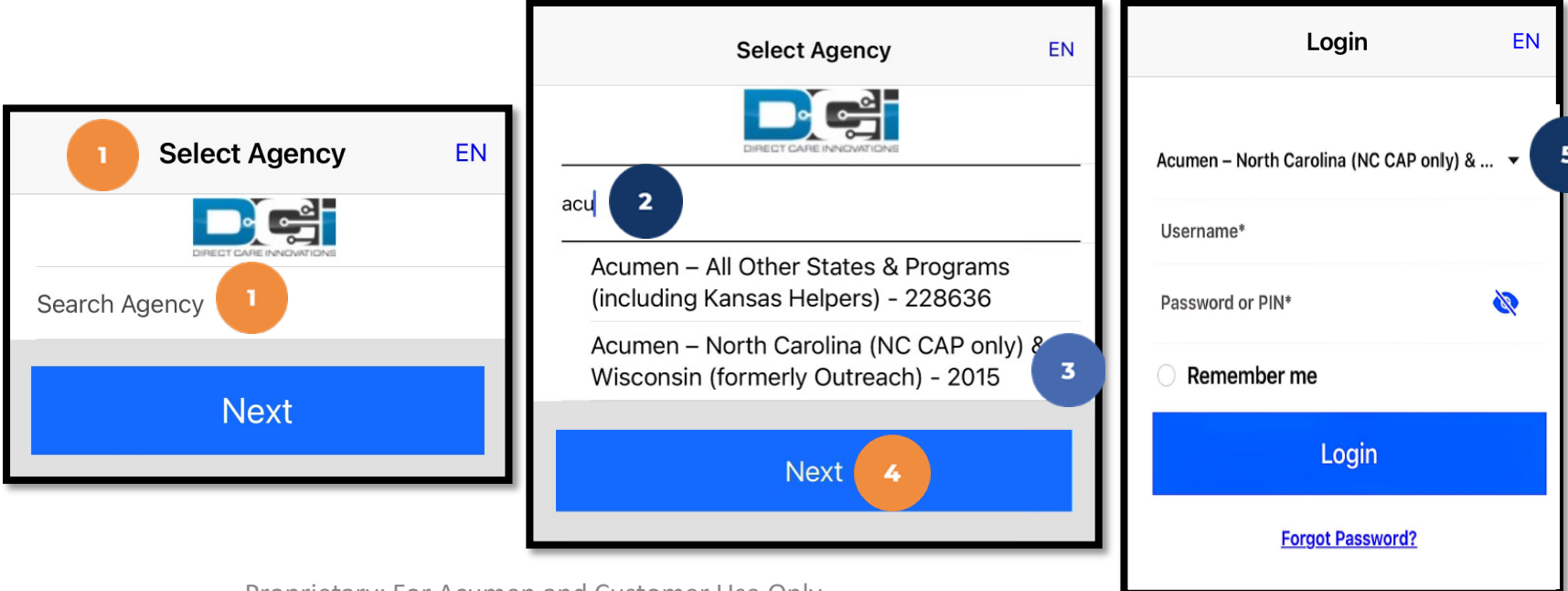
button

### 5. The agency is now

selected and

appears on the

login screen

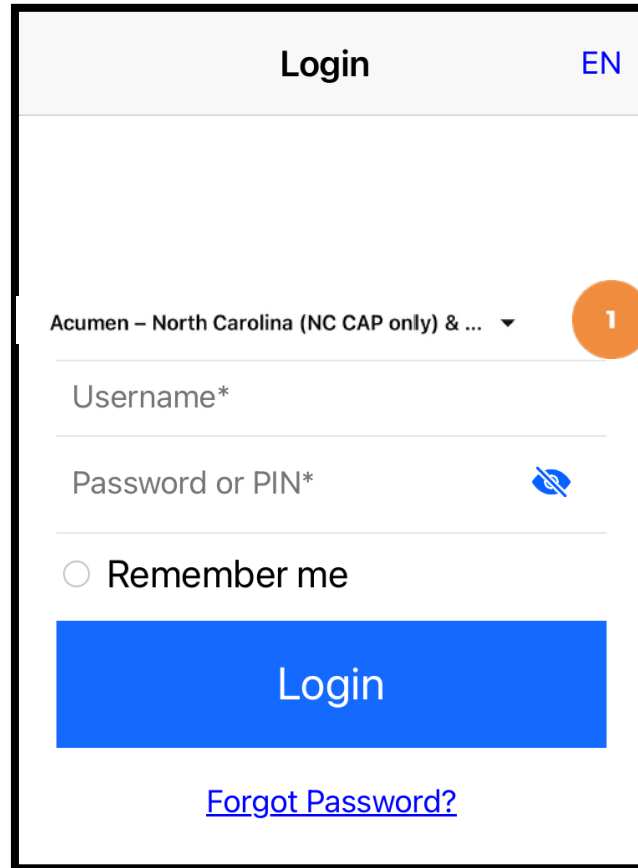


The figure consists of three screenshots of the app interface, each with numbered callouts (1-5) indicating the steps in the agency selection process.

- Screenshot 1 (Left):** Shows the 'Select Agency' screen. A search field contains 'acu' with a callout '1'. A blue 'Next' button is at the bottom with a callout '1'.
- Screenshot 2 (Middle):** Shows the search results for 'acu'. The results list 'Acumen – All Other States & Programs (including Kansas Helpers) - 228636' and 'Acumen – North Carolina (NC CAP only) & Wisconsin (formerly Outreach) - 2015'. The second result is highlighted with a callout '3'. A blue 'Next' button is at the bottom with a callout '4'.
- Screenshot 3 (Right):** Shows the 'Login' screen. The dropdown menu at the top shows 'Acumen – North Carolina (NC CAP only) & ...' with a callout '5'. Below are fields for 'Username\*' and 'Password or PIN\*', a 'Remember me' checkbox, a blue 'Login' button, and a 'Forgot Password?' link.

# Add More Agencies

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



EN

Acumen – North Carolina (NC CAP only) & ...

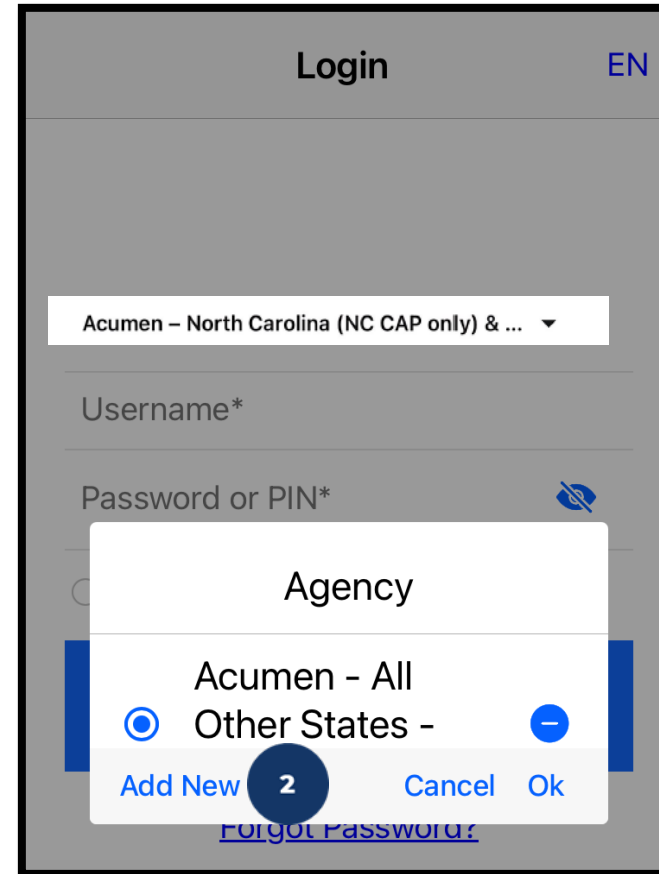
Username\*

Password or PIN\*

Remember me

Login

[Forgot Password?](#)



EN

Acumen – North Carolina (NC CAP only) & ...

Username\*

Password or PIN\*

Agency

Acumen - All

Other States -

Add New Cancel Ok

[Forgot Password?](#)



# Add More Agencies

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

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

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

Login EN

Acumen - All Other States - 228... ▾

Username\*

Password or PIN\*

Add Agency

Search Agency **3**

Cancel Add

[Forgot Password?](#)

Login

Add Agency

acu|

Acumen - All Other States - 228636

Acumen - North Carolina & Wisconsin - 2015

Cancel Add

[Forgot Password?](#)

Login EN

Acumen - North Carolina (NC CAP only) & ... ▾

Username\*

Password or PIN\*

Add Agency

Agency Name

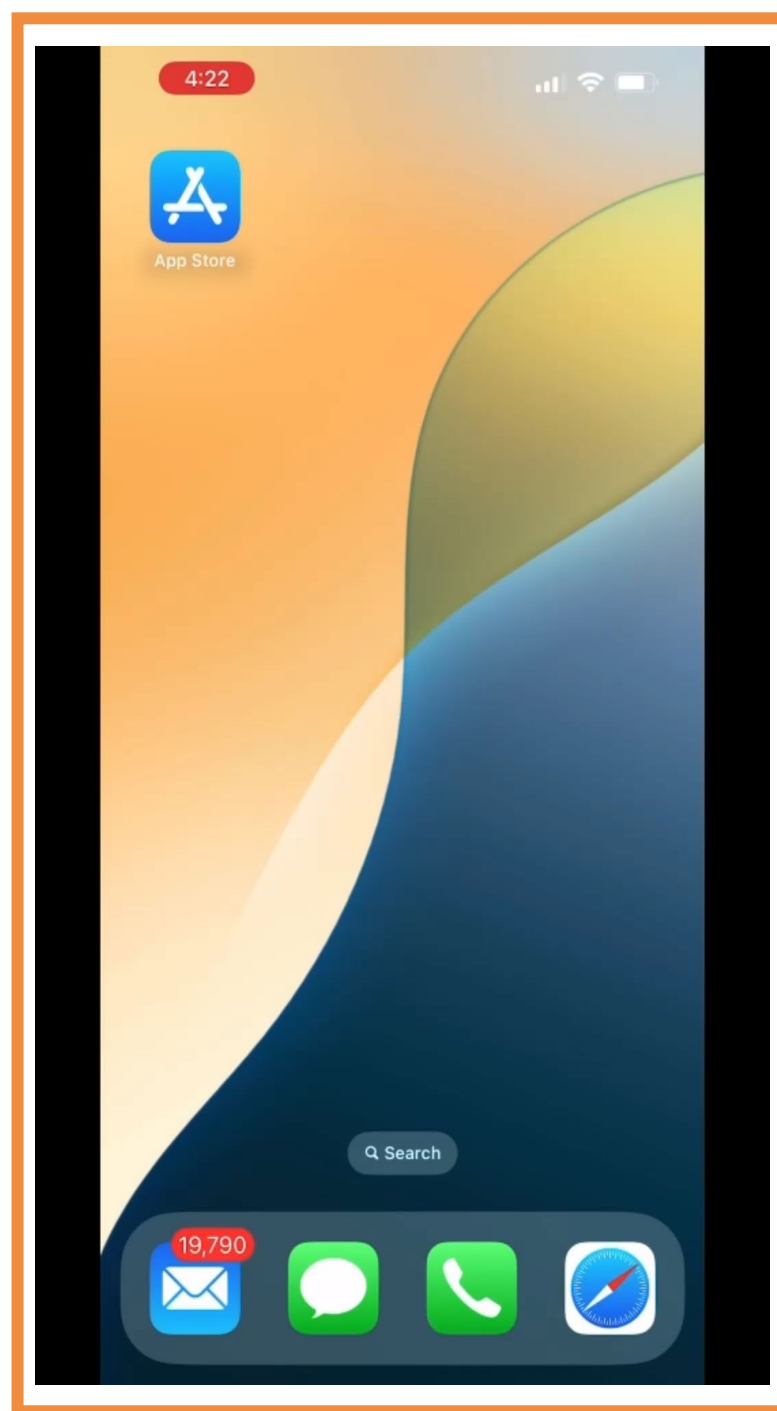
Cancel Add **5**

[Forgot Password?](#)

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

# Mobile App Video

## Downloading the App (Apple User)



# Mobile App Video

## Downloading the App (Android User)



# Log into the DCI Mobile EVV App



1. Enter employee credentials
  - ✓ Acumen provided a **username** and **password** on the Good to Go letter via email or mail
2. Optionally, select the **Remember me** button to remember the Username.

**\*Please note:** Do not use on a shared device

3. 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 customer service or your support coordinator 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 for "Acumen – North Carolina (NC CAP only) & ...". There are two input fields: "Username\*" and "Password or PIN\*", both with a red circle containing the number "1" next to them. Below the password field is a radio button for "Remember me" with a red circle containing the number "2" next to it. At the bottom is a large blue button labeled "Login" with a red circle containing the number "3" next to it. Below the button is a blue link that says "Forgot Password?".

EN

Acumen – North Carolina (NC CAP only) & ...

Username\* 1

Password or PIN\* 1

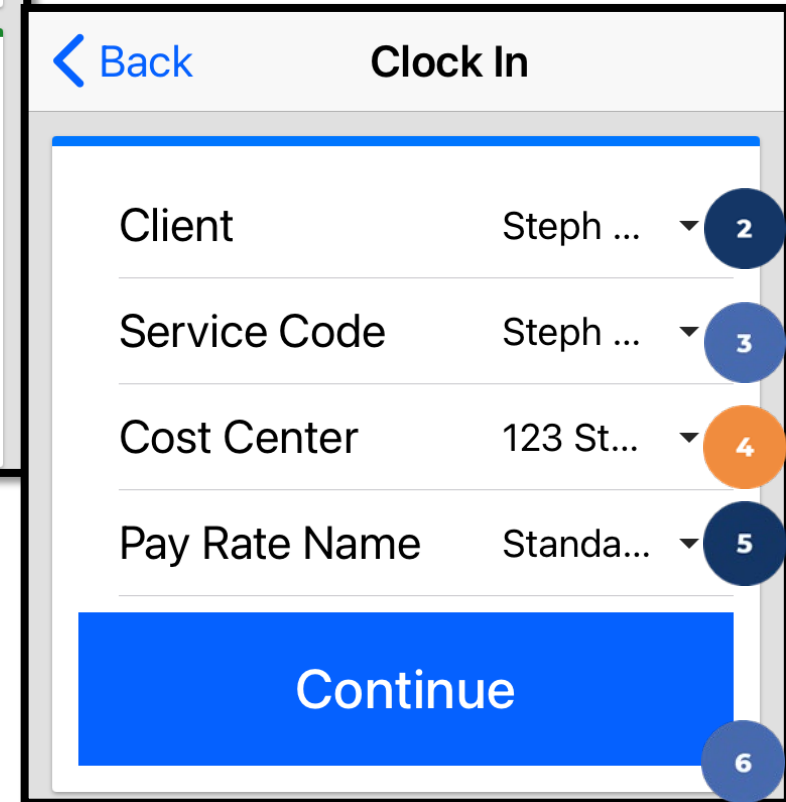
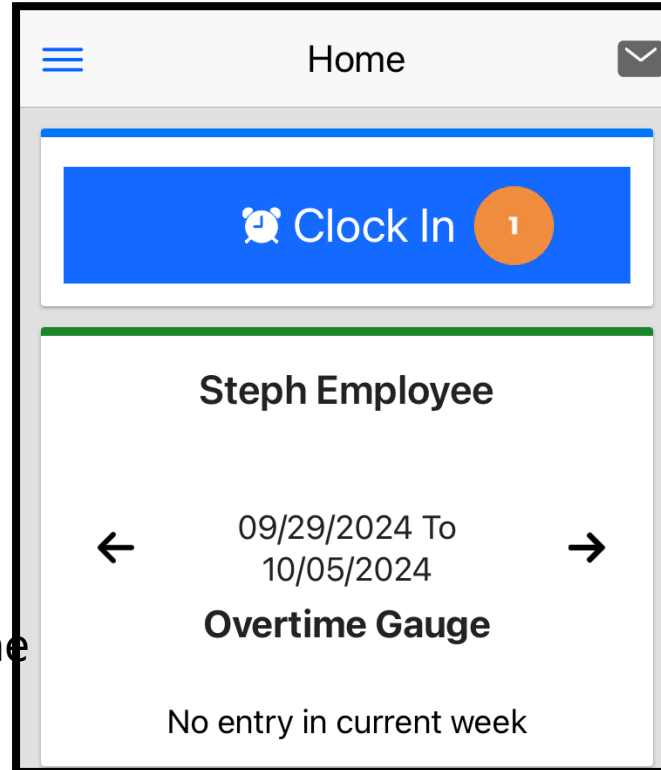
Remember me 2

Login 3

[Forgot Password?](#)

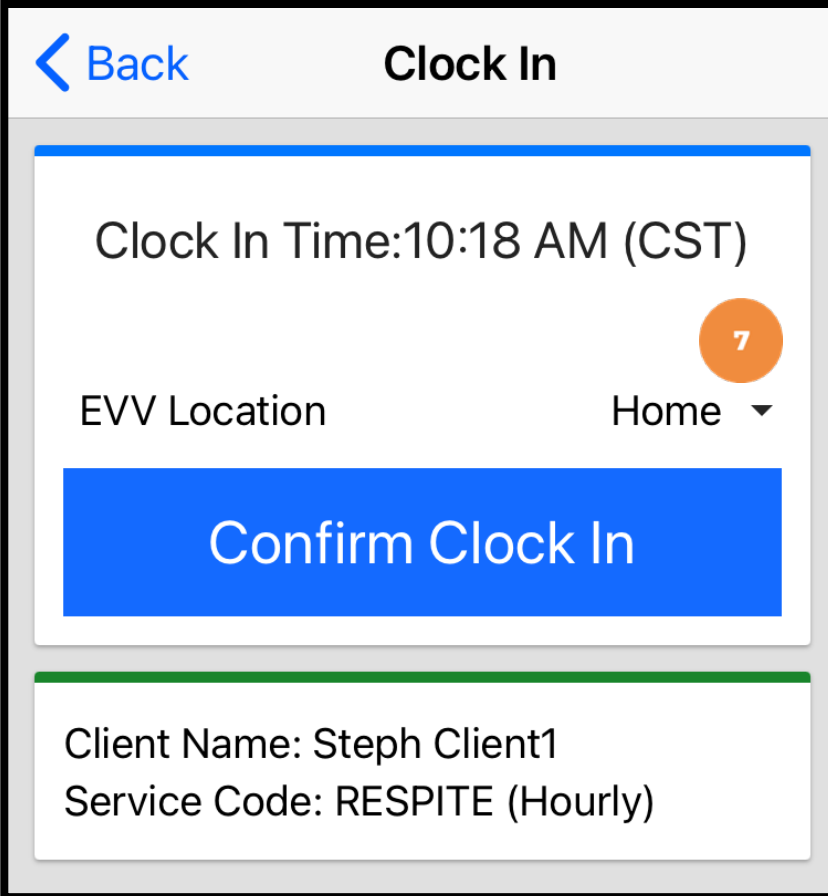
# Clock In on Mobile App

1. Click the blue **Clock In** Button
2. Select the Client's Name
  - Auto-fills for a single client
3. Select the Service Code
  - Auto-fills for a single service
4. Cost Center is always auto-filled
5. If applicable to the program, select the Pay Rate Name from the drop-down.
6. Click the blue **Continue** button



# Clock In on Mobile App (cont.)

7. If required by the program, click the drop-down menu to select the EVV Location.
8. Click **Ok** to confirm the EVV Location selection



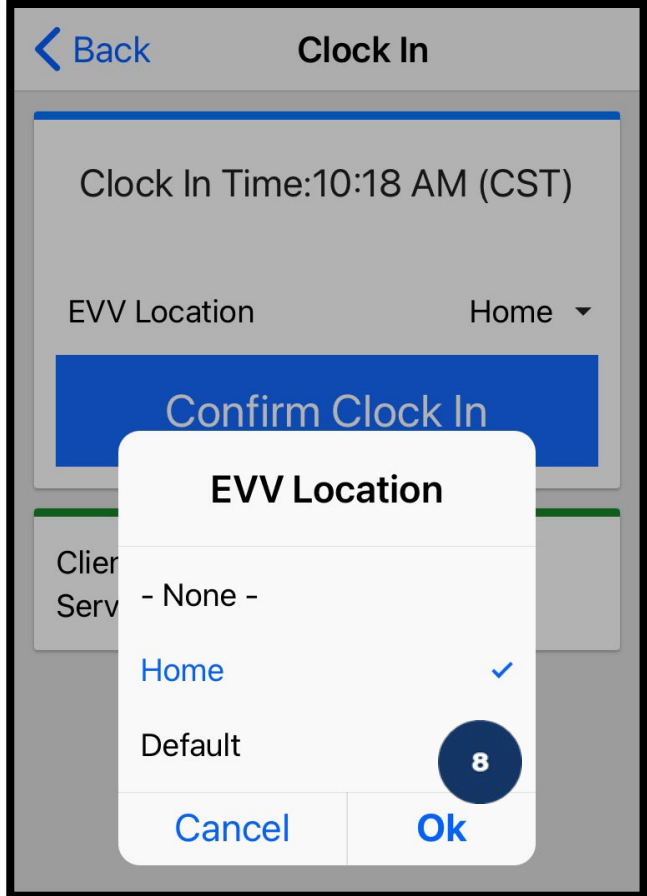
Back Clock In

Clock In Time: 10:18 AM (CST)

EVV Location Home

Confirm Clock In

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



Back Clock In

Clock In Time: 10:18 AM (CST)

EVV Location Home

Confirm Clock In

EVV Location

- None -

Home ✓

Default

Cancel Ok

# Clock In on Mobile App (cont.)

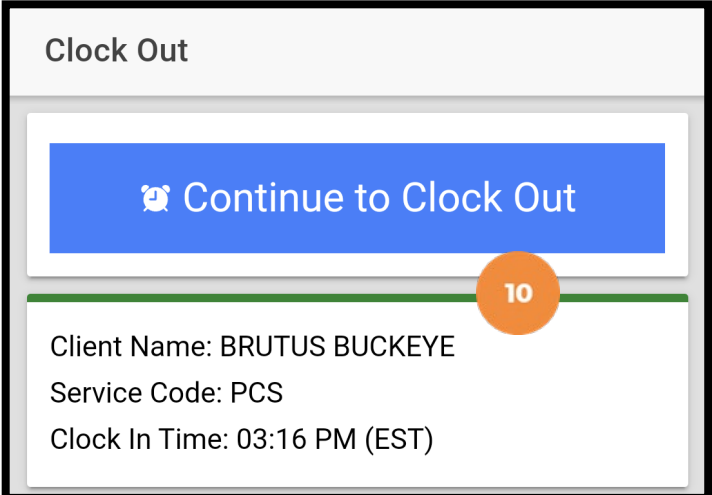
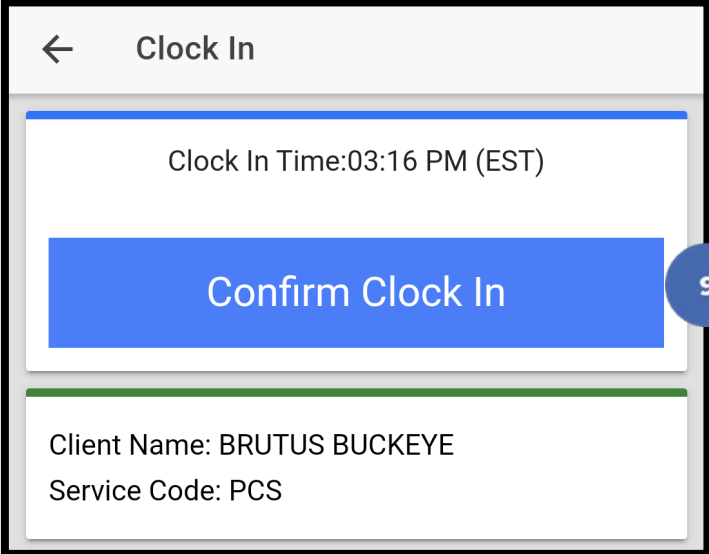
## 9. Select Confirm Clock In

\* *This will start the time for the shift*

## 10. Clock In Details Summary

- Clock in is successful when the blue **Continue to Clock Out** button displays
- Clock in details display in summary form

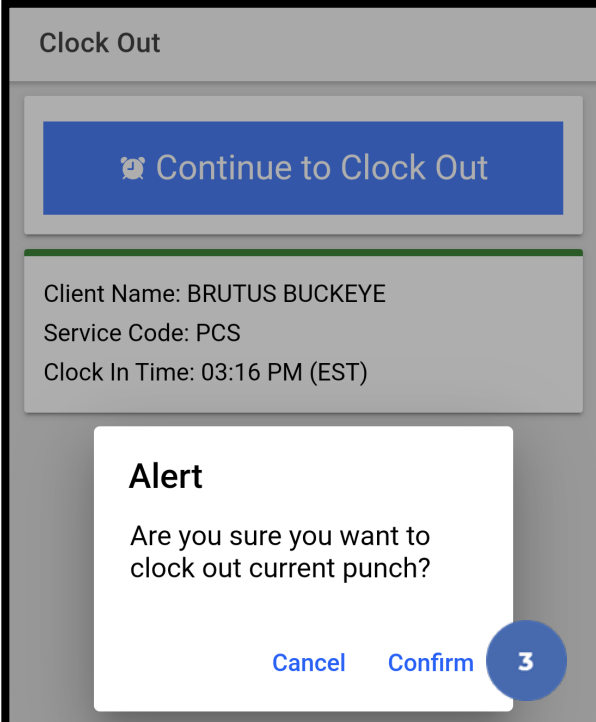
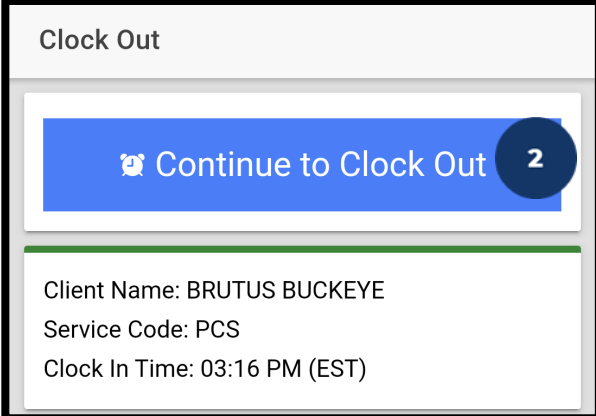
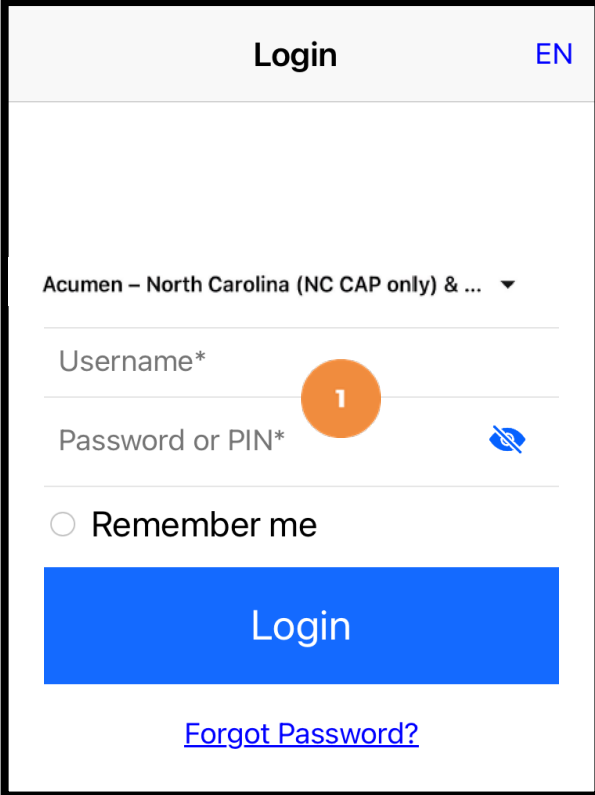
**\*Please note:** Users do not need to stay logged into the mobile app during their shift and cannot take any other action until clocked out.



# Initial Clock Out Process

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

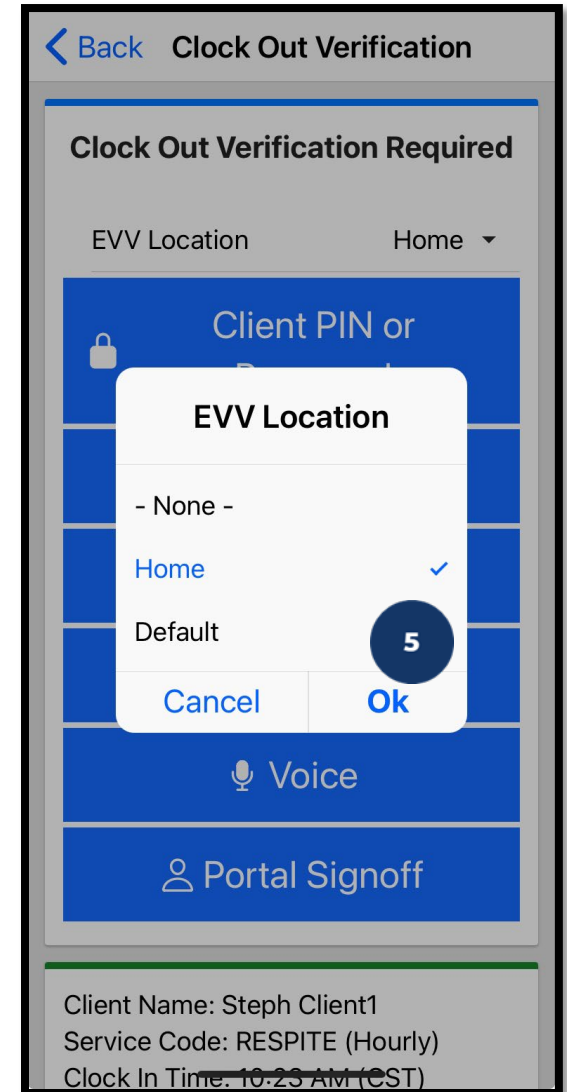
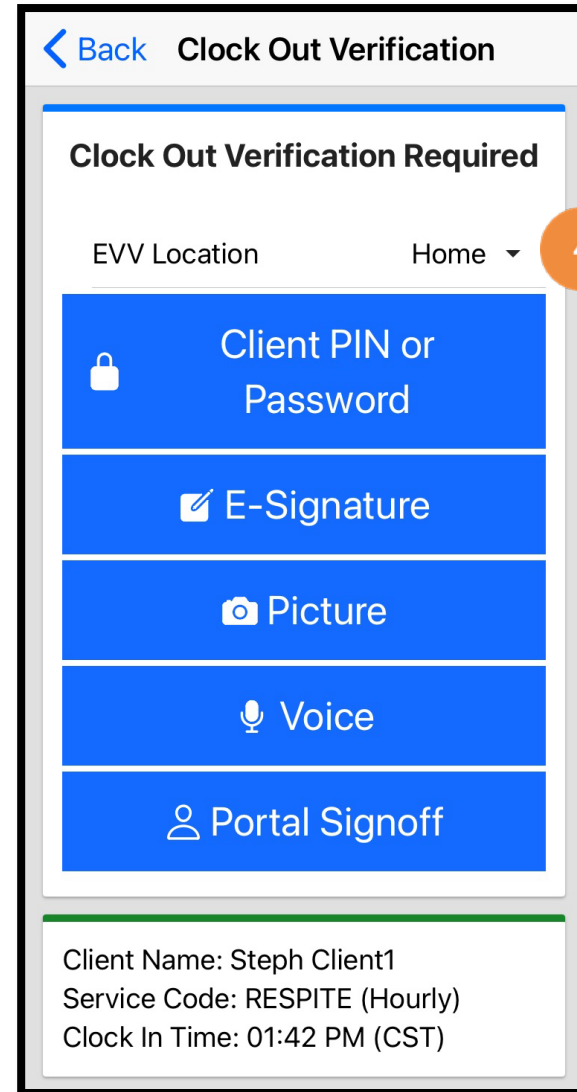
1. At the end of the shift, log in to the mobile app.
2. Click the blue **Continue to Clock Out** button
3. Select **Confirm** to proceed with clocking out



# Initial Clock Out Process

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

4. If required by the program, click the drop-down menu to select the EVV Location.
5. Click **Ok** to confirm the EVV Location selection



# Mobile App – EVV Options (Client/Employer Attestation)



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

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

Back Clock Out Verification

**Clock Out Verification Required**

EVV Location Home ▾

Client PIN or Password

E-Signature

Picture

Voice

Portal Signoff

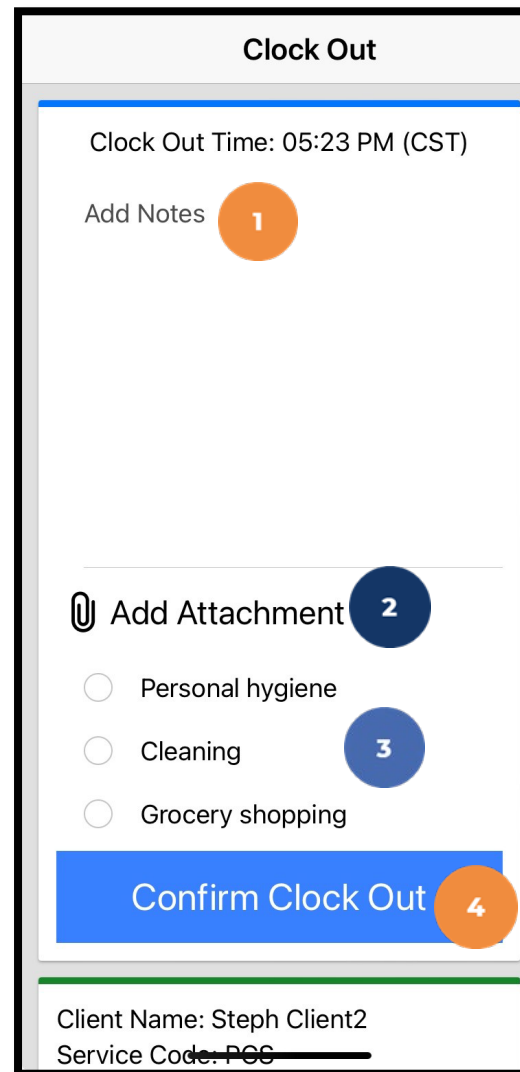
Client Name: Steph Client1  
Service Code: RESPITE (Hourly)  
Clock In Time: 01:42 PM (CST)

Choose one at clock out if required by the program

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

## The employee:

1. Enters any notes for the punch (optional)
2. Adds an attachment for the punch (optional)
3. If required by the program, selects the task(s)/statement(s) that was completed during the shift
  - ✓ Tasks/statements are a quick way to document the duties completed with/for the participant
  - ✓ The entry cannot be saved without a selection
4. Clicks the blue **Confirm Clock Out** button when ready
  - ✓ *This will stop the time for the shift*
5. Punch Confirmation
  - ✓ Punch details, including verification option selected, display.
  - ✓ Optionally, click the blue **Home** button to return to the dashboard.



**Clock Out**

Clock Out Time: 05:23 PM (CST)

Add Notes 1

Add Attachment 2

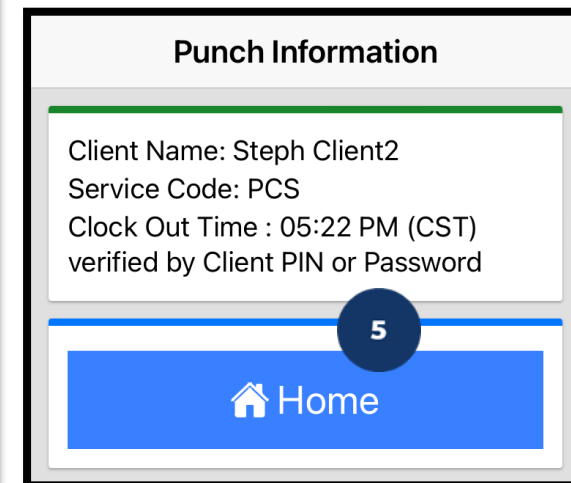
Personal hygiene

Cleaning 3

Grocery shopping

**Confirm Clock Out** 4

Client Name: Steph Client2  
Service Code: PCS



**Punch Information**

Client Name: Steph Client2  
Service Code: PCS  
Clock Out Time : 05:22 PM (CST)  
verified by Client PIN or Password

**Home** 5

# EVV or Client Attestation Options

---

**\*There are up to five options**

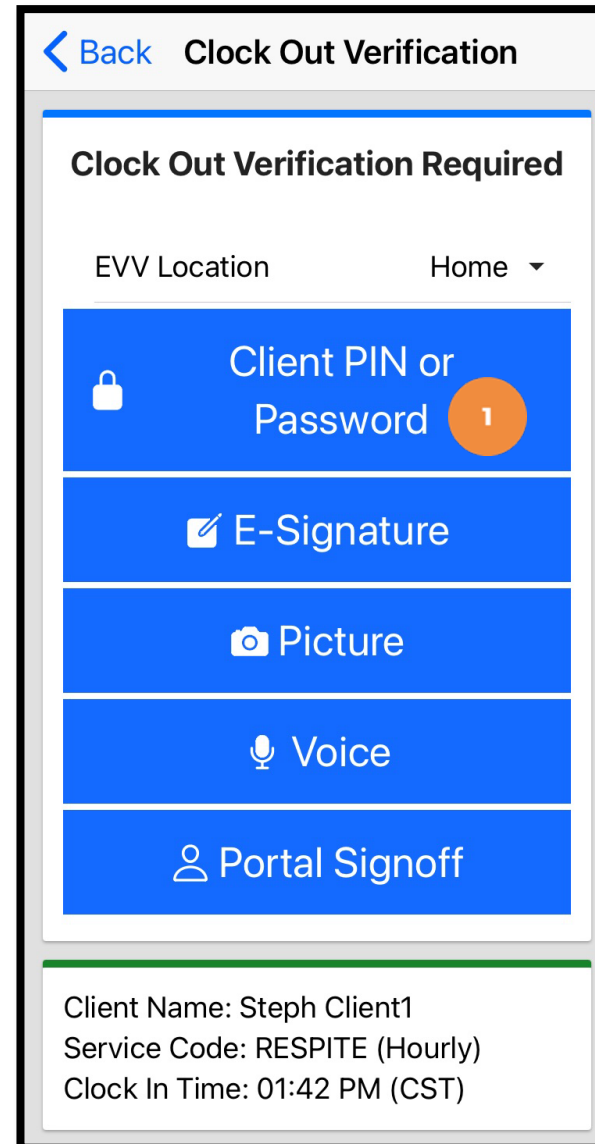
**Choose only one at clock out:**

- **Client PIN or Password**
- **E-Signature**
- **Picture**
- **Voice**
- **Portal Signoff**

# Clock Out - EVV Option #1

## Client PIN or Password

1. Select the clock out verification type:
  - ✓ Client PIN or Password
2. Hand the mobile device to the client or employer, who enters the Client PIN or Password (client PIN or password issued on the Employer Good to Go/Welcome letter).
3. The client or employer clicks the blue **Submit** button when ready
4. The client or employer clicks **Confirm** to validate the PIN or password and hands the mobile device back to the employee



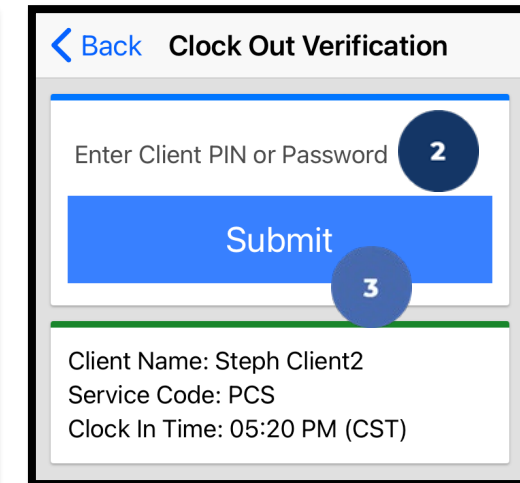
Back Clock Out Verification

**Clock Out Verification Required**

EVV Location Home ▾

- Client PIN or Password 1
- E-Signature
- Picture
- Voice
- Portal Signoff

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

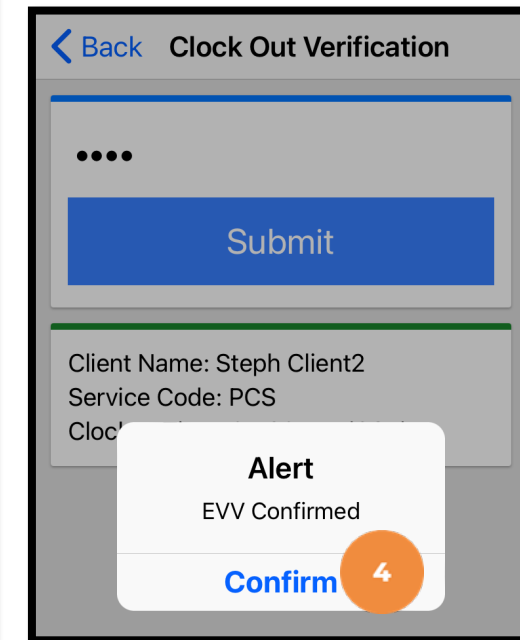


Back Clock Out Verification

Enter Client PIN or Password 2

Submit 3

Client Name: Steph Client2  
Service Code: PCS  
Clock In Time: 05:20 PM (CST)



Back Clock Out Verification

Submit

Client Name: Steph Client2  
Service Code: PCS  
Clock In Time: 05:20 PM (CST)

**Alert**  
EVV Confirmed

Confirm 4


# Mobile App Video

Clock in and  
Out Using  
Client PIN or  
Password  
Option

Login EN

Acumen - All Other States & Programs (inclu... ▼

Username\*

Password or PIN\* 

Remember me


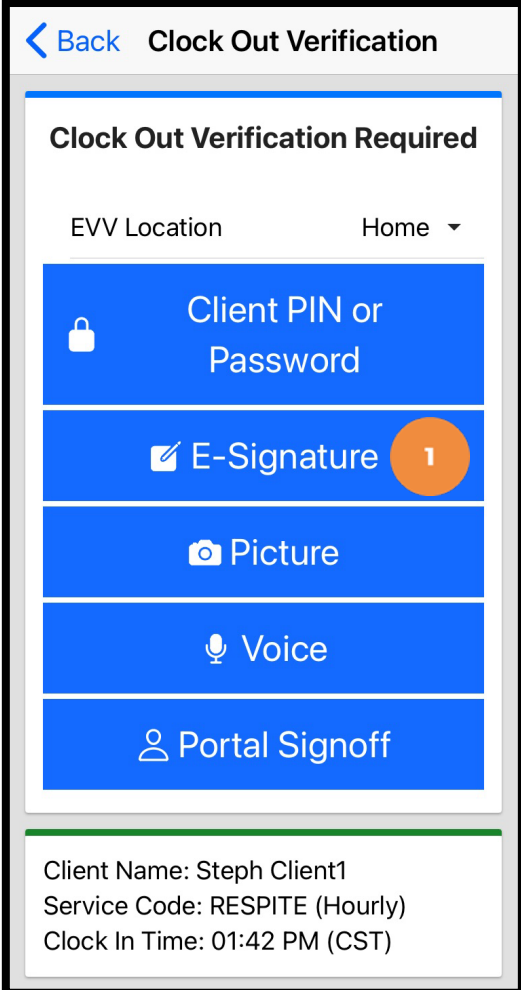
Login

[Forgot Password?](#)

# Clock Out - EVV Option #2

## E-Signature

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

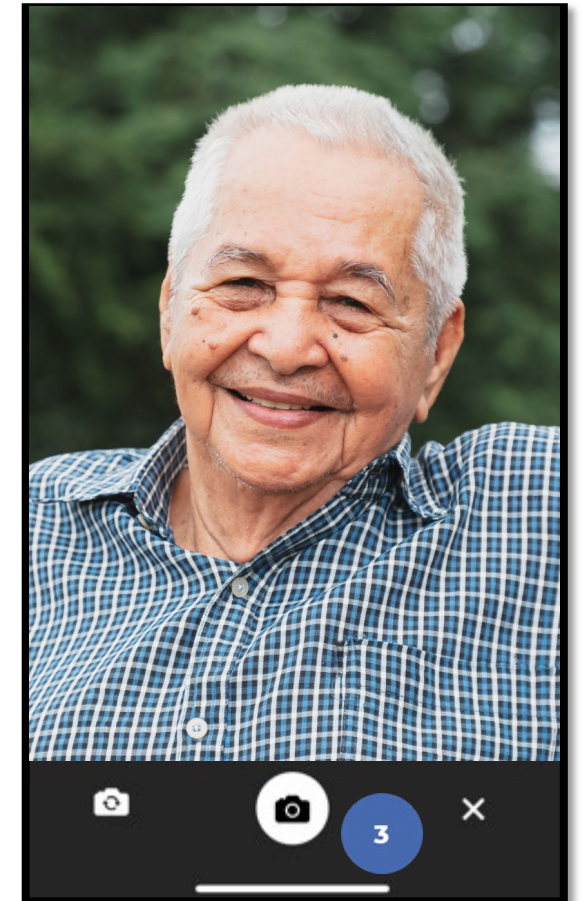
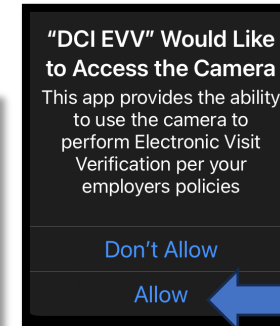
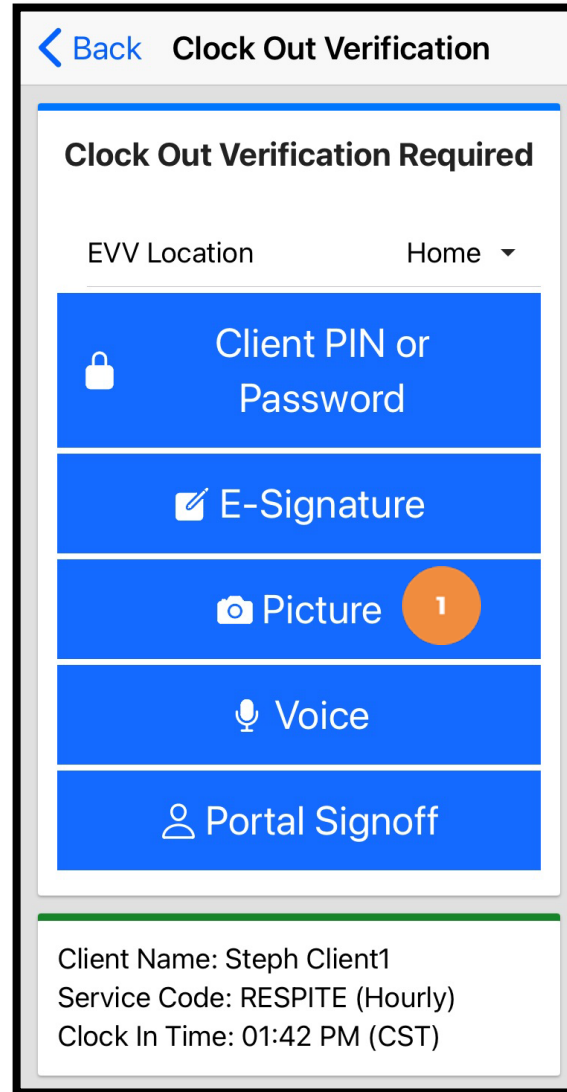


# Clock Out - EVV Option #3

## Picture

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

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

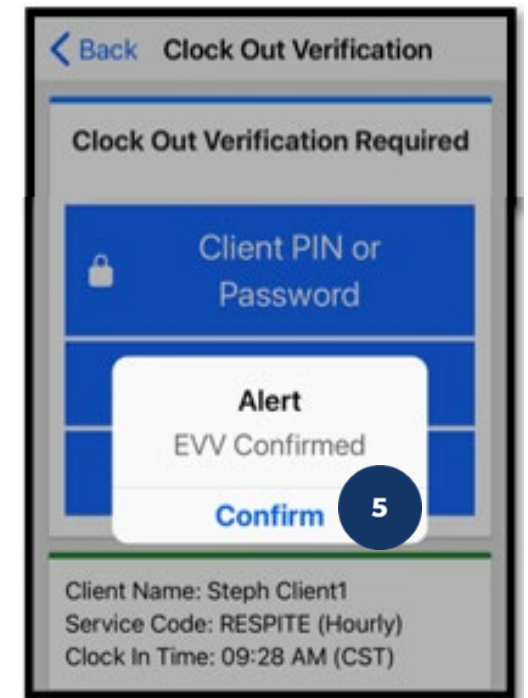
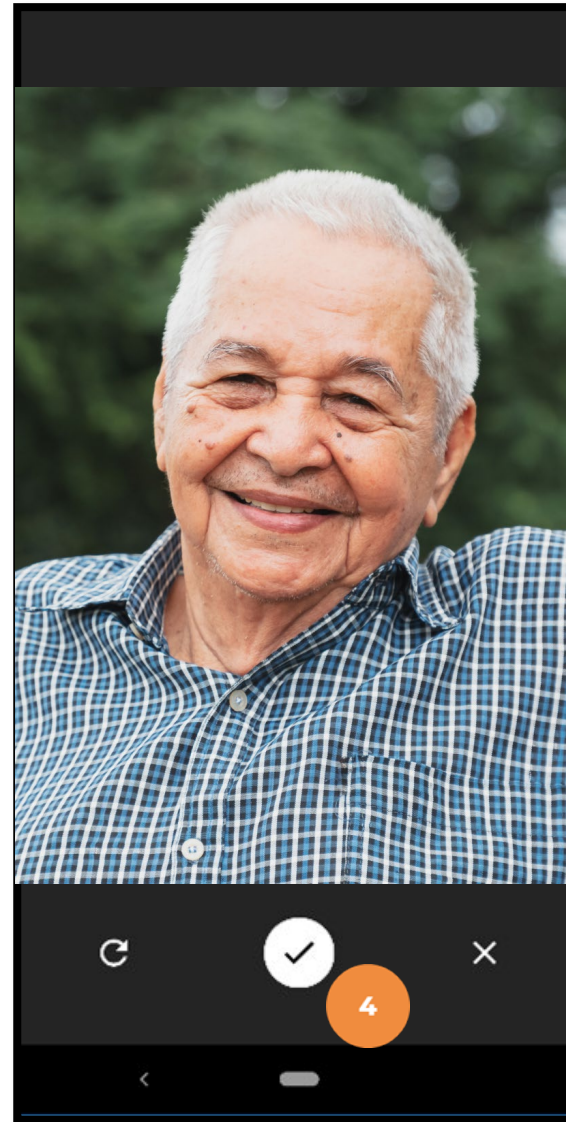


# Clock Out - EVV Option #3

## Picture

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

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




# Mobile App Video

## Clock in and Out Using Picture Option

Login EN

Acumen - All Other States & Programs (inclu... ▼

Username\*

Password or PIN\* 

Remember me

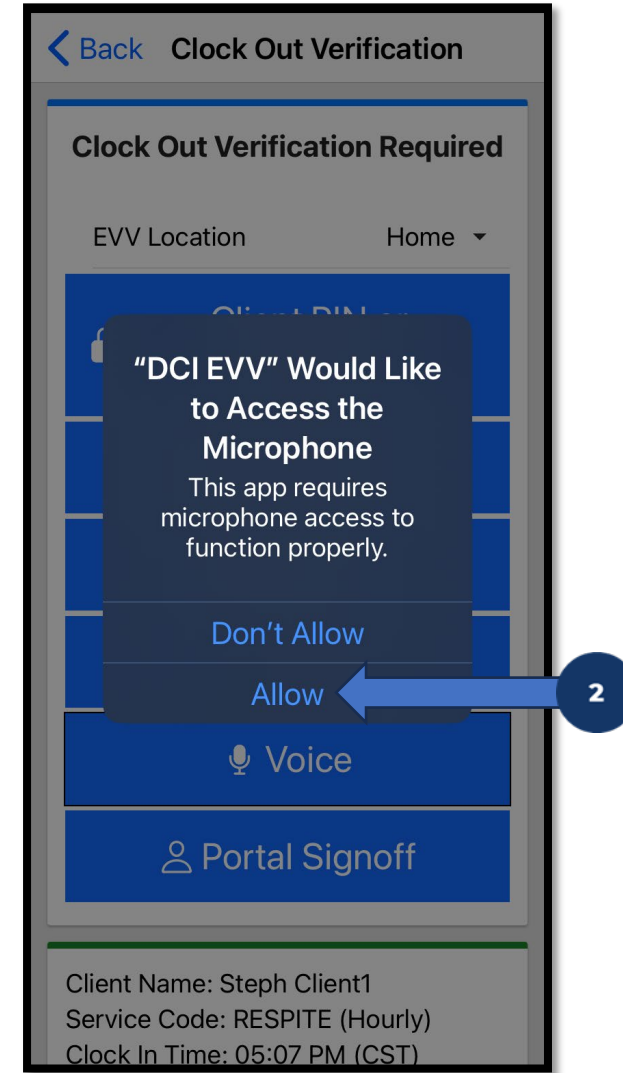
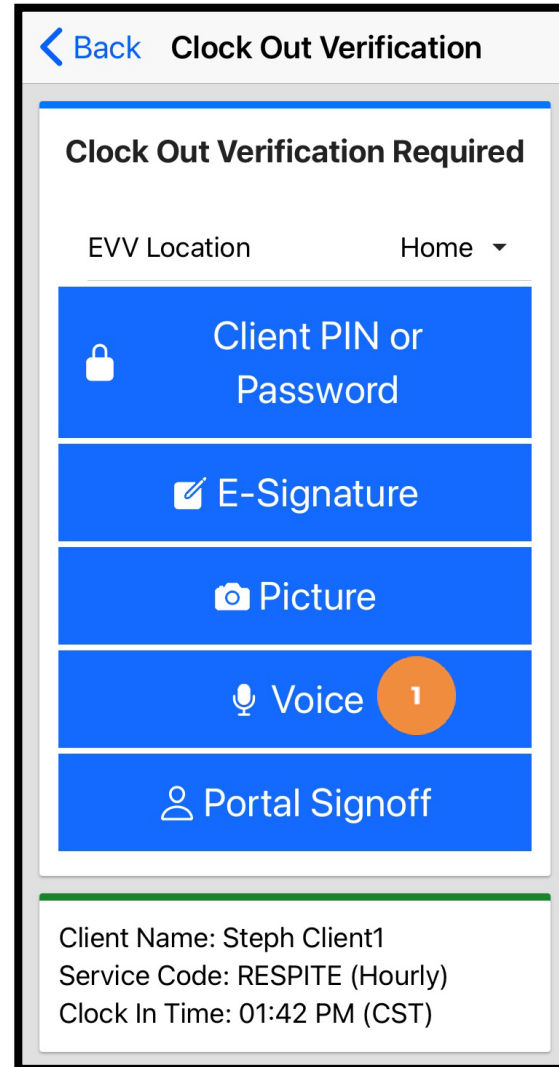
Login

[Forgot Password?](#)

# Clock Out - EVV Option #4

## Voice

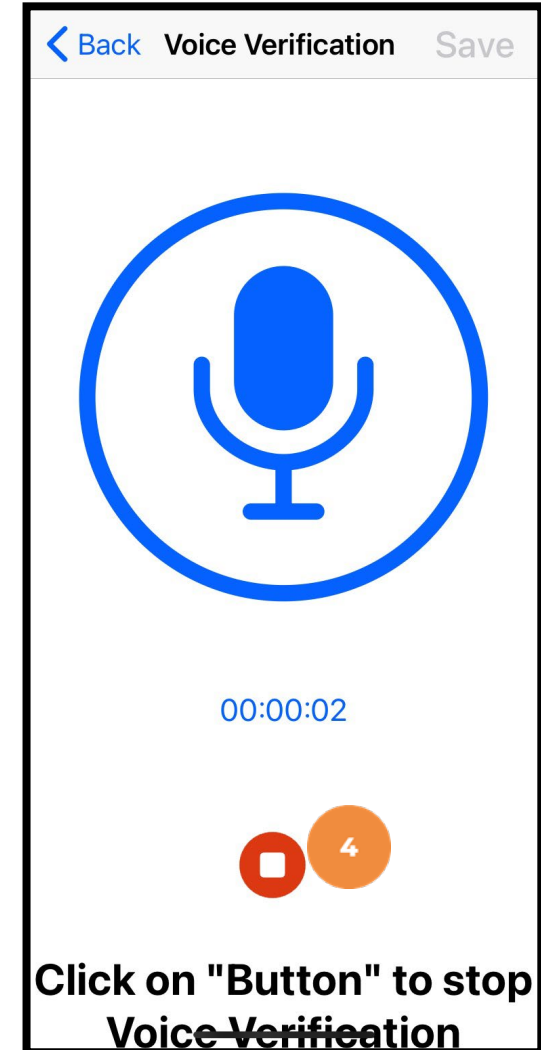
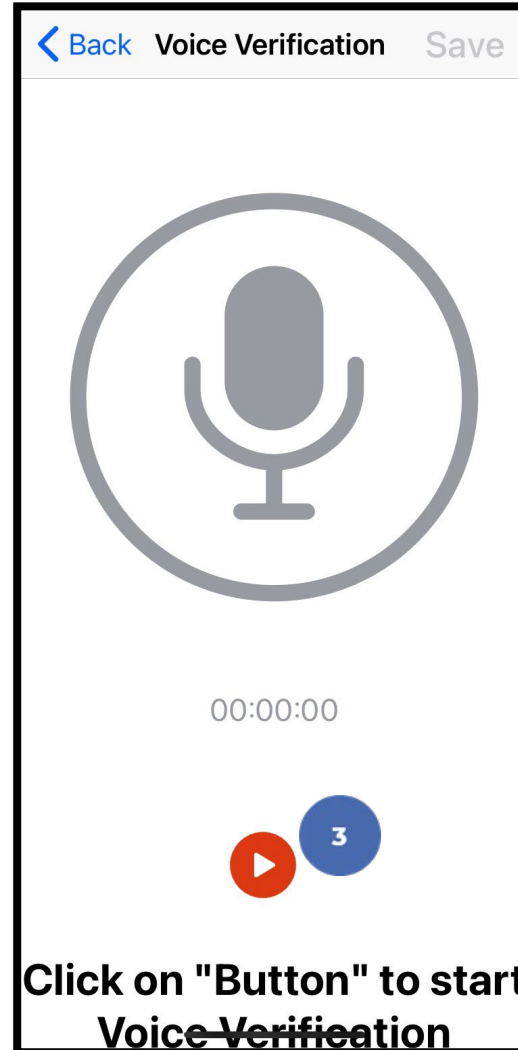
1. Select the clock out verification type:
  - ✓ Voice
2. Hand the device to the client or employer. A pop-up stating "DCI EVV" Would Like to Access the Microphone appears. The client or employer selects **Allow**.



# Clock Out - EVV Option #4

## Voice

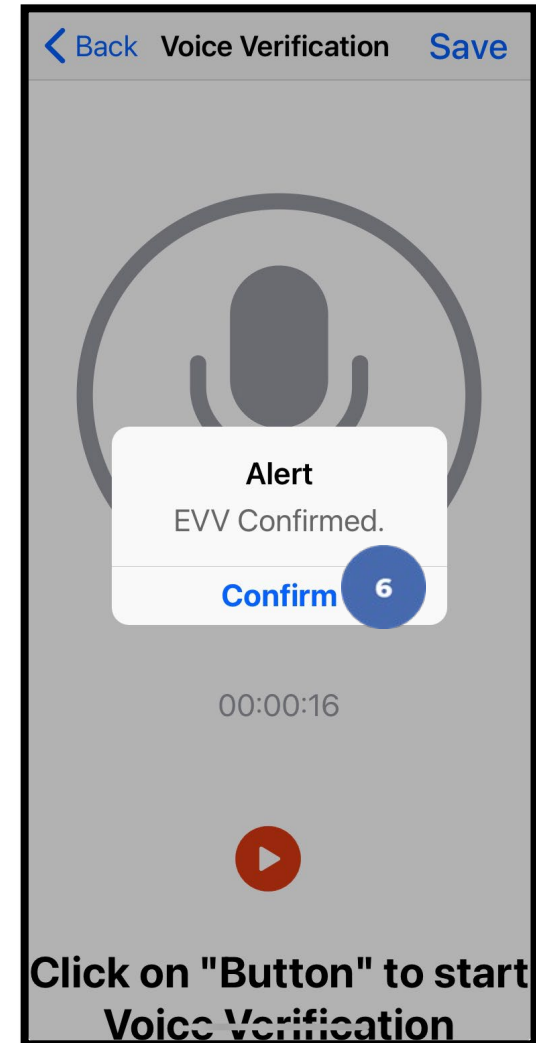
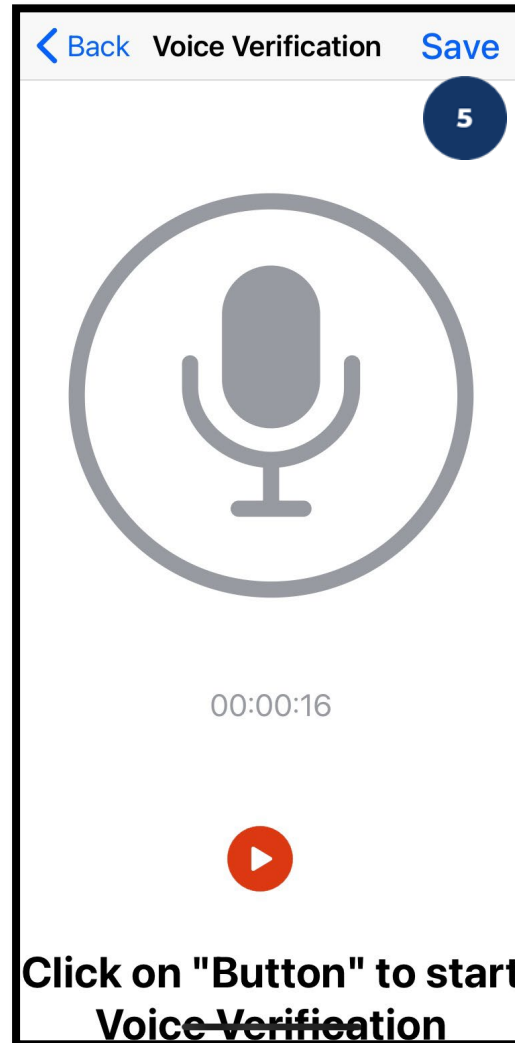
3. The client or employer clicks the **red play** button to start the voice verification
  - ✓ An automated voice will say "Please repeat after me. My name is (client name) and I am verifying this visit."
4. The client or employer states "My name is (client or employer name) and I am verifying this visit."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



# Clock Out - EVV Option #4

## Voice

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



# Mobile App Video

## Clock in and Out Using Voice Option

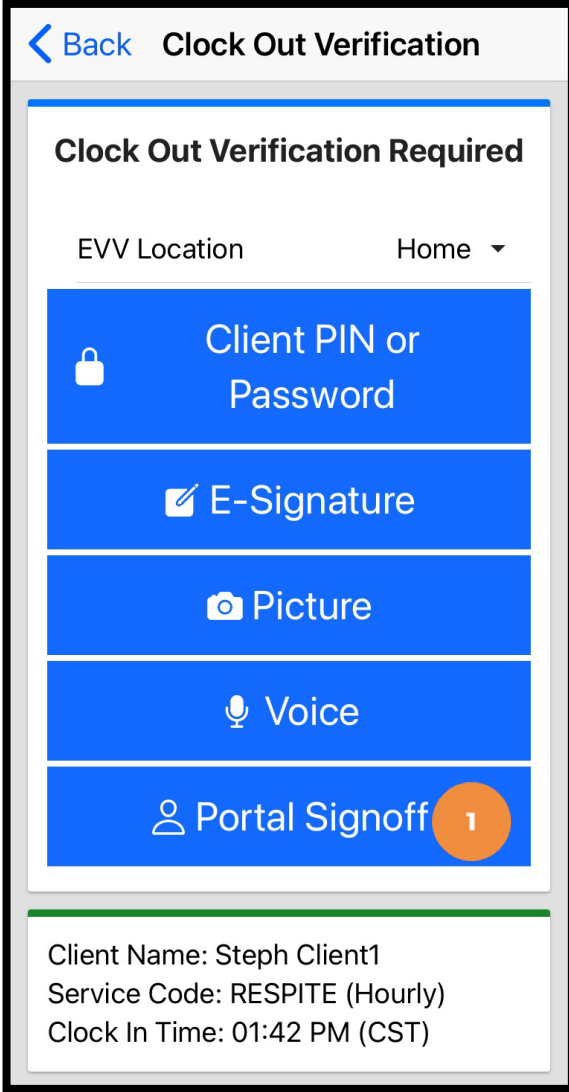
Mobile app login screen showing the following fields and options:

- Language: EN
- Dropdown menu: Acumen – All Other States & Programs (inclu... ▼
- Username\*
- Password or PIN\* (with eye icon for visibility toggle)
- Remember me (radio button)
- Login button
- [Forgot Password?](#)

# Clock Out - EVV Option #5

## Portal Signoff

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



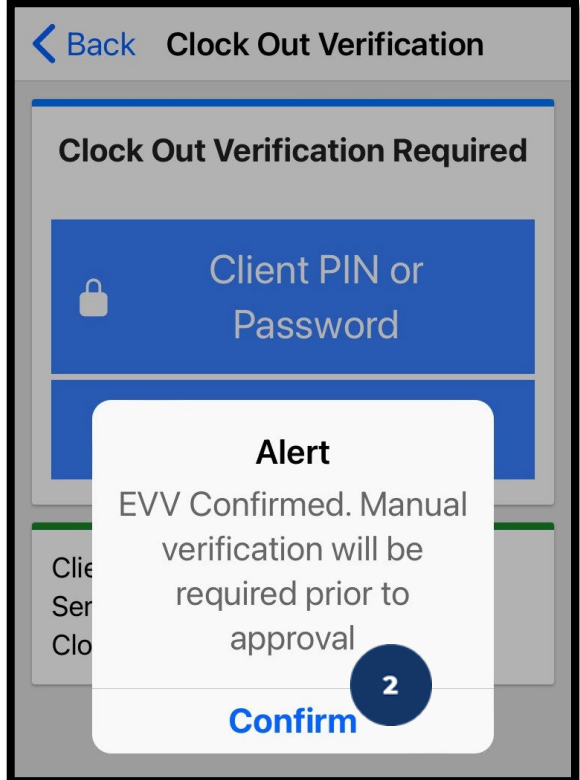
Back Clock Out Verification

Clock Out Verification Required

EVV Location Home ▾

- Client PIN or Password
- E-Signature
- Picture
- Voice
- Portal Signoff **1**

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



Back Clock Out Verification

Clock Out Verification Required

- Client PIN or Password

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

**Confirm** **2**

# Mobile App Video


## Clock in and Out Using Portal Signoff Option

Proprietary: For Acumen and Customer Use Only

Login EN

Acumen - All Other States & Programs (inclu... ▼

Username\*

Password or PIN\* 

Remember me

Login

[Forgot Password?](#)

# Mobile App Offline Mode



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

# Employers & EVV Compliance

Proprietary: For Acumen and Customer Use Only



# Facial Recognition Setup

---

# What is Facial Recognition?

---

- Facial recognition is the process of identifying or verifying a person's identity by comparing their face to a collection of pictures of them
- It "learns" over time and becomes more accurate with each submission
- Acumen collects but does not share photos
  - Photos are stored in a secure business cloud and are only used by our facial recognition technology to verify that the client was present for the employee's visit
  - Photos are not stored on the employee's device



# Facial Recognition Setup

---

Take a picture of the client (participant). Photos must comply with the requirements below:

- ✓ Participant is the only individual in the photo
- ✓ Participant is facing the camera directly with a full face in view
- ✓ Participant is not wearing sunglasses, hat, or any other accessory that alters the Participant's appearance.
- ✓ Photos are taken with a solid color background
- ✓ Photo size is 2MB or less
- ✓ JPG format



# Facial Recognition Setup

---

Email the picture to Acumen Customer Service at [nccapagents@acumen2.net](mailto:nccapagents@acumen2.net)

**\*Please note! A valid email must be on file for the employer/client (participant) to set up facial recognition. The photo must be sent from the email on file.**

- Type “Photo - Facial Recognition Setup” in the email subject line
- Enter the client’s name, state, and program in the body of the email.
- Acumen will send notification when setup is complete
  - ✓ Your employee will now be able to use Picture as an EVV option at clock out when using the mobile app

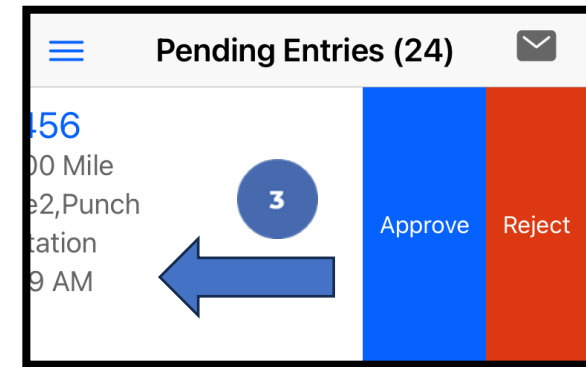
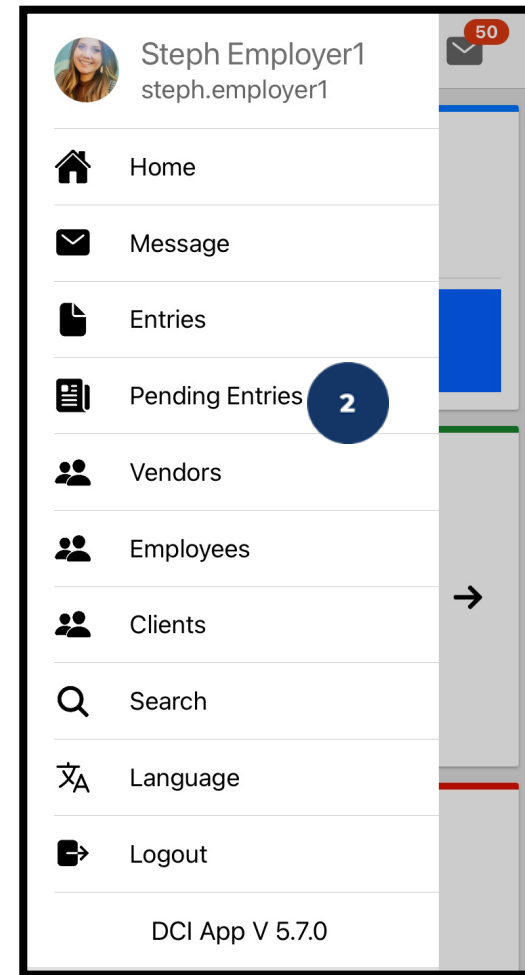
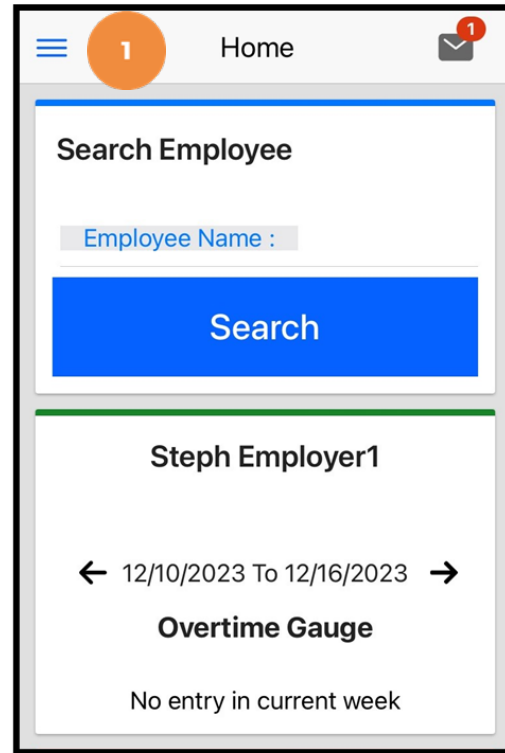


# Employer Mobile App

---

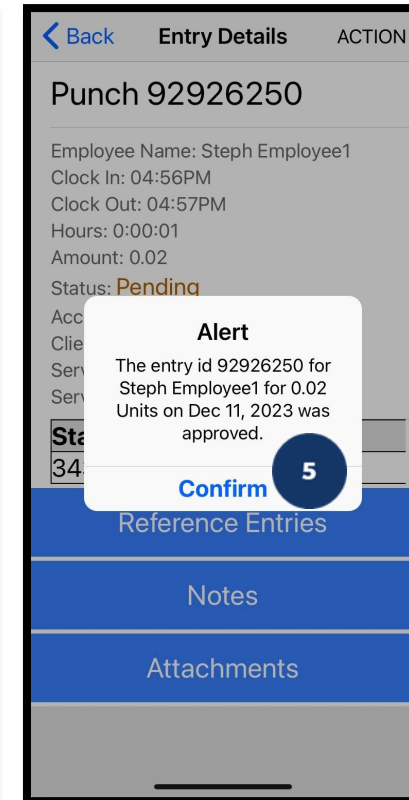
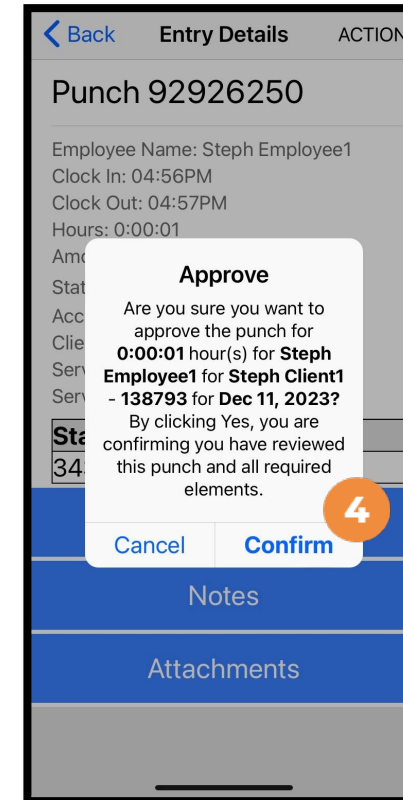
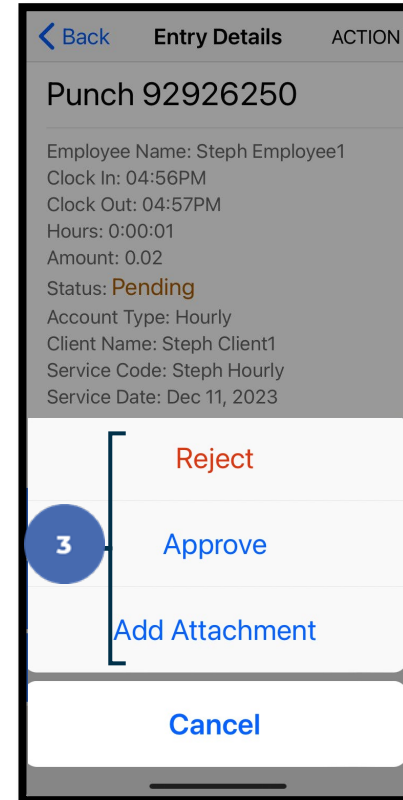
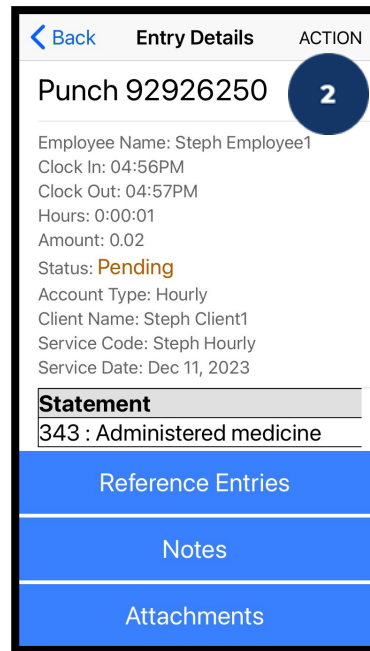
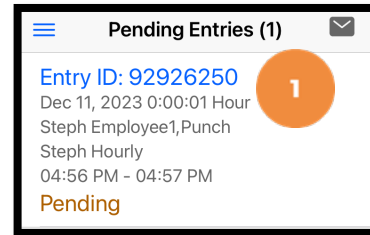
# Review & Approve Entries

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.**


# Mobile App Video

## Employer Reviews & Approves Entries

Login EN

Acumen - All Other States & Programs (inclu... ▾

Username\*

Password or PIN\* 

Remember me

Login

[Forgot Password?](#)

Proprietary: For Acumen and Customer Use Only

# Web Portal - Navigation, Profile Settings, Messaging & Dashboard

---

## Full Site – Most compatible when accessed via desktop or laptop

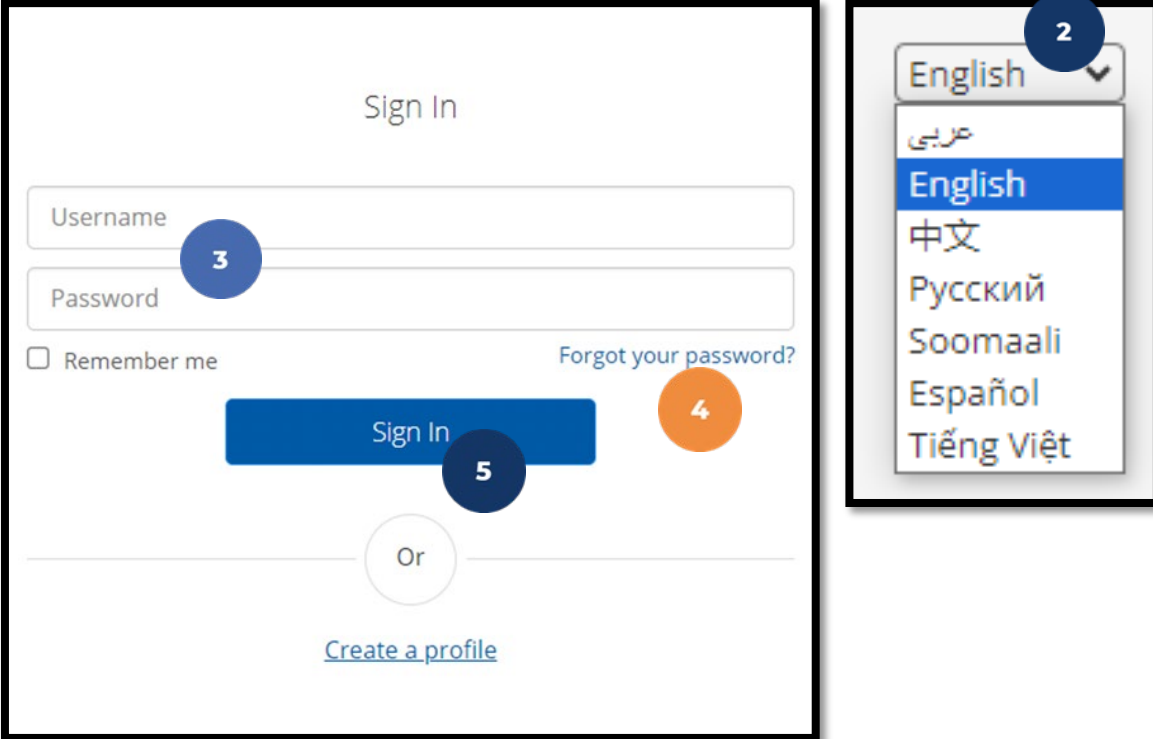
- The employer reviews and manages time
- Employees correct punches and/or enter historical time
- All users may update profile settings

# Accessing the DCI Web Portal

1. Open an internet browser on a computer or mobile device (Google Chrome is preferred) and navigate to the [Outreach DCI 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 [outreach.dcisoftware.com](https://outreach.dcisoftware.com)



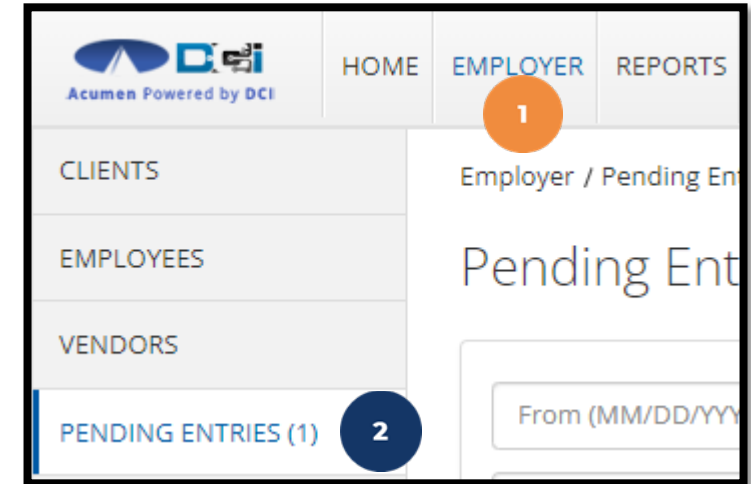
The screenshot shows the sign-in page for the DCI Web Portal. It features a 'Sign In' heading, a 'Username' field (callout 3), a 'Password' field (callout 3), a 'Remember me' checkbox, and a 'Forgot your password?' link (callout 4). A blue 'Sign In' button (callout 5) is prominently displayed. Below the button is an 'Or' separator and a 'Create a profile' link. On the right side, a language drop-down menu (callout 2) is open, showing options: English (selected), العربية, 中文, Русский, Soomaali, Español, and Tiếng Việt.

# Manage 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 <b>R</b>	Sep 04, 2024	10:56 AM	10:59 AM	12.00	0:00:03		Steph Client1	Steph Employee1	RESPITE (Hourly)	Hourly	<b>?</b>
A <b>R</b>	Jun 05, 2024	10:52 AM	10:53 AM	26.00	0.02	0.52	Steph Client1	Steph Employee4	RESPITE (Dollars)	Hourly	<b>?</b>
A <b>R</b>	Sep 25, 2024	01:11 PM	01:13 PM	12.00	0:00:02		Steph Client2	Steph Employee1	RESPITE (Hourly)	Hourly	<b>👁</b>
A <b>R</b>	Sep 25, 2024	01:09 PM	01:10 PM	12.00	0:00:01		Steph Client2	Steph Employee1	RESPITE (Hourly)	Hourly	<b>👁</b>

# Verify Picture

1. If an entry has a red eye icon in the Needs Review column, hover over it to see why it needs review. If it states, "Signature Unverified", "Picture Unverified", or "Voice Unverified", **click anywhere on the entry row** to open the punch details page.
2. Scroll down to select the **Verifications** tab
3. Click the **attachment** to review the signature or picture. Click the **download** icon to download, open, and listen to the voice recording.
4. Click the **A** to approve the attachment or the red **R** to reject it. The punch may now be approved or rejected.

Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Estimate)	Client Name	Employee Name	Service Code	Account Type	Needs Review
<span>A</span> <span>R</span>	Feb 25, 2025	11:18 AM	11:19 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code	- Voice Unverified	
<span>A</span> <span>R</span>	Feb 25, 2025	11:17 AM	11:18 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code	- Picture Unverified	
<span>A</span> <span>R</span>	Feb 25, 2025	11:16 AM	11:17 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code	- Signature Unverified	

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

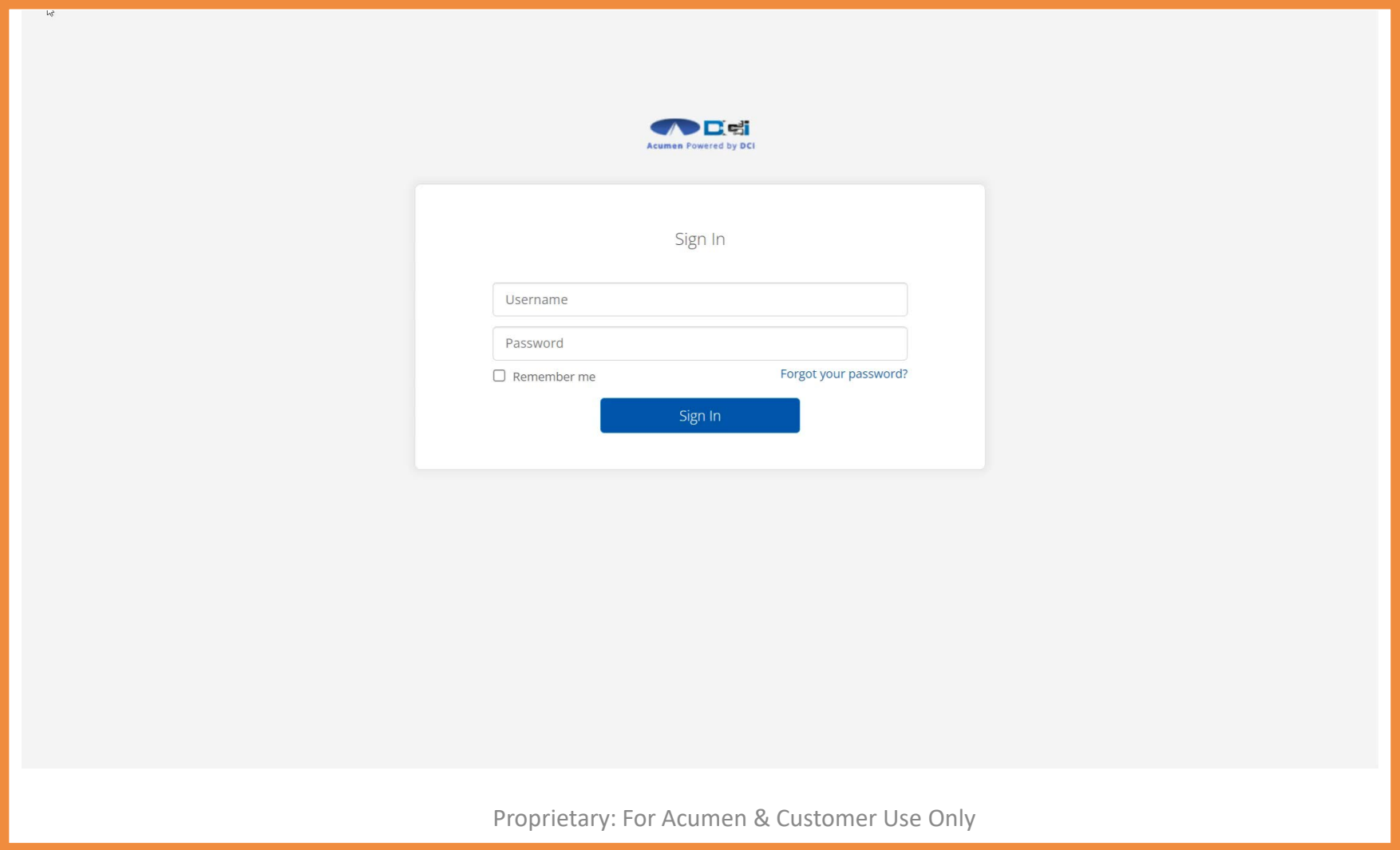
From (MM/DD/YYYY) 2 To (MM/DD/YYYY) | Verification Type | Select Status | Reset | Search

EWV Verifications | Showing 1 out of 1 record | Export

Approve	Date	Verification Type	Status	Attachments	Compare	Approved By	Approved Date
<span>A</span> <span>R</span> <span>4</span>	Dec 21, 2023 09:31:46 AM	Picture	Unverified	<span>3</span> <a href="#">6bdde351-0119-483c-b3b2-e31d99223e9d.jpeg</a>			

# Employer Web Portal Video

# Verify Picture



Proprietary: For Acumen & Customer Use Only



# Manage Pending Entries



**\*Important!** Please check to see if your program has a timely filing rule, meaning entries must be both entered AND approved within a certain number of days from the date of service

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 05, 2024	01:49 PM	01:51 PM	20.00	0:00:02	0.60	Steph Client3	Steph Employee3	SDFSS	Hourly	
A R	Sep 05, 2024	01:41 PM	01:43 PM	20.00	0:00:02	0.60	Steph Client3	Steph Employee3	SDFSS	Hourly	
A R	Sep 04, 2024	10:56 AM	10:59 AM	12.00	0:00:03		Steph Client1	Steph Employee1	RESPITE (Hourly)	Hourly	

- View high-level punch information on the entry row
- After needed verifications have been performed, click the **A** to approve the entry or the red **R** to reject it.
- Optionally, click anywhere on the entry row to view the details.

# **Adding a New EVV Location**

# Client Details Page

## EVV Locations Tab

- The EVV Locations tab displays all locations for the client, and which is primary (if applicable).
- Click anywhere on the EVV location row to view the details

Entries Accounts Certifications **EVV Locations** Diagnosis Notes Attachments Custom Fields History

Type EVV Name Begin Date (MM/DD/YYYY) End Date (MM/DD/YYYY) Select Type

Type City Type State Active

Reset Search

Export

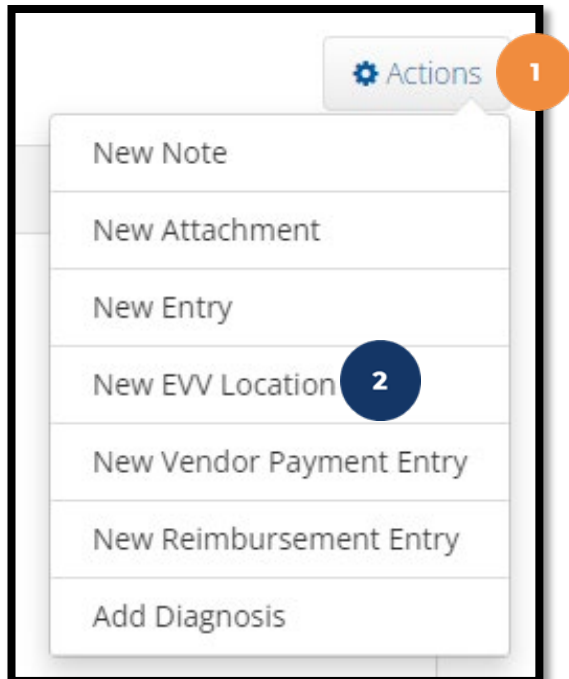
Showing 2 out of 2 records

EVV Name	Primary	EVV Location Type	Address	Begin Date	End Date	Status
Dad's House	FALSE	Residential	701 S Nedderman Drive Arlington, TX 76019	Sep 01, 2024		Active
Home	TRUE	Residential	835 White House Road Mansfield, TX 76063	Aug 16, 2022		Active

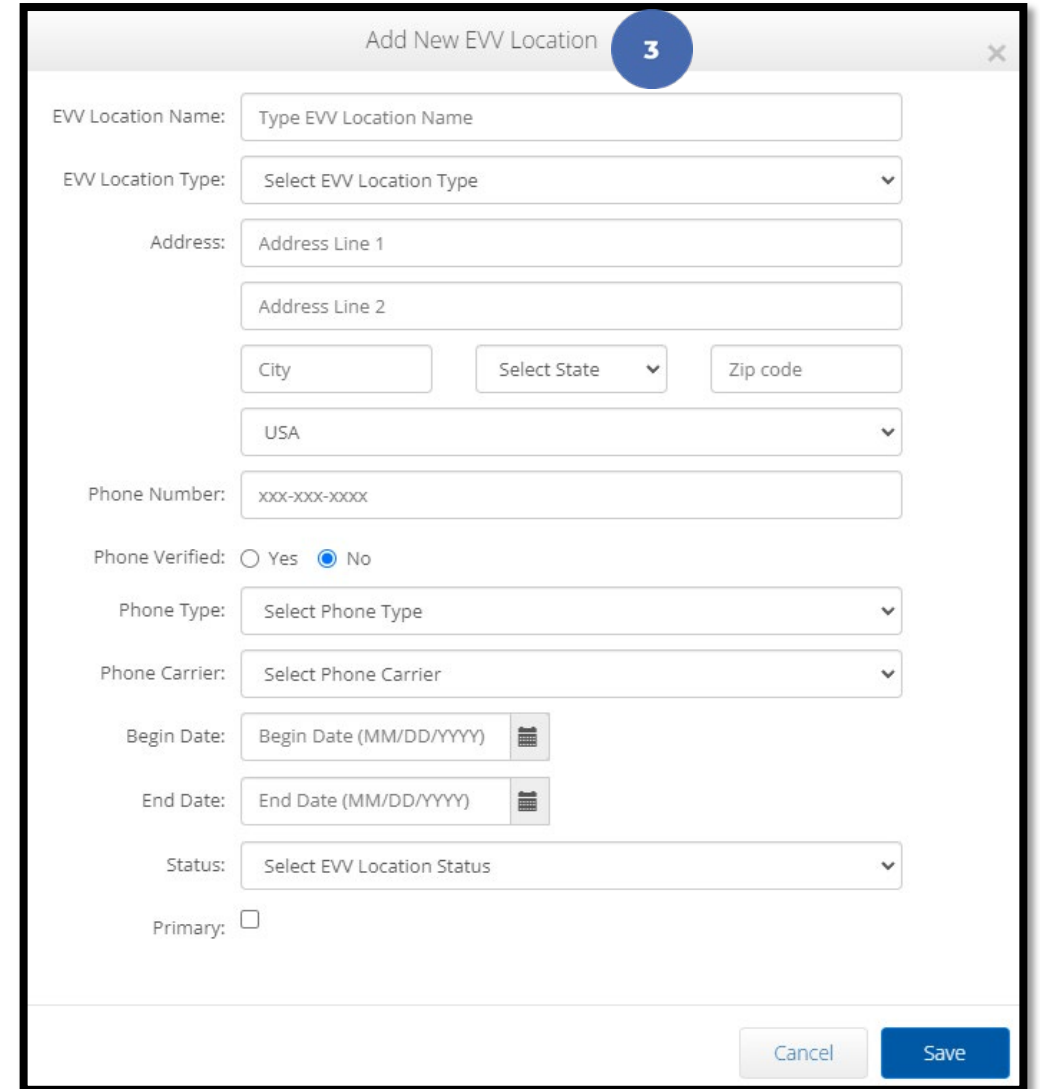
# Client Details Page

## Add an EVV Location

1. Click the **Actions** button
2. Select **New EVV Location** from the drop-down menu
3. Complete the Add New EVV Location form wizard



A screenshot of the 'Actions' menu in a software application. The menu is open, showing several options: 'New Note', 'New Attachment', 'New Entry', 'New EVV Location', 'New Vendor Payment Entry', 'New Reimbursement Entry', and 'Add Diagnosis'. The 'New EVV Location' option is highlighted with a blue circle containing the number '2'. The 'Actions' button itself is highlighted with an orange circle containing the number '1'.



A screenshot of the 'Add New EVV Location' form wizard. The form is titled 'Add New EVV Location' and has a blue circle with the number '3' in the top right corner. The form contains the following fields:

- EWV Location Name: Type EWV Location Name
- EWV Location Type: Select EWV Location Type
- Address: Address Line 1, Address Line 2
- City, Select State, Zip code
- USA
- Phone Number: xxx-xxx-xxxx
- Phone Verified:  Yes  No
- Phone Type: Select Phone Type
- Phone Carrier: Select Phone Carrier
- Begin Date: Begin Date (MM/DD/YYYY)
- End Date: End Date (MM/DD/YYYY)
- Status: Select EWV Location Status
- Primary:

At the bottom right, there are 'Cancel' and 'Save' buttons.

# **Phone IVR (Interactive Voice Response)**

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

# Phone EVV Basics

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



# Phone EVV (IVR)

---

## Real-Time Entry

# Clock In: Real-Time Entry

---

1. Sign in:
  - ✓ Call (844) 608-0047 from the client's landline to start the shift
  - ✓ Enter the last four digits of the social security number
  - ✓ Enter PIN
  - ✓ Enter month/day of birth (MMDD)
2. Press 1 for hourly
3. Confirm the client's name with the prompt given
4. Press 1 for real time entry
5. Select the service code with the prompts given
6. Depending on program settings, the available balance may be announced. Press 1 to continue.
7. Select "none" for the clock in EVV location
8. Press 1 to confirm and save the punch
9. The recording will read back the punch details and then disconnect



# Clock Out: Real-Time Entry

1. Sign in:
  - ✓ Call (844) 608-0047 from the client's landline to end the shift
  - ✓ Enter the last four digits of the social security number
  - ✓ Enter PIN
  - ✓ Enter month/day of birth (MMDD)
2. The system announces that there is an open punch. When prompted, press 1 to confirm closing the punch.
4. Select "none" for the clock out EVV location
5. The punch is now closed, and the employee is clocked out. Press 2 to disconnect or 1 to open a new punch.



# Tips & Questions/Answers

Proprietary: For Acumen and Customer Use Only



# Tips for the Mobile App



## DO — Mobile App

- Use for routine clock in for every shift
- Use for routine clock out for every shift
- Hand the device to the Employer during the attestation part of the log out
- Keep track of all entries and work with your Employer to ensure all are being approved for payment
- Avoid using the web portal (unless there was an emergency or service interruption) to ensure all entries are EVV Compliant.
- Be as accurate on your shift times (clock in/clock out), when a punch is edited, it is **no longer EVV Compliant**

## DON'T — Mobile App

- Use the app for anything other than real-time clock in and clock out.
- Leave the app open while you provide your services, it will drain your battery. You are clocked in regardless if the app is open.
- Forget to use the app for all real-time entries. The goal is for all entries to be EVV Compliant!

### Mobile App Limitations:

- Only **one registered device** at a time
- Can only **clock in and out** while offline
- Other functions may not work offline

# Tips for the Web Portal



## **DO — Web Portal**

- View submitted time
- Update personal information (as allowed)
- Enter time **only if there is a service interruption** (these are **not** EVV complaint)
- Respond to entries returned for correction
- Employers: Ensure you are approving all entries for on time payment
- Employers: Verify all EVV Verifications when prompted

## **DON'T — Web Portal**

- Use the portal for routine clock-in or clock-out
- Use portal entries to replace mobile app time
- Assume portal entries are EVV-compliant
- Edit or resubmit entries unless mandatory (editing a punch completed in the mobile app will make it **non-evv compliant**)

# Frequently Asked Questions (FAQs)

---

# Frequently Asked Questions



- **Q: Is there a separate app for CAP vs. MCO?**  
**A:** No. The *same* app is used for both CAP and MCO.
- **Q: What do stakeholders select under “Agency”?**  
**A: CAP = “2015”**  
**A: MCO = “228636”**
- **Q: What if a stakeholder chooses the wrong agency?**  
They can add another agency within the app.  
**Q: A stakeholder sees two agencies and wants only one. How do they remove the extra?**  
**A:** They must delete and redownload the app to reset settings, then select the correct agency during setup.
- **Q: Can users select “Remember Me” on a shared device?**  
**A:** No. Avoid using “Remember Me” on shared devices for security reasons.
- **Q: Does “Forgot Password” always work?**  
**A:** Only if the stakeholder has a valid email on file.
- **Q: Where can stakeholders access paystubs?**  
**A:** On both the Portal and the App, inside the messaging module. Make sure to be on the attachment tab inside the message.

# Frequently Asked Questions



- **Q: What auto-selects during shift entry?**
  - A:** If there is only one option for:
    - Code
    - Client
    - Cost Center...it will auto-select.
- **Q: What must the stakeholder choose manually?**
  - A:** Pay rate type.
- **Q: Can shifts be adjusted once clocked in?**
  - A:** No. Adjustments cannot be made after clock-in.
- **Q: What is important at clock-out?**
  - Select the correct **EVV location**.
  - Verification should occur at **clock-out after attestation**.
  - The **Employer must review** submitted shifts.

# Frequently Asked Questions



- **Q: If the client and EOR are the same person, which profile do they use?**  
**A:** The **EOR profile**.
- **Q: What if the EOR role isn't assigned in DCI?**  
They will not see the Employer tab.
- **Q: If using Portal sign-off, does it happen automatically?**  
**A:** No. The EOR must manually sign off.
- **Q: What is required to sign in?**  
A password.
- **Q: What if a stakeholder dislikes their digital signature?**  
They can use the "**Clear**" button and sign again.
- **Q: Do signatures need to be added before using DCI?**  
**A:** Yes. Approved signatures must be added *before* stakeholders begin.
- **Q: What is required for facial recognition to work?**  
A photo must be uploaded to the user's account.

# Frequently Asked Questions



- **Q: If the EOR hasn't submitted a photo?**

A: They must send it to the Acumen inbox so an agent can upload it.

**Additional Notes:**

- Photos are stored in a **cloud-based system**, not on the device.
- Photos must meet specific quality requirements.
- Submissions must come from a **DCI-verified email address**.

- **Q: How does voice verification work?**

A: The EOR must repeat the pre-set phrase.

The recording is sent to Acumen and added to their DCI account.

- **Q: Online vs Offline Mode?**

- **Online Mode: Green bar** at top of screen
- **Offline Mode: Red bar** at top of screen

- **Q: Will punches sync automatically?**

A: Yes — once the device connects to cellular or Wi-Fi.

- **Q: What is required for offline punches to sync?**

A: The device must be **registered** (linked during first internet connection).

- **Q: Can stakeholders switch devices?**

A: Only by calling Acumen to register a new device.

# Frequently Asked Questions



- **Q: Are corrected punches EVV compliant?**

**A:** No.

Shifts that are rejected or edited are no longer EVV-compliant.

- **Q: Are multiple languages available?**

**A:** Acumen offers several language options for both the App and the Portal.

- **Q: Are landline-based historical punches EVV compliant?**

**A:** No — and they are time-consuming to enter.

- **Q: When are reason codes required?**

**A:** Whenever:

- A shift is edited
- A historical punch is created
- Reason codes must include:
  - Visit Edit Reason
  - Visit Edit Action Taken

- **Q: What if the EOR cannot sign off at the end of the shift?**

**A:** Most sign-off methods will not work.

The employee must use the **Portal** sign-off method.

# Quick Resources

- Short step-by-step resource documents have been added to [DCI Training Materials Site](#) providing instructions for Employees and Employers on maintaining EVV Compliance.
- Employer Specific Resources
- Employee Specific Resources
- Shared Resources:
  - ✓ Download the DCI Mobile EVV App & Log In
  - ✓ Logging into the Web Portal or the Mobile App
  - ✓ Phone EVV IVR Real Time & Historical Entries
  - ✓ Business Rule Alerts



Proprietary: For Acumen and Customer Use Only



**Acumen Fiscal Agent**

Innovation • Opportunity • Freedom

**Questions?**

---

**nccapagents@acumen2.net**

**THANK YOU!**  
Your NC Acumen Team

**[acumenfiscalagent.com](http://acumenfiscalagent.com)**

Proprietary: For Acumen & Customer Use Only