

Phone EVV IVR Guide*

Presented By:
Acumen Fiscal Agent

*GA requires DCH approval



Acumen Fiscal Agent

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Acumen Fiscal Agent facilitates freedom, choice and opportunity through innovative fiscal agent solutions.

Phone EVV IVR 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 (their employee pin)
 - ✓ MMDD of their birthday
 - ✓ Client Name & Service Code for the shift
- **Client or Employer – Need client PIN for historical phone entries**
 - ✓ Client PIN is on the Employer Good To Go letter



Clock In: Real Time Entry

1. Sign in:
 - ✓ Call from the client's landline to start the shift
 - ✓ **All States** except NC Cap: (855) 807-9595
 - ✓ **NC Cap Only:** Call (844) 608-0047
 - ✓ 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. Press #1 to confirm and save the punch
7. The recording will read back the punch details and then disconnect



Clock Out: Real Time Entry

1. Sign in:
 - ✓ Call from the client's landline to end the shift
 - ✓ **All States** except NC Cap: (855) 807-9595
 - ✓ **NC Cap Only:** Call (844) 608-0047
 - ✓ Enter the last four digits of the social security number
 - ✓ Enter PIN
 - ✓ Enter month/day of birth (MMDD)
2. Recording announces that there is an open punch
3. When prompted press #1 to confirm closing the punch
4. The punch is now closed, and the employee is clocked out
5. Press #2 to disconnect or Press #1 to open a new punch



Historical Entry

***Please note!** Historical entries are used for a missed punch or punch correction.

The client or employer must be present at the end of this process.

1. Sign in:

- ✓ Call from the client's landline to start the shift
 - ✓ **All States** except NC: (855) 807-9595
 - ✓ **NC Cap Only:** Call (844) 608-0047
- ✓ 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. Select #2 for historical entry

5. Select the service code with the prompts given



Historical Entry (cont.)

6. Enter the date of service in MMDDYYYY format (i.e., April 28, 2024 = 04282024)
7. Enter the clock-in time in HH:MM (i.e., 0830)
8. Select #1 for AM or #2 for PM
9. Enter the clock-out time in HH:MM (i.e., 0530)
10. Select #1 for AM or #2 for PM
11. The recording will read back the punch details
12. Press #1 to confirm



Historical Entry (cont.)

***Please Note!** The client or employer must be present for the following final steps:

13. Hand the phone to the client/employer who presses #1 when ready
14. The client/employer reviews the punch details and presses #1 to accept or #2 to reject the entry
15. The client/employer will validate the call using the client PIN
16. The punch is created
17. The phone disconnects and the shift is recorded



Troubleshooting


- **Is the employee having trouble signing in?**
 - ✓ PIN not working? [Add/Change PIN](#) inside profile settings
 - ✓ Employee can call Acumen to confirm their date of birth & last four digits of their social security number on their profile
- **Is the employee having trouble clocking in?**
 - ✓ Only call from the client's landline
 - Call Acumen to confirm the client's number
- **Is the employee having trouble adding historical entries?**
 - ✓ Enter the date & time in the correct format (MM/DD/YYYY & HH:MM)
 - ✓ Do not overlap with other employee's shifts
- **Is the client having trouble validating the entry?**
 - ✓ Employer calls Acumen to reset their client PIN



Add / Change PIN

***Please Note!** The PIN can only be added or changed in the web portal

1. Log in to the DCI Web Portal
 1. All states **except** NC Cap: acumen.dcisoftware.com
 2. NC Cap **Only**: outreach.dcisoftware.com
2. Click the username in the top right corner of the main menu
3. Click **Settings** from the drop-down menu
4. Select **Change PIN** or **Add New PIN**
 - ✓ Add New PIN after a reset
 - ✓ Change PIN anytime
5. Enter password
6. Click the blue **Verify** button



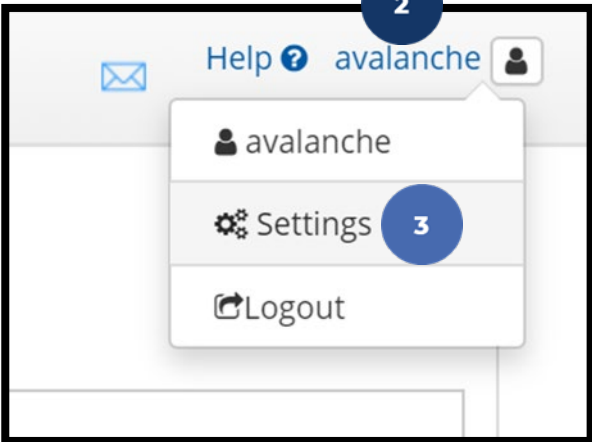
Sign In

Username **1**

Password **1**

Remember me [Forgot your password?](#)

Sign In

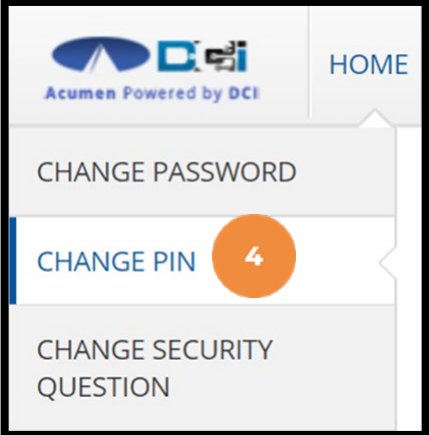


Help ? avalanche **2**

avalanche

Settings **3**

Logout



HOME

CHANGE PASSWORD

CHANGE PIN **4**

CHANGE SECURITY QUESTION



Password: * Please enter password **5**

Cancel Verify **6**

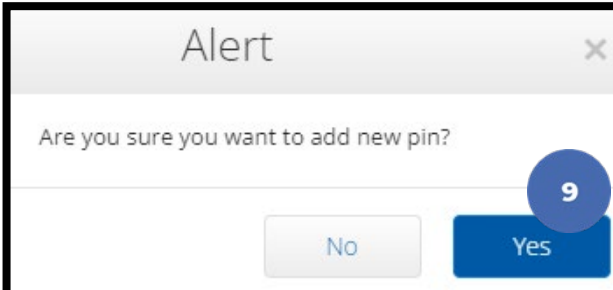
Add / Change PIN (cont.)

- Complete the New Pin field and retype the pin in the Confirm Pin field
- Click the blue **Change Pin** button
- Select **Yes** to confirm the pin change
- A green bar stating "Pin Changed Successfully!" appears



The screenshot shows a form with two input fields: "New Pin: *" and "Confirm Pin: *". Both fields contain the placeholder text "Please enter New Pin" and "Please Confirm Pin" respectively. An orange circle with the number 7 is positioned over the "Confirm Pin" field. To the right of the fields are two buttons: a grey "Cancel" button and a blue "Change Pin" button. A blue circle with the number 8 is positioned over the "Change Pin" button.

***Please Note!** The PIN can only be added or changed in the web portal



The screenshot shows a dialog box titled "Alert" with a close button (X) in the top right corner. The text inside the dialog reads "Are you sure you want to add new pin?". At the bottom of the dialog are two buttons: a grey "No" button and a blue "Yes" button. A blue circle with the number 9 is positioned over the "Yes" button.



The screenshot shows a green horizontal bar with the text "Pin Changed Successfully!". A blue circle with the number 10 is positioned over the right side of the bar.

Questions?

Thank you!

**Visit the Acumen Help Center
to learn more at:**

acumenfiscalagent.zendesk.com