

DCI Employee Portal Guide

Presented By: Acumen Fiscal
Agent



Acumen Fiscal Agent

Innovation • Opportunity • Freedom



OUR MISSION

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

DCI Web Portal Basics



- The Employer (ER)/designated representative (DR) reviews and manages time & enters vendor payments
- Employees correct punches and/or enter historical time
- Users may update profile settings

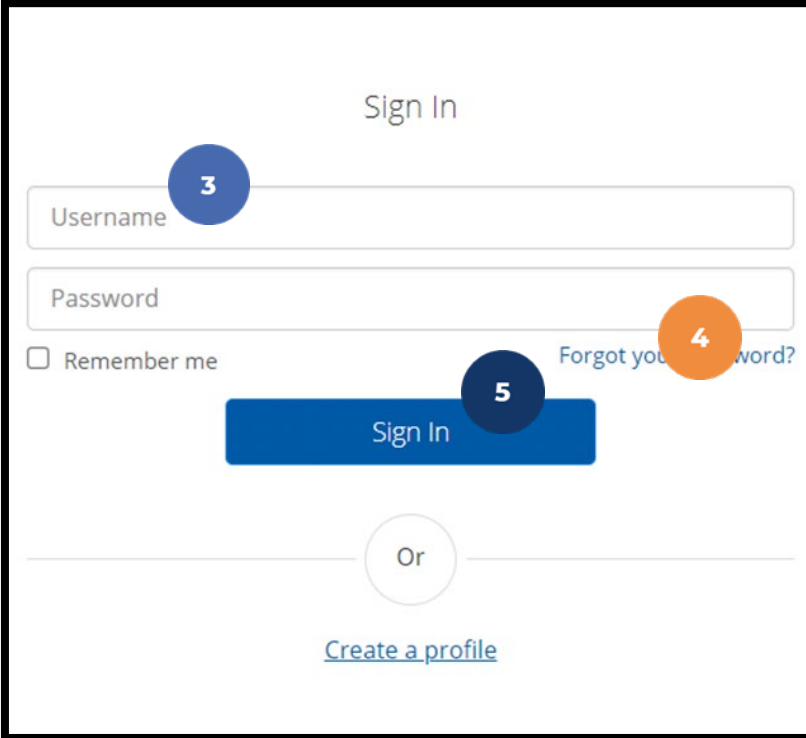


Accessing the DCI Web Portal

1. Open an internet browser on a computer or mobile device (Google Chrome is preferred) and navigate to the DCI Web Portal.
 1. All states **except** NC Cap (including KS Helpers): acumen.dcisoftware.com
 2. NC Cap **Only**: outreach.dcisoftware.com
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
 - This feature is only available for employees
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

1 acumen.dcisoftware.com

outreach.dcisoftware.com



Sign In

3 Username

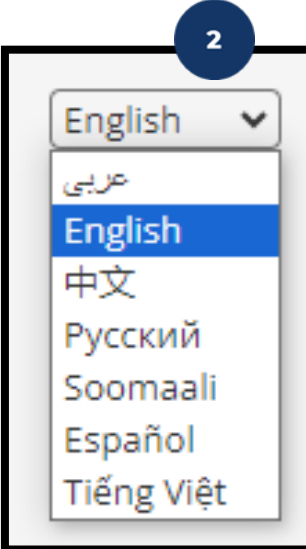
Password

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

5 Sign In

Or

[Create a profile](#)



2

English

عربي

English

中文

Русский

Soomaali

Español

Tiếng Việt

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

Profile Settings

***Please note!** Profile settings are only available on the full site

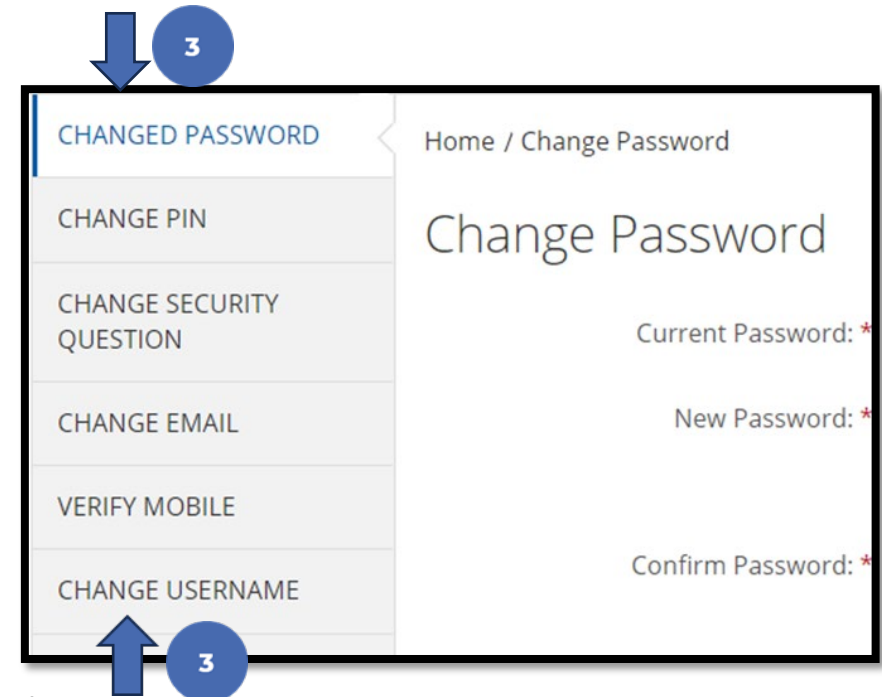
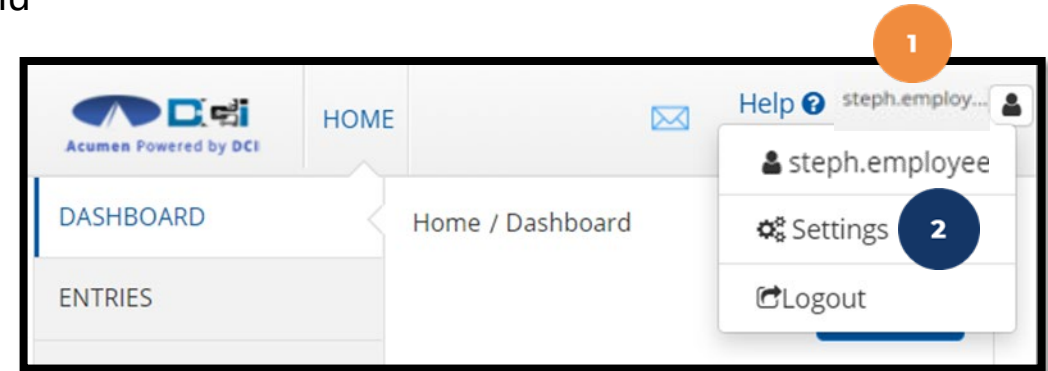


1. Click the **username** in the top right corner of the main menu

2. Click **Settings**

3. Select a submenu tab to update:

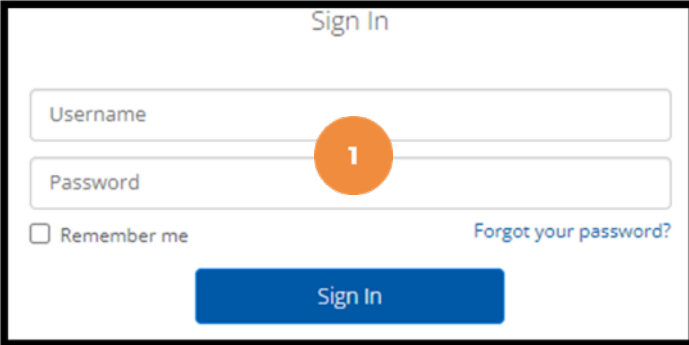
- Change Password – Used for login
- Change PIN – A number that can be used instead of a password when logging into the mobile app. *Required for employees if using Phone EVV IVR.*
- Change Security Question
- Change Email – A valid and correct email address is required for password recovery
- Verify Mobile
- Change Username – Used for login



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 (including KS Helpers): 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



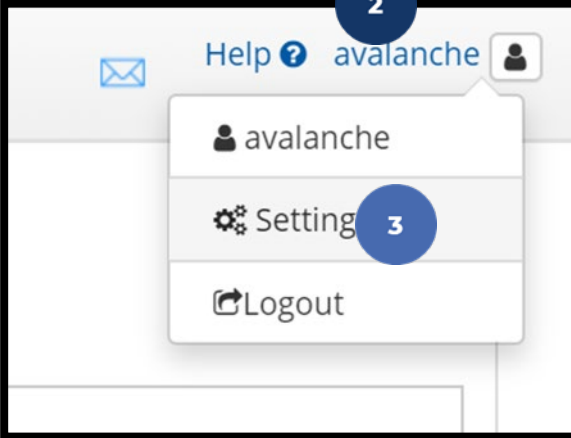
Sign In

Username **1**

Password **1**

Remember me [Forgot your password?](#)

Sign In

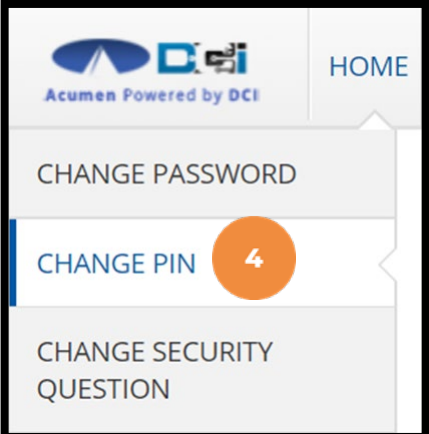


Help **2** avalanche **2**

avalanche

Setting **3**

Logout



HOME

CHANGE PASSWORD

CHANGE PIN **4**

CHANGE SECURITY QUESTION



Password: * Please enter password **5**

Cancel Verify **6**

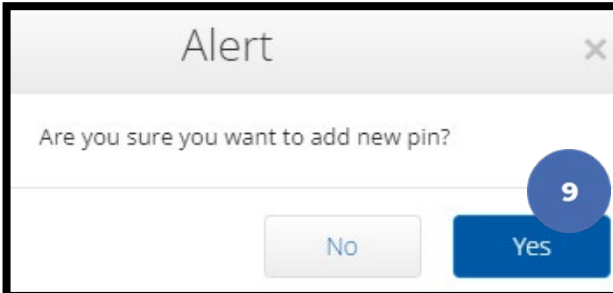
Add / Change PIN (cont.)

- 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. A blue 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

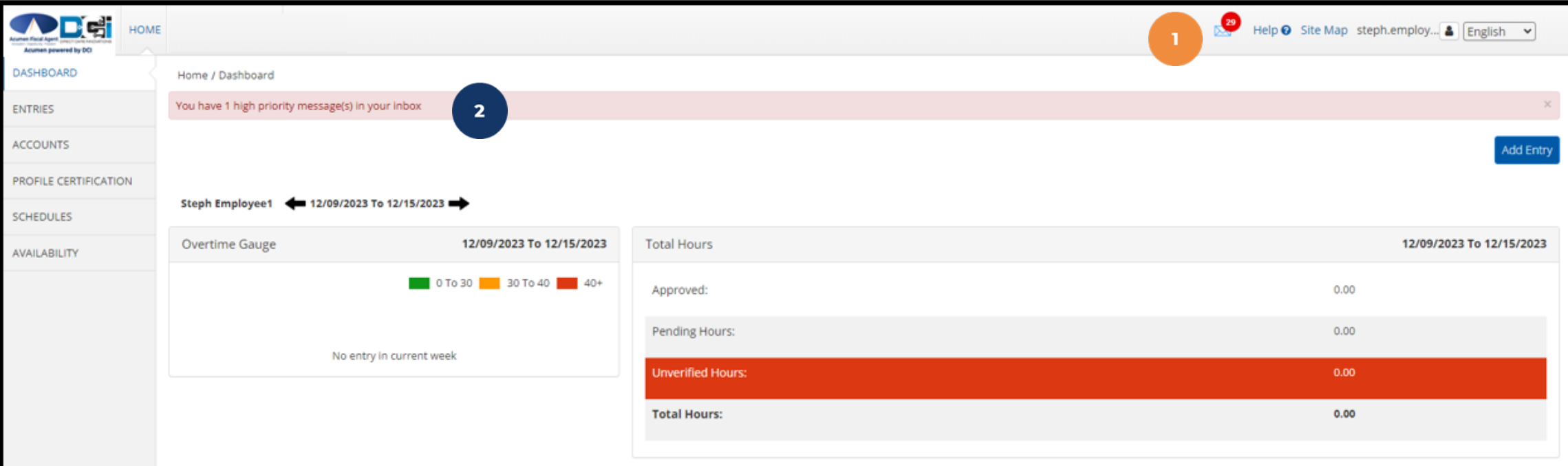


The screenshot shows a dialog box titled "Alert" with a close button (X) in the top right corner. The main text reads "Are you sure you want to add new pin?". At the bottom, there are two buttons: a grey "No" button and a blue "Yes" button. A blue circle with the number 9 is positioned over the "Yes"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



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 Acumen Fiscal Agent web portal dashboard. The top navigation bar includes the logo, a 'HOME' link, and a notification bubble with the number '1'. A red banner at the top of the main content area reads 'You have 1 high priority message(s) in your inbox' with a blue circle containing the number '2' next to it. The dashboard is for 'Steph Employee1' for the period '12/09/2023 To 12/15/2023'. It features an 'Overtime Gauge' showing 'No entry in current week' and a 'Total Hours' summary table.

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



Archive
Delete

Export

Showing 7 out of 7 records

		Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>	★		DCI Support	Account Statement	07:42 AM	
<input type="checkbox"/>	★		DCI Support	Pin Added	06/04/2024 03:28 PM	
<input type="checkbox"/>	★		DCI Support	User Profile Unlocked	12/05/2023 02:53 PM	
<input type="checkbox"/>	★		DCI Support	User Locked Out	12/05/2023 02:48 PM	

View Paystubs/Statements via Messaging Module



1. Locate the Paystub/Statement message in the inbox and click anywhere on the line to view it
2. Click the **Attachments** tab
3. Click the **eye** icon in the download column to view the paystub/statement or the **download** icon to download it

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>			DCI Support	Account Statement	07:42 AM	

Notes **Attachments** 2

<input type="checkbox"/>	Date	File Name	File Type	File Size	Added By	Download	Status
<input type="checkbox"/>	Aug 27, 2024	Account Statement.pdf		82.16 KB	Stephanie Smith		Active

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Home Tab Details & Add New Entry



1. Log in to the DCI Web Portal
 - All states **except** NC CAP: acumen.dcisoftware.com
 - NC CAP **Only**: outreach.dcisoftware.com
2. Select the **Entries** tab to view a complete list of submitted time entries
3. Overtime Gauge & Total Hours display for the current calendar week

Sign In

Username

Password 1

Remember me [Forgot your password?](#)

The **Dashboard** is the landing page

123 Steph Employer

Overtime Gauge 09/01/2024 To 09/07/2024

3.06

Total Hours	09/01/2024 To 09/07/2024
Approved:	0.00
Pending Hours:	3.06
Unverified Hours:	0.00
Total Hours:	3.06

Add New Entry (cont.)

5. Type a minimum of three characters to generate results and select the Client's name from the list
6. Select the Service Code
7. Select the Service Date
8. Enter the Check In (start) and Check Out (end) times
9. Select the Pay Rate Name (if required)

Add New Entry

Entry Type: * Punch

Employee Name: Steph Employee

Account Type: * Hourly

Client: * Steph Client - 125 5

Service Code: * SDFSS 6

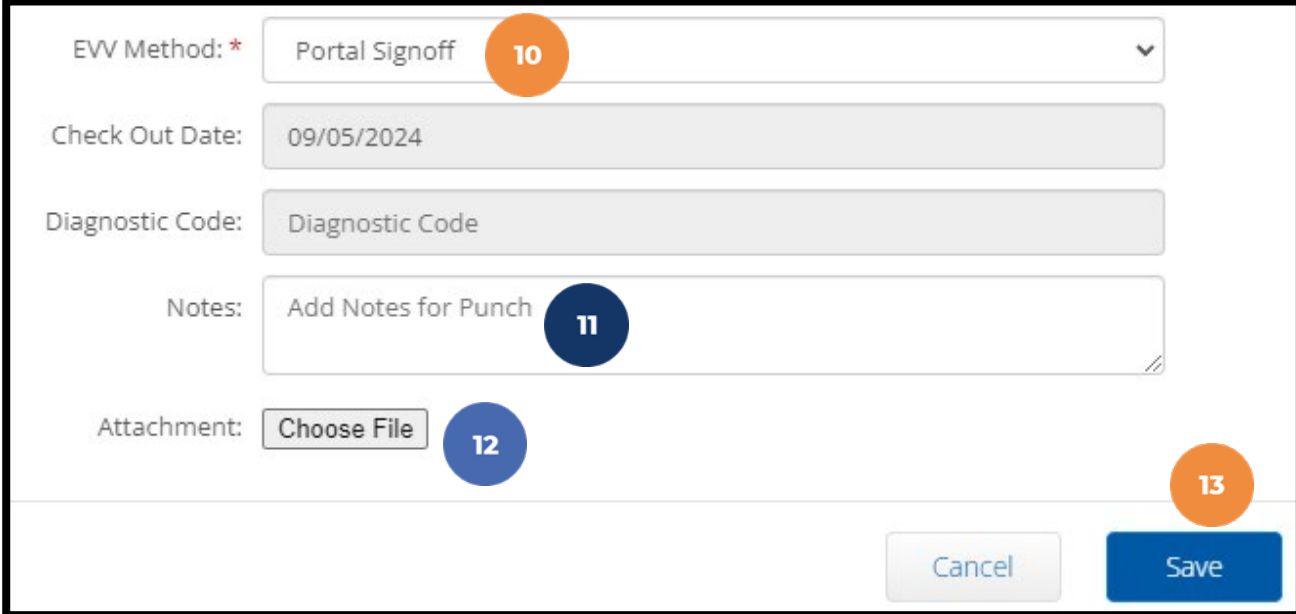
Service Date: * 09/05/2024 7

8 Check In: * 6:00 AM Check Out: * 9:00 AM 8

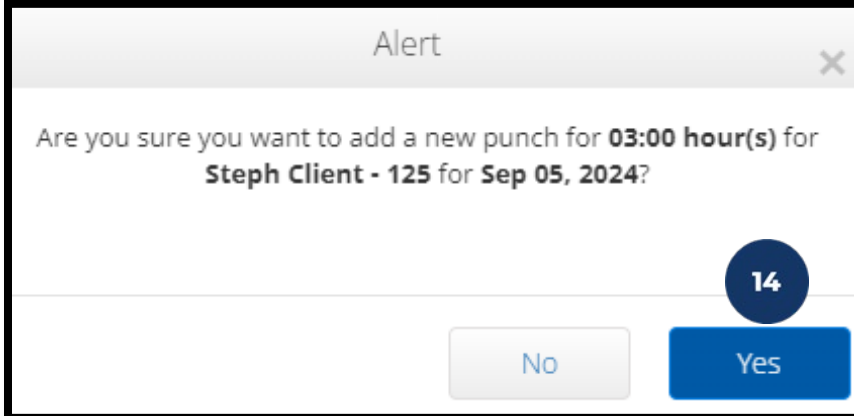
Pay Rate Name: * THR 9

Add New Entry (cont.)

10. Select Portal Signoff as the EVV Method Method
11. Enter Notes for the punch (optional)
12. Click the **Choose File** button to select and upload Attachments (optional)
13. Click **Save**
14. Click **Yes** to submit



The screenshot shows a form for adding a new entry. It includes a dropdown menu for 'EVV Method: *' with 'Portal Signoff' selected (callout 10), a 'Check Out Date' field with '09/05/2024', a 'Diagnostic Code' field with 'Diagnostic Code', a 'Notes' text area with 'Add Notes for Punch' (callout 11), and an 'Attachment' section with a 'Choose File' button (callout 12). At the bottom right, there are 'Cancel' and 'Save' buttons (callout 13).



The screenshot shows an alert dialog box titled 'Alert' with a close button (X). The message reads: 'Are you sure you want to add a new punch for 03:00 hour(s) for Steph Client - 125 for Sep 05, 2024?'. At the bottom, there are 'No' and 'Yes' buttons (callout 14).



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Edit Entry

***Please note!** Only entries in a Pending status can be edited by the employee. Contact Acumen for assistance if in any other status.

- Log in to the DCI Web Portal
 - All states **except** NC
CAP: acumen.dcisoftware.com
 - NC CAP
Only: outreach.dcisoftware.com
- Click **Entries** on the submenu
- Click anywhere on the line of the punch entry to be edited
- Click the **Actions** button in the top right corner
- Select **Edit Entry** from the drop-down menu

Sign In

Username

Password **1**

Remember me [Forgot your password?](#)

Sign In

Acumen Powered by DCI

HOME

DASHBOARD

ENTRIES **2**

ACCOUNTS

PROFILE CERTIFICATION

Id	Service Date	Start Time	End Time	Type	Account Type	Ref.	Client Name	Service Code	Amount	Unit Type	Status
92926243	Dec 02, 2023	10:30 AM	02:30 PM	Punch	Hourly 3		Steph_Client1	Steph Hourly	0:04:00	Hourly	Pending

Actions **4**

- New Note
- New Attachment
- Edit Entry **5**
- Reject

Edit Entry (cont.)

***Please note!** Only entries in a Pending status can be edited by the employee



6

Entry Type: * Punch

Employee Name: Steph Employee - 125

Account Type: * Hourly

Client: * Steph Client - 550

Service Code: * SDFSS

Select Date: * 09/05/2024

Check In: * 6:00 AM Check Out: * 9:00 AM

Pay Rate Name: THR

Check Out Date: 09/05/2024

EVV Method: * Portal Signoff

Diagnostic Code: Diagnostic Code

Notes: Add Notes for Punch

Attachment: Choose File

7

Cancel Save

6. Complete the necessary changes in the Edit Entry form wizard
7. Click **Save**
8. Click **Yes** to confirm the changes

The edited entry moves into a Rejected status, and a new (corrected) entry in Pending status is created.

Alert

Are you sure you want to cancel the existing punch for 0:03:00 hour(s) for Sep 05, 2024 and add a new punch for 02:30 hour(s) for Steph Employee for Steph Client-550 for Sep 05, 2024?

8

No Yes

Questions?

Thank you!

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

acumenfiscalagent.zendesk.com