Case Worker Portal Guide

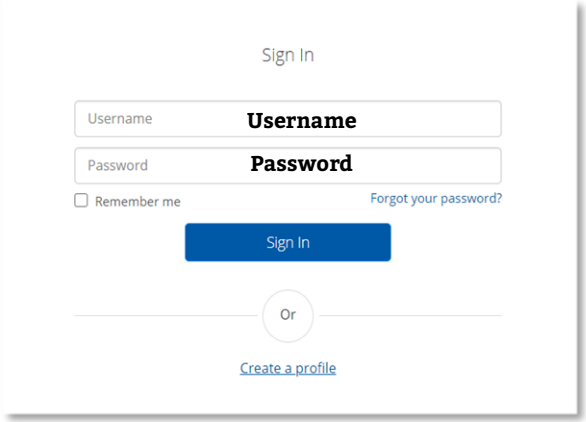
Case Worker Profile Basics

DCI Case Worker Portal

- DCI's Case Worker Portal allows SC's to review budget & entry details for their Caseload
- Only clients who are assigned will be visible in DCI
- All Case Workers will have unique login credentials
- Use Forgot Password link when necessary
- Contact Customer Service with any login issues

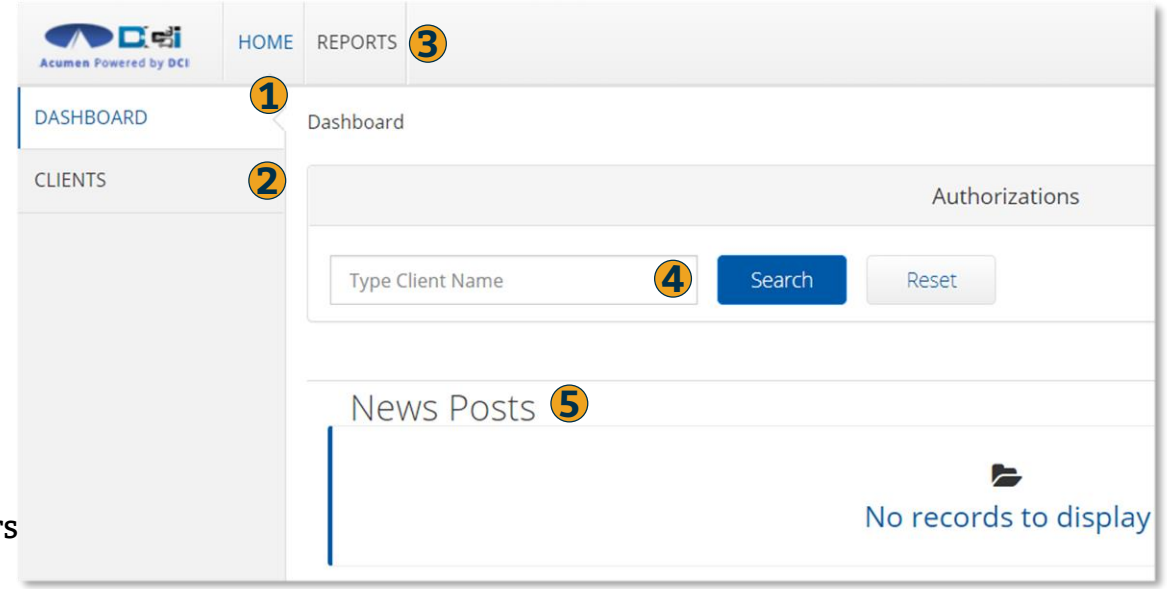
How to access

- Go to acumen.dcisoftware.com
- Log into **Case Worker Profile**



Case Worker Dashboard

1. Home/Dashboard is the landing page to the Portal
2. Clients Tab will show list of clients. (Case Load)
3. Access to Reporting features
4. Authorization Widget
5. News Posts for Case Managers

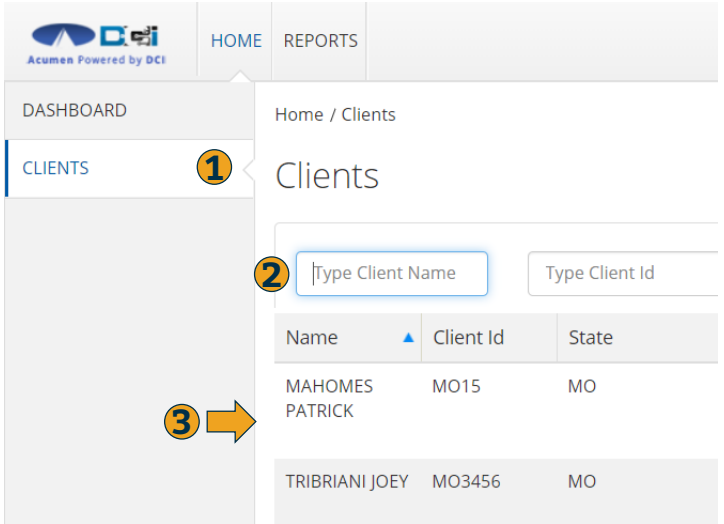


Client Details

Case Worker - Clients

Once logged into the DCI Portal

1. Click on Clients Tab to view list of Clients in case load
2. Use Search features if needed
3. Click on Client name to view Client Details page

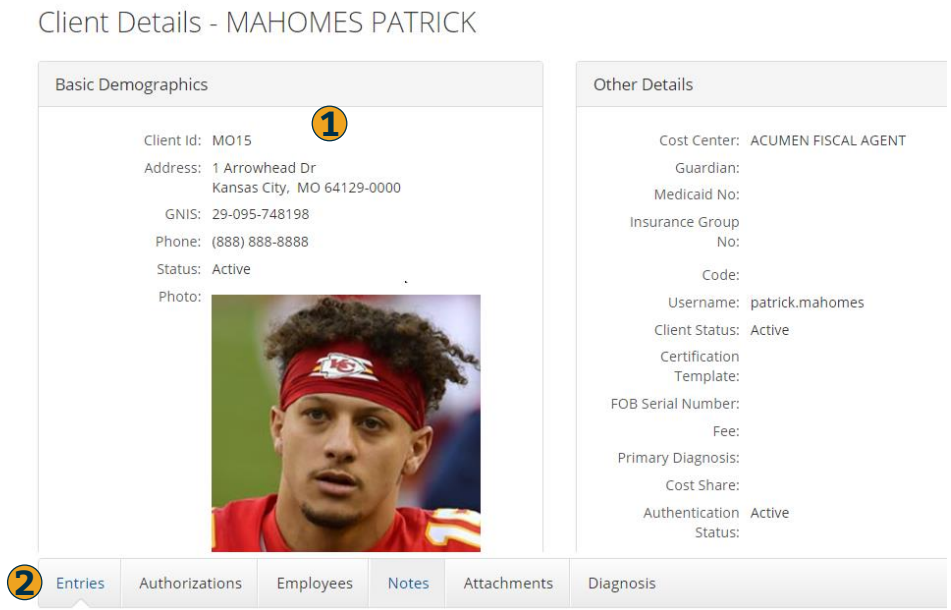


Client Details Page

<u>Once logged into the DCI Portal</u>

1. Client Details Page will show basic demographic info
2. Scroll down to view details on the different tabs*

**We will cover Entries, Authorizations, & Notes tabs*

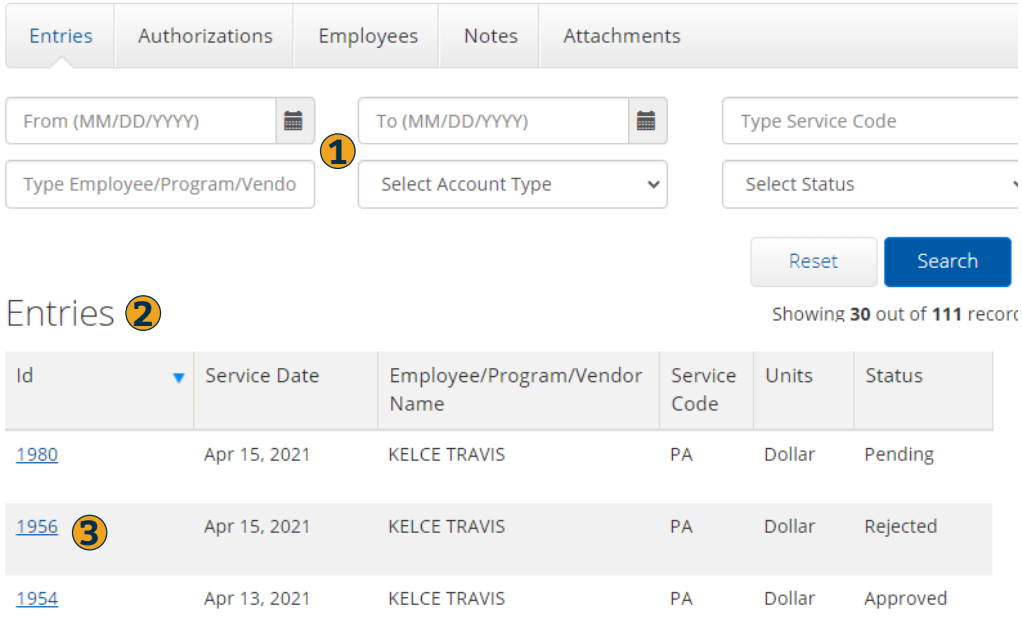


Entries Tab

Once on the Events Tab

1. Use search filters if needed
2. Scroll down to view list
3. Select entry to view Punch Detail page*

**Punch Detail page shows basic punch data, EVV & Service notes for the shift.*

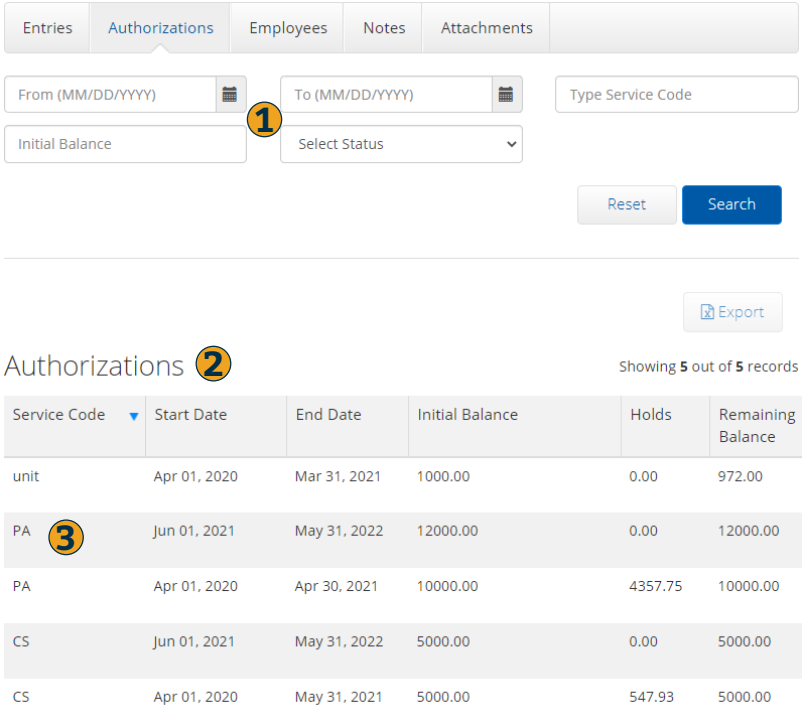


Authorizations Tab

Once on the Auth Tab

1. Use search filters if needed
2. Scroll down to view list
3. Select entry to view Authorization Detail page*

**Auth Detail page shows basic authorization data such as balances and budget period.*

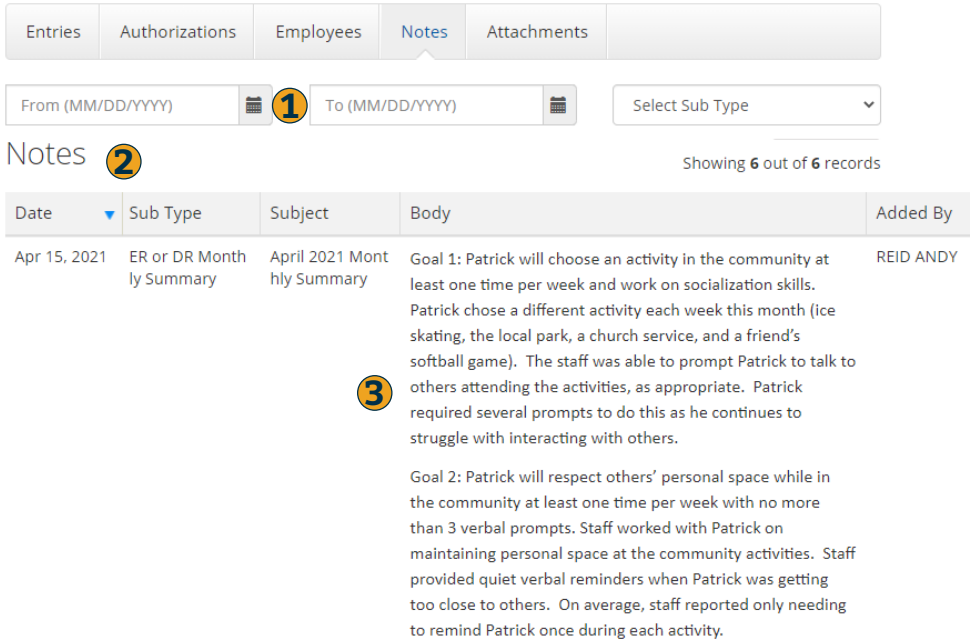


Notes Tab

Once on the Notes Tab

1. Use search filters if needed
2. Scroll down to view notes
3. Select note entry to view Note Detail page*

**Note Detail page shows the complete note.*

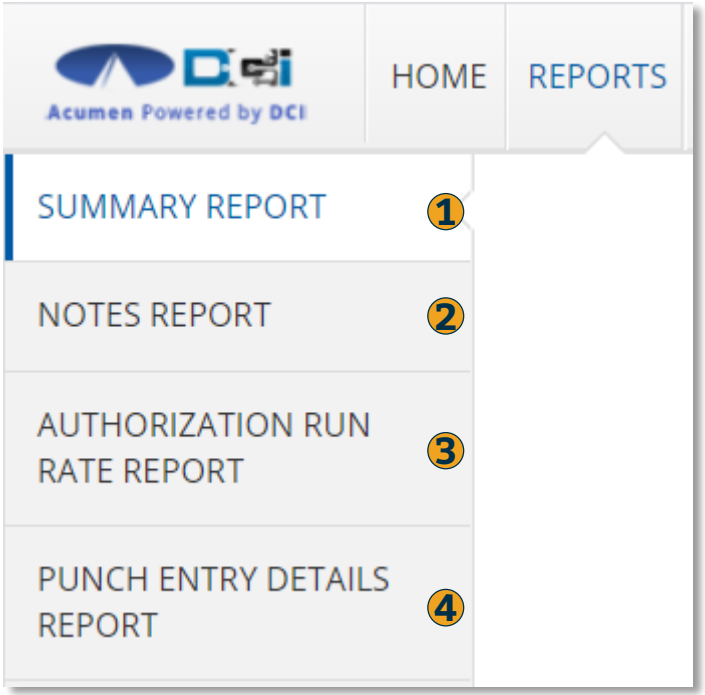


Reporting Features

Reporting Features

Once on the Reports Tab

1. Summary Report
   - Spending Summary
2. Notes Report
   - Service Notes
3. Authorization Run Rate Report
   - Shows acutal vs projected budget usage
4. Punch Entry Details Report
   - List of entries in DCI



Summary Report

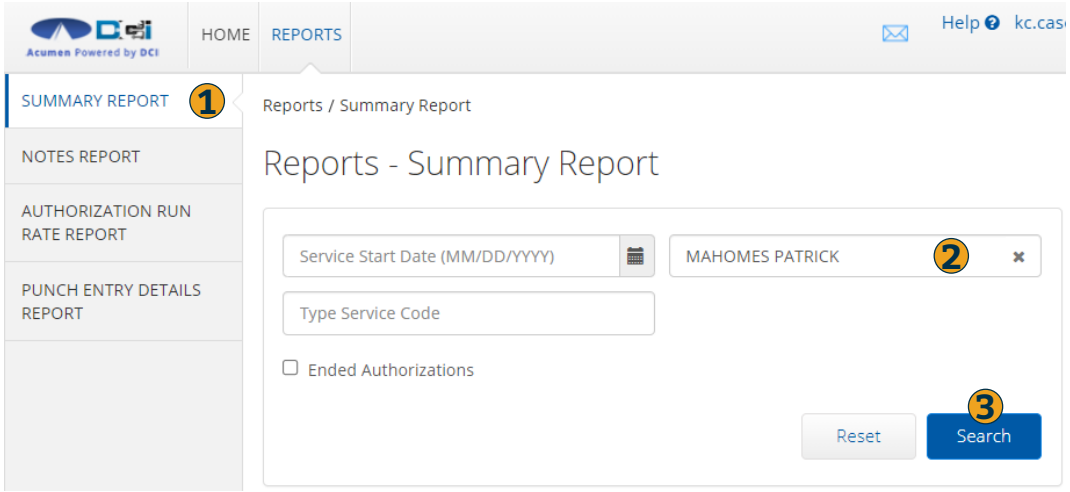
Summary Report Basics

Only One Summary Report

1. Select Summary Report
2. Type Client Name
   - Type 3 letters > Select Name
3. Click Search

Pro Tips:

Search without filters to view all active Authorizations in DCI.



View Report Results

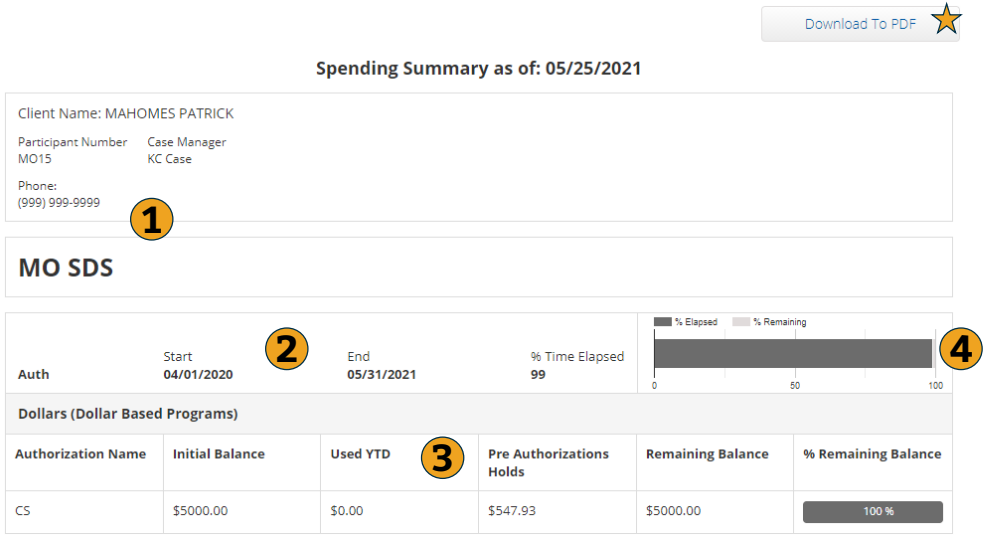
Once Results are Listed

1. Client/Program info
2. Budget Period
3. Budget Balances ($$)
4. Budget Time Remaining (%)

Pro Tip:

Scroll down for a list of punches.

★ *Download to save for your records.*



Notes Report

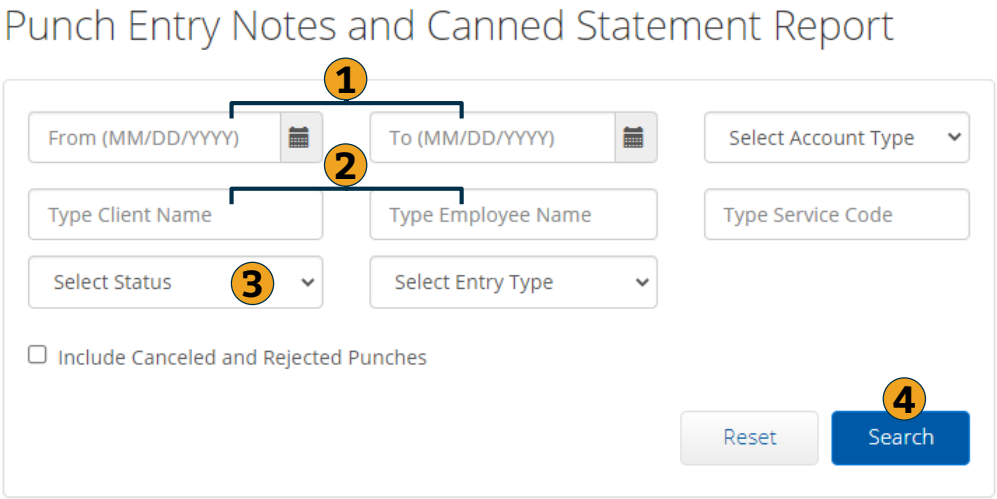
Punch Entry Notes Report

Daily Service Notes Report

1. Filter by Date Range ★
2. Filter by CLT or EE
3. Filter by Punch Status
4. Click Search for report

Pro Tip:

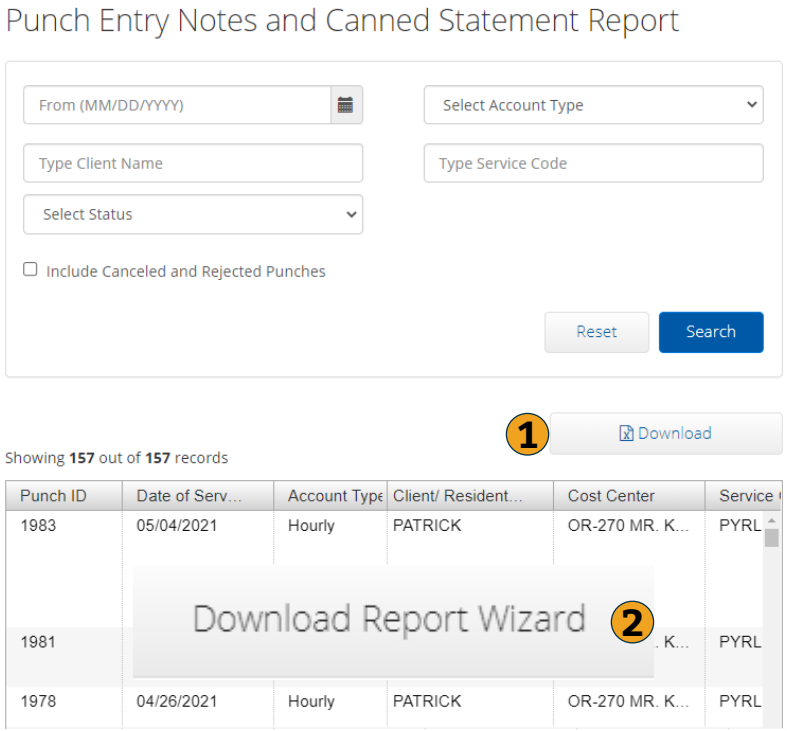
Searching without filters will pull ALL punches in DCI



Download Report Results

Once Results are Listed

1. Select Download button
2. Complete Download Wizard
   - Select Columns & Format
3. See Next Slide for details



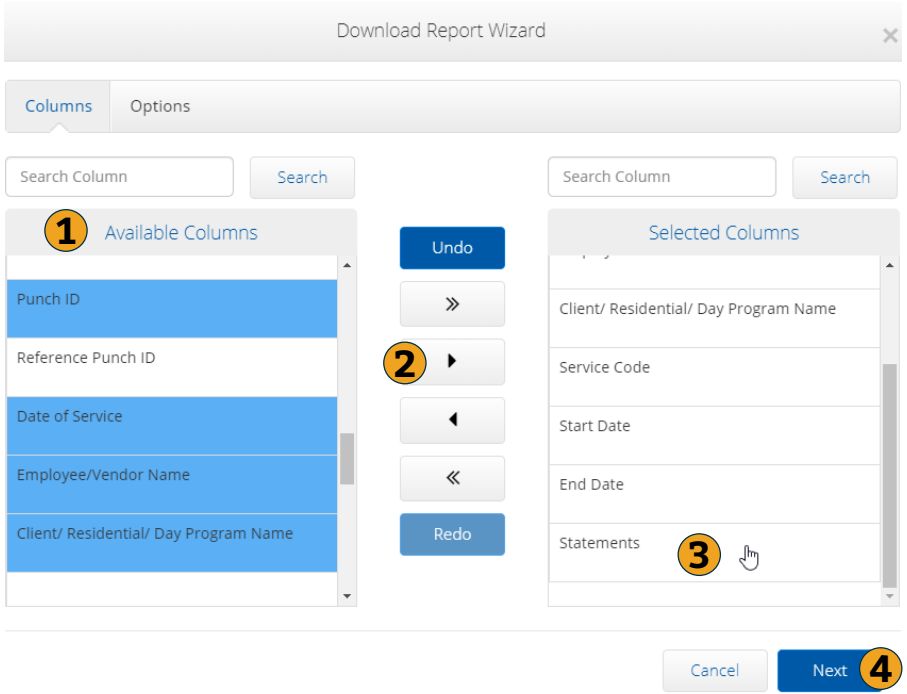
Download Report Wizard

Once Report Wizard is open

1. Select all desired columns
2. Click single arrow to add
3. Rearrange columns as needed
4. Select Next for more

Recommended Columns

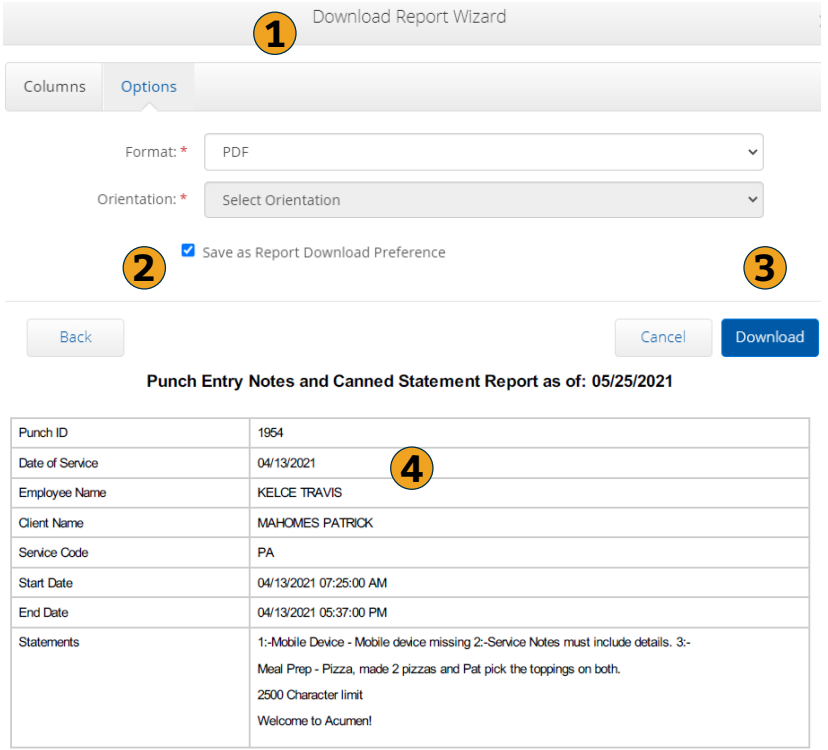
- Punch ID
- Date of Service
- Employee Name
- Client Name
- Service Code
- Start Date
- End Date
- Statements



Download Notes Report

Once Columns are Selected

1. Select File Format
   - PDF is Recommended for Notes Reports
2. Save Report Preferences
3. Click Blue Download button
4. View, Save & Print Report



Authorization Run Rate Report

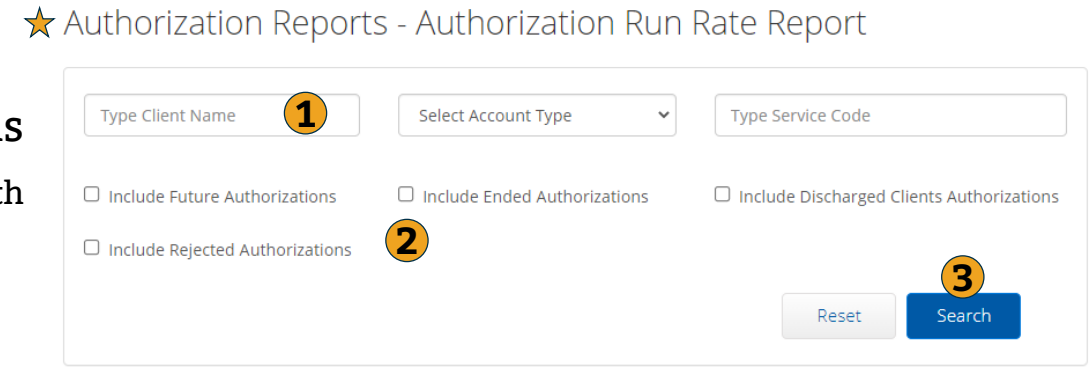
Authorization Run Rate Report

Auth Run Rate Report

1. Type Client Name
   - Type 3 letters > Select Name
2. View other Authorizations
   - Not needed to view current Auth
3. Click Search

Pro Tip:

Searching without filters will pull ALL Authorizations in DCI



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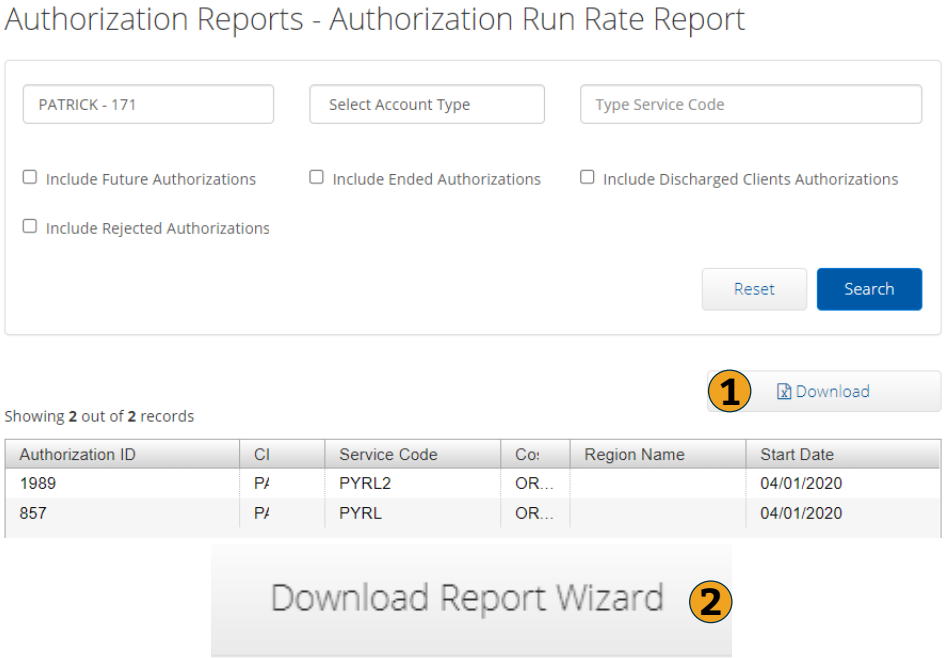


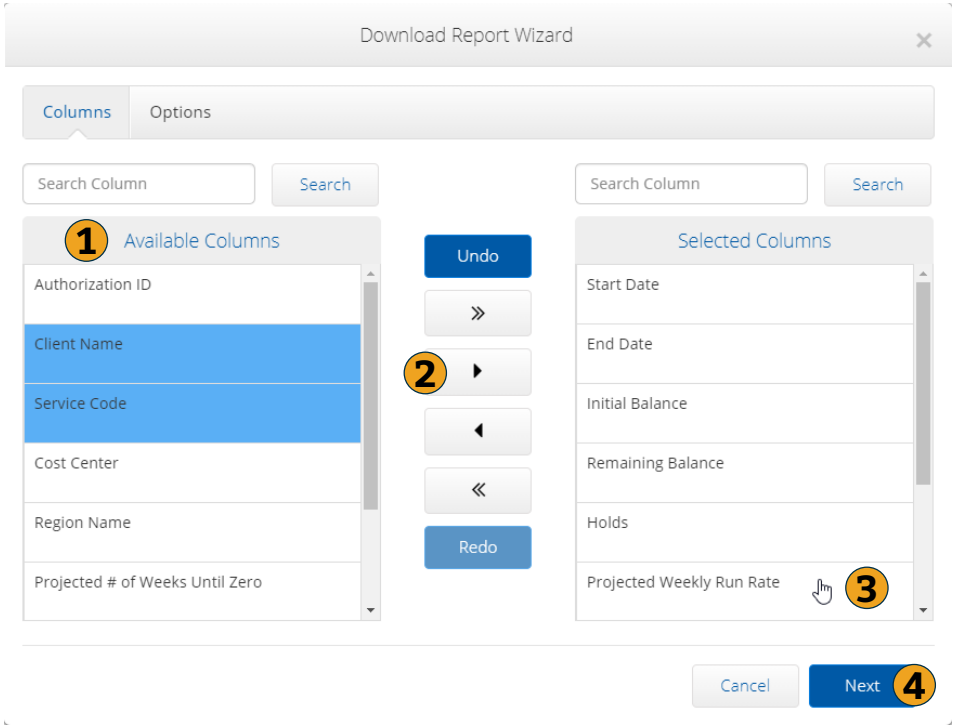
Download Report Wizard

Once Report Wizard is open

1. Select all desired columns
2. Click single arrow to add
3. Rearrange columns as needed
4. Select Next for more

Recommended Columns

- Client Name
- Service Code
- Start & End Date
- Initial Balance
- Remaining Balance
- Holds
- Projected/Current Rate
  - Weekly & Monthly



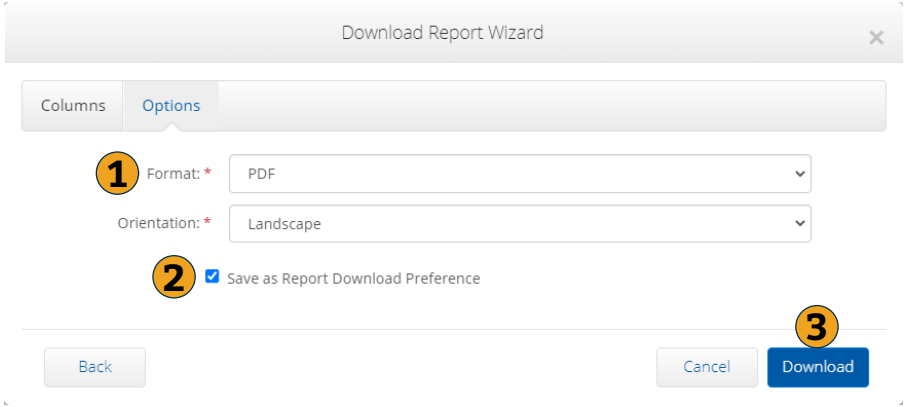
Download Run Rate Report

Once Columns are Selected

1. Select File Format
   - PDF/Landscape is Recommended
2. Save Report Preferences
3. Click Blue Download button
4. View, Save & Print Report

Pro Tip:

Keep Current Rates slightly below Projected Rates to ensure proper budget usage



Authorization Run Rate Report as of: 05/07/2021

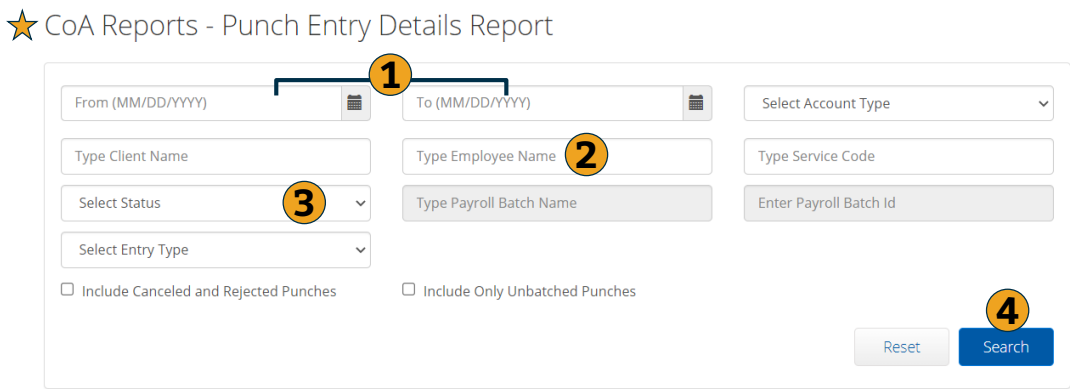
Client Name	Service Code	Start Date	End Date	Initial Balance	Remaining Balance 4	Holds	Projected Weekly Run Rate	Current Weekly Run Rate	Projected Monthly Run Rate	Current Monthly Run Rate
PATRICK	PYRL2	04/01/2020	05/31/2022	12000.00	12000.00	0.00	106.19	0.00	455.06	0.00
PATRICK	PYRL	04/01/2020	05/31/2021	10000.00	10000.00	6407.87	164.31	0.00	704.23	0.00

Punch Entry Details Report

Punch Entry Details Report

Punch Entry Details Report

1. Filter by Date Range
2. Filter by Employee
3. Filter by Punch Status
4. Click Search for report



Pro Tip:

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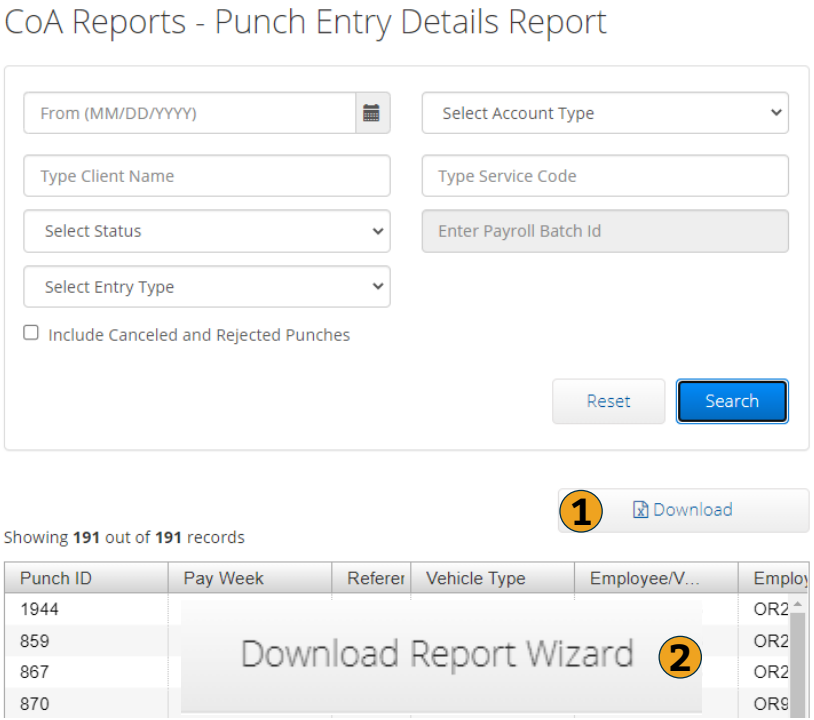


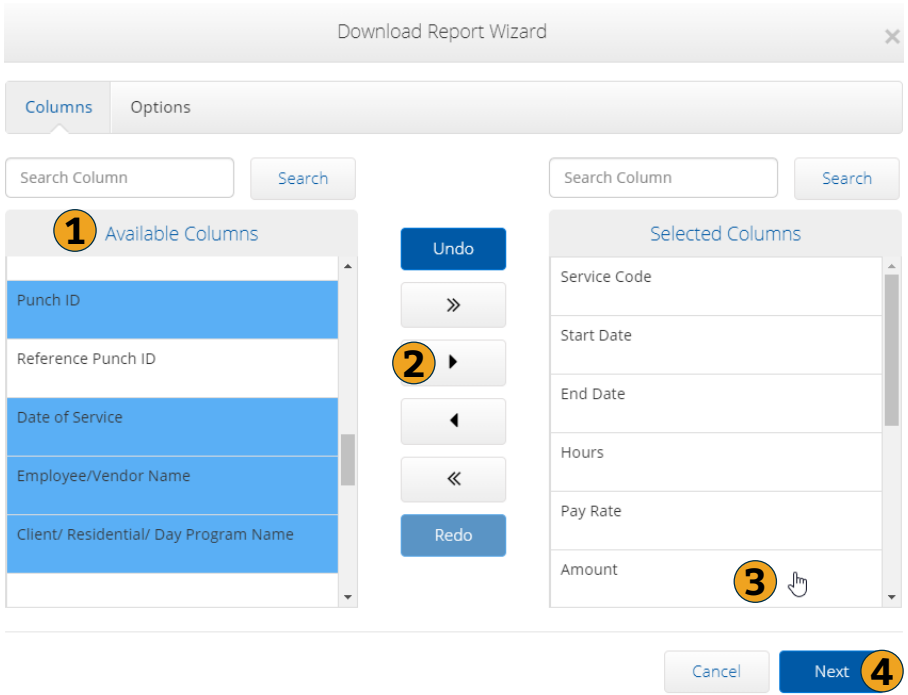
Download Report Wizard

Once Report Wizard is open

1. Select all desired columns
2. Click single arrow to add
3. Rearrange columns as needed
4. Select Next for more

Recommended Columns

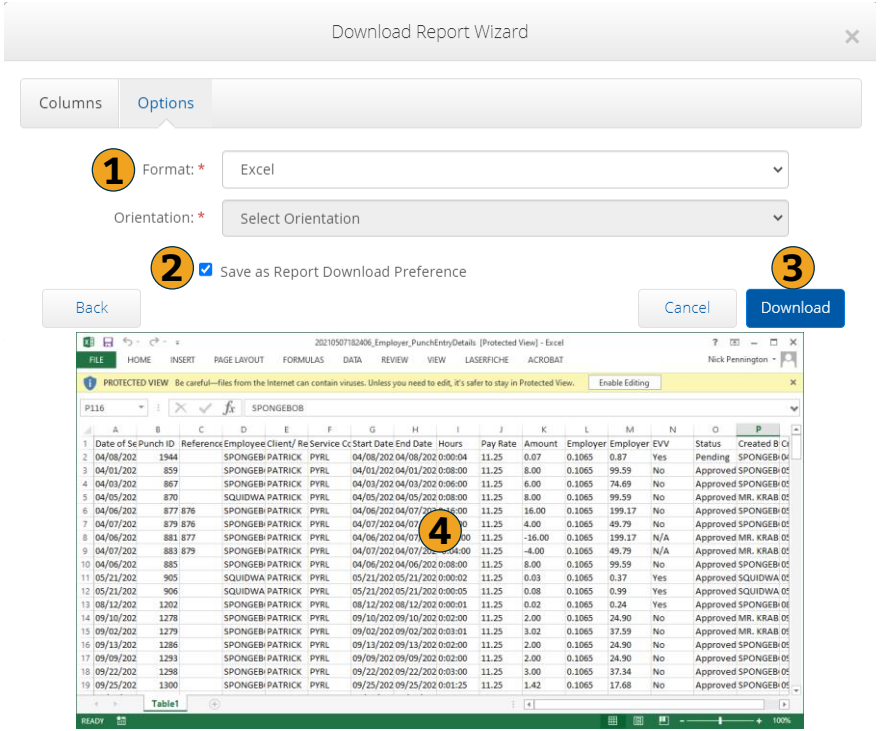
- Punch ID
- Date of Service
- Employee Name
- Client Name
- Service Code
- Start & End Date
- Hours
- Amount
- Pay Rate
- Employer Burden
- Status
- EVV



Download Report

Once Columns are Selected

1. Select File Format
   - Excel is Recommended for this report
2. Save Report Preferences
3. Click Blue Download button
4. View, Save & Print Report

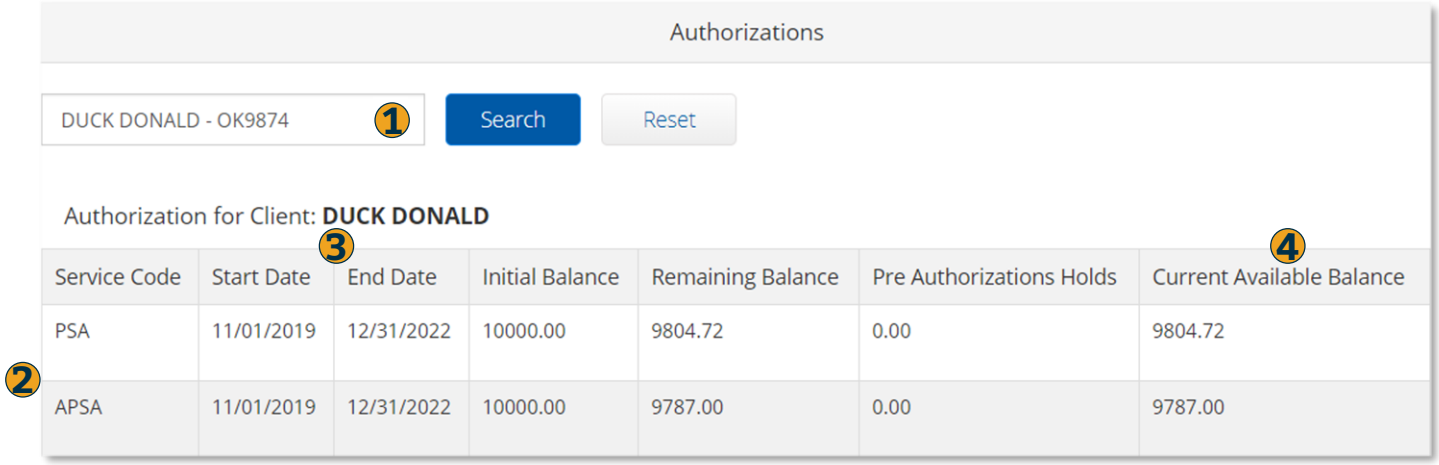


Authorization Widget

Authorization Widget

Available on Home/Dashboard

1. Type Client name and select
2. View Authorizations for services
3. Authorization period breakdown
4. Current balance available for use.



Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorizations Holds	Current Available Balance
PSA	11/01/2019	12/31/2022	10000.00	9804.72	0.00	9804.72
APSA	11/01/2019	12/31/2022	10000.00	9787.00	0.00	9787.00

Thank you!

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