



# Historical Entries with Reason Codes

# Reason Code Basics

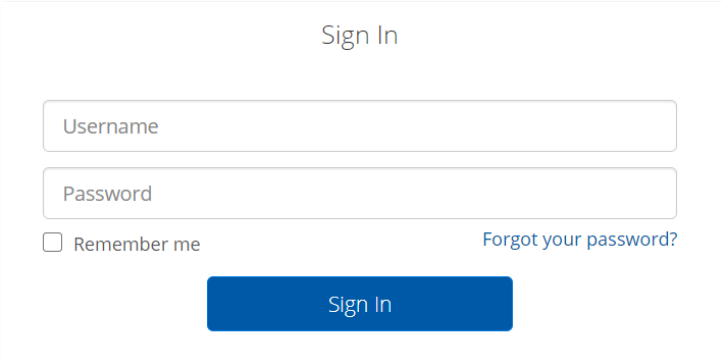
- Reason Codes are required for some programs and services
- If you see an option to select a reason, it's required for you
- This is the reason you are entering your time in the DCI Web Portal instead of an EVV Compliant method
- The DCI Web Portal should only be used to enter missed punches.

Reason: 

# The DCI Web Portal

1. Open an Internet Browser on a computer or mobile device
2. Navigate to the DCI Web Portal
3. Enter Employee Username/Password
4. Use Forgot Password link if needed
5. Contact Acumen Agent for help

[acumen.dcisoftware.com](https://acumen.dcisoftware.com)



Sign In

Username

Password

Remember me [Forgot your password?](#)

Sign In

The screenshot shows a white rectangular box representing the sign-in interface. At the top center is the text 'Sign In'. Below it are two input fields: 'Username' and 'Password'. Under the 'Password' field, there is a checkbox labeled 'Remember me' and a blue link 'Forgot your password?'. At the bottom center is a blue button with the text 'Sign In'.

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# DCI Web Portal

On a Laptop or Desktop Computer

# Add New Entry (Computer/Laptop)

## Once logged in

1. Select Add New Entry

Home > Dashboard

Help spongebob

1 → Add Entry

SPONGEBOB ← 11/01/2020 to 11/07/2020 →

**Overtime Gauge** 11/01/2020 to 11/07/2020

0 to 30 30 to 40 40+

No entry in current week


**Total Hours** 11/01/2020 to 11/07/2020

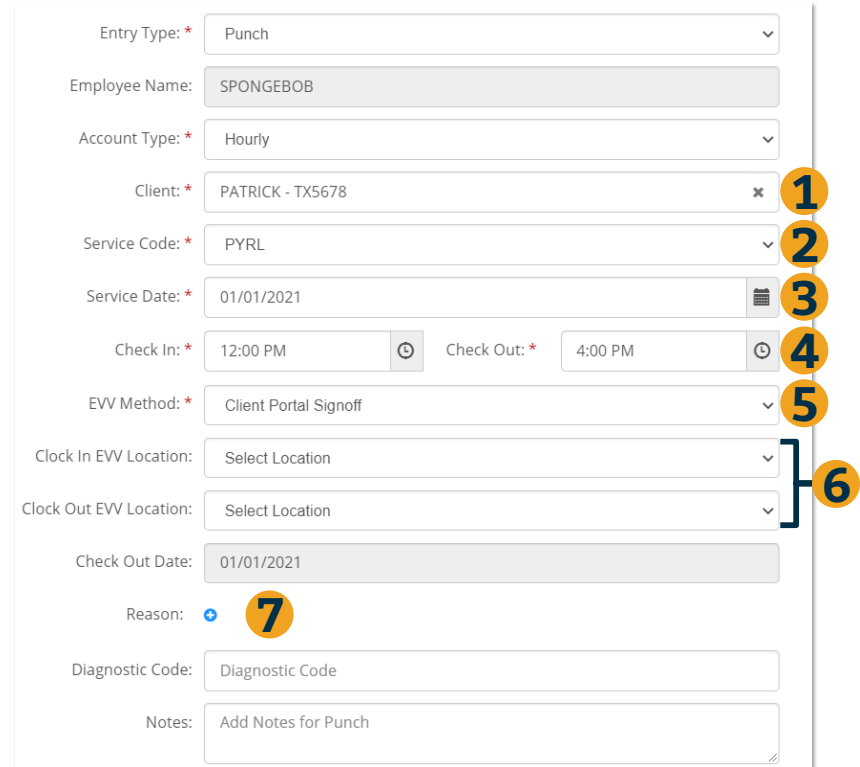
Approved By:	7.52
Pending Hours:	0.00
<b>Unverified Hours:</b>	<b>0.00</b>
<b>Total Hours:</b>	<b>7.52</b>

**Expiring Certifications**

Certification Name	Certification Expiration Date	Link to Certification Course
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# Complete New Entry


1. Enter Client Name & Select
2. Select Service Code
3. Select Service Date
4. Enter Start & End Time
5. Select Client Portal Signoff
6. Select Location if necessary
7. Select  to choose reason code




Entry Type: \* Punch



Employee Name: SPONGEBOB

Account Type: \* Hourly

Client: \* PATRICK - TX5678  1

Service Code: \* PYRL 2

Service Date: \* 01/01/2021  3


Check In: \* 12:00 PM  Check Out: \* 4:00 PM  4

EVV Method: \* Client Portal Signoff 5

Clock In EVV Location: Select Location } 6

Clock Out EVV Location: Select Location }


Check Out Date: 01/01/2021

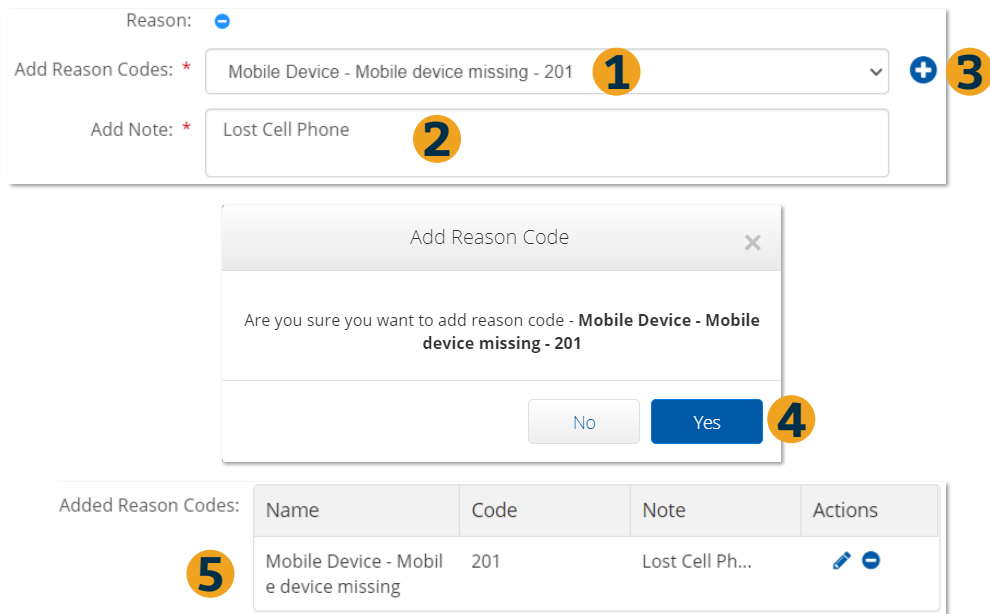
Reason:  7


Diagnostic Code: Diagnostic Code


Notes: Add Notes for Punch

# Add Reason Code


1. Select Reason code from list
2. Enter Note to explain
3. Select  to add reason code
4. Select Yes to add code
5. Reason code should be displayed below w/ note



Reason: 

Add Reason Codes: \*   **3**



Add Note: \*  **2**

Add Reason Code 

Are you sure you want to add reason code - **Mobile Device - Mobile device missing - 201**

**4**

Added Reason Codes:

Name	Code	Note	Actions
Mobile Device - Mobile device missing	201	Lost Cell Ph...	 

**5**

# Add Notes and Submit

## After Reason Code is added

1. Notes are required for Reason Code “Other” but are optional for other reasons.
2. Attachments are optional
3. Select Save
4. Select Yes to Submit

Diagnostic Code:

Notes:

Attachment:

Alert

Are you sure you want to add a new punch for **04:00 hour(s)** for **PATRICK - TX5678** for **Jan 01, 2021**?



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# Mobile Web Portal

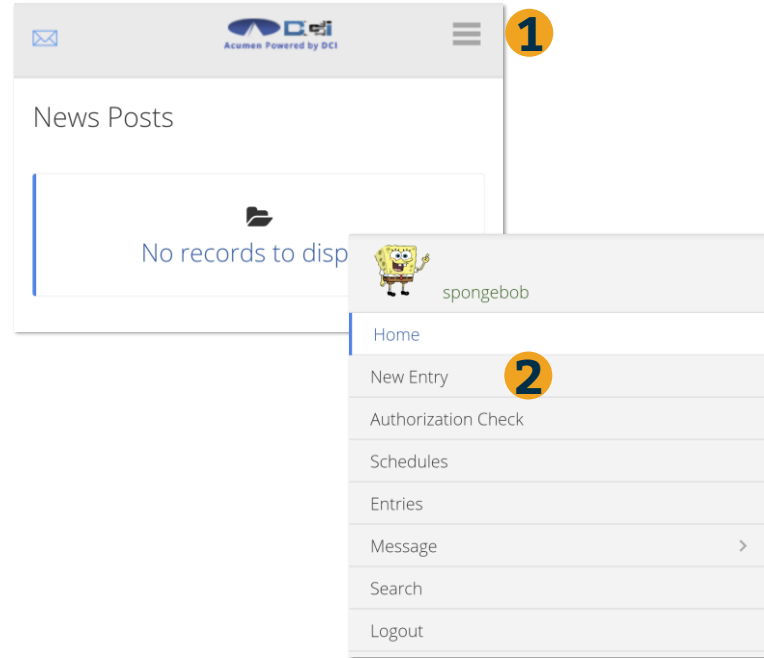
On a Smartphone or Tablet

# Add New Entry (Mobile Device)

Once logged in

1. Select the Menu in the top right corner
2. Select New Entry

Complete the Add New Entry Wizard



# Add New Entry Wizard

1. First 2 boxes are preset
2. Enter Client Name
3. Select Service Code
4. Select Service Date
5. Enter Start & End Time
6. Select Client Portal Signoff
7. Select Location if necessary

The screenshot shows a web form titled "Add New Entry" with the following fields and callouts:

- 1:** A bracket groups the first two dropdown menus, which are preset to "Punch" and "Hourly".
- 2:** A text input field containing "PATRICK - TX5678" with a clear (x) button.
- 3:** A dropdown menu with "PYRL" selected.
- 4:** A date input field showing "01/01/2021" with a calendar icon.
- 5:** Two time input fields: "6:00 AM" and "10:00 AM", each with a clock icon.
- 6:** A dropdown menu with "Client Portal Signoff" selected.
- 7:** A bracket groups the last two dropdown menus: "Select Clock In EVV Location" and "Select Clock Out EVV Location".

# Add New Entry Wizard (Cont)

1. Select **+** to choose Reason Code
2. Select Reason Code from dropdown list
3. Enter Note to explain
4. Select **+** to add Reason Code
5. Reason Code will be added

The screenshot displays a multi-step wizard interface. At the top, there is a date field showing '01/01/2021' with a calendar icon. Below this is a 'Reason:' label followed by a minus sign and a circled '1'. A dropdown menu is open, showing 'Mobile Device - Mobile device missing -' with a circled '2' and a plus sign with a circled '4' to its right. Below the dropdown is a text input field containing 'Lost Cell Phone' with a circled '3'. A second, overlapping window shows a 'Select Reason' dropdown with a plus sign, and a list of details: 'Name : Mobile Device - Mobile device missing' with a circled '5', 'Code : 201', 'Note : Lost Cell Phone', and 'Action : [edit icon] [minus icon]'.

# Save & Submit

1. Enter Notes if necessary
2. Select Save
3. Select Yes to confirm
4. Punch will be submitted

Diagnosis Code

Add Notes for Punch **1**

Choose File

Cancel

Save **2**

This screenshot shows a form for entering punch details. It includes a text input for 'Diagnosis Code', another for 'Add Notes for Punch' (annotated with a yellow circle containing the number 1), a 'Choose File' button, and two buttons at the bottom: 'Cancel' and 'Save' (annotated with a yellow circle containing the number 2).

Alert

Are you sure you want to add a new punch for 04:00 hour(s) for PATRICK - TX5678 for Jan 01, 2021?

No Yes **3**

This screenshot shows a confirmation dialog box titled 'Alert'. The message asks, 'Are you sure you want to add a new punch for 04:00 hour(s) for PATRICK - TX5678 for Jan 01, 2021?'. At the bottom, there are two buttons: 'No' and 'Yes' (annotated with a yellow circle containing the number 3).

Punch 1641 **4**

Jan 01, 2021

SPONGEBOB

06:00 AM - 10:00 AM

Hours: 0:04:00

Amount: 4.00

Pending

Hourly

PATRICK

PYRL

Reject

This screenshot shows the final submitted punch details. It includes the punch ID 'Punch 1641' (annotated with a yellow circle containing the number 4), the date 'Jan 01, 2021', employee name 'SPONGEBOB', time range '06:00 AM - 10:00 AM', 'Hours: 0:04:00', and 'Amount: 4.00'. The status is 'Pending' and the punch type is 'Hourly'. The employee name 'PATRICK' and code 'PYRL' are listed. A 'Reject' button is at the bottom.

# Where to go for help?

- Utilize our [DCI Training Materials](#) for more help
  - This will give you a full list of Training Materials for DCI
- Contact your Acumen Agent for more help
  - Contact Customer Service if you don't know your assigned agent



Phone: (877) 211-3738



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



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# Thank you!

Visit the **Acumen Help Center** to learn more at:  
[acumenfiscalagent.zendesk.com](https://acumenfiscalagent.zendesk.com)