Acumen powered by DCI Software

Reports in DCI

Reporting Basics

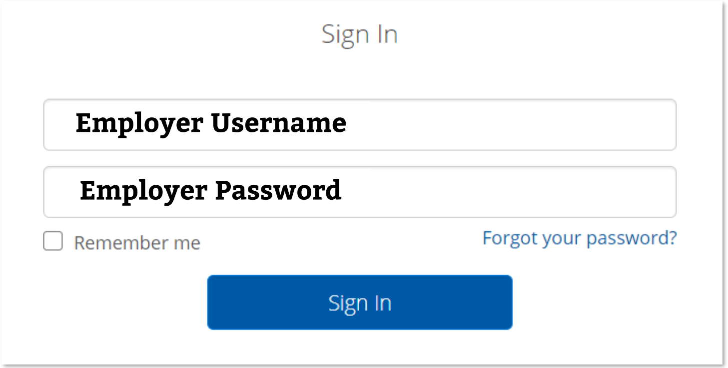
- Reports allow Employers to view important details in DCI
- Can only be found on the full desktop site (Computer/Laptop)
  - Click "Go to Full Site" on mobile device
- Only the Employer or Designated Rep profile can access reports
- Multiple categories to select from to help stay organized
  - Time Entry, Budgets, Notes, Summaries, and more
- Download and Save reports for future reference

How to Find Reports

Access the DCI Portal

1. Open an Internet Browser
2. Navigate to the DCI Web Portal
    - Click "Go to Full Site" on mobile
3. Enter Employer Username/Password
4. Use Forgot Password link if needed
5. Contact Acumen Agent for help

acumen.dcisoftware.com



Employer Portal

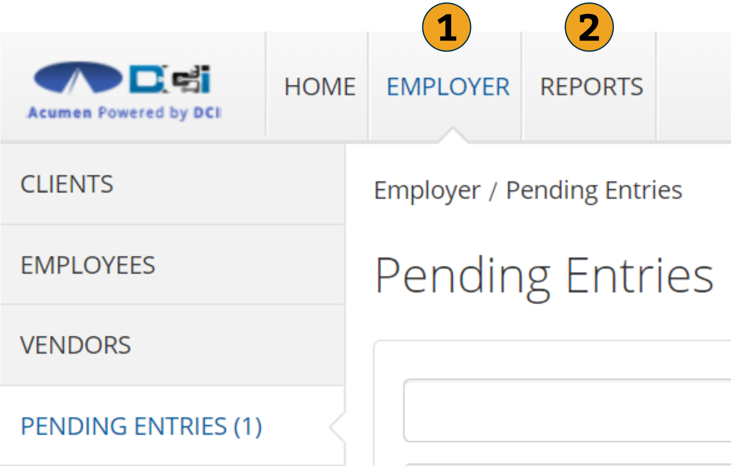
<u>Once logged into ER Portal</u>

1. Must be on Employer Tab

2. Click on Reports Tab

Pro Tips:

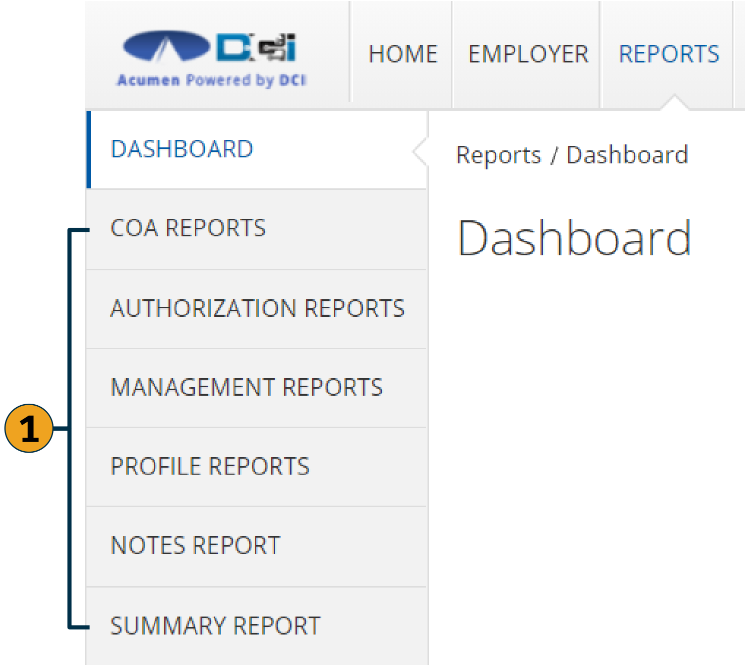
If on Home Tab/Dashboard, Click Employer Tab to view Reports



Reports Dashboard

<u>Once on Reports Dashboard</u>

1. Use mouse to hover over each tab
2. Each section will offer reports for different topics & DCI data
3. Pull Reports often to learn more



COA Reports

COA Reports Basics

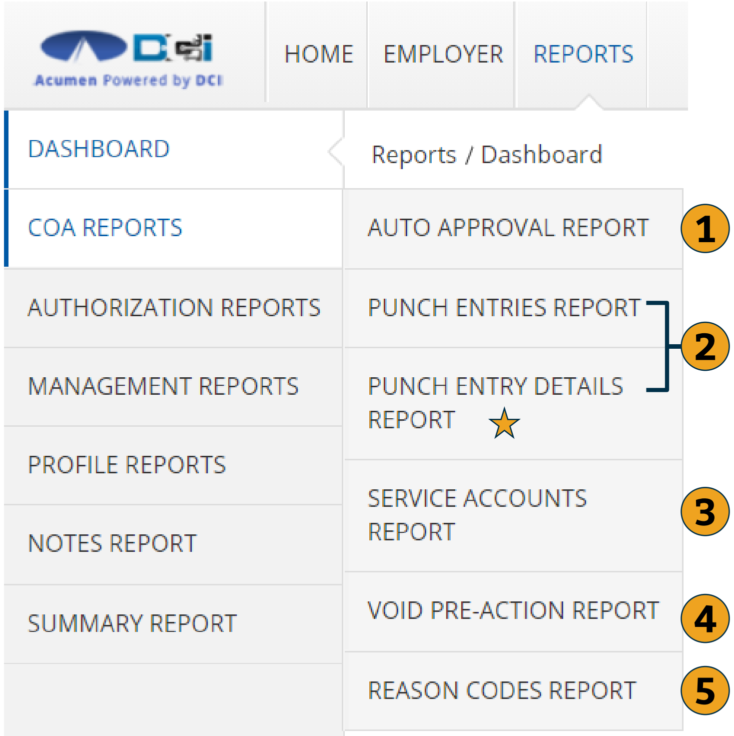
<u>Hover mouse over COA Reports</u>

1. Use to view Auto-Approval Results
2. List of punches in DCI
3. View full list of Service Accounts
4. Will show if punches can be voided
5. Will show list of Reason Codes used

***Pro Tips*:**

★ *Report #2 is the Most Popular COA Report*

COA Reports update in Real-Time



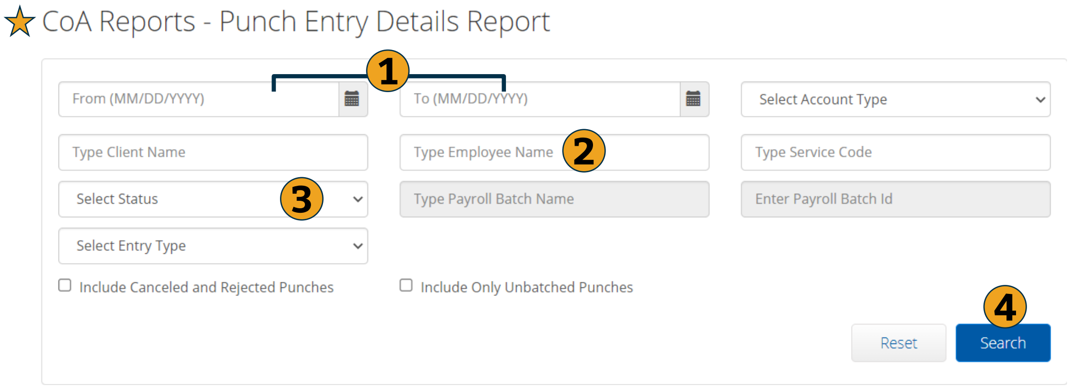
Punch Entry Details Report

Most Common COA Report

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

Pro Tip:

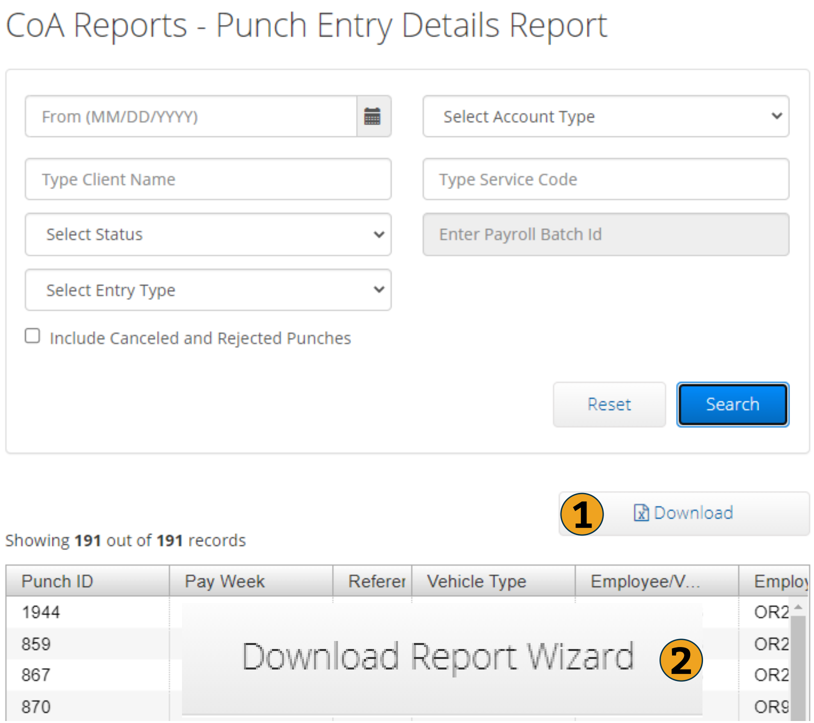
Searching without filters will pull ALL punches in DCI



Download Report Results

Once Results are Listed

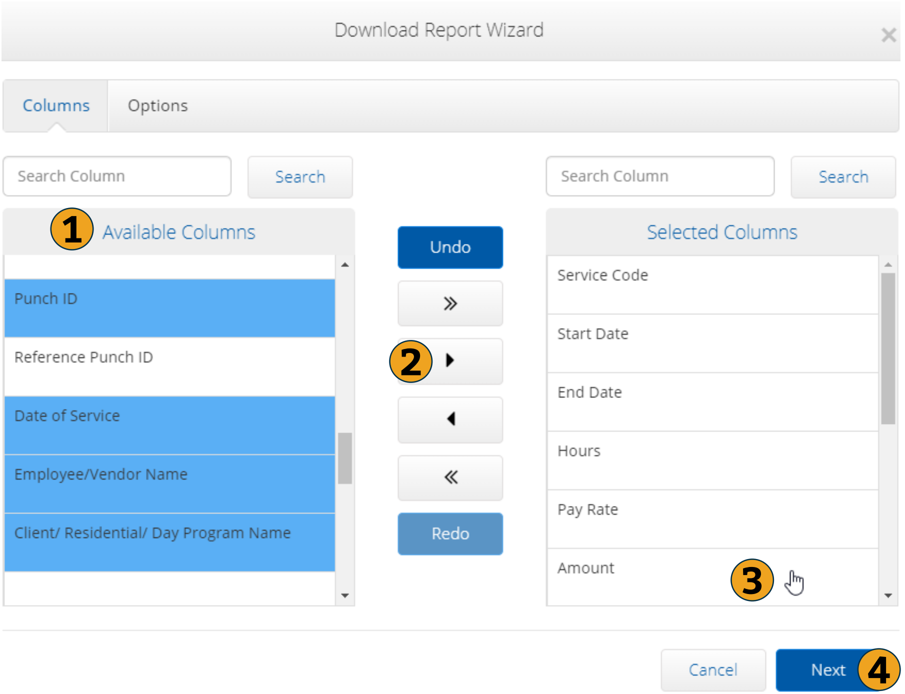
1. Select Download button
2. Complete Download Wizard
   - Select Columns & Format
3. See Next Slide for details



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



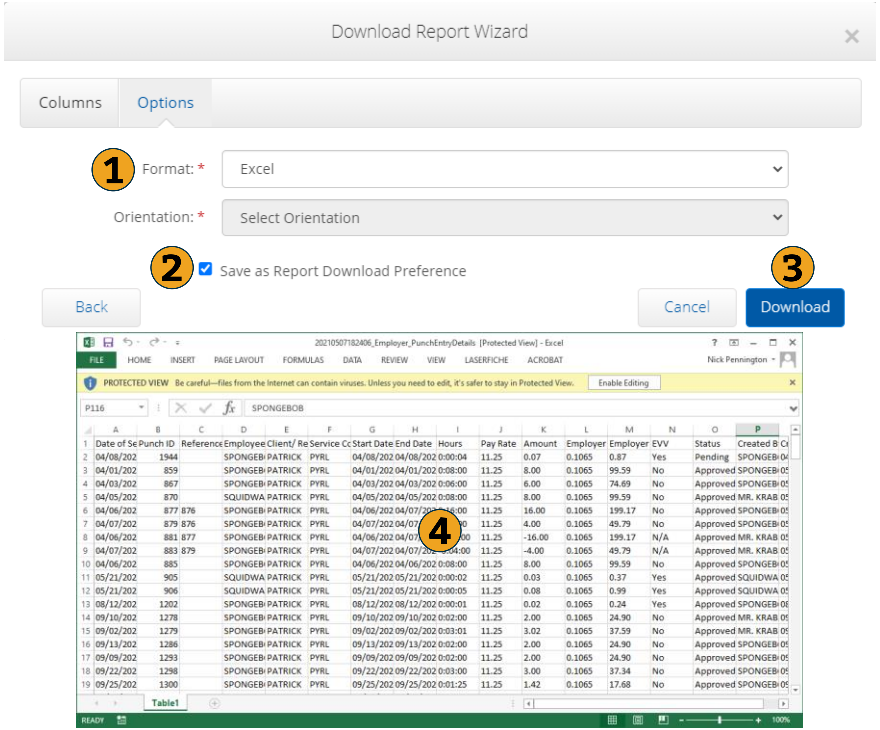
Recommended Columns

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

Download COA Report

<u>Once Columns are Selected</u>

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



Authorization Reports

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Authorization Report Basics

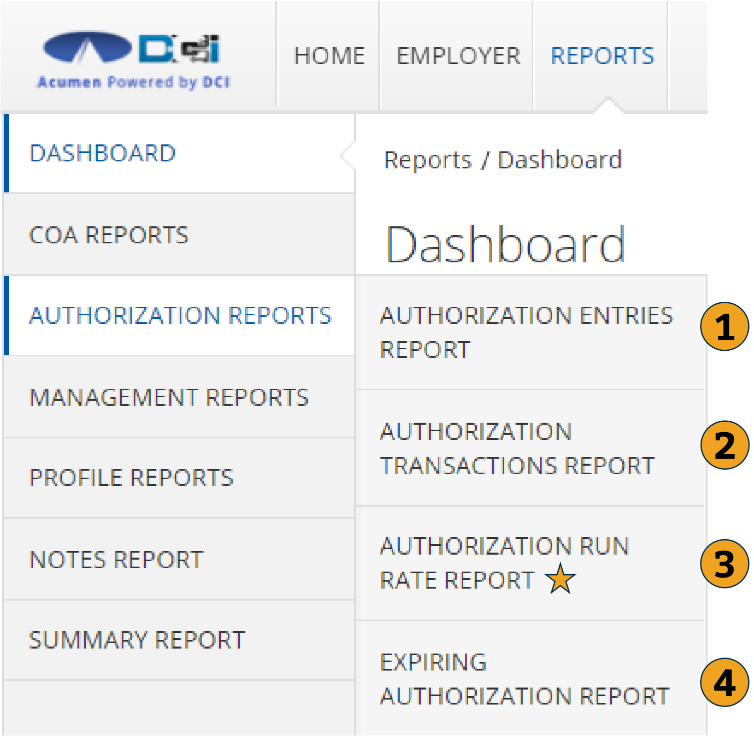
<u>**Hover over Authorization Reports**</u>

1. Shows all Authorizations in DCI
2. List of all punches on Authorization
3. Compares Projected Budget Use vs Actual Budget Use
4. Auths Ending in 30, 60, 90, or 120 days

Pro Tips:

★ *Report #3 is Most Valuable Authorization Report*

Auth Reports update in each Payroll Cycle



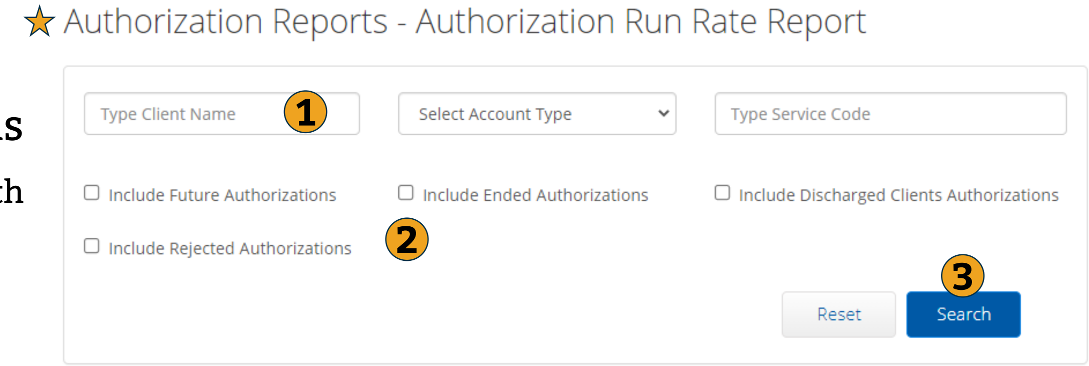
Authorization Run Rate Report

<u>Most Common Auth Report</u>

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

Pro Tip:

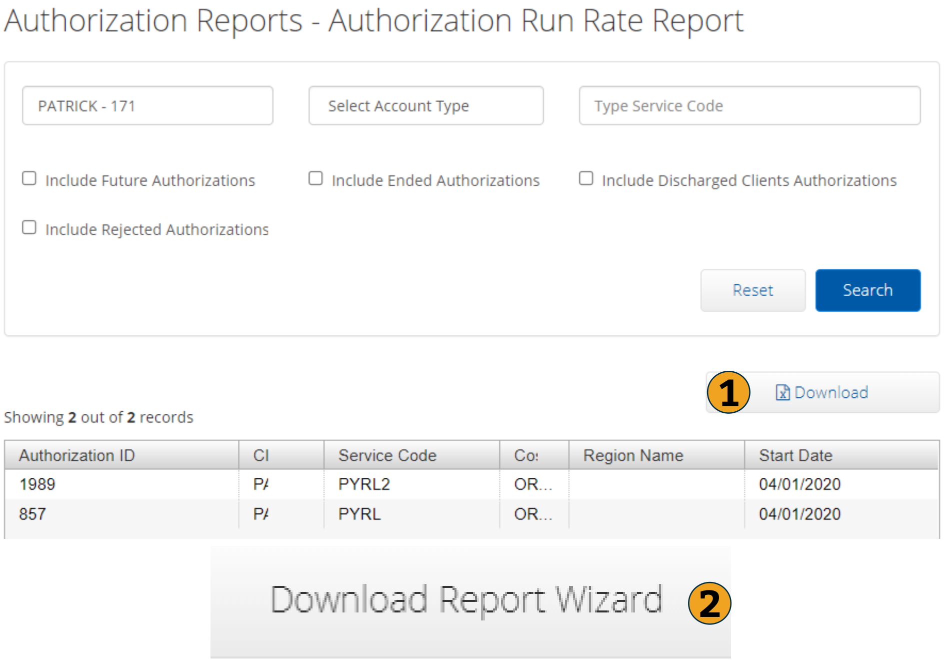
Searching without filters will pull ALL Authorizations in DCI



Download Report Results

Once Results are Listed

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



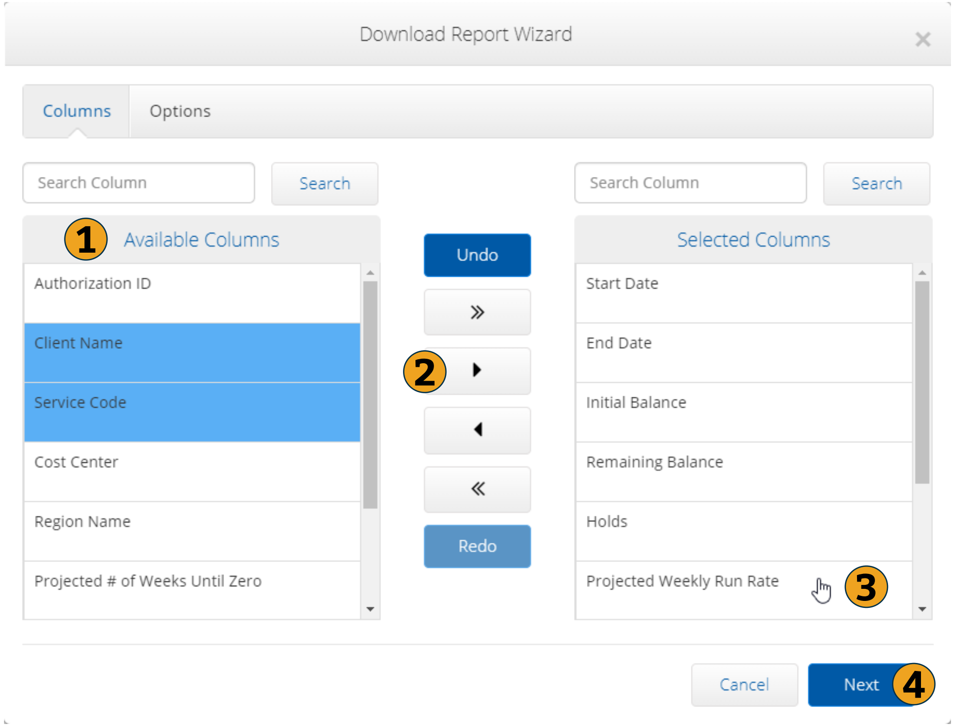
Download Report Wizard

<u>Once Report Wizard is open</u>

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

<u>Recommended Columns</u>

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



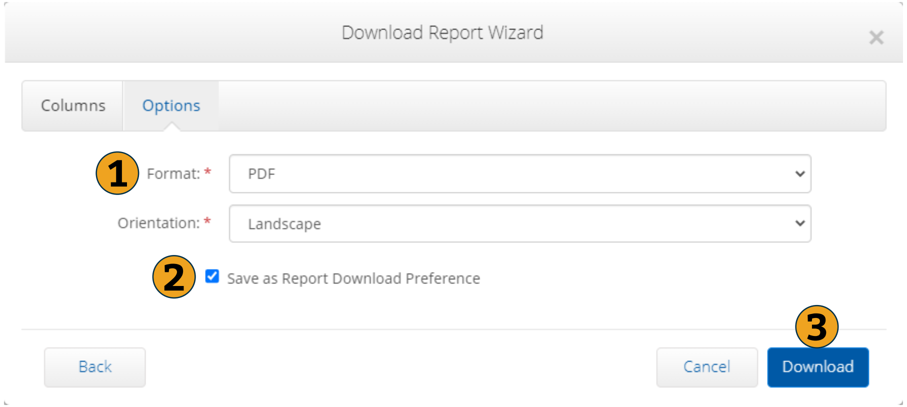
Download Run Rate Report

<u>Once Columns are Selected</u>

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	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

Management Reports

Management Report Basics

Hover over Management Reports

1. Lists Employees with OT
2. Shows Weekly hours worked
3. Shows Daily hours worked
4. View Employee Pay Rates

Pro Tips:

★*Report #2 is Most Valuable Management Report.*

Management Reports are updated in Real-Time.

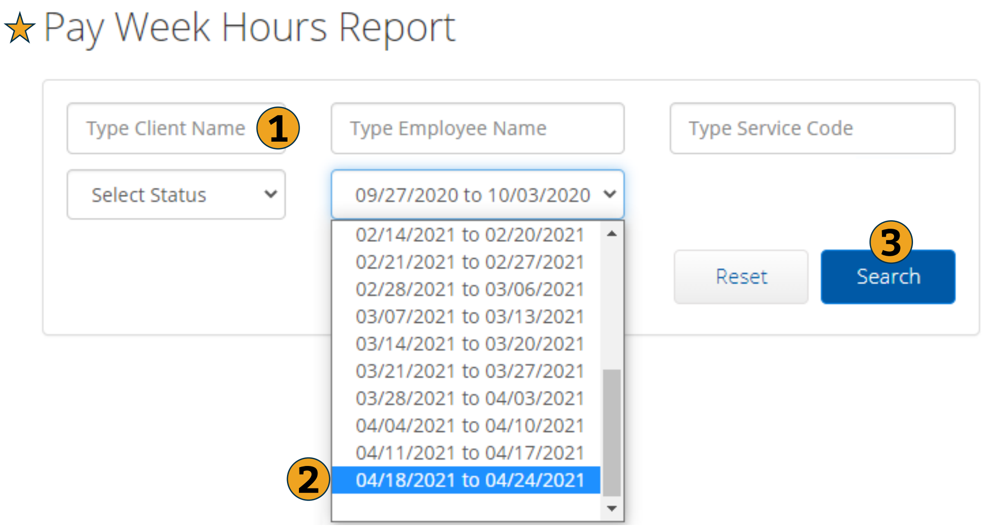
Pay Week Hours Report

Best Management Report

1. Type Client Name
   - Type 3 letters > Select Name
2. Select Pay Week to view
   - Pay weeks are Sun - Sat
3. Click Search

Pro Tip:

Searching without other filters will pull ALL weekly hours in DCI



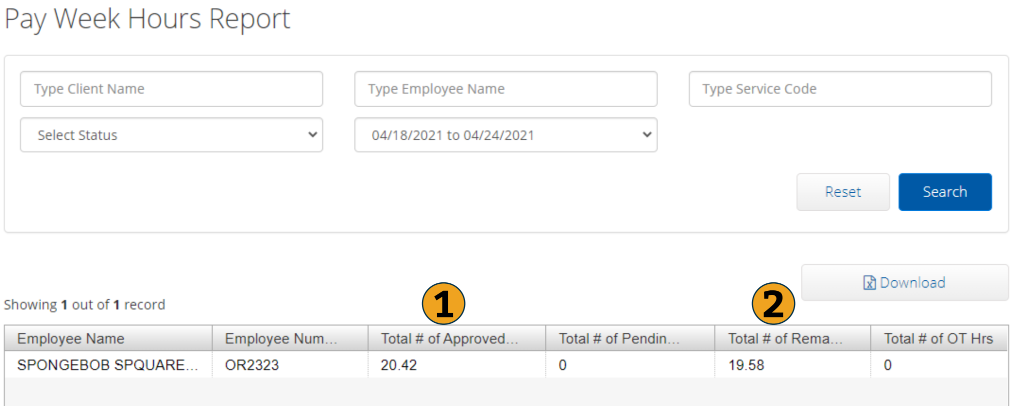
View Report Results

<u>Once Results are Listed</u>

- No Download needed to view Report Results

1. Total # of Approved
   - Total Hours worked
2. Total # of Remaining
   - Based on 40 hrs

Pro Tip:
Some states allow for over 40 hours. Contact agent for more details.



Profile Reports

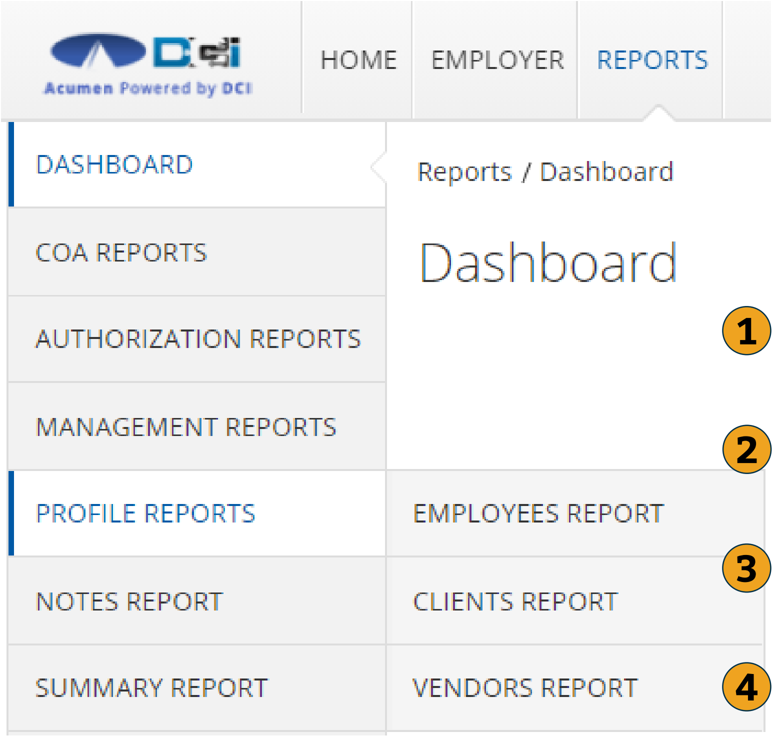
Profile Report Basics

Hover over Profile Reports

1. Employee Details
2. Client Details
3. Vendor Details

Pro Tips:

Profile reports provide details that are available on the user's profile. Use this to view all profile details.



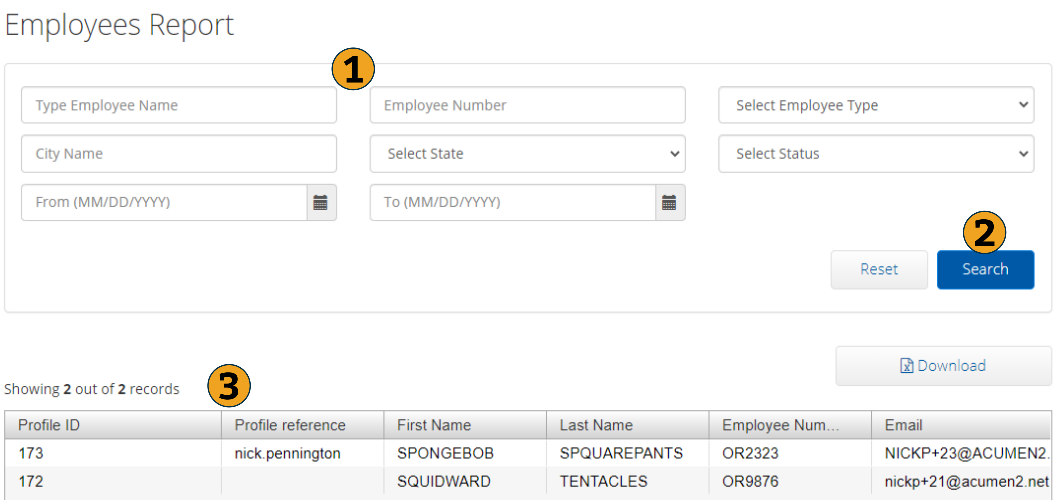
Profile Reports

First Select Profile

1. Filters will narrow results
2. Click Search
3. View profile details

Pro Tip:

Searching without other filters will pull ALL profiles in DCI



Notes Report

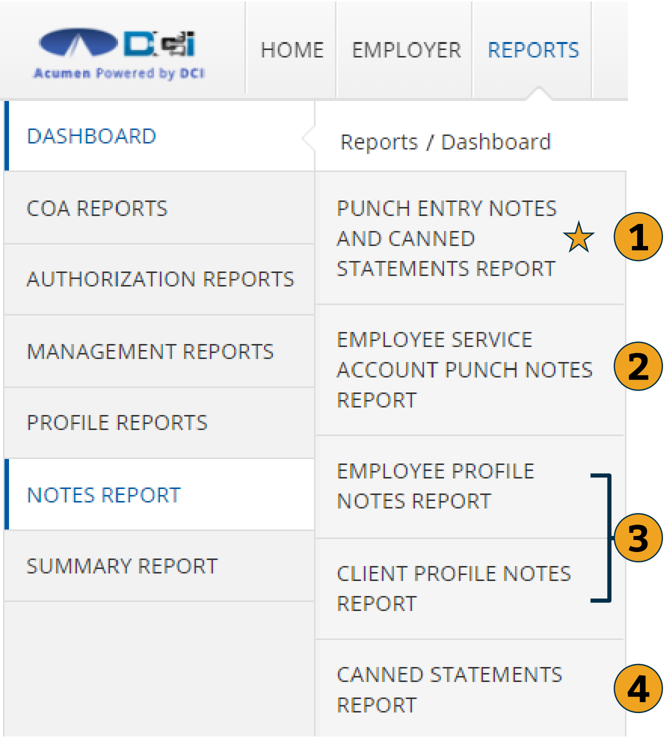
Notes Report Basics

<u>Hover over Notes Report</u>

1. View Service Notes on Punches
2. Service Account Notes
   - Typically no results
3. View all Profile Notes
4. Canned Statements

Pro Tips:

★ *Report #1 is Most Valuable Notes Report*



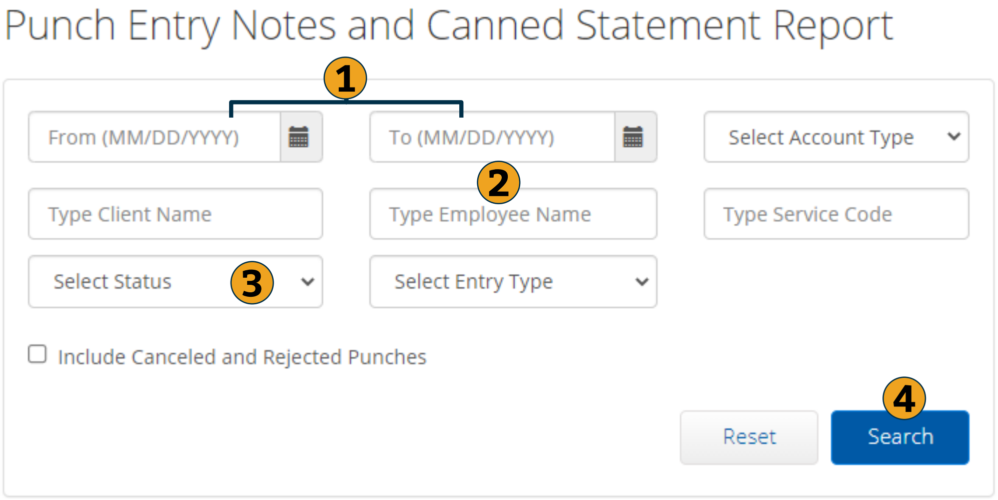
Punch Entry Notes Report

Most Common Notes Report

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

Pro Tip:

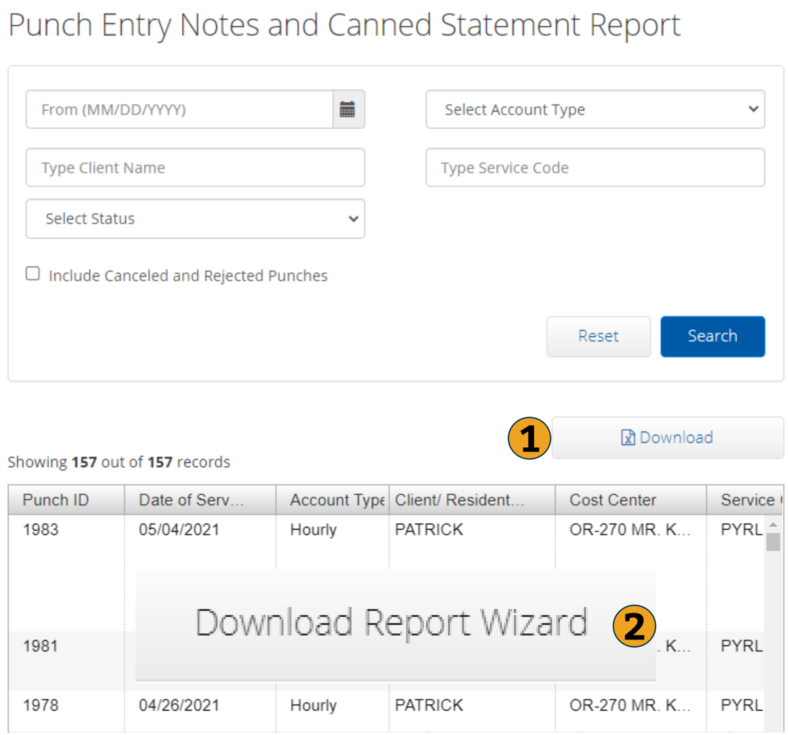
Searching without filters will pull ALL punches in DCI



Download Report Results

Once Results are Listed

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



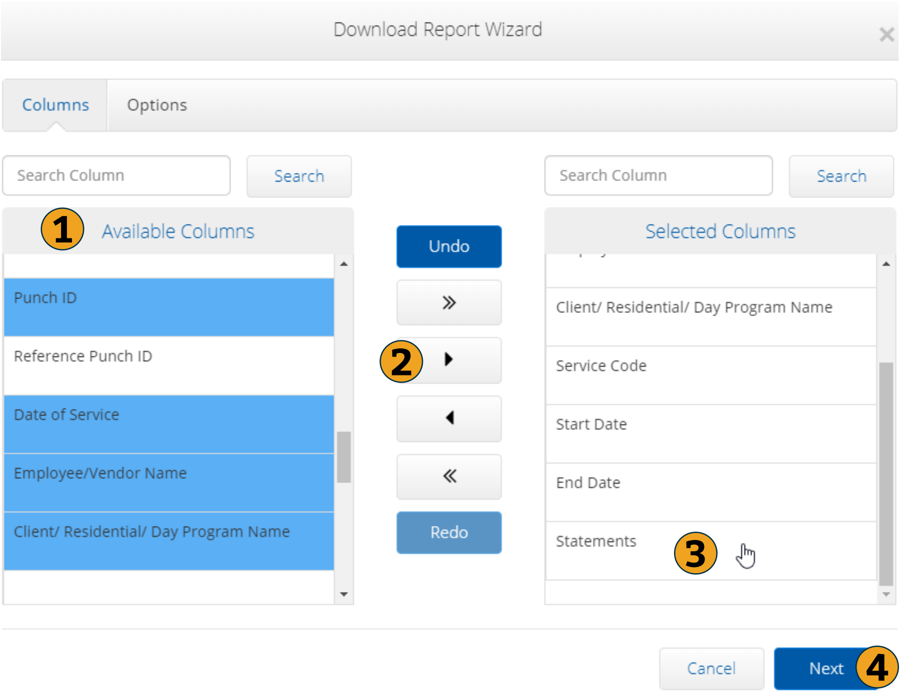
Download Report Wizard

<u>Once Report Wizard is open</u>

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

<u>Recommended Columns</u>

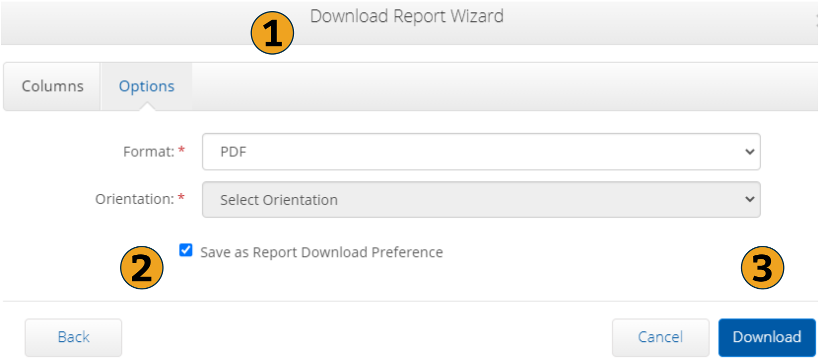
- Punch ID
- Date of Service
- Employee Name
- Client Name
- Service Code
- Start Date
- End Date
- Statements



Download Notes Report

<u>Once Columns are Selected</u>

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



Punch Entry Notes and Canned Statement Report as of: 05/10/2021

Punch ID	1983
Date of Service	05/04/2021
Employee/Vendor Name	SPONGEBOB
Client/ Residential/ Day Program Name	PATRICK
Service Code	PYRL
Start Date	05/04/2021 08:40:00 AM
End Date	05/04/2021 08:44:00 AM
Statements	1:-32993b68-0c8d-4e82-a8b4-822b69044e4b.jpeg was uploaded 2:-aef2757c-bbc7-445f-8266-57afef8d9cdf.jpeg was uploaded 3:-notes

4

Summary Report

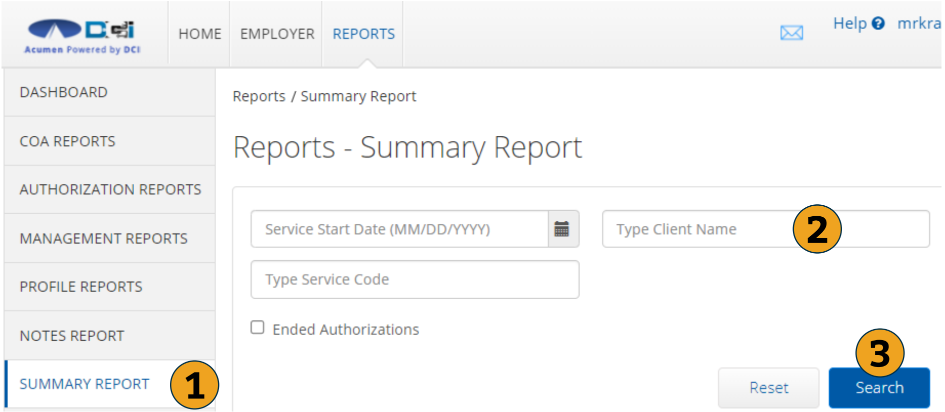
Summary Report Basics

<u>Only One Summary Report</u>

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

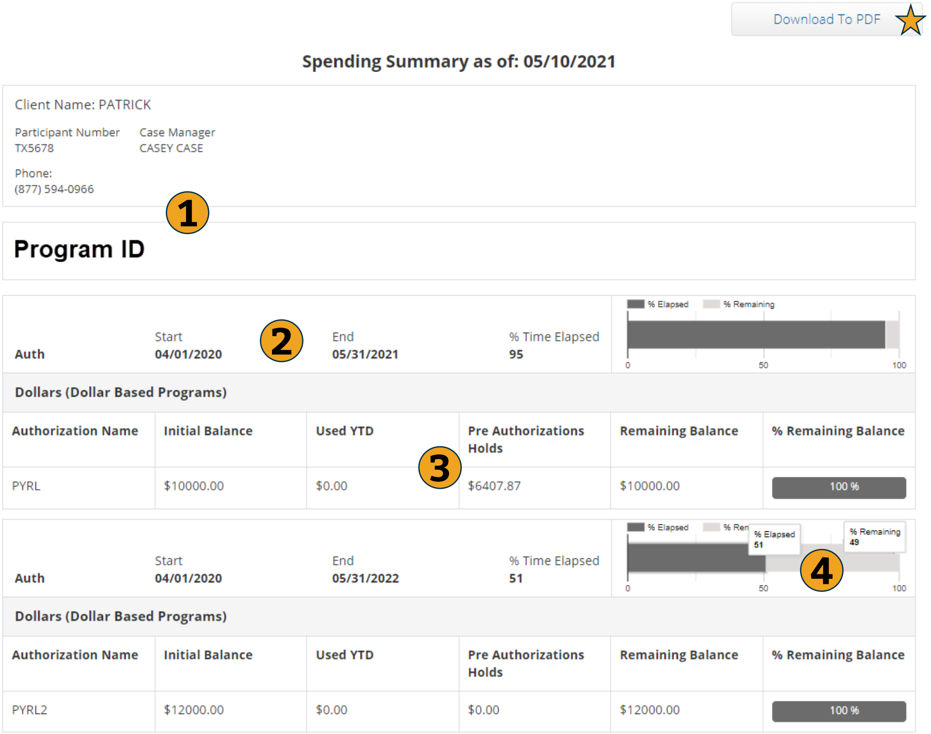
Once Results are Listed

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.*



Reports Recap

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Reporting Recap

- Reports are available to Employers in DCI on a Computer/Laptop
  - Click "Go to Full Site" on mobile device
- Most Reports are updated in Real-Time
  - Budget reports are updated each payroll cycle
- Download and Save reports for future reference
  - Use Excel or PDF to view downloaded reports
- Save download preferences for easy access later on

Thank you!

Visit the **Acumen Help Center** to learn more at:
acumenfiscalagent.zendesk.com