



# Acumen Georgia DCI Mobile EVV Training

Go Live July 1, 2021

# What is DCI?

DCI is an online platform to help manage your Employees Time and your Service Budget.

DCI will also help keep you compliant with the 21<sup>st</sup> Century Cures Act which requires Electronic Visit Verification (EVV) for Community Living Services (CLS) and Personal Support Services (PSS).



# The Time Entry Process

- Employees will be entering their time using the DCI Mobile EVV App which meets federal and state requirements. The Mobile App will be used by employees only.
- The Employer will be responsible for reviewing time entries in the DCI Portal ([acumen.dcisoftware.com](https://acumen.dcisoftware.com)) which is used for administrative purposes. Verified EVV Compliant entries can be auto approved, and viewed on the portal.
- EVV requires shifts be entered “in real time”. Make sure all shifts are in an approved status by the 1<sup>st</sup> and 16<sup>th</sup> of each month.
- ALL CLS and PSS shifts are required to be entered using the DCI Mobile EVV App \* beginning July 1, 2021. (\*Landline is allowed by DCH approval only)



# DCI Mobile EVV App



# Download the DCI Mobile EVV App

1. Download the **DCI Mobile EVV** App



2. Set App Permissions



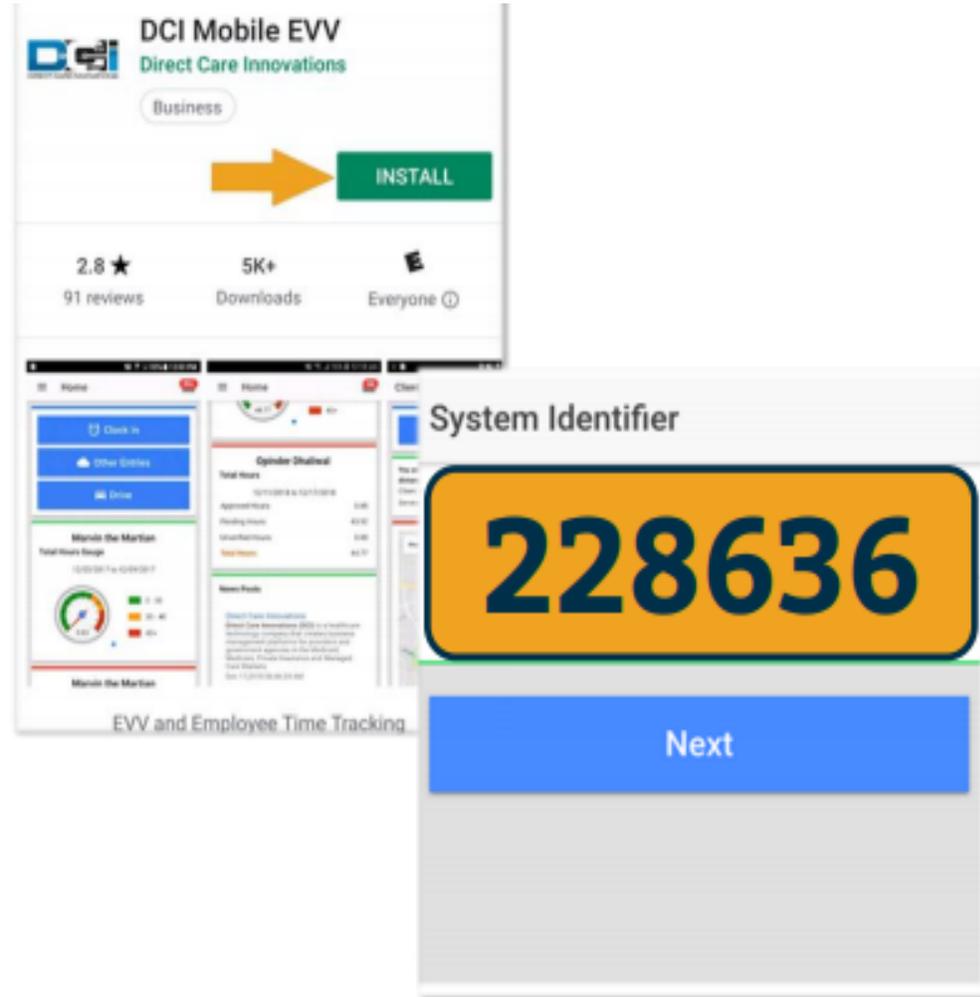
- Location is Required



- Media access is not necessary

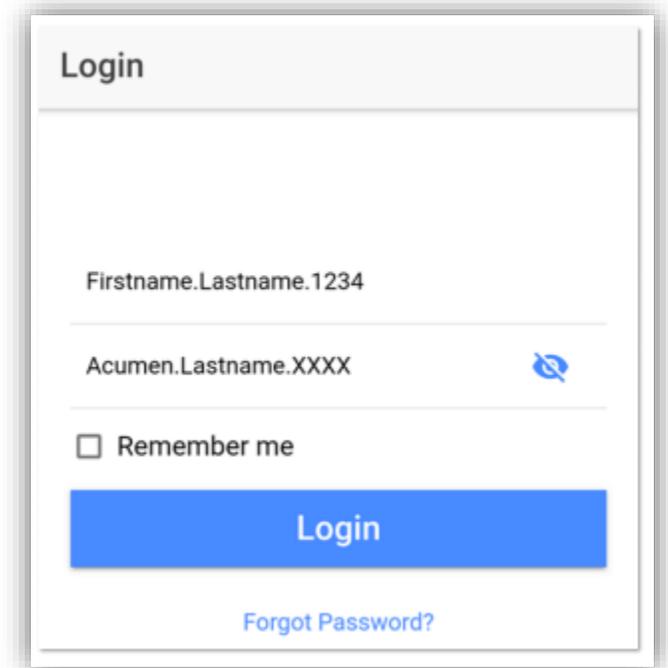
3. Enter System Identifier: **228636**

4. Select Next to login



# Log in to the DCI Mobile EVV App

- Open your app and login using the same username and password you use on the web portal. Then click “Login”.
- If you forget your password, use the “Forgot Password” link. Use the same email you have provided to Acumen to reset your password. The link will be sent to your email.
- DO NOT use the “Remember Me” feature if you are using a shared device.
- DO NOT share your login credentials with anyone.



The screenshot shows a mobile application login screen titled "Login". It features a white background with a light gray header. Below the header, there are two input fields: the first contains the text "Firstname.Lastname.1234" and the second contains "Acumen.Lastname.XXXX" with a blue eye icon to its right. Below these fields is a checkbox labeled "Remember me". A prominent blue button with the text "Login" is centered below the checkbox. At the bottom of the screen, there is a blue link that says "Forgot Password?".

# Mobile App Home Page

## 1. Menu Button

- Use to navigate in Mobile App

## 2. Clock In Button

- Use to begin Clock In /Out process

## 3. Overtime Gauge

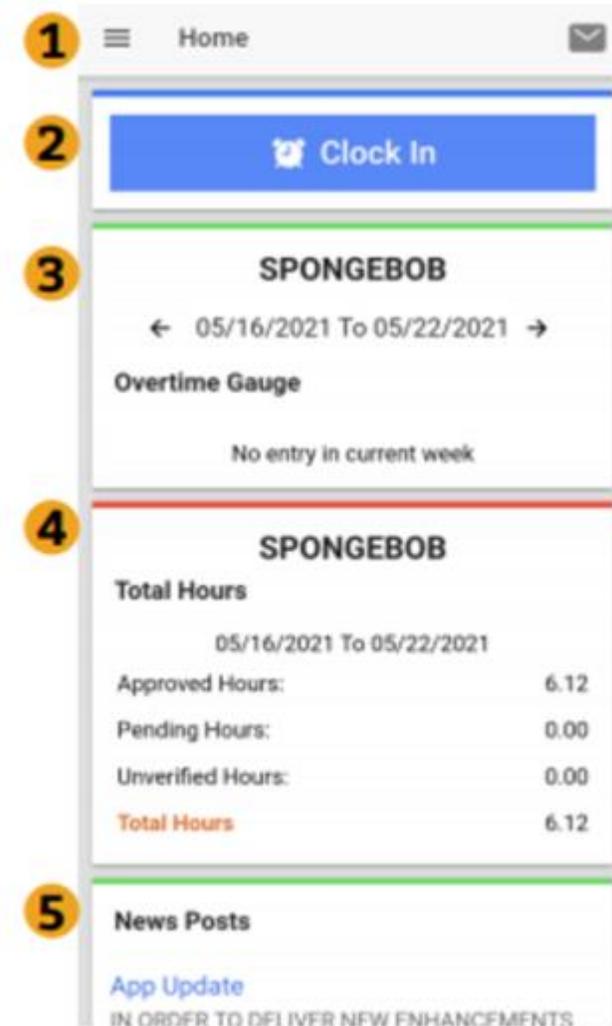
- Shows OT hours

## 4. Total Hours Breakdown

- Shows the current calendar week

## 5. News Posts

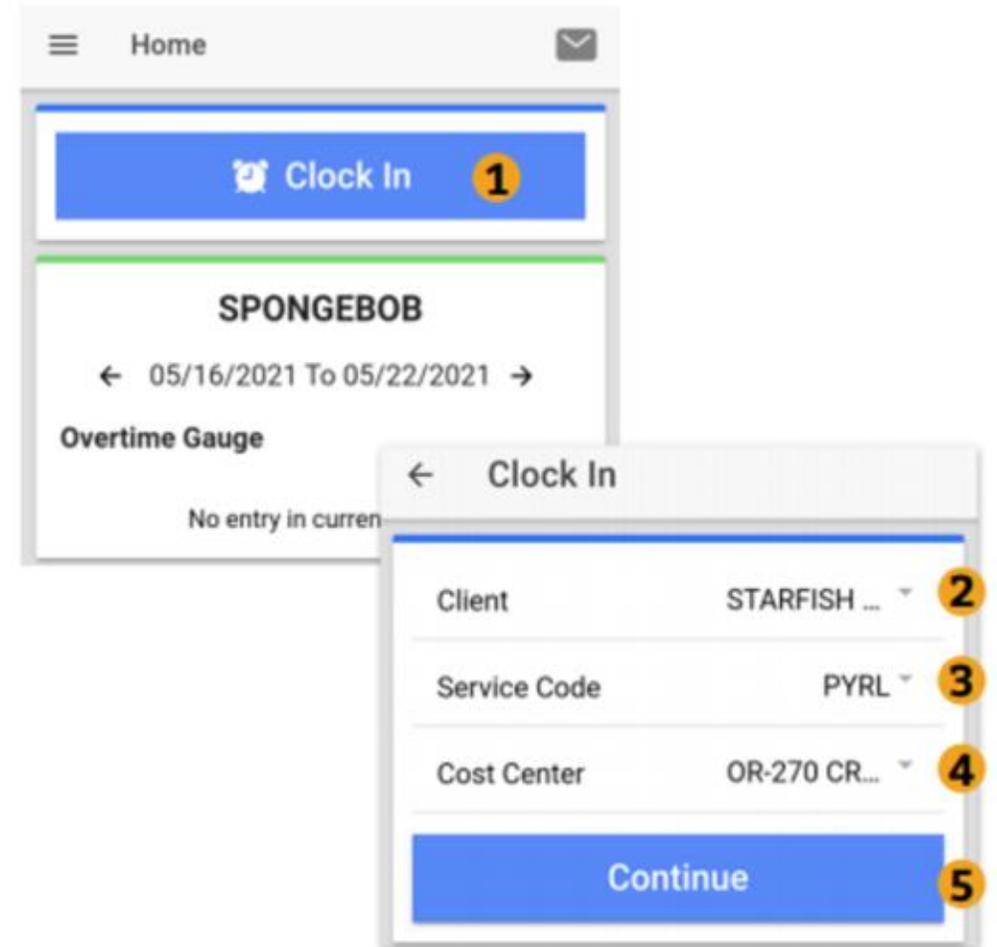
- Will show relevant updates



# Clock In on the Mobile App

Employee will log in to the Mobile App

1. Tap Blue Clock In Button
2. Select Client Name
3. Select Service Code
4. Cost Center will auto-fill
5. Select Continue



# Confirm Clock In

1. Select Confirm Clock In

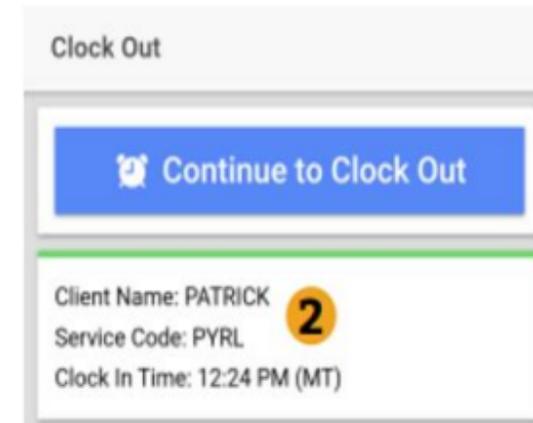
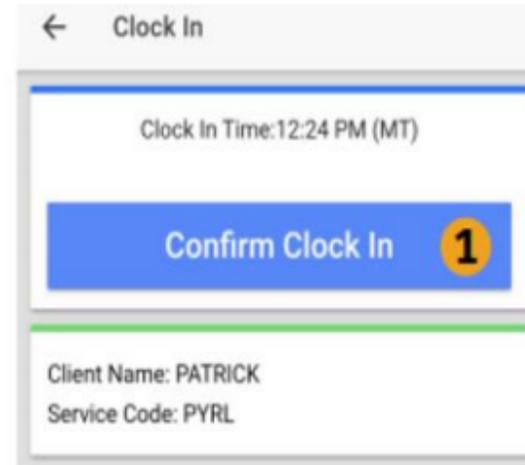
*\*this will start the shift*

2. Punch Confirmation

The Clock Out page shows  
the clock in time

**Congratulations!**

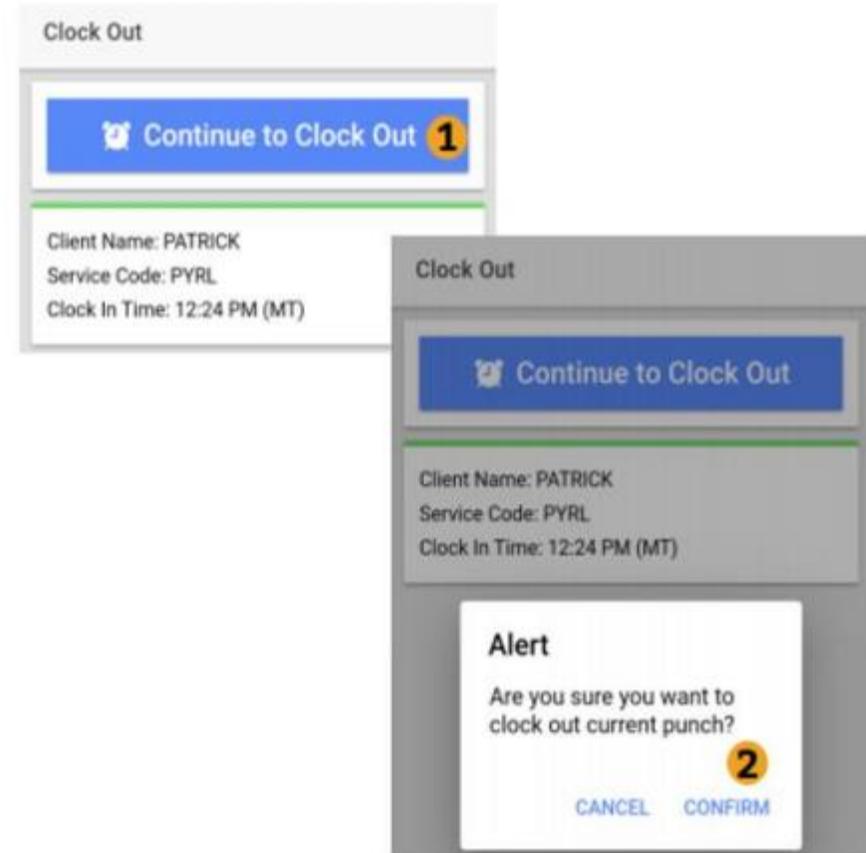
You are now on the clock.



# Clock Out on Mobile App

Employee will log in to the Mobile App

1. Select Continue to Clock Out
2. Confirm you would like to Clock Out



# Client Verification: Choose Your Method

Choose a Verification Method:

## 1) Client PIN or password

- Requires set-up. PIN must match for the shift to auto-approve.

## 2) E-signature

- Does **not** require set-up. Either the Employer or Participant can sign. The shift will auto-approve if there is a signature present.

## 3) Picture

- Requires set-up. Facial Recognition technology is used to match the photo and auto-approve.

## 4) Portal Signoff

- Does **not** require set-up. The shift will not auto-approve, even when EVV compliant. The Employer will be required to review and approve the shift on the DCI portal.

Clock In Verification Required

Client PIN or Password

E-Signature

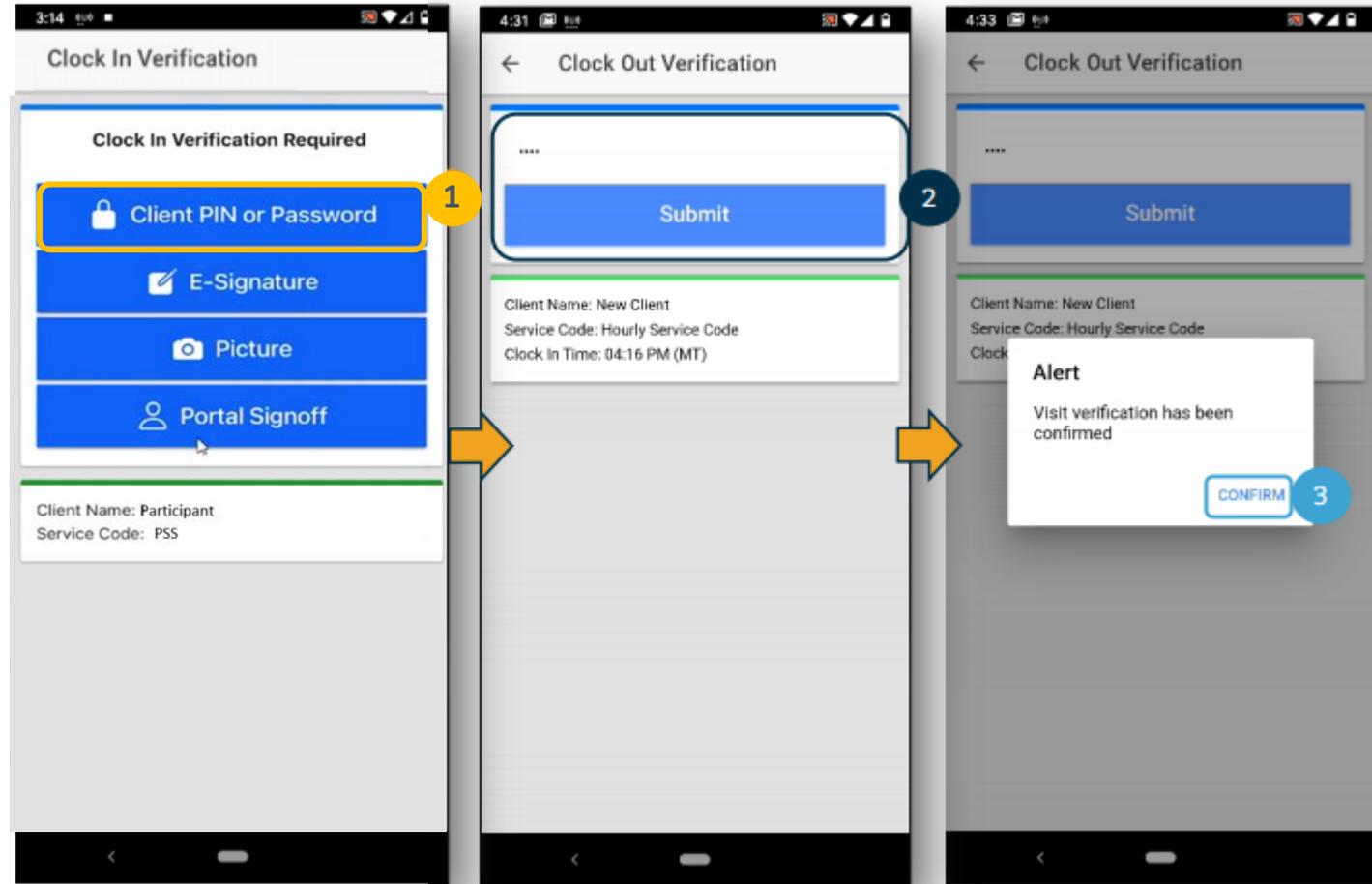
Picture

Portal Signoff

Client Name: Participant  
Service Code: PSS

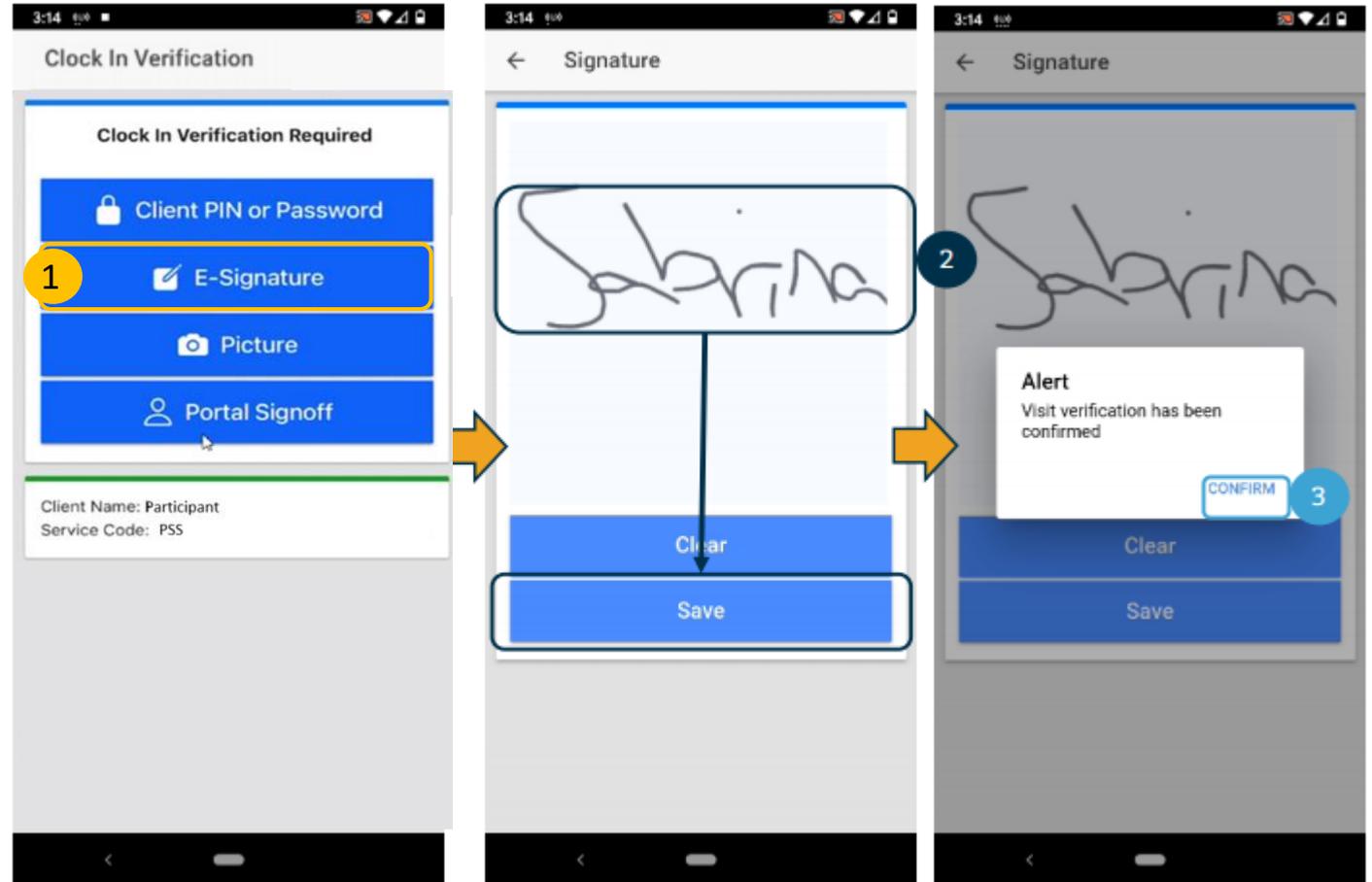
# Client Verification: PIN or Password

1. Select PIN or Password from the menu
2. Client or Employer will enter their PIN or password then select Submit
3. Select Confirm to validate PIN or password



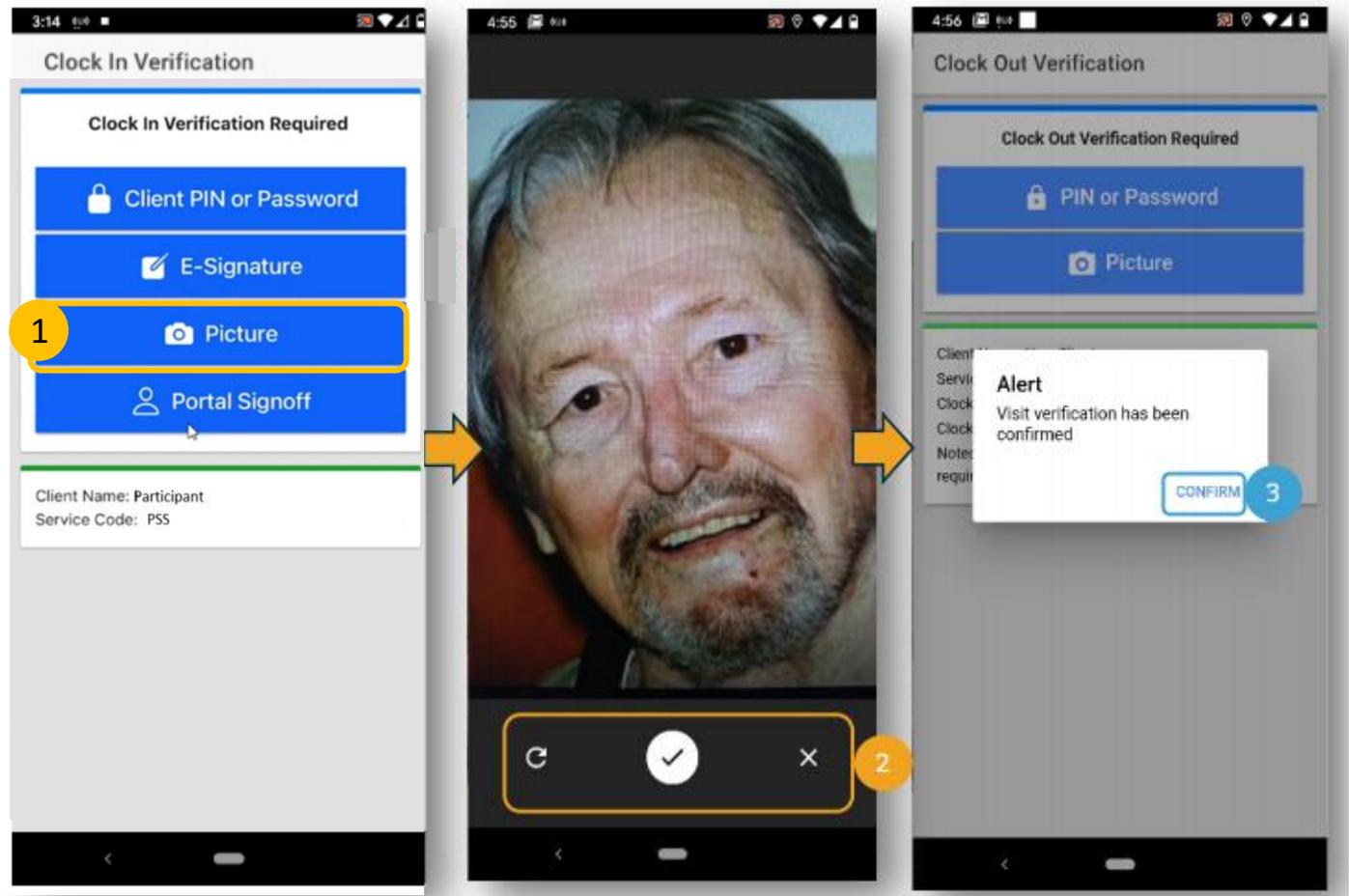
# Client Verification: Signature

1. Select signature
2. Client or Employer will draw their signature on the screen
3. Select Confirm to validate signature



# Client Verification: Facial Recognition

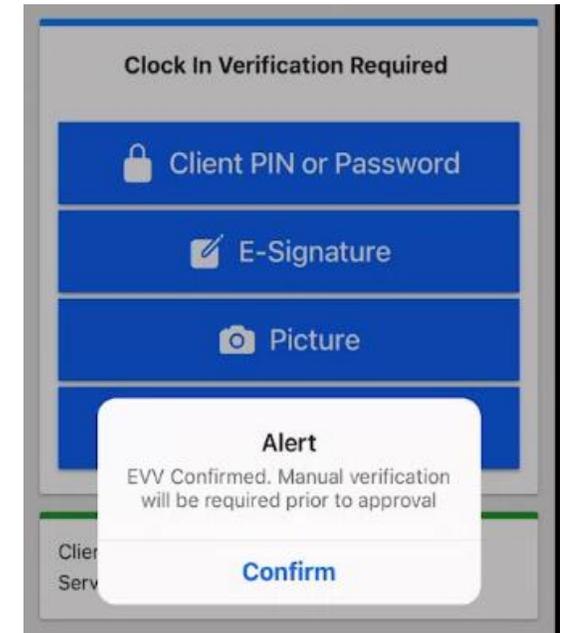
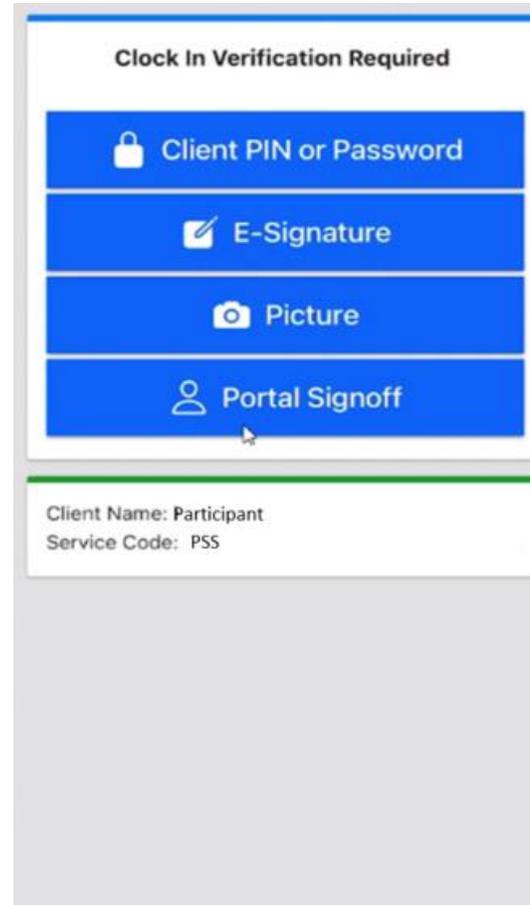
1. Select Picture
2. Your camera will open up. Take a picture of the Client's face.
3. Select ✓ to take the picture, X to cancel picture, and ↺ to reset to take a new picture.
4. Select Confirm to validate photo



# Client Verification: Portal Signoff

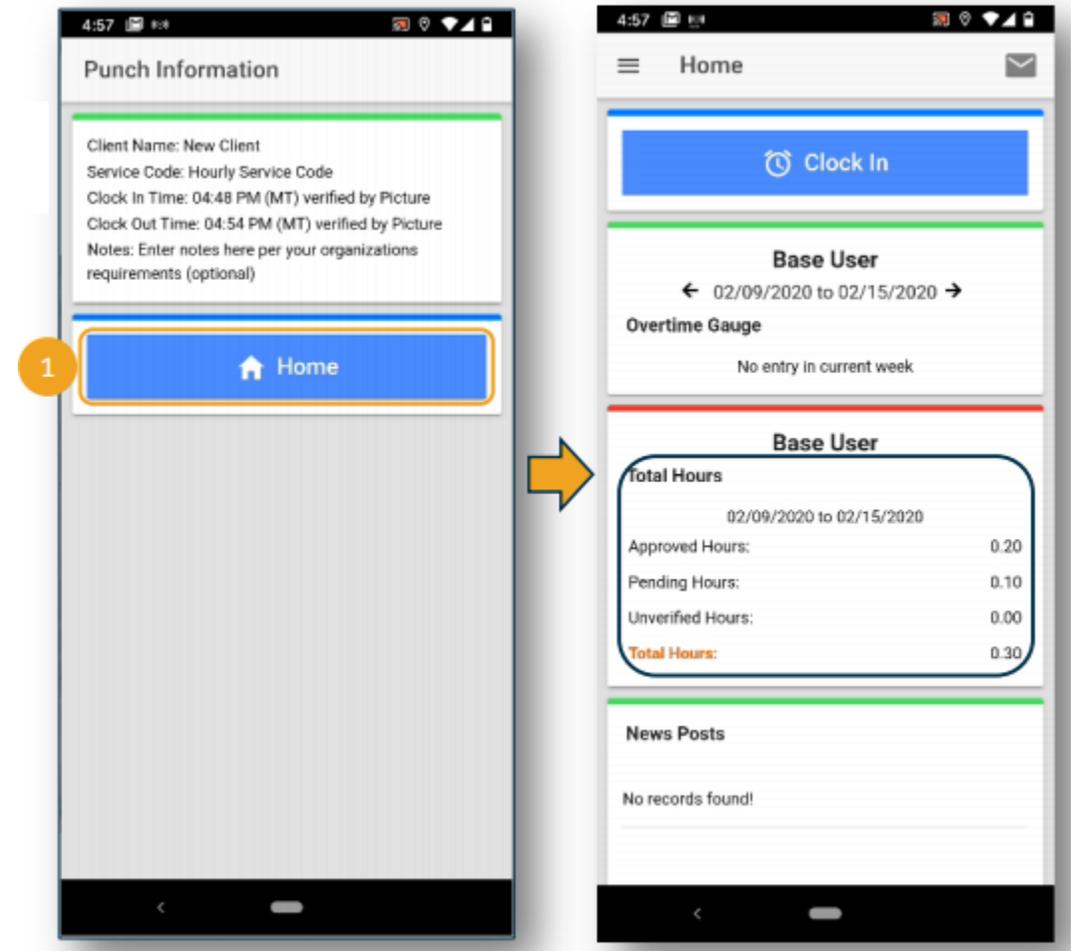
1. Select Portal Signoff
2. Select Confirm to validate portal signoff

**Reminder:** The Employer will have to log in to the DCI Portal to manually approve the shift.

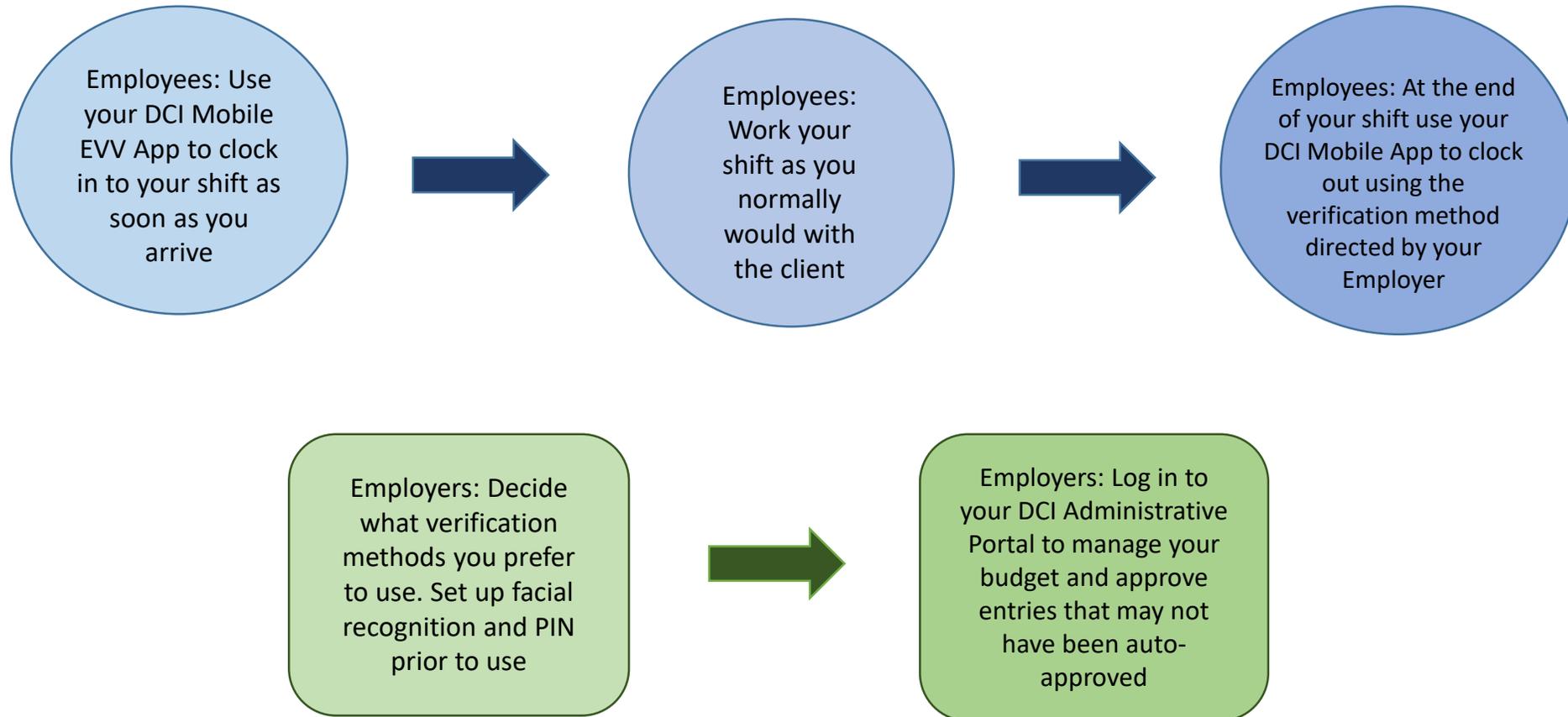


# Clock Out is Complete

- The clock out process is complete.
- Select Home to return to the Home Screen.
- The Home Screen will update to show the shift information.



# Process Flow for Time Entry



# How to set up PIN or Facial Recognition

The Employer MUST set up a PIN or Facial Recognition before these are used.

- **PIN:** Must be set up in the DCI Portal, under the CLIENT profile. (Note this is a different login than the Employer Administrative login). Contact your Acumen Agent to learn the Username for the CLIENT profile. Once logged in, go to the profile icon in the upper right, and choose Settings. Go to “Change PIN” and follow the steps to Add/Change the PIN.
- **Facial Recognition:** Set up by emailing Acumen from the Employer email address we have on file for you. Attach a forward facing photo of the waiver participant. The photo should just include the face (ie head and shoulders) and not have anything such as sunglasses or a hat obscuring the photo. We will enter this into our system and notify you when this is ready to use. Future photos will be compared against this initial photo.

# What happens if I forget ...

- CMS (federal) and DCH (state) require that entries be made using an approved EVV method. There is a process in place if you forget. If you are not able to use the Mobile App for shift entry you must enter the time on the DCI portal ([acumen.dcisoftware.com](https://acumen.dcisoftware.com)) and let us know WHY the shift was not EVV compliant.
- The WHY generates a “Reason Code” which describes the reason why the shift was not EVV compliant. The Reason Code is sent to Tellus when we bill for the shift.
- Choose from a list of state supplied reasons from the Add Entry screen on the DCI web portal.

# Entering Historical Shifts



# How an Employee Adds an Historical Shift

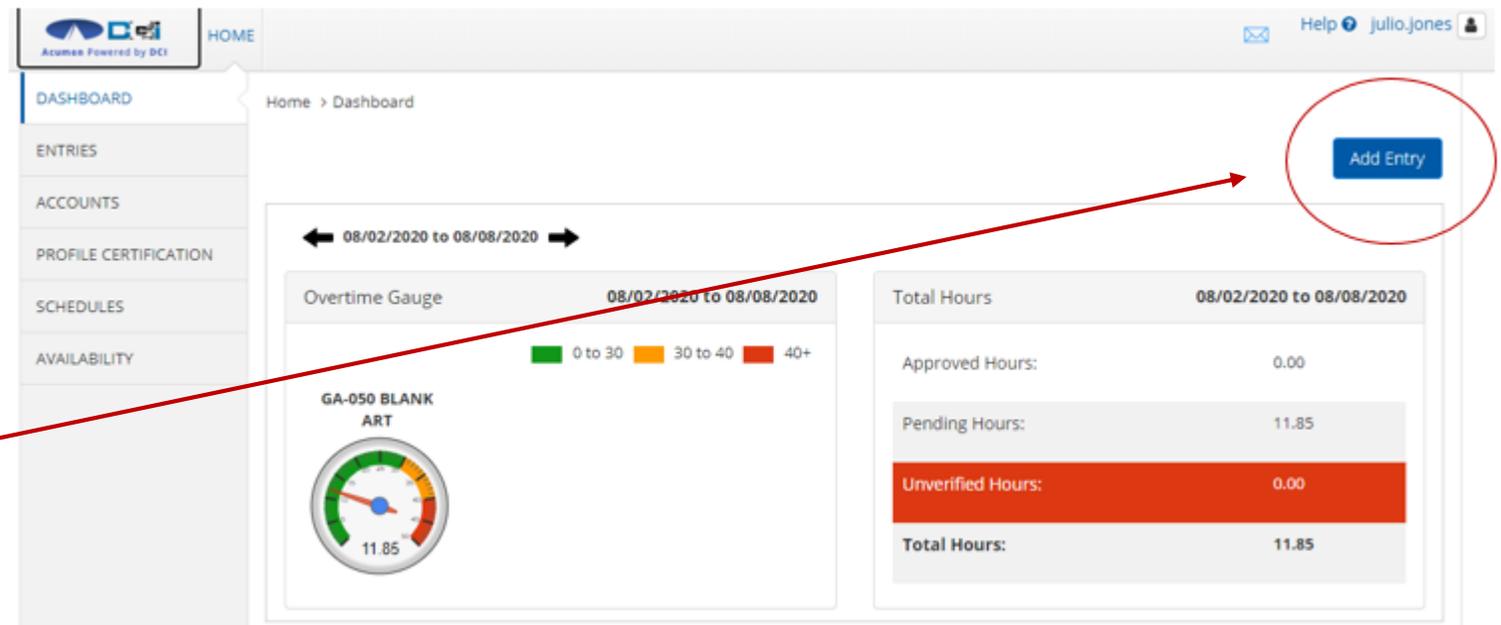
Use this method to enter a CLS or PSS shift that was not entered using the DCI EVV Mobile App (or landline if approved). ONLY use this method as a backup.

You may use this method for services that do not need to be EVV compliant.

To get started: Log in to the DCI web portal:

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

Click the blue Add Entry button in the upper right of your dashboard.



The screenshot shows the DCI web portal dashboard. The top navigation bar includes the Acumen logo, 'HOME', and user information 'Help julio.jones'. A left sidebar contains menu items: DASHBOARD, ENTRIES, ACCOUNTS, PROFILE CERTIFICATION, SCHEDULES, and AVAILABILITY. The main content area displays a date range '08/02/2020 to 08/08/2020' and an 'Overtime Gauge' for 'GA-050 BLANK ART' with a value of 11.85. A table on the right shows 'Total Hours' for the same period: Approved Hours (0.00), Pending Hours (11.85), Unverified Hours (0.00), and Total Hours (11.85). A blue 'Add Entry' button is circled in red in the top right corner, with a red arrow pointing to it from the text on the left.

# To add an Historical Shift

- Complete the information on the form.
- In the Reason field: Click the blue **+** to open the list of reason codes.
- From the dropdown menu, choose the best reason that describes why the shift was not EVV compliant.
- You must select the **+** that will appear after the selected code to add the reason to the form.
- You will be prompted to confirm you want to add a reason code. Click YES.
- Click **Save**, then **Yes** to Submit the shift.

The screenshot shows a form with the following fields:

- Entry Type: Punch
- Employee Name: SPONGEBOB
- Account Type: Hourly
- Client: PATRICK - TX5678
- Service Code: PYRL
- Service Date: 01/01/2021
- Check In: 12:00 PM
- Check Out: 4:00 PM
- EVV Method: Client Portal Signoff
- Clock In EVV Location: Select Location
- Clock Out EVV Location: Select Location
- Check Out Date: 01/01/2021
- Reason: **+**
- Diagnostic Code: Diagnostic Code

A red arrow points from the third bullet point in the list to the blue plus sign in the Reason field.

This is a close-up of the Reason dropdown menu. It shows the text "Reason:" followed by a blue minus sign. Below it, the text "Add Reason Codes:" is followed by a dropdown menu containing the selected option "Mobile Device - Mobile device missing - 201". To the right of the dropdown menu is a blue plus sign.

# Reason Codes

Choose from one of the following reasons to explain why the shift was not entered using the DCI Mobile EVV App (or landline if DCH approved):

- General: Disaster or Emergency
- Mobile App: Forgot to Clock-In
- Mobile App: Forgot to Clock-Out
- Mobile Phone or Tablet Broken/Not Working
- Mobile Phone or Tablet Not Available
- Mobile Phone or Tablet Not Yet Operational
- Mobile Phone or Tablet: App Not Working
- Landline EVV Not Working
- Landline EVV Not Available
- Landline: Employee Forgot to Clock In
- Landline: Employee Forgot to Clock Out
- Landline: Employee Forgot to Clock In and Out
- Landline EVV: Called from Wrong Number

# Adding an Historical Shift

Employers: Since a verification method is not used, you will need to log in to the Acumen DCI portal to review and approve the shift. You will see shifts that need your attention as soon as you log in.

Review the shift information and click A to approve or R to reject.

Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Est)	Client Name	Employee Name	Service Code	Account Type	Needs Review
A R	Aug 03, 2020	08:00 AM	07:51 PM	15.50	0:11:51	217.34	RYAN MA TT	JONES JULIO	CLE	Hourly	?

Employees: If it appears that your shift is not saving, go back to the reason code list and be sure to click the + to add the reason code to the punch entry before saving the shift.

Reason: -

Mobile Device: Lost or Stolen +

# Offline Mode



# What is Offline Mode?

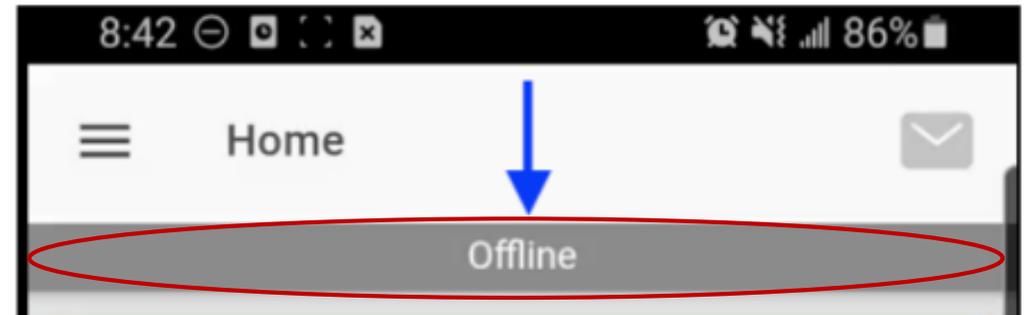
Offline Mode will be available before July 1, 2021 and will happen automatically when the device is not connected to the internet. This means that if your employee needs to clock in or out they can still use the DCI Mobile App!

Clock in or out as you normally would. The next time the employee logs in to the app and has a Wi-Fi or cellular data connection they will be prompted to sync any shifts that were entered while in offline mode.

# Offline Mode

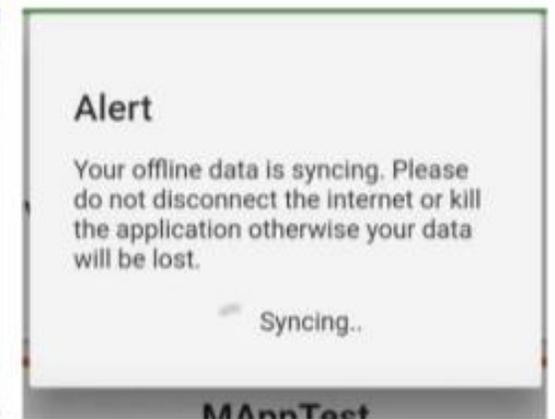
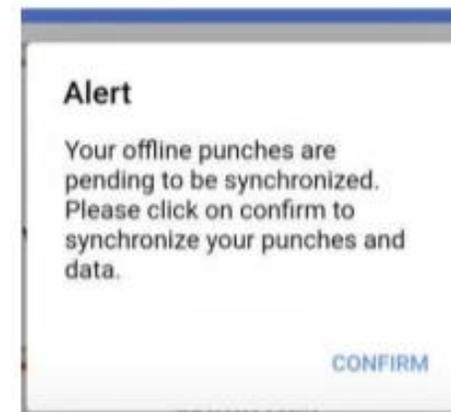
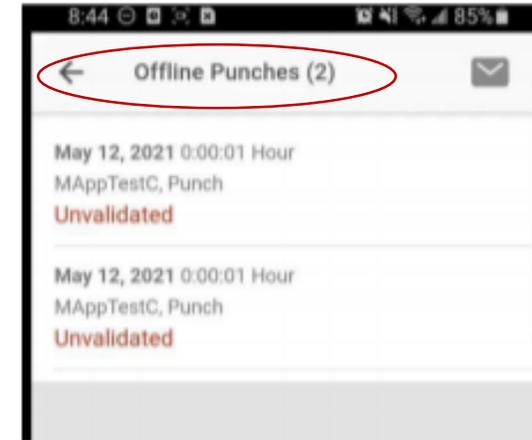
The Mobile App will check for an internet connection and automatically switch to Offline Mode if it can't connect, or loses connection.

A banner will display across the top of the Mobile App screen when in Offline Mode. You don't need to do anything to switch to Offline Mode.



# Offline Mode

- Clock in and out as you normally would. Your punches will be saved in the Mobile App in Offline Mode as Offline Punches. Once your device is back online, you will be asked to sync your offline punches.
- This may take a few minutes. Do not disconnect from the internet or close the app during this process. After the offline punches have been synced they will appear in the Entries table.



# Employer Administrative Portal



# Employer Administrative Portal

The Employer will go to their Administrative Portal to:

- Review and Approve shifts that were not auto-approved when entered
- Manage their budget
- View services, payments, and balances
- See when Acumen has received and processed your budget (PA) and any budget (PA) changes

Log in to the portal by the 1<sup>st</sup> and 16<sup>th</sup> of each month to make sure all shifts are approved so your employee is paid timely! We highly recommend frequent review of your shift entries.

# Logging in to the Portal

- Go to [acumen.dcisoftware.com](https://acumen.dcisoftware.com)
- Enter your Username and Password
  - Use the “[Forgot your password?](#)” link if you don’t know this. Make sure you use the email address you provided to Acumen.
- NEVER share your log in credentials with anyone.



The screenshot shows the login page for Acumen, powered by DCI. At the top right is the logo and text "Acumen Powered by DCI". The main heading is "Sign In". Below this are two input fields: "Username" and "Password". To the left of the "Password" field is a checkbox labeled "Remember me". To the right of the "Password" field is a blue link labeled "Forgot your password?". Below these fields is a blue "Sign In" button. Underneath the button is a horizontal line with a circle containing the word "Or" in the center. Below the line is a blue link labeled "Create a profile". A red arrow points from the "Forgot your password?" link to the right.

# The Employer Dashboard

- Any shifts your employees have entered that were not auto-approved will appear on your dashboard.
- Each shift will appear as a separate entry. Carefully review the details of the shift to ensure accuracy.
- Click on the “A” to Approve the entry. Click on the “R” to Reject the entry.

The screenshot displays the 'Employer > Pending Entries' page. The left sidebar contains navigation options: CLIENTS, EMPLOYEES, VENDORS, and PENDING ENTRIES (2). The main content area features a search filter with fields for 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Service Code', 'Type Client Name', 'Type Employee Name', 'Type Cost Center', 'Select Account Type', 'Select EVV', and 'Select Review'. There are 'Reset' and 'Search' buttons. An 'Export' button is located below the search filters. A table at the bottom shows two records, with the first record highlighted. A red arrow points from the first bullet point to the 'PENDING ENTRIES (2)' link in the sidebar.

Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Est)	Client Name	Employee Name	Service Code	Account Type	Needs Review
A R	Aug 03, 2020	08:00 AM	07:51 PM	15.50	0:11:51	217.34	Client Name	Employee Name	CLE	Hourly	?
A R	Aug 01, 2020	09:00 AM	01:00 PM	15.50	0:04:00	73.36	Client Name	Employee Name	CLE	Hourly	?

# Approving or Rejecting the Shift

- Review all of the shift data before you approve or reject it. Upon selecting your option, you will get an alert pop up that asks you to confirm your selection.
- If you see an error in the entry, you can reject the shift and have your employee submit a Historical Entry as shown earlier.

# Viewing all Entries

- Your employer dashboard will only show shifts that require your review and approval.
  - To view all shifts, go to the EMPLOYER tab at the top of the screen, then CLIENTS on the left menu. Click on the name of the client. All entries will appear at the bottom of the page.
  - You can also run a “Punch Entries Report” from the Report tab.

**Pending** = entered by your employee and needs your attention

**Open** = Your employee has clocked in but has not yet clocked out

**Approved** = you have approved this but it is not yet paid

**Unverified** = the employer has entered or changed the shift and the employee needs to verify the accuracy of the entry

**Rejected** = either you or the employee has rejected the shift

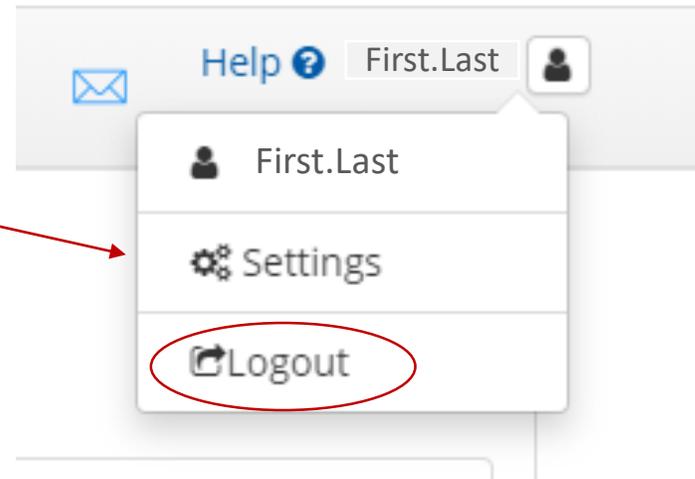
**Processed** = Acumen has pulled the shift into the system for payment but your employee has not yet received the payment

**Paid** = your employee has received payment for this shift

# Logging Out

- Always log out of the portal when you are done. To log out, click on the profile in the upper right hand corner next to your name. Then click Logout.

- Go to the settings menu to change your password or security questions.



# Things to remember:

- CLS and PSS shifts are required to be entered **in real time**. This means you must use the DCI Mobile EVV App to clock in when you start your shift, and clock out at the end of your shift.
- **Never** share your password information.
- If you want to use PIN/Password or Facial Recognition get this set up before you begin using the app.
- Employers should continue to review the Employer portal ([acumen.dcisoftware.com](https://acumen.dcisoftware.com)) to ensure they are managing their budget and approving any shifts that did not get auto-approved in the verification process.
- CLS and PSS codes require EVV compliance. ALL other employee services can be entered using either the Mobile App OR the DCI portal (or the landline if approved). There is no change to how you submit vendor payment requests.
- Paper time sheets for CLS or PSS will be rejected. (For NOW/COMP clients: PAR does not require EVV)

Thank you for joining the Acumen family!



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

Helping create a positive, long lasting impact on people's lives.