



Case Worker Portal Guide

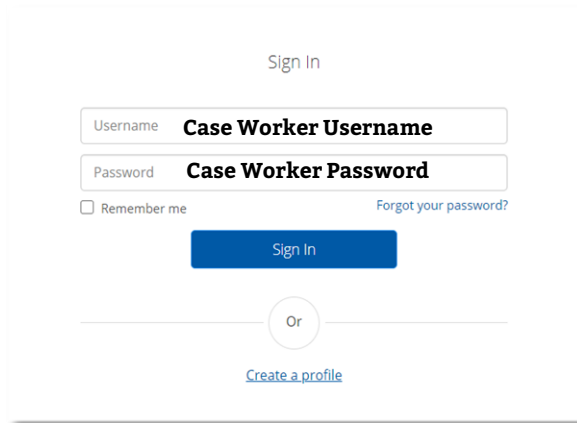
Case Worker Profile Basics

- DCI's Case Worker Portal creates a Client-Focused Environment to review budget & entry details
- All Case Workers will have unique login credentials
- Only clients who are assigned will be visible in DCI
- Think of this as Acumen giving you the ability to view your individual case load within the DCI Portal

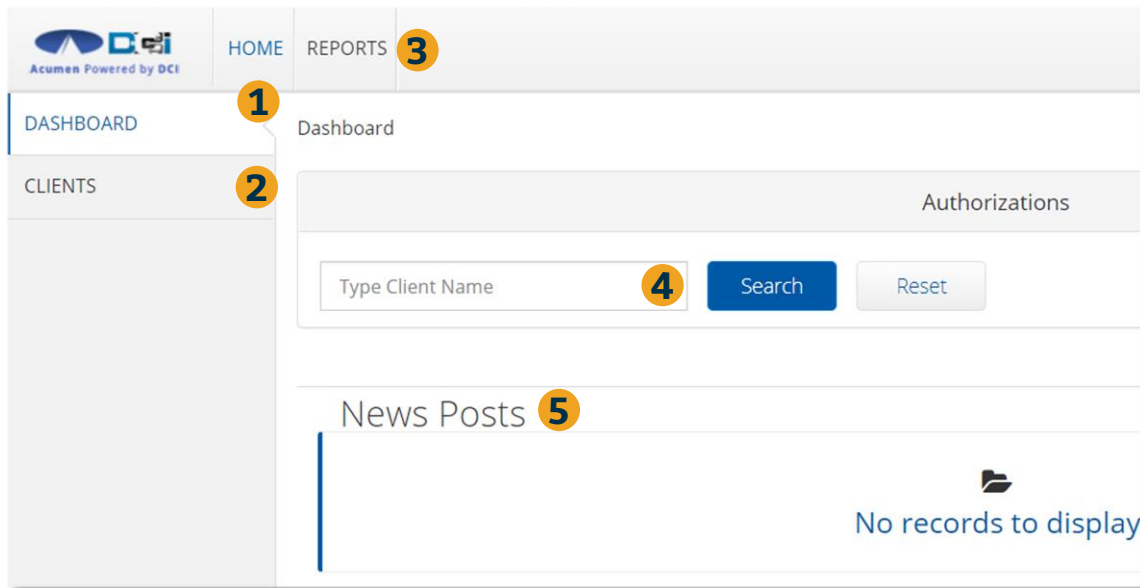
How to access



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

A screenshot of the 'Sign In' page for the Case Worker Profile. The page has a white background with a light gray border. At the top, the text 'Sign In' is centered. Below it are two input fields: 'Username' with the placeholder text 'Case Worker Username' and 'Password' with the placeholder text 'Case Worker Password'. To the left of the password field is a checkbox labeled 'Remember me'. To the right is a link that says 'Forgot your password?'. Below the input fields is a blue button labeled 'Sign In'. Below the button is a horizontal line with a circle in the center containing the word 'Or'. Below the line is a link that says 'Create a profile'.

Case Worker Dashboard



1. Home/Dashboard is the landing page to access details
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

The screenshot shows the Acumen Case Worker interface. The top navigation bar includes the Acumen logo and tabs for 'HOME' and 'REPORTS'. The left sidebar has 'DASHBOARD' and 'CLIENTS' tabs. The 'CLIENTS' tab is selected, indicated by a yellow circle with the number '1'. The main content area shows the breadcrumb 'Home > Clients' and the title 'Clients'. Below the title are search filters: 'Type Client Name' (a text input field) and 'Type Client Id' (a button). A table lists clients with columns 'Name', 'Client Id', and 'State'. The first client is 'DUCK DONALD' with 'Client Id' 'OK9874' and 'State' 'OK'. The second client is 'MICHAEL SCOTT' with 'Client Id' 'CO3456' and 'State' 'CO'. A yellow circle with the number '2' and an arrow points to the 'MICHAEL SCOTT' row.

Name	Client Id	State
DUCK DONALD	OK9874	OK
MICHAEL SCOTT	CO3456	CO

1. Click on Clients Tab to view list of Clients in case load
2. Click on Client name to view Client Details page*

**Client Details page will contain client specific authorization information.*

Client Details Page

DASHBOARD

Home > Clients > DUCK DONALD

CLIENTS

1 Client Details - DUCK DONALD

Basic Demographics

Client Id: OK9874
Address: 4823 S Sheridan
Ste 310
Tulsa, OK 74135
GNIS: 40-143-1100962
Region:
Phone: (480) 497-0343
Alternate Phone:

DASHBOARD

Home > Clients > DUCK DONALD > 282

CLIENTS

Authorization Detail - 282

Authorization Details

Start Date: Nov 01, 2019
End Date: Dec 31, 2022
Expiration Date: Dec 31, 2022
Initial Balance: 10000.00
Remaining Balance: 9804.72
Monthly Max: 10000.00
Weekly Max: 10000.00
Daily Max: 10000.00

1. Client Details Page will show demographic info
2. Scroll down to view Authorization preview
3. Click on Authorization to view details

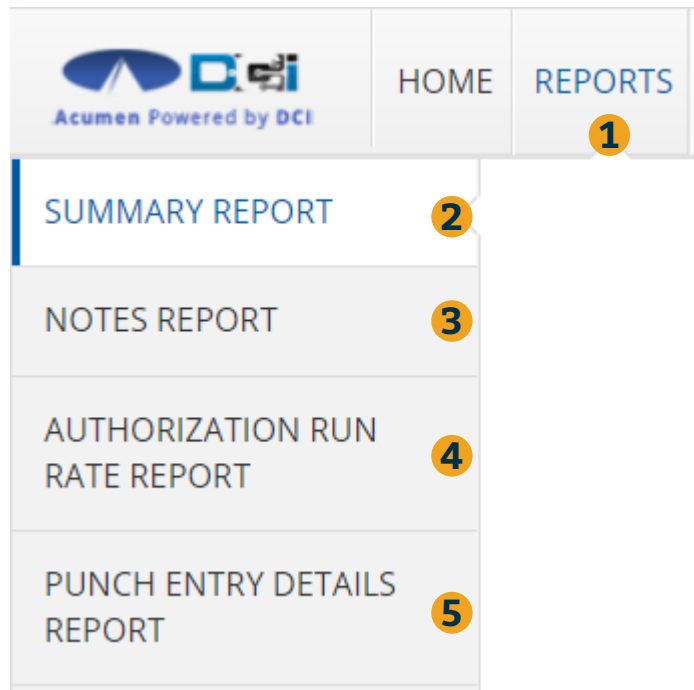
Authorizations

Showing 2 out of 2 records

Service Code	Start Date	End Date	Bill Rate	Initial Balance	Holds	Remaining Balance	Status
PSA	Nov 01, 2019	Dec 31, 2022	3.61	10000.00	0.00	9804.72	Approved
APSA	Nov 01, 2019	Dec 31, 2022	3.61	10000.00	0.00	9787.00	Approved

Reporting Features

Reporting Features



1. Click on Reports Tab to access reports
2. Summary Report – View a Summary of Authorization usage and Employee entries.
3. Notes Reports* – View progress notes entered by Employees for each shift.
4. Authorization Run Rate Report – View Projected vs Current Authorization usage
5. Punch Entry Details – View a full list of entries for a specified time period.

**Only visible if the Client/Employees are entering progress notes for shifts in the DCI Portal.*

Summary Report

The screenshot shows the 'Summary Report' page in a web application. The interface includes a sidebar with navigation links (SUMMARY REPORT, NOTES REPORT, AUTHORIZATION RUN RATE REPORT, PUNCH ENTRY DETAILS REPORT) and a main content area. The main area displays a 'Spending Summary as of: 07/13/2020'. It features input fields for 'Service Start Date', 'Service End Date', and 'Type Client Name'. A 'Search' button is highlighted with a red circle 2. Below the search fields, client details for 'DUCK DONALD' are shown, including 'Participant Number OK9874' and 'Case Manager CASEY CASE', with a red circle 3. The 'OK CD-PASS' program name is highlighted with a red circle 4. A table shows authorization details with columns for 'Auth', 'Start', 'End', and '% Time Elapsed', with a red circle 5. A progress bar indicates '% Elapsed' and '% Remaining'. Below this, a table titled 'Units (Unit Based Programs)' shows authorization utilization for 'APSA' and 'PSA' with columns for 'Initial Balance', 'Used YTD', 'Pre Authorizations Holds', 'Remaining Balance', and '% Remaining Balance', with a red circle 6.

1. Type Client Name > Then select Client from list

2. Click Search

3. Client & Case Worker details

4. Client Program Name

5. Authorization Period details

6. Authorization utilization details

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.

Authorizations

DUCK DONALD - OK9874

Search

Reset

Authorization for Client: **DUCK DONALD**

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!

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