Acumen powered by DCI Software

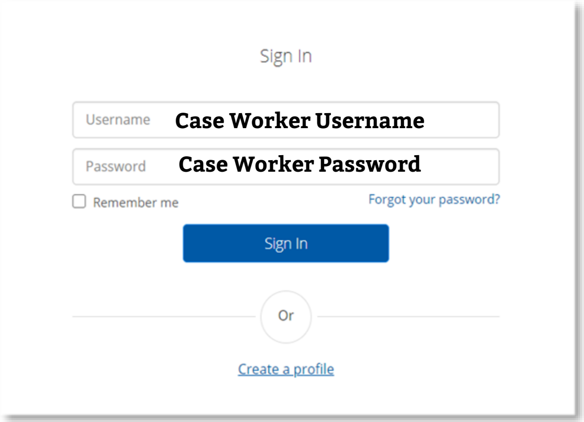
Case Worker Portal Guide

Case Worker Profile Basics

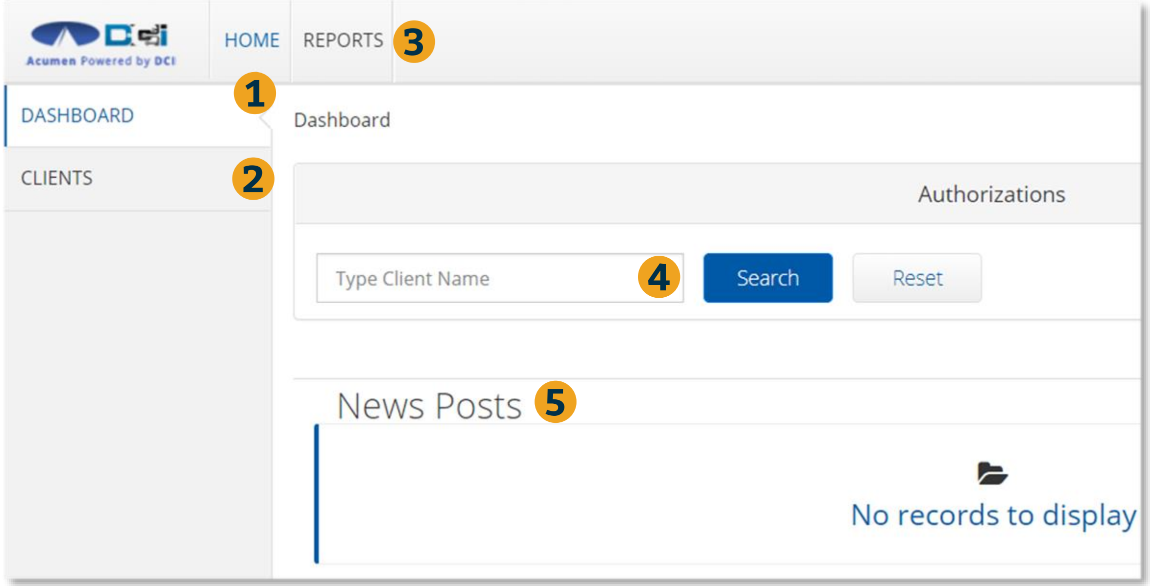
- DCI's Case Worker Portal creates a Client-Focused Environment to review budget & entry details
- All Case Workers will have unique login credentials
- Only clients who are assigned will be visible in DCI
- Think of this as Acumen giving you the ability to view your individual case load within the DCI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

How to access

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



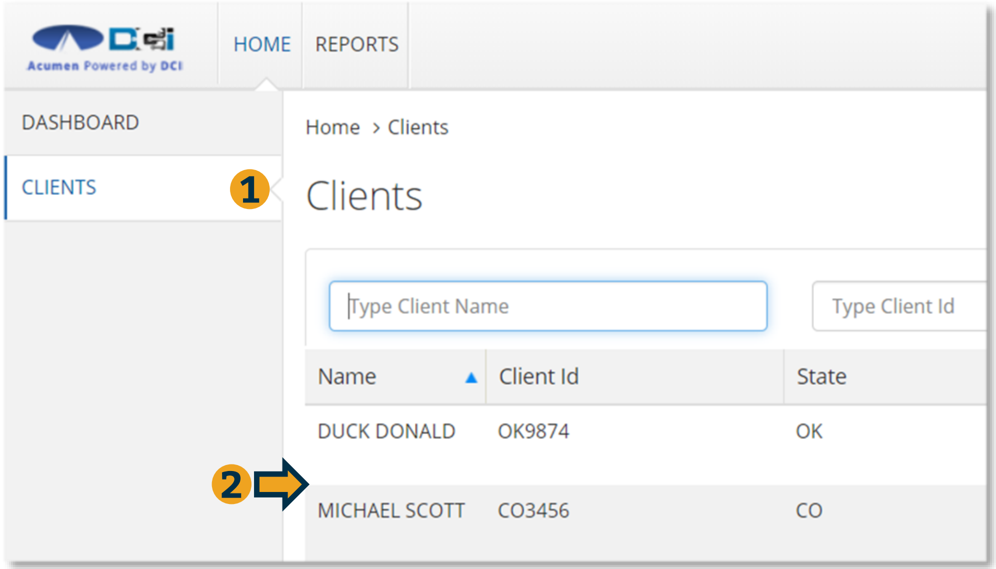
Case Worker Dashboard



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

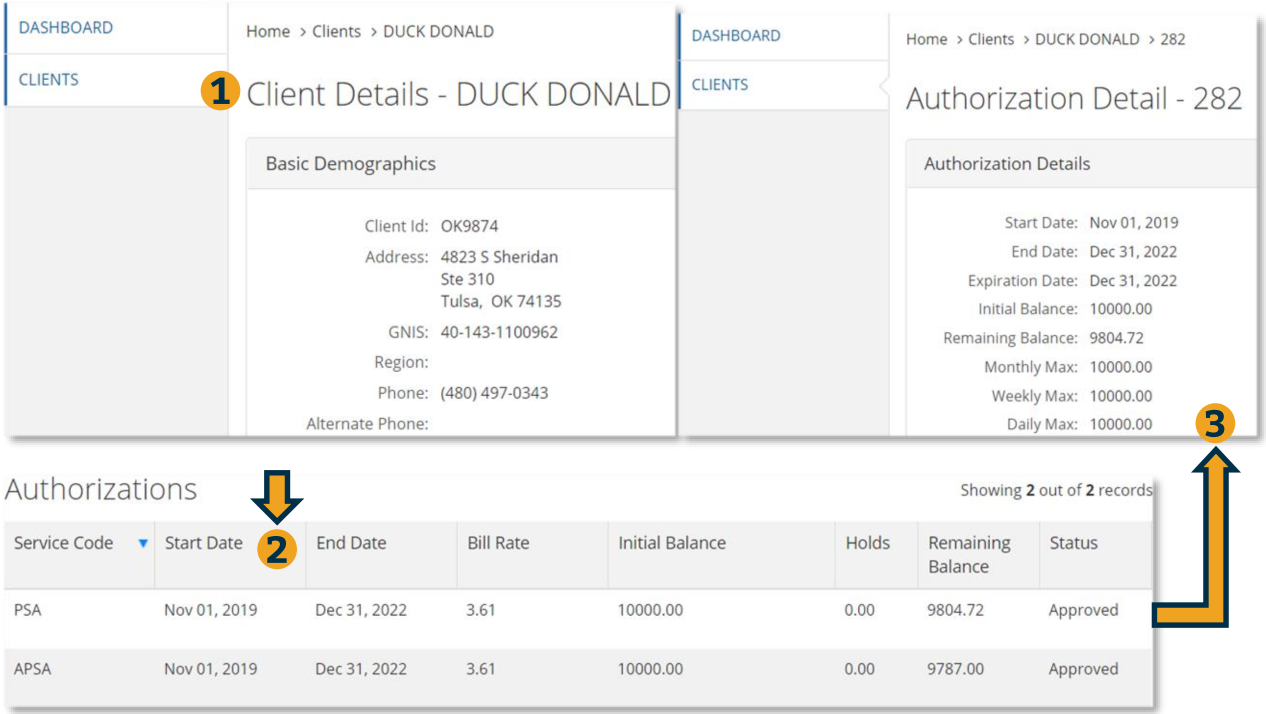
Case Worker – Clients



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



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

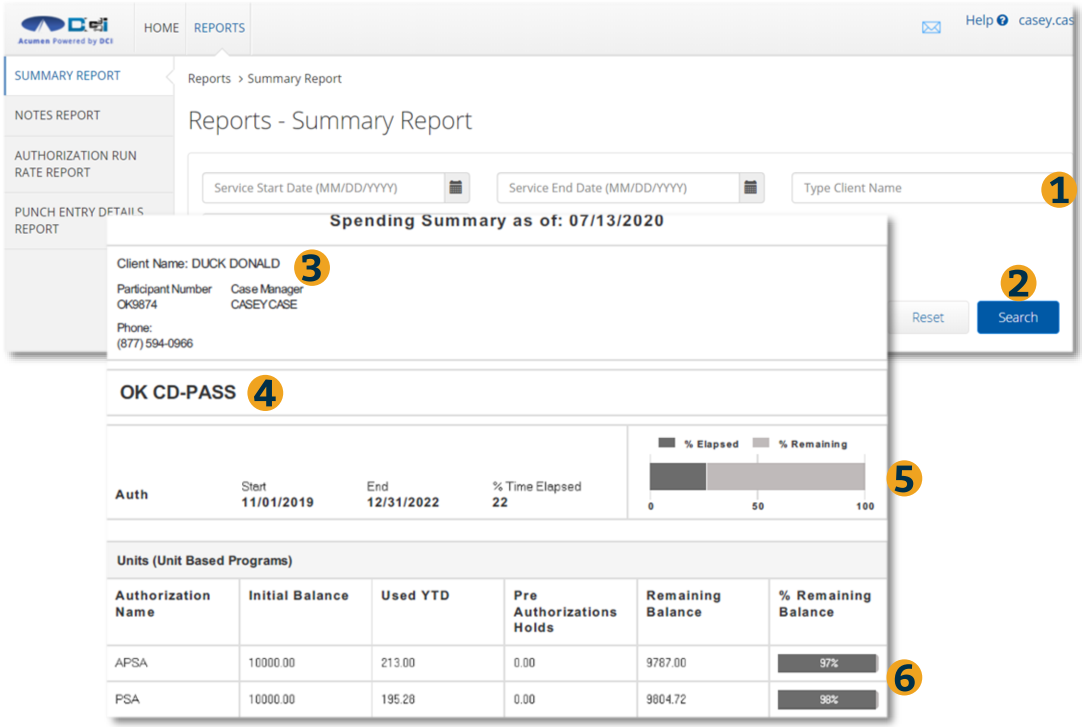
Reporting Features

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



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