



NC MCO Bonus and Reimbursement Requests

Bonus Requests

Your savings are used to pay employee's bonuses, mileage, and trainings. Please check to make sure there is an active account in DCI with funds available before submitting a request. Go to the Dashboard –go to section that says authorizations, enter clients name and all active authorizations will appear for your review.

- Partners: **XBOBP** (expires 60 days after plan year)**
- Alliance: **XAFUND** (expires 6 months after plan year)**
- Trillium : **Trillium Reserve** (no expiration)
- Vaya: **Vaya FUND Bonus** (no expiration)

****IMPORTANT: Funds do not roll over - you must use them by the expiration date****

Accessing the DCI Employer Web Portal

1. Open an Internet Browser on a computer or mobile device
 - Google Chrome is preferred
2. Navigate to the [DCI Web Portal](#)
3. Enter Employer Username and Password
 - Credentials provided by Acumen
4. Utilize Forgot Password link if necessary
5. Contact Acumen Agent with login issues
6. This is the same login you use to approve time entered by staff.

Sign In

Employer Username

Employer Password

☐ Remember me [Forgot your password?](#)

Sign In

Or

[Create a profile](#)

**Only the Employer can submit Employee Bonus Entry*

Bonus: Paying an Active Employee

1. Start on the Dashboard/Home page
2. Select Employer Tab at top
3. Select Employee Tab on left side
4. Select Employee Name from list
5. Select Actions on the top right
6. Select New Bonus Payment

The screenshot displays the Acumen software interface with the following elements and numbered callouts:

- 2**: The **EMPLOYER** tab is selected in the top navigation bar.
- 3**: The **EMPLOYEES** tab is selected in the left sidebar.
- 4**: An employee is selected from the list, with the name **LAST NAME, FIRST NAME OF EMPLOYEE** visible.
- 5**: The **Actions** menu is open in the top right corner.
- 6**: The **New Bonus Payment** option is selected within the Actions menu.

The interface also shows a search bar labeled "Type Employee Name" and a table header with "Name" and "Employee #".

Add New Bonus Entry

The screenshot shows a web form titled "Add New Bonus Payment" with a close button (X) in the top right corner. The form contains the following fields and options:

- Entry Type:** A dropdown menu with "Bonus Payment" selected.
- Client:** A text input field containing "CLIENT'S NAME".
- Account Type:** A dropdown menu with "Hourly" selected.
- Employee Name:** A text input field containing "EMPLOYEE'S NAME".
- Service Code:** A dropdown menu with "VAYA FUND BONUS" selected.
- Dollar Amount:** A text input field with the placeholder "Enter Amount".
- Date of Service:** A date picker showing "XX/XX/2023".
- Notes:** A text area with the placeholder "Add Notes".
- Attachment:** A link labeled "Add Attachment".

At the bottom of the form are two buttons: "Cancel" and "Save".

Numbered callouts (1-7) are placed on the form to indicate the sequence of steps:

- 1. Client field
- 2. Account Type dropdown
- 3. A bracket grouping the Client, Account Type, and Employee Name fields.
- 4. Service Code dropdown
- 5. Dollar Amount field
- 6. Date of Service field
- 7. Notes field

The text "See next slide" is located to the right of the Date of Service field.

*Small sub screen must be work from top down

1. Type Client/Employer name then select from list
2. Account Type is **Hourly**
3. Entry Type & Employee Name are Auto Selected (based on previous employee selection)
4. Select your Bonus service code
5. Total Bonus Amount
6. Enter your date of service*
7. In the Notes section, enter in a note regarding your bonus. Notes are optional.

*See next slide for additional date considerations

Add New Bonus Entry

1. Click in box to bring up calendar
2. Select a date within the authorization you want to pay your bonus from by clicking on the date*
3. Hover over "i" icon to view your current Authorization balance - this will not show a previous plan year if it has ended

Date(s) of Service: 07/01/2020

Calendar: July 2020

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Ok

Authorization Remaining Balance: 49800
Authorization Daily Max: 50000
Authorization End Date: 12/31/2022

Information icons (i) are shown next to the date selection and the authorization details.

Add New Bonus Entry Cont.

Notes:

Attachment: [Add Attachment](#)

1

2 Alert

Are you sure you want to add a new **BONUS** entry for
SPONGEBOB for \$100.00 for 01 Day to service PATRICK - ?

Mar
2023
06

3

1. Click Save to finish process
2. Confirm details for this entry
3. Click Yes to submit Entry

**The Bonus Entry will then be submitted for review. The status is visible in the Client's profile and listed with the Entries.*

Reimbursements: Paying an Active Employee

1. From the Dashboard/Home
2. Select Employer Tab at top
3. Select Employee Tab on left side
4. Select Employee Name from list
5. Select Actions on the top right
6. Select New Reimbursement Entry

The screenshot displays the Acumen HR system interface. At the top, there is a navigation bar with tabs: HOME, EMPLOYER (highlighted with a yellow circle 2), and REPORTS. Below this, a left sidebar contains a menu with options: CLIENTS, EMPLOYEES (highlighted with a yellow circle 3), VENDORS, and PENDING ENTRIES (3). The main content area shows a search bar labeled 'Type Employee Name' and a table of employees. The table has two columns: 'Name' and 'Employee #'. The first row shows 'LAST NAME, FIRST NAME OF EMPLOYEE' and 'NC XXXXXX'. A yellow circle 4 is placed over the first row. On the right side of the table, there is an 'Actions' button (highlighted with a yellow circle 5) with a gear icon. A dropdown menu is open from the 'Actions' button, showing options: New Note, New Attachment, View Roles, New Service Account, New Entry, New Bonus Payment, and New Reimbursement Entry (highlighted with a yellow circle 6).

Add New Reimbursement Entry

Add New Reimbursement Entry

Entry Type: * Employer Reimbursement ✓

Client: Type Client Name 1

Account Type: * Select Account Type 2 ✓

Employee Name: * SPONGEBOB 3

Service Code: * Select Service Code 4 ✓

Dollar Amount: * Enter Amount 5

Date(s) of Service: * ⓘ See next slide 6

Date	Amount	Action
Select Date (MM/DD/Y) [Calendar Icon]		[-] [+]

Notes: Add Notes

Invoice Attachments: * Choose Files 7

Cancel Save

*Small sub screen must be work from top down

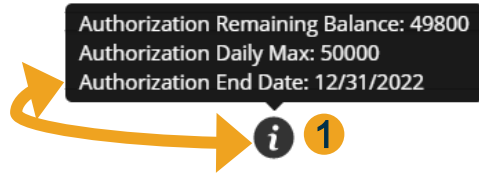
1. Type Client/Employer name then select from list
2. Select Account Type: Hourly
3. Entry Type & Employee Name are Auto Selected (based on previous employee selection)
4. Select your Fund balance Service Code[^]
5. Enter Total Reimbursement Amount
6. Enter your date of service* and amount needed.
7. Attachments are required for reimbursements~

[^] Reimbursements can only be submitted for employee reimbursement, not employer reimbursement.

* See next slide for additional date considerations

~ Amount listed must match invoice or receipt attached below. The attachments must include an paid invoice & Acumen Reimbursement Request Form.

Add New Reimbursement Entry



1. Hover over “i” icon to view current active Authorization balance - this will not show a previous plan year auth if it has ended
2. Click in Date of Service box to bring up calendar
3. Select an applicable service date
4. Enter total amount listed on invoice*

**The total of all amounts listed must also match Dollar Amount box on previous page.*

Add New Reimbursement Entry Cont.

Notes: (Optional) Medical Supplies 1

Invoice Attachment: Add Attachment(s) 2
Sample Invoice 2020.pdf

Alert × Cancel Save 3

Are you sure you want to add a new **Reimbursement** entry for
SPONGEBOB for **\$100.00** for **01 Day** to service **PATRICK** - ?

Mar 2023 4
06

No Yes 5

1. Entry Notes are Optional
2. Attachments are required for reimbursement requests - Attach a paid Invoice & Acumen Reimbursement Request Form
3. Click Save to finish process
4. Confirm details for this entry
5. Click Yes to submit Entry

**The Reimbursement Entry will then be submitted for review. The status is visible in the Client's profile and listed with the Entries.*

What happens next?

1. Entries will initially appear in the unvalidated status on in DCI.
2. After 30 minutes, the entry will change to the pending status in DCI if there was enough funds in auth otherwise it will show rejected
3. Acumen will review and approve all bonus and reimbursement requests.
4. Employers are NOT to approve bonuses or reimbursements

- If Approved, status will change and payment will be made at scheduled time.
- If an entry needs rejected, you will need to reach out to your agent for assistance.

Entries

Showing 30 out of 198 records

Id	Service Date	Type	Service Code	Cost Center	Employee /Program /Vendor Name	Ref.	Amount	Unit Type	Status	Client Sign-off
1030	Jul 01, 2020	Employer BONUS	BONUS	LA-010 TEST ER - LA-010 TEST ER	EMPLOYER ELLEN		100.00	Dollar	Pending	N/A

Helpful Tips

- Employee bonuses and reimbursements follow the same schedule as payroll – they must be submitted within the pay cycle, by the time entry due date, to receive with paycheck; payment(s) will show on the employee's pay stub
- No bonus payment form is needed!
- For all reimbursements, a paid invoice and reimbursement form must be attached when you submit the request
- All reimbursements/bonuses will follow the directions outlined in this training

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 NC Agent for more help
 - ncmcoagents@acumen2.net



Phone: (866) 811 - 3099



acumenfiscalagent.com



Thank you!

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