DCI Employer Portal Guide

What is DCI?

DCI is an online platform to help manage Employee Time and Service Budget

- Better tools for both Employers & Employees
- Faster and easier time entry & payroll processing

DCI will also helps keep you compliant with the 21st Century Cures Act

- As long as you use DCI to properly enter and manage time using EVV.

Important Terms

- **Client** (CLT) - This individual receives the care. Some programs refer to this individual as a Participant or Member. Clients may be their own Employer.
- **Employee** (EE) - This person is hired & trained to provide services to the Client. EE's also are responsible for entering their own time into the system.
- **Employer** (ER) - This is the leader who hires the Employee(s) & manages the process. The Employer will approve time & manage the budget in DCI.
- **Authorized Representative** (AR) - This individual helps the Employer complete various tasks. This is common in families & when a CLT is their own ER.
- **Electronic Visit Verification** (EVV) - This is how punches are verified in the system. Verification is a vital part of the Clock In/Out process.

Multiple Ways to Enter Time

Mobile App

- Preferred Method
- Real Time Entry
- Auto-Approved Time
- EVV Compliant

Phone EVV

- Alternate Method
- Real Time & Historical
- Auto-Approved Time
- EVV Compliant

Web Portal

- Time Management
- Historical Entries
- Manual Time Approval
- Non-EVV Compliant

DCI Mobile App

Mobile App Basics

- **The DCI Mobile App is meant for Real-Time Entry**
    - Missed punches are entered in Web Portal
- **Employees will Clock In/Out with Mobile App**
    - Employers can review time in Web Portal
- **2 Options for Verification with EVV**
    - PIN/Password entered by Employer
    - Picture taken of Client by Employee
- **Employers do not need to use the Mobile App**
    - All Employer tasks completed the Web Portal
- **For more detail view the *Mobile App Guide***

Mobile App Process Timeline

Process starts when the Employee is ready to begin their shift.

1. Open *DCI Mobile EVV* app and Login with Username & Password

2. Select the blue Clock In/Out button at the top of the screen

3. Select Client Name & Service Code for that shift

   Confirm Clock In

4. **Verification with EVV**

   Employer enters PIN/Password

   Employee takes picture of Client*

5. Visit Verification is confirmed

   User is Clocked In!

6. When ready to Clock Out

   Repeat Steps 1, 2 & 4

*Requires Facial Recognition

Facial Recognition Setup

1. Employer will take the Initial picture of Client
    - Should be a headshot on a plain background
2. Email Picture to Customer Service
3. Enter “Facial Recognition Setup” into Subject Line
4. Enter Client Name & State in the body of the email to prevent confusion with any other clients.
5. Ouitreach will notify Employer once complete

DCI Phone EVV

Phone EVV Basics

- **Phone EVV is an alternative option for both Real-Time & Historical time entry**
  - Only used by those with limited access to smartphone or computer
- **Real-Time = Clock In/Out at Start/End of Shift (Preferred)**
  - Historical = Entering a full shift after that fact
    - Used only for missed punches and corrections
- **Client Phone number must be a Landline or VOIP**
  - Landline & VOIP phones meets all EVV Requirements
- **For more detail view the *Phone EVV Guide***

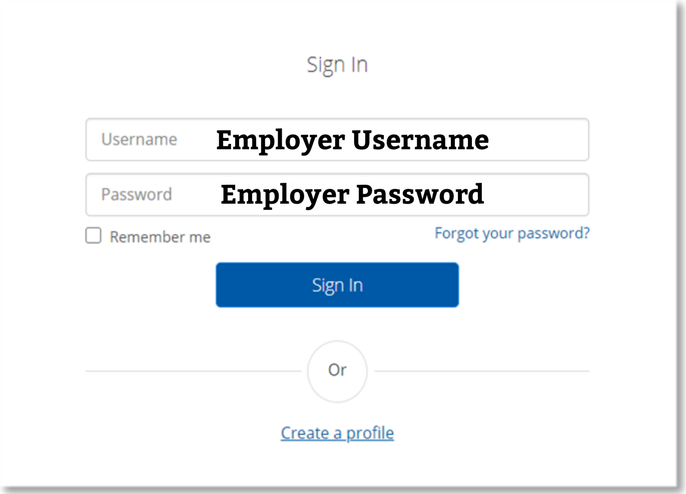
Employer Web Portal

Accessing the DCI Web Portal

1. Open up an Internet Browser on a computer or mobile device
2. Navigate to the DCI Web Portal
3. Enter Employer Username and Password
4. Utilize Forgot Password link if necessary*

   * Requires email to be on file

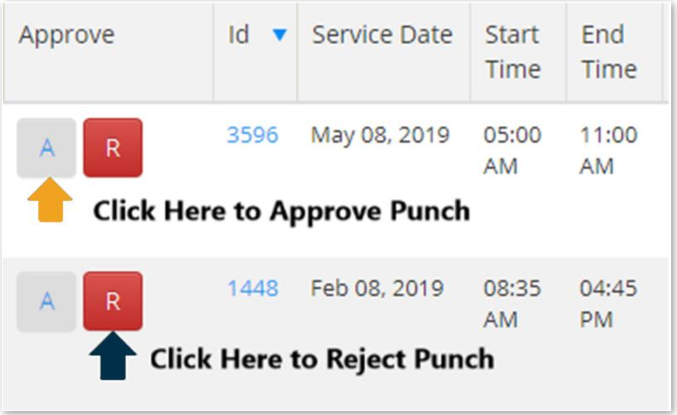
5. Contact Customer Service with login issues



Approve Pending Entries

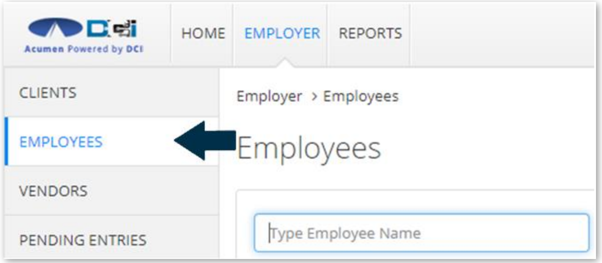
Pending Entries is the landing page

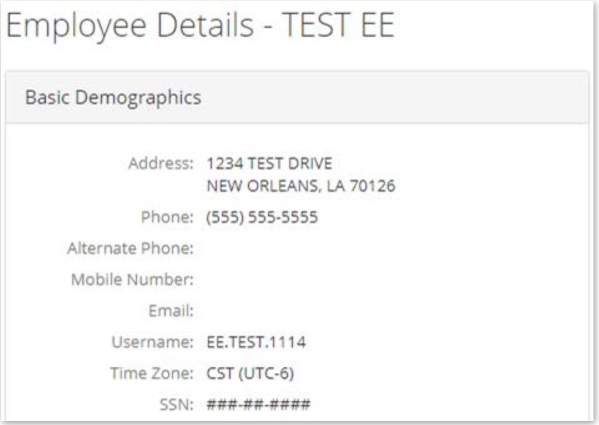
- What shows up here?
  - Any punch that requires approval
- Scroll down to view list of Entries
  - Review each entry and Approve or Reject
  - Click any entry for more detail
- If Rejected, inform Employee to re-enter time correctly via DCI Portal



How to Use “Employees” Page

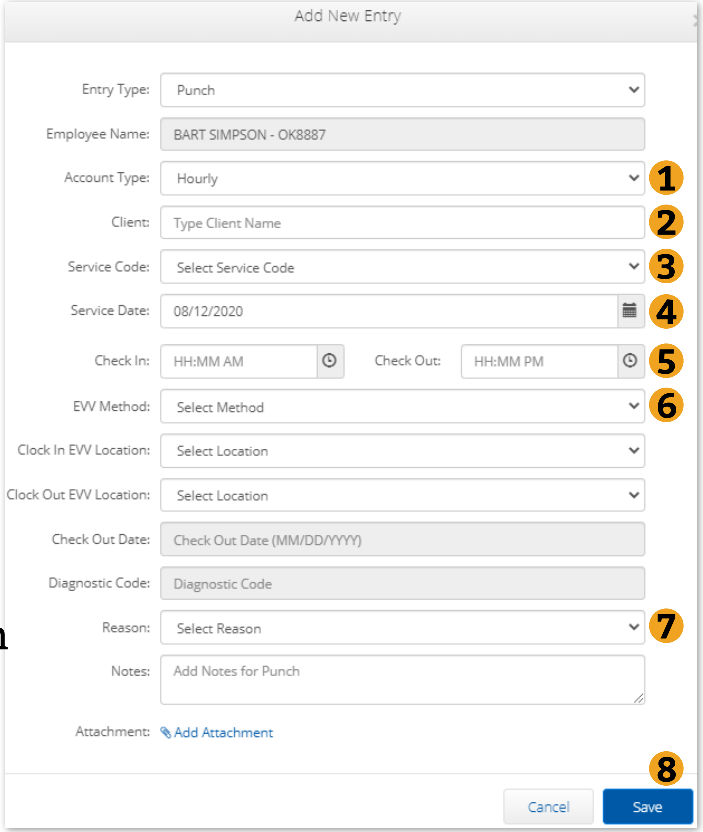
1. **Select the “Employees” Tab from the Home Page**
   - Located on the left side of the screen
   - Select Employee name from the list displayed
2. **Scroll Down to View List of Entries**
   - Here you will see a list of punches for this Employee
3. **Great Resource for Payroll Deadlines**
   - Ensure all time for pay period is entered and “Approved”
4. **Enter time for Employee on this page (Computer Only)**
   - Select “Actions” button and then select new entry
   - Employee should enter time themselves
     - Only use if necessary





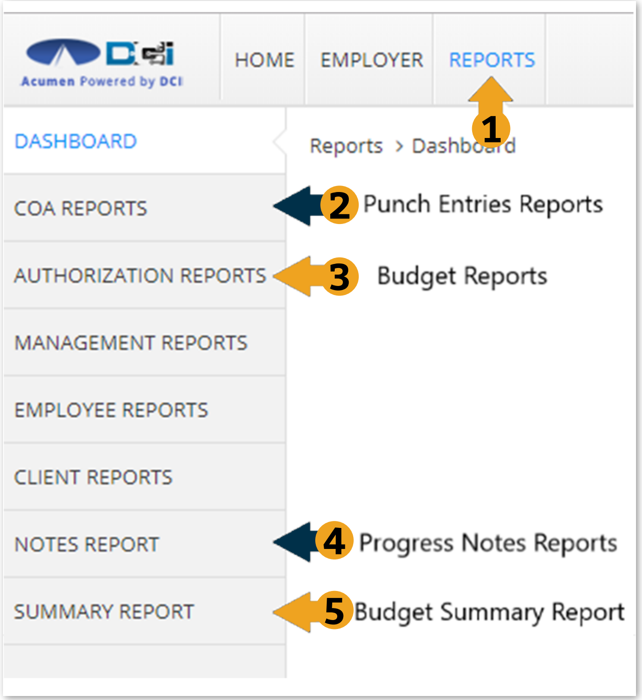
Add New Entry

1. Account Type Always Hourly
2. Type Client Name > Select from list
3. Select Service Code from dropdown
4. Select Service Date from calendar
5. Input Clock In/Out Times
   - Always after shift is completed
6. Select Client Portal Signoff as EVV Method
7. Skip to “Reason” > Select appropriate reason
8. Select “Save” to Submit Entry



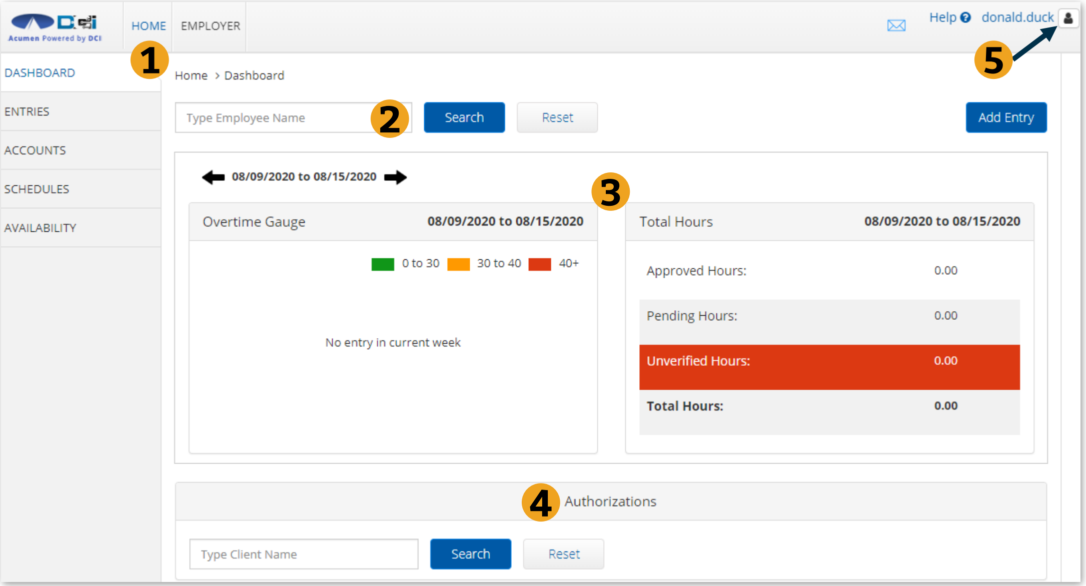
How to Use Reports (Computer/Laptop)

1. Select “Reports” Tab from **Employer Tab**
2. **COA Reports** - This will show you a full list of punches from the previous month or pay period. Simply select date range to view.
3. **Authorization Reports** - Authorization Run Rate Report is the most valuable. The Projected Weekly Run Rate is the amount of units available weekly.
4. **Note Reports** - Here you can pull any notes entered by the Employee or Employer. This is similar to progress notes required by some states.
5. **Summary Report** - Gives a breakdown of punches and percentages of budget remaining.



Home Page Basics

1. Select Home Tab
2. Search for Employee Name
    - View EE's weekly time
3. Overtime Gauge & Total Hours breakdown for selected Employee
4. Authorization Widget
    - View a snapshot of all active budgets
5. Profile Settings



DCI Tips & Tricks

1. All Employers and Employees must have a unique valid email address in DCI
2. Login and take action as often as possible to become familiar with DCI and the tasks
3. Users have 3 attempts to login until they are locked out and need to contact Customer Service
4. Employers will exclusively use the DCI Web Portal and Employees will use the Mobile app
5. Employees will always enter their own time
    - Employers will Approve or Reject

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 Customer Service for more help**

NC Phone: (877) 901-5827
WI Phone: (877) 901-5826

acumenfiscalagent.zendesk.com

Thank you!

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