



**Outreach Powered by DCI**

# Historical Entries with Reason Codes

# Reason Code Basics

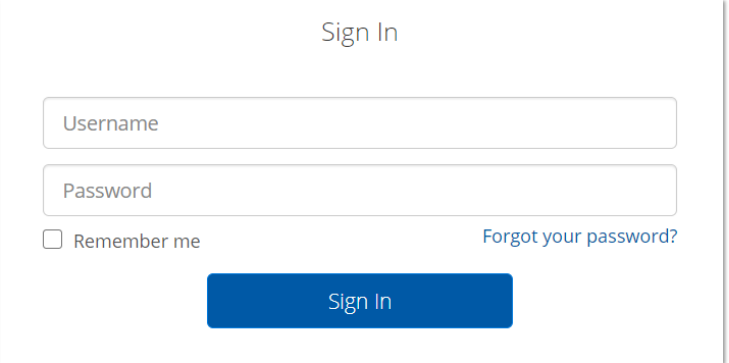
- Reason Codes are required for some programs and services
- If you see an option to select a reason, it's required for you
- This is the reason you are entering your time in the DCI Web Portal instead of an EVV Compliant method
- The DCI Web Portal should only be used to enter missed punches or for Live-In Exempt Employees.
  - Discuss with your Agent for more info on Live-In Exemptions

Reason: 

# The DCI Web Portal

1. Open an Internet Browser on a computer or mobile device
2. Navigate to the DCI Web Portal
3. Enter Employee Username/Password
4. Use Forgot Password link if needed
5. Contact Outreach Agent for help

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



Sign In

Username

Password

Remember me [Forgot your password?](#)

Sign In

The screenshot shows a white rectangular sign-in form. At the top center is the text "Sign In". Below it are two input fields: "Username" and "Password". Under the "Password" field, there is a checkbox labeled "Remember me" and a blue link "Forgot your password?". At the bottom center of the form is a blue button with the text "Sign In".

---

# DCI Web Portal

On a Laptop or Desktop Computer

# Add New Entry (Computer/Laptop)

## Once logged in

1. Select Add New Entry

Home > Dashboard

Help spongebob

1 → Add Entry

SPONGEBOB ← 11/01/2020 to 11/07/2020 →

**Overtime Gauge** 11/01/2020 to 11/07/2020

0 to 30 30 to 40 40+

No entry in current week


**Total Hours** 11/01/2020 to 11/07/2020

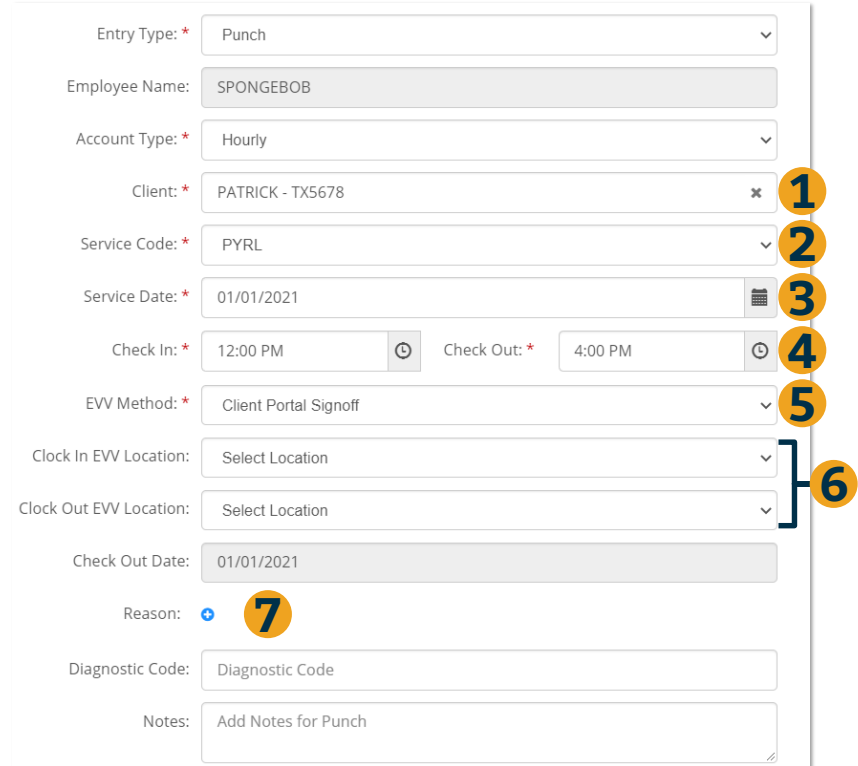
Approved By:	7.52
Pending Hours:	0.00
<b>Unverified Hours:</b>	<b>0.00</b>
<b>Total Hours:</b>	<b>7.52</b>

**Expiring Certifications**


Certification Name	Certification Expiration Date	Link to Certification Course
--------------------	-------------------------------	------------------------------

# Complete New Entry

1. Enter Client Name & Select
2. Select Service Code
3. Select Service Date
4. Enter Start & End Time
5. Select Client Portal Signoff
6. Select Location if necessary
7. Select  to choose reason code




The screenshot shows a form for creating a new entry. The fields and their values are as follows:

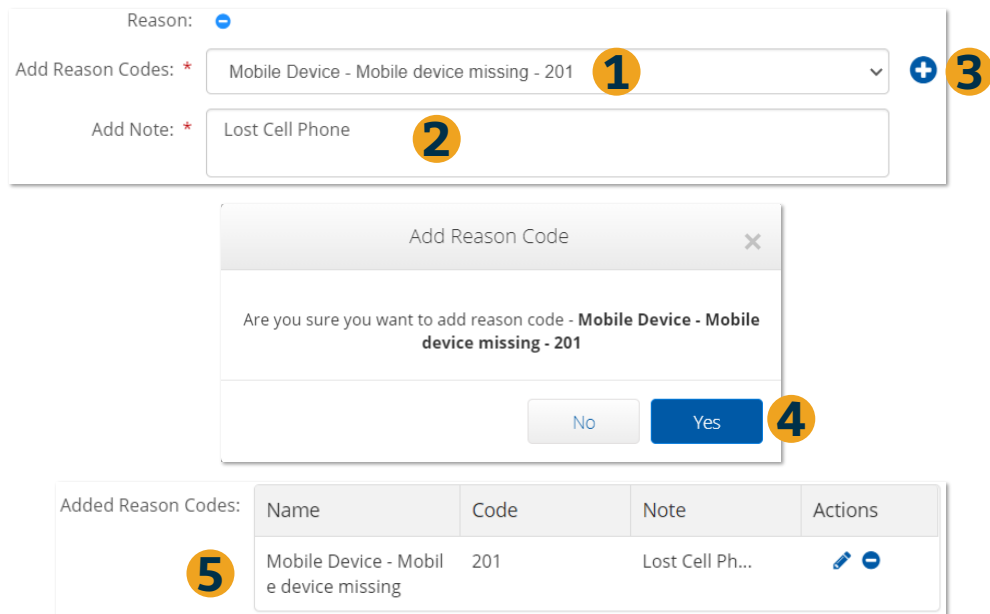
- Entry Type: \* Punch
- Employee Name: SPONGEBOB
- Account Type: \* Hourly
- Client: \* PATRICK - TX5678
- Service Code: \* PYRL
- Service Date: \* 01/01/2021
- Check In: \* 12:00 PM
- Check Out: \* 4:00 PM
- EVV Method: \* Client Portal Signoff
- Clock In EVV Location: Select Location
- Clock Out EVV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


Numbered callouts (1-7) are placed to the right of the form, corresponding to the steps in the list:




- 1: Client field
- 2: Service Code field
- 3: Service Date field
- 4: Check In and Check Out fields
- 5: EVV Method field
- 6: Clock In and Clock Out EVV Location fields
- 7: Reason field


# Add Reason Code


1. Select Reason code from list
2. Enter Note to explain
3. Select  to add reason code
4. Select Yes to add code
5. Reason code should be displayed below w/ note




Reason: 




Add Reason Codes: \*    

Add Note: \*  

Add Reason Code 

Are you sure you want to add reason code - **Mobile Device - Mobile device missing - 201**



Added Reason Codes:		Name	Code	Note	Actions
		Mobile Device - Mobile device missing	201	Lost Cell Ph...	 

# Add Notes and Submit

## After Reason Code is added

1. Notes are Optional
2. Attachments are Optional
3. Select Save
4. Select Yes to Submit

Diagnostic Code:

Notes:  **1**

Attachment:  **2**

**3**

Alert

Are you sure you want to add a new punch for **04:00 hour(s)** for **PATRICK - TX5678** for **Jan 01, 2021**?

**4**



---

# Mobile Web Portal

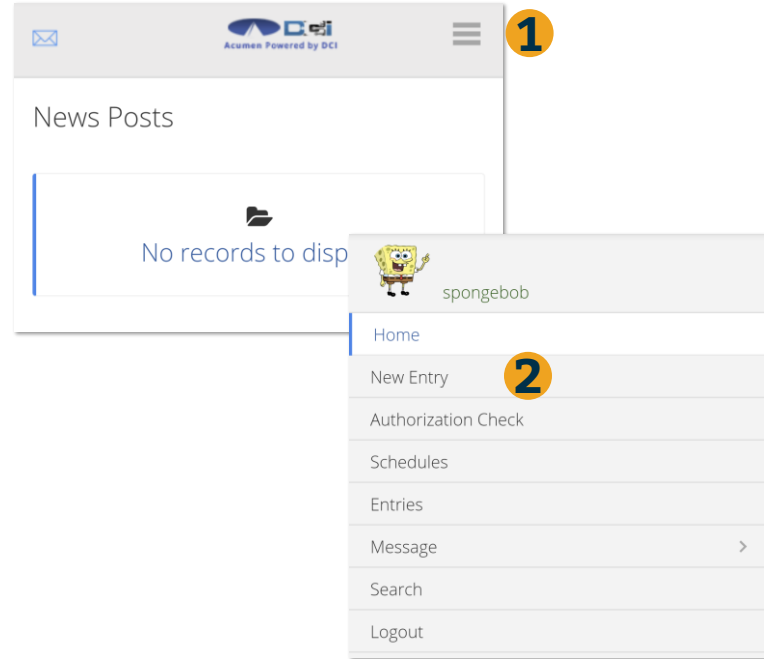
On a Smartphone or Tablet

# Add New Entry (Mobile Device)

Once logged in

1. Select the Menu in the top right corner
2. Select New Entry

Complete the Add New Entry Wizard





# Add New Entry Wizard

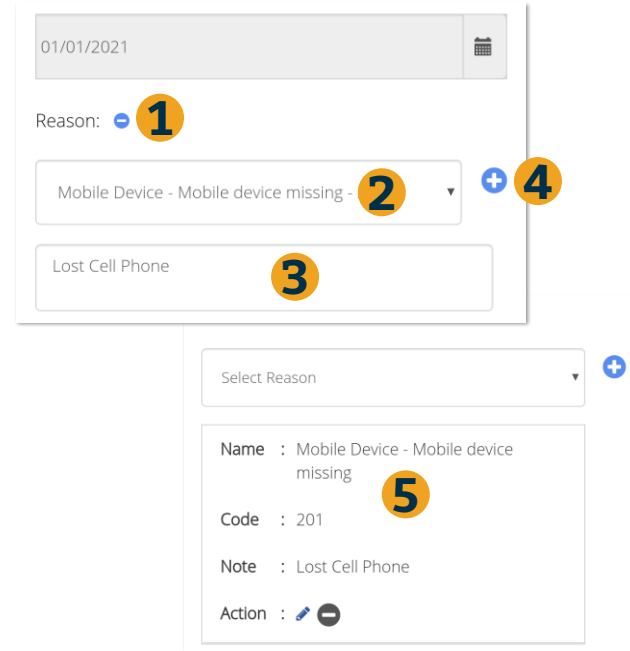
1. First 2 boxes are preset
2. Enter Client Name
3. Select Service Code
4. Select Service Date
5. Enter Start & End Time
6. Select Client Portal Signoff
7. Select Location if necessary



The screenshot shows a web form titled "Add New Entry" with the following fields and callouts:

- 1:** A bracket groups the first two dropdown menus, which are preset to "Punch" and "Hourly".
- 2:** A text input field containing "PATRICK - TX5678" with a clear (X) button.
- 3:** A dropdown menu with "PYRL" selected.
- 4:** A date input field showing "01/01/2021" with a calendar icon.
- 5:** Two time input fields: "6:00 AM" and "10:00 AM", each with a clock icon.
- 6:** A dropdown menu with "Client Portal Signoff" selected.
- 7:** A bracket groups the last two dropdown menus: "Select Clock In EVV Location" and "Select Clock Out EVV Location".

# Add New Entry Wizard (Cont)

1. Select  to choose Reason Code
2. Select Reason Code from dropdown list
3. Enter Note to explain
4. Select  to add Reason Code
5. Reason Code will be added



The screenshot displays the 'Add New Entry Wizard' interface. At the top, there is a date field showing '01/01/2021' with a calendar icon. Below this is a 'Reason:' label with a minus sign icon and a yellow circle containing the number '1'. A dropdown menu is open, showing 'Mobile Device - Mobile device missing -' with a yellow circle containing the number '2' and a plus sign icon with a yellow circle containing the number '4'. Below the dropdown is a text input field containing 'Lost Cell Phone' with a yellow circle containing the number '3'. A second window is shown below, displaying a 'Select Reason' dropdown with a plus sign icon. Below this, the details for the selected reason are shown: 'Name : Mobile Device - Mobile device missing' with a yellow circle containing the number '5', 'Code : 201', 'Note : Lost Cell Phone', and 'Action :  

# Save & Submit

1. Enter Notes if necessary
2. Select Save
3. Select Yes to confirm
4. Punch will be submitted

The screenshot shows a form for entering punch data. It includes a 'Diagnosis Code' field, an 'Add Notes for Punch' field with a yellow '1' callout, and a 'Choose File' button. Below these are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted in blue and marked with a yellow '2'. Below the form is an 'Alert' dialog box with the text: 'Are you sure you want to add a new punch for 04:00 hour(s) for PATRICK - TX5678 for Jan 01, 2021?'. The dialog has 'No' and 'Yes' buttons, with the 'Yes' button highlighted in blue and marked with a yellow '3'.

The screenshot shows a punch summary card for 'Punch 1641' on 'Jan 01, 2021' for 'SPONGEBOB'. The details include '06:00 AM - 10:00 AM', 'Hours: 0:04:00', and 'Amount: 4.00'. The status is 'Pending' in red text, and the punch type is 'Hourly'. The employee name is 'PATRICK' and the punch code is 'PYRL'. A red 'Reject' button is located at the bottom right of the card, with a yellow '4' callout next to the punch number.

# 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 Outreach Agent for more help
  - Contact Customer Service if you don't know your assigned agent



Phone: (877) 901-5826



[outreachhealth.com](https://www.outreachhealth.com)



---

# Thank you!

Visit the **DCI Help Center** to learn more at:  
[Outreach DCI Help Center](#)