



# Historical Entries with Reason Codes

# Reason Code Basics

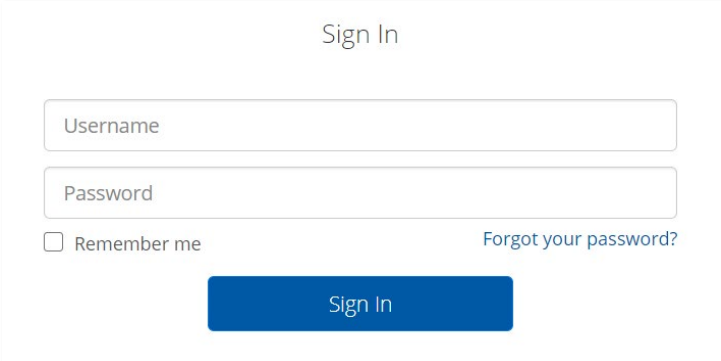
- Reason Codes are required for some programs and services
- If you see an option to select a reason, it's required for you
- This is the reason you are entering your time in the DCI Web Portal instead of an EVV Compliant method
- The DCI Web Portal should only be used to enter missed punches or for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



# 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 Customer Service for help

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



Sign In

Username

Password

Remember me [Forgot your password?](#)

Sign In

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

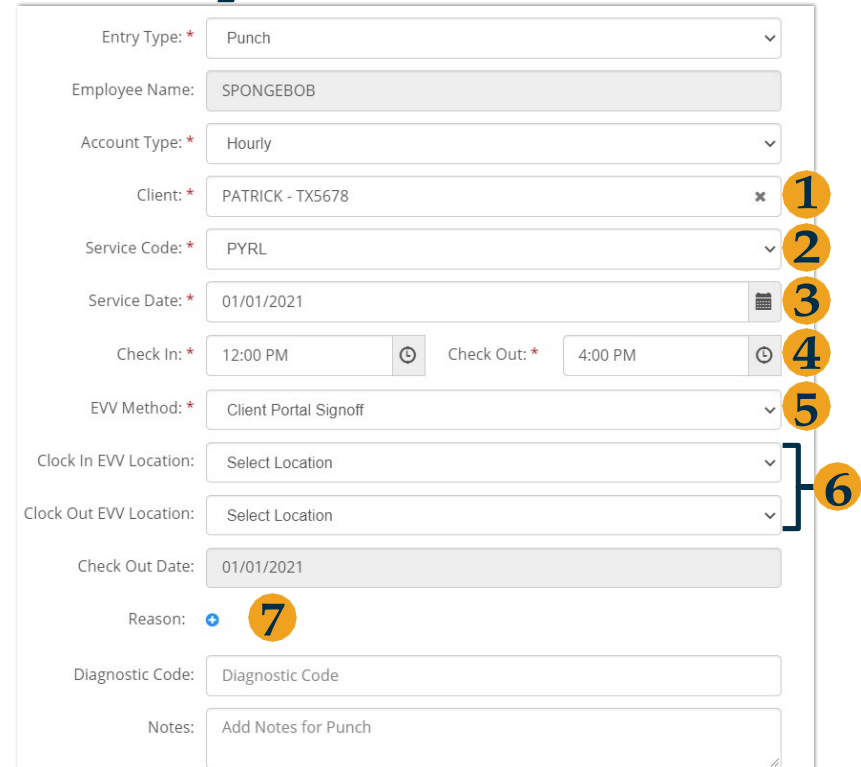
Expiring Certifications

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




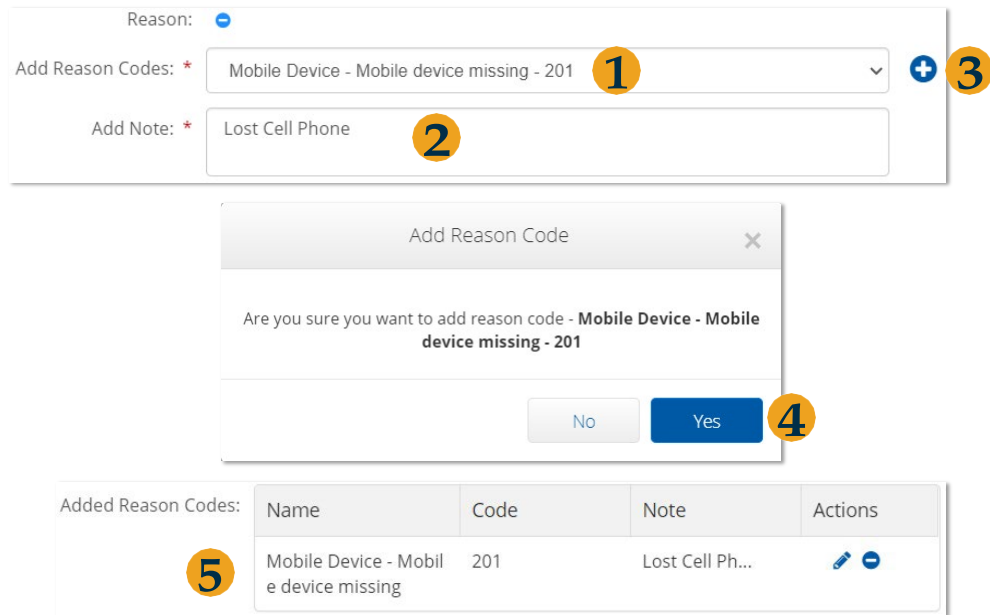
The screenshot shows a form for creating a new entry. The fields are as follows:


- Entry Type: \* Punch
- Employee Name: SPONGEBOB
- Account Type: \* Hourly
- Client: \* PATRICK - TX5678 (marked with 1)
- Service Code: \* PYRL (marked with 2)
- Service Date: \* 01/01/2021 (marked with 3)
- Check In: \* 12:00 PM (marked with 4)
- Check Out: \* 4:00 PM (marked with 4)
- EVV Method: \* Client Portal Signoff (marked with 5)
- Clock In EVV Location: Select Location (marked with 6)
- Clock Out EVV Location: Select Location (marked with 6)
- Check Out Date: 01/01/2021
- Reason:  (marked with 7)
- Diagnostic Code: Diagnostic Code
- Notes: Add Notes for Punch






# 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: \* Mobile Device - Mobile device missing - 201  

Add Note: \* Lost Cell Phone 



 


Add Reason Code 

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

No  

Added Reason Codes:

Name	Code	Note	Actions
Mobile Device - Mobile device missing	201	Lost Cell Ph...	 

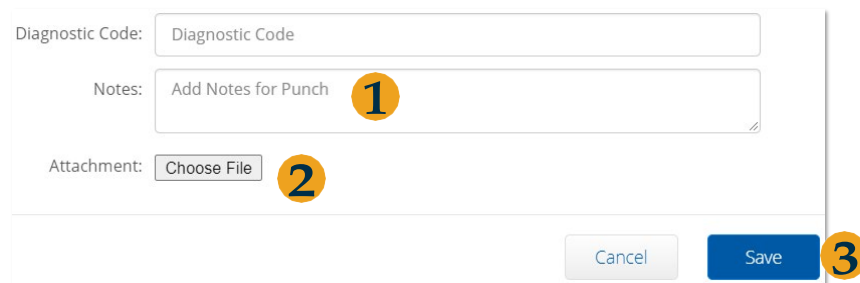




# Add Notes and Submit

After Reason Code is added

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

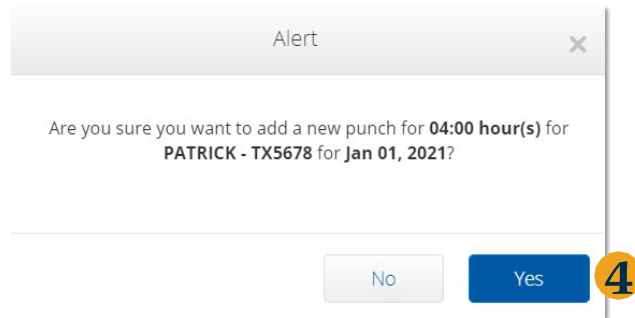


Diagnostic Code:

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

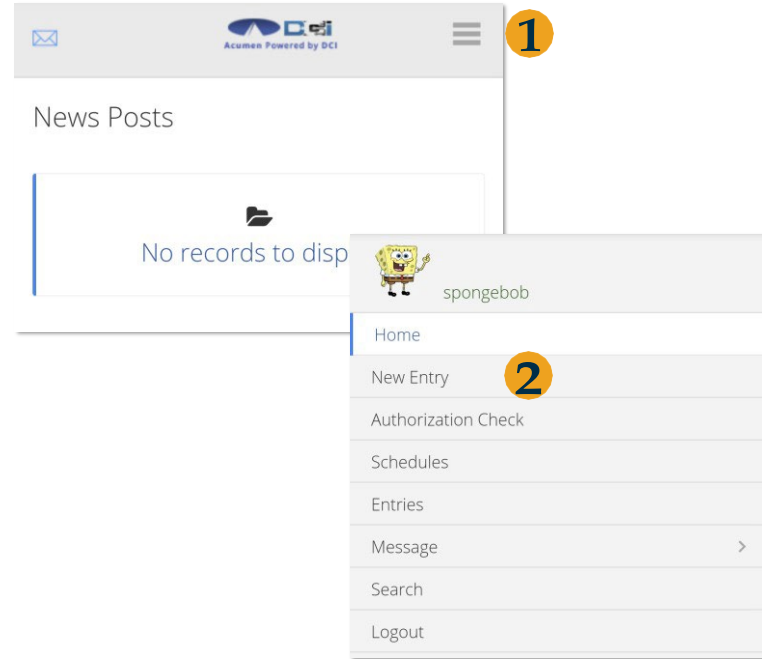
On a Smartphone or Tablet

# 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 form titled "Add New Entry" with the following fields and callouts:

- 1. A bracket groups the first two dropdown menus: "Punch" and "Hourly".
- 2. A text input field containing "PATRICK - TX5678".
- 3. A dropdown menu containing "PYRL".
- 4. A date input field containing "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 containing "Client Portal Signoff".
- 7. A bracket groups the last two dropdown menus: "Select Clock In EW Location" and "Select Clock Out EW 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 illustrates 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 and a circled '1'. A dropdown menu is open, showing 'Mobile Device - Mobile device missing -' with a circled '2' and a plus sign with a circled '4'. Below the dropdown is a text input field containing 'Lost Cell Phone' with a circled '3'. A second window is shown below, displaying the selected reason code details: 'Select Reason' with a plus sign, 'Name : Mobile Device - Mobile device missing' with a circled '5', 'Code : 201', 'Note : Lost Cell Phone', and 'Action : [edit icon] [minus icon]'.



# Save & Submit

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

The screenshot illustrates the 'Save & Submit' process in a web application. It is divided into four numbered steps:

- 1**: The user enters notes in the 'Add Notes for Punch' field. The field is highlighted with a yellow circle containing the number 1.
- 2**: The user clicks the 'Save' button. The button is highlighted with a yellow circle containing the number 2.
- 3**: A confirmation alert is displayed: 'Alert Are you sure you want to add a new punch for 04:00 hour(s) for PATRICK - TX5678 for Jan 01, 2021?'. The 'Yes' button is highlighted with a yellow circle containing the number 3.
- 4**: The final punch summary is displayed: 'Punch 1641 Jan 01, 2021 SPONGEBOB 06:00 AM - 10:00 AM Hours: 0:04:00 Amount: 4.00 Pending Hourly PATRICK PYRL'. The 'Reject' button is highlighted with a yellow circle containing the number 4.



# 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



WI: (877) 901-5826



[acumenfiscalagent.zendesk.com](https://acumenfiscalagent.zendesk.com)



---

# Thank you!

Visit the **Help Center** to learn more at:  
[acumenfiscalagent.zendesk.com](https://acumenfiscalagent.zendesk.com)