



Punch Corrections in DCI

Punch Correction Basics

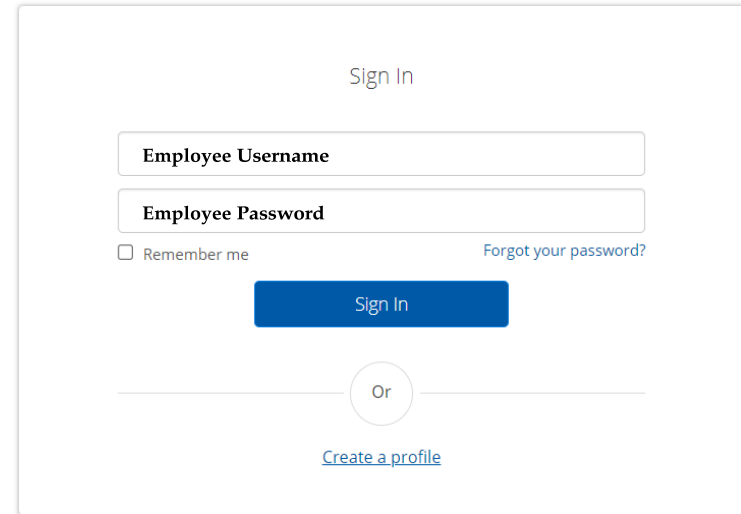
- Only Employee's should edit punches
- Corrections should only take place in the [DCI Web Portal](#) full site (Not mobile)
- Punch Correction Reasons
 - Incorrect Date of Service
 - Incorrect time on punch
 - Wrong Service Code



Accessing the DCI Web Portal

1. Open an Internet Browser on a computer or laptop
2. Navigate to the [DCI Web Portal](#)
3. Enter Employee Username/Password
4. Use Forgot Password link if needed
5. Contact Acumen Agent for help

Select Go To Full Site on Mobile



The screenshot shows a 'Sign In' page with the following elements:

- Header: Sign In
- Input field: Employee Username
- Input field: Employee Password
- Checkbox: Remember me
- Link: [Forgot your password?](#)
- Button: Sign In
- Separator: Or
- Link: [Create a profile](#)

Incorrect Pending Entry

Incorrect Pending Entries

- If an incorrect punch is still pending, select it to correct the punch
 - Edit punch with correct details
- Always try to edit a punch if it was first entered with EVV
 - This will create a reference entry
- Reject a punch when EVV is not required
 - Employee will enter new punch in DCI

The screenshot displays a web interface for managing punch entries. At the top, there is a navigation bar with 'Home / Entries' and an 'Actions' button. Below this is a search and filter section with fields for 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Punch ID', 'Type Client Name', 'Type Service Code', 'Select Account Type', and 'Select Status'. The main content area features a table of entries with columns for Id, Service Date, Type, Client Name, Service Code, Amount, Unit Type, and Status. The entry with Id 2131 is highlighted in yellow, indicating it is pending. A modal window titled 'Punch Detail - 2131' is open over this entry, showing the following details:

Id	Service Date	Type	Client Name	Service Code	Amount	Unit Type	Status
2131	Jul 14, 2021	Punch	PATRICK	PYRL	0:05:30	Dollar	Pending
2107	Jul 14, 2021	Punch	PATRICK	PYRL	0:05:30	Dollar	Approved
2082	Jul 14, 2021	Punch	PATRICK	PYRL	0:05:30	Dollar	Approved
2080	Jul 14, 2021	Punch	PATRICK	PYRL	0:05:30	Dollar	Approved

Punch Detail - 2131

Punch Details

- Entry Id: 2131
- Machine Details: 70.176.215.182
- Service Date: Jul 14, 2021
- Check In: 10:00 AM
- Check Out: 03:30 PM
- Hour(s): 0:05:30
- Amount: 5.50
- Status: Pending
- Created By: SPONGEBOB
- Created: Jul 16, 2021
- Input Method Type: Web Portal

How to Edit a Punch (1/3)

Navigate to Entries page in DCI Portal

1. Select Entry that needs corrected
 - Should still be Pending
2. Select Actions
 - Located in top-right corner
3. Select Edit Entry
 - See next slide for more

The screenshot shows the 'Entries' page in the DCI Portal. At the top right is an 'Actions' button. Below it is a search bar with fields for 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', and 'Type Punch ID'. A table lists entries with columns: Id, Service Date, Client Name, Service Code, Amount, Unit Type, and Status. The first entry, ID 2131, is highlighted with a red circle '1' and has a status of 'Pending'. Below the table, a breadcrumb trail reads 'Home / Entries / 2131'. A 'Punch Detail - 2131' modal is open, showing details for entry 2131. In the top right of this modal, an 'Actions' button is highlighted with a red circle '2'. A dropdown menu is open from this button, with the 'Edit Entry' option highlighted by a red circle '3'. Other options in the menu include 'New Note', 'New Attachment', and 'Reject'. The punch details include: Entry Id: 2131, Machine Details: 70.176.215.182, Service Date: Jul 14, 2021, Check In: 10:00 AM, Check Out: 03:30 PM, Hour(s): 0:05:30, Status: Pending, Created By: SPONGEBOB, Created: Jul 16, 2021, and Input Method Type: Web Portal.

How to Edit a Punch (2/3)

Once Edit Entry window is open

1. Make necessary corrections
 - Service Code, Date, or In/Out Time
2. Select EVV Method
 - Portal Signoff
3. Select Reason code from list

Entry Type: Punch

Employee Name: Steph Employee2

Account Type: Hourly

Client: Steph Client3 - 1778

Service Code: RESPITE (Hourly)

Service Date: 11/21/2023

Remaining Balance: 99996.43

Check In: 5:00 AM Check Out: 1:30 PM

EVV Method: Portal Signoff

Clock In EVV Location: Home

Clock Out EVV Location: Home

Add Reason Codes: * Forgot mobile device - 4568

How to Edit a Punch (3/3)

4. Enter Reason Code Note, if required.
5. Add a Punch Note, if required.
6. Add Attachment, if required.
7. Select Save to save all changes
8. Select Yes to add code
9. Reason code should be displayed below w/ note

Add Reason Code Note: 4

Diagnosis Code:

Notes: 5

Attachment: [Add Attachment](#) 6

7

Alert

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

8

Added Reason Codes: 9

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

What Happens Next

After the punch is saved

1. Go to Entries Page
2. Updated punch is entered
 - Reference Entry is created
3. Original punch is Rejected
4. Select any punch to review

Home / Entries

Entries **1** ⚙️ Actions

From (MM/DD/YYYY) 📅 To (MM/DD/YYYY) 📅 Type Punch ID

Id	Service Date	Ref.	Client Name	Service Code	Amount	Status
2132	Jul 14, 2021 2	2131	PATRICK	PYRL	0:05:00	Unvalidated *
2131	Jul 14, 2021		PATRICK	PYRL	0:05:30	Rejected 3
2107	Jul 12, 2021		PATRICK	PYRL	0:04:35	Approved

*** Unvalidated needs no further action.
Punch will update after a few minutes**

Incorrect Approved Entry

Incorrect Approved Entries

- When an incorrect punch is approved, there is only 1 option to correct it
 - **Employer** must Cancel entry first, then the **Employee** can re-enter in DCI Portal
- If a punch is Canceled, a negative punch is entered to offset the incorrect punch
- EVV will not be compliant on the new punch when entered with the DCI Portal

This should NOT happen regularly

The screenshot shows the 'Entries' page in the DCI Portal. At the top, there is a navigation bar with 'Home / Entries' and an 'Actions' button. Below this is a search section with filters for 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', and 'Type Punch ID'. A table of entries is displayed with columns: Id, Service Date, Ref., Client Name, Service Code, Amount, and Status. The table contains three entries: 2132 (Approved), 2131 (Rejected), and 2107 (Approved). A modal window titled 'Punch Detail - 2131' is open, showing the following details: Entry Id: 2131, Machine Details: 70.176.215.182, Service Date: Jul 14, 2021, Check In: 10:00 AM, Check Out: 03:30 PM, Hour(s): 0:05:30, Amount: 5.50, Status: Approved, Created By: SPONGEBOB, Created: Jul 16, 2021, and Input Method Type: Web Portal.

Id	Service Date	Ref.	Client Name	Service Code	Amount	Status
2132	Jul 14, 2021	2131	PATRICK	PYRL	0:05:00	Approved
2131						Rejected
2107						Approved

Punch Detail - 2131

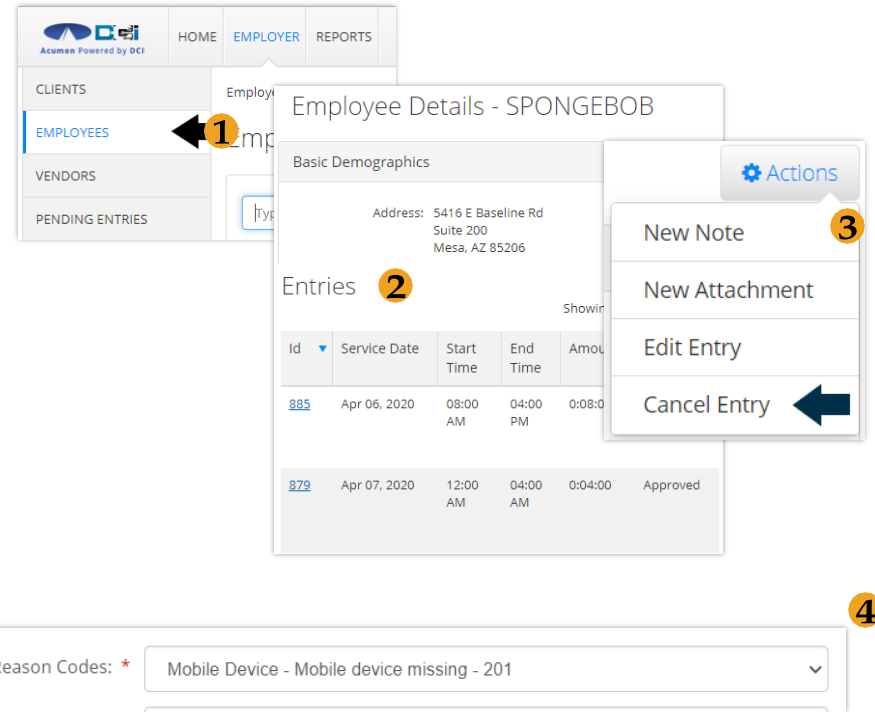
Punch Details

Entry Id: 2131
Machine Details: 70.176.215.182
Service Date: Jul 14, 2021
Check In: 10:00 AM
Check Out: 03:30 PM
Hour(s): 0:05:30
Amount: 5.50
Status: Approved
Created By: SPONGEBOB
Created: Jul 16, 2021
Input Method Type: Web Portal

Cancel Approved Entries (Employer)

Log into the DCI Employer Portal

1. Select the Employees Tab
 - Search for Employee & select
2. Scroll down to find incorrect entry
 - Select entry to view details
3. Select Actions > Cancel Entry
 - Creates negative reference entry
4. Add Reason Code
 - See Next Slide for details



Employee Details - SPONGEBOB

Basic Demographics

Address: 5416 E Baseline Rd
Suite 200
Mesa, AZ 85206

Entries

Id	Service Date	Start Time	End Time	Amot	
885	Apr 06, 2020	08:00 AM	04:00 PM	0:08:00	
879	Apr 07, 2020	12:00 AM	04:00 AM	0:04:00	Approved

Actions

- New Note
- New Attachment
- Edit Entry
- Cancel Entry

Add Reason Codes: * Mobile Device - Mobile device missing - 201

Cancel Approved Entries (Employer)

5. Enter Reason Code Note, if required.
6. Add a Punch Note, if required.
7. Add Attachment, if required.
8. Select Save to save all changes
9. Select Yes to add code
10. Reason code should be displayed below w/ note

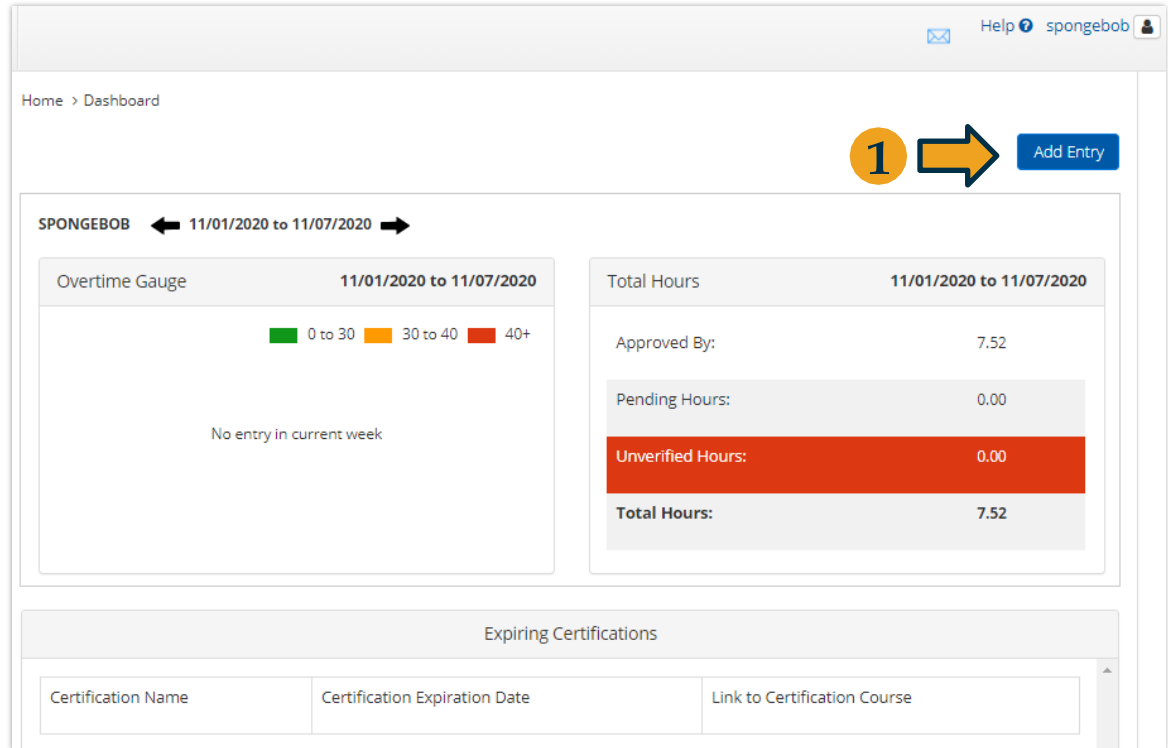
The screenshot shows a web form for adding a punch. It includes a text input for 'Add Reason Code Note' (containing 'Lost my phone'), a 'Diagnosis Code' dropdown (set to 'Diagnostic Code'), and a 'Notes' text area (containing 'Add Notes for Punch'). There is an 'Attachment' link with a plus icon. At the bottom right are 'Cancel' and 'Save' buttons. An 'Alert' dialog box is open, asking for confirmation to add a new punch for 04:00 hours for 'PATRICK - TX5678' on 'Jan 01, 2021'. Below the alert is a table of 'Added Reason Codes'.

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

Add New Entry (Employee)

Once logged in

1. Select Add New Entry



Home > Dashboard

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
Unverified Hours:	0.00
Total Hours:	7.52

Expiring Certifications

Certification Name	Certification Expiration Date	Link to Certification Course
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Complete New Entry

1. Enter Client Name & Select
2. Select Service Code
3. Select Service Date
4. Enter Check In and Check Out times
5. Select Portal Signoff
6. Select EVV Location if necessary

Add New Entry

Entry Type:	Punch	1
Employee Name:	Steph Employee2	2
Account Type:	Hourly	3
Client:	Steph Client3 - 1778	4
Service Code:	RESPIRE (Hourly)	5
Service Date:	11/21/2023	6
Remaining Balance:	99996.43	
Check In:	5:00 AM	
Check Out:	1:30 PM	
EVV Method:	Portal Signoff	
Clock In EVV Location:	Home	
Clock Out EVV Location:	Home	

Complete New Entry (Cont.)

7. Select Reason Code from drop-down list
8. Add Reason Code Note, if required.
 - An * will appear if a note is required
9. Notes are optional
10. Attachments are optional
11. Select Save
12. Select Yes to Submit

The screenshot shows a web-based form for adding a new entry. The form includes the following fields and elements:

- Add Reason Codes:** A dropdown menu with the selected option "Forgot mobile device - 4568".
- Add Reason Code Note:** A text input field containing "Lost my phone". A red asterisk (*) is visible to the left of the field, indicating a required note.
- Diagnosis Code:** A text input field containing "Diagnostic Code".
- Notes:** A text input field containing "Add Notes for Punch".
- Attachment:** A button labeled "Add Attachment".
- Buttons:** "Cancel" and "Save" buttons are located at the bottom right of the form.

An "Alert" dialog box is displayed in the foreground, asking for confirmation: "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.

Numbered callouts (7-12) are placed on the right side of the image, corresponding to the steps in the list:

- 7: Points to the Reason Code dropdown.
- 8: Points to the Reason Code Note field.
- 9: Points to the Notes field.
- 10: Points to the Attachment button.
- 11: Points to the Save button.
- 12: Points to the Yes button in the alert dialog.

What Happens Next

After the punch is saved

1. Go to Entries Page
2. Updated punch is entered
3. Negative reference entry is Approved to offset the punch
4. Original punch is still Approved

Home / Entries

Entries **1**

⚙️ Actions

From (MM/DD/YYYY)		To (MM/DD/YYYY)		Type Punch ID		
Id	Service Date	Ref.	Client Name	Service Code	Amount	Status
2141	Jul 17, 2021	2	PATRICK	PYRL	0:06:30	Unvalidated *
2139	Jul 17, 2021	2137 3	PATRICK	PYRL	-0:08:00	Approved
2137	Jul 17, 2021		PATRICK	PYRL	0:08:00	Approved 4

* Unvalidated needs no further action.
Punch will update after a few minutes

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



Phone: (877) 211-3738



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



Thank you!

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