

Tips and Tricks



Acumen Fiscal Agent

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Time Entry Statuses and Explanation



Entries Needing Action Taken

- **Open** A true clock in/out entry that has started but has not been clocked out of
 - It is important to make sure that entries do not stay open.
 - If an entry is left open, then the Employer or Authorized Rep, should Reject the entry, and then manually create the entry within the web portal.
- **Pending** The entry has been saved and is awaiting review by the Employer or Authorized Representative
 - Make sure that all Pending Entries are approved before the Monday of the week payroll will be issued.
 - Pending statuses are flagged with the EYE symbol. If you hover over the eye it will indicate the Pending reason.
- **Rejected** A pending entry that has been reviewed and rejected by the employee or Employer.

Entries Needing No Action to be Taken – **Note the order below highlights the four statuses the entry will go through and means that it is on track to be paid.**

1. **Approved** The pending entry has been reviewed and approved by a supervisor and is ready for billing/payroll
2. **Batched** An approved entry that has been included in a pending payroll batch
3. **Processed** An approved entry that has been processed in a payroll batch
4. **Paid** An approved entry that has been paid out

Business Rules Quick Overview

Note that these statuses will most likely be in a Pending status

Alert	Business Rule Name	Reason	How to Proceed
"Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry."	budget Remaining Balance	There are not enough funds available in the budget to cover the hours submitted	The entry cannot be saved. Ask the employer to review their budget utilization and coordinate with DDS Broker to make updates if appropriate.
"Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry."	No valid pay rate punch entry	There is no pay rate for this employee for the punch date of service and service code.	Ensure the employee is submitting for the correct service and date, If the entry is incorrect, contact the employer who can work with Acumen State Agent to update payrate and code. A form may need to be submitted.
"Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry."	Employee service account start date punch entry	The punch date is before the start date of the service and service code.	Ensure the employee is submitting for the correct date. If the entry is correct, the employer can reach out to their State Agent to look-into the issue further and update the dates of the service code if possible. DDS broken may need to approve or confirm.
"Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry."	Employee service account end date punch entry	The punch date is after the end date of the service code	Ensure the employee is submitting for the correct date. If the entry is correct, the employer can reach out to their State Agent to look-into the issue further and update the dates of the service code if possible. DDS broken may need to approve or confirm.
"There is no active budget for this account. Please contact your supervisor."	budget Expiration Date	The punch is for a date of service after the budget end date	The punch cannot be saved. Contact the employer who can verify their budget data in partnerships with their DDS Broker.
No alert at this time. When reviewing their entries, employees will see a rejected punch.	budget Weekly Max	The punch violates the weekly max setting for the budget	Employees click the rejected punch entry then click the Business Rules tab to review the failure. The employee should contact their employer so that they can work with DDS

Verification Methods

Verification Method	Steps	Is Additional Verification Required	Is Auto-Approved	Additional Steps
Client Pin	<ul style="list-style-type: none"> After a shift, Employee punches out. Participant\EOR then approves the end of the shift by inputting Pin. 	No	Yes	None
Picture	<ul style="list-style-type: none"> After a shift, Employee punches out Signature option is utilized Participant applies signature to confirm shift ended. it is compared to PARTICIPANT's photo in DCI system, if it is a match then will proceed to auto-approve 	<p>No - But only if the PARTICIPANT picture is on-file and is clear.</p>	<ul style="list-style-type: none"> Yes - If picture matches is a success No - If Participant's picture matches is not a success or not on file – See Additional Steps 	<ul style="list-style-type: none"> EOR logs into DCI web portal – Identifies pending punch – clicks into it – Goes to verification – Confirms Picture matches Participant. *
Signature	<ul style="list-style-type: none"> After a shift, Employee punches out. Signature option is utilized by the Participant. EOR logs into DCI web portal – Identifies pending punch – clicks into it – Goes to verification – Confirms signature matches* 	Yes	No - Verification Steps need to be applied	None
Portal Sign-off	<ul style="list-style-type: none"> After a shift, Employee punches out Portal sign-off is chosen. EOR logs into web portal – Approves Pending Shift. 	No	No	None

***See next slide**

Verify Signature, Picture, or Voice



1. If an entry has a red eye icon in the Needs Review column, hover over it to see why it needs review. If it states, "Signature Unverified", "Picture Unverified", or "Voice Unverified", click anywhere on the entry row to open the punch details page.
2. Scroll down to select the **Verifications** tab
3. Click the **attachment** to review the signature or picture. Click the **download** icon to download, open, and listen to the voice recording.
4. Click the **A** to approve the attachment or the red **R** to reject it. The punch may now be approved or rejected.

Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Estimate)	Client Name	Employee Name	Service Code	Account Type	Needs Review
A R	Feb 25, 2025	11:18 AM	11:19 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code	- Voice Unverified	
A R	Feb 25, 2025	11:17 AM	11:18 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code	- Picture Unverified	
A R	Feb 25, 2025	11:16 AM	11:17 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code	- Signature Unverified	

Ref Entries

Notes

Attachments

Events

Verifications

Map

Business Rules

Auto Approval

Custom Fields

History

From (MM/DD/YYYY)

To (MM/DD/YYYY)

Verification Type

Select Status

Reset

Search

EWV Verifications

Showing 1 out of 1 record

Approve

Date

Verification Type

Status

Attachments

Compare

Approved By

Approved Date

[A](#) [R](#)

Dec 21, 2023 09:31:46 AM

Picture

Unverified

[6b0de351-0119-483c-b3b2-e31d99223e9d.jpeg](#)

Web Portal Messaging Module

Select a message to view by clicking anywhere on the line

- ✓ Bold text indicates the message has not been read
- ✓ Light text indicates the message has been read
- ✓ A yellow star indicates a high priority message
- ✓ A paperclip indicates an attachment













Archive

Delete

Export

Showing 30 out of 72 records

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>	★		DCI Support	Paystub for check date XX/XX/XXXX	11/02/2023 02:00 AM	 
<input type="checkbox"/>	★		Kristen Ziegler	hello there	12/08/2023 05:19 PM	 
<input type="checkbox"/>	★		Steph Client1	Checking on the status	11/02/2023 11:50 AM	 
<input type="checkbox"/>	★		DCI Support	Punch Rejected	10/12/2023 08:33 AM	 

View Paystubs/Statements via Messaging Module



1. Locate the Paystub/Statement message in the inbox and click anywhere on the line to view it
2. Click the **Attachments** tab
3. Click the **eye** icon in the download column to view the paystub/statement or the **download** icon to download it

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>	★		DCI Support	Paystub for check date XX/XX/XXXX	07:13 PM	

Notes

Attachments

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<input type="checkbox"/>	Date	File Name	File Type	File Size	Added By	Download	Status
<input type="checkbox"/>	Dec 08, 2023	Paystub.pdf		2554.02 KB	Kristen Ziegler		Active

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Viewing Budgets

As discussed during the training the Summary Report is the simplest resource to pull budget information

Reports / Summary Report

Reports - Summary Report

☐ Ended Authorizations

Spending Summary as of: 05/27/2025

Client Name: Matt Massachusetts

Participant Number: MA999999 Case Manager: Multiple

Phone: Multiple

MA PDP

Auth	Start 07/01/2024	End 06/30/2025	% Time Elapsed 91	<div><div></div><div>% Elapsed % Rema...</div></div>	
Dollars (Dollar Based Programs)					
Authorization Name	Initial Balance	Used YTD	Pre Authorizations Holds	Remaining Balance	% Remaining Balance
5300 Flex Funds	\$6000.00	\$0.00	\$0.00	\$6000.00	100 %

Agent Directory



Supervisor \ Escalations

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**Acumen Customer Support line is also available 7 days a week at
(866) 427-1739**