Tips and Tricks



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 Pend 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."	INTIGGET REMAINING RAIANCE	hudget 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."	INO Valid hav rate hijhen 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."		The punch date is after the <u>end date</u> 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."	INLINGET EXPIRATION LIGHT	· ·	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.	IDLIGRET VVEEKIV 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	 After a shift, Employee punches out. Participant\EOR then approves the end of the shift by inputting Pin. 	No	Yes	None
Picture	 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 	No - But only if the PARTICIPANT picture is on- file and is clear.	 Yes - If picture matches is a success No - If Participant's picture matches is not a success or not on file - See Additional Steps 	• EOR logs into DCI web portal – Identifies pending punch – clicks into it – Goes to verification – Confirms Picture matches Participant. *
Signature	 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	 After a shift, Employee punches out Portal sign-off is chosen. EOR logs into web portal – Approves Pending Shift. 	No	No	None

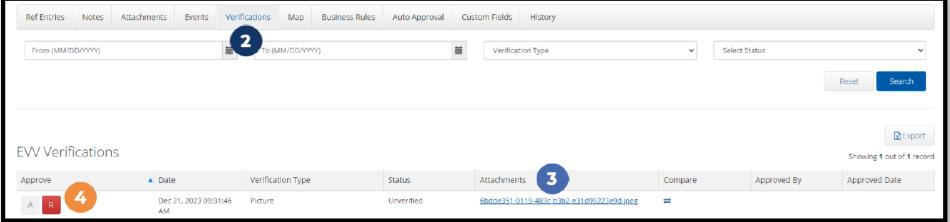
^{*}See next slide

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 \mathbf{A} to approve the attachment or the red \mathbf{R} to reject it. The punch may now be approved or rejected.





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

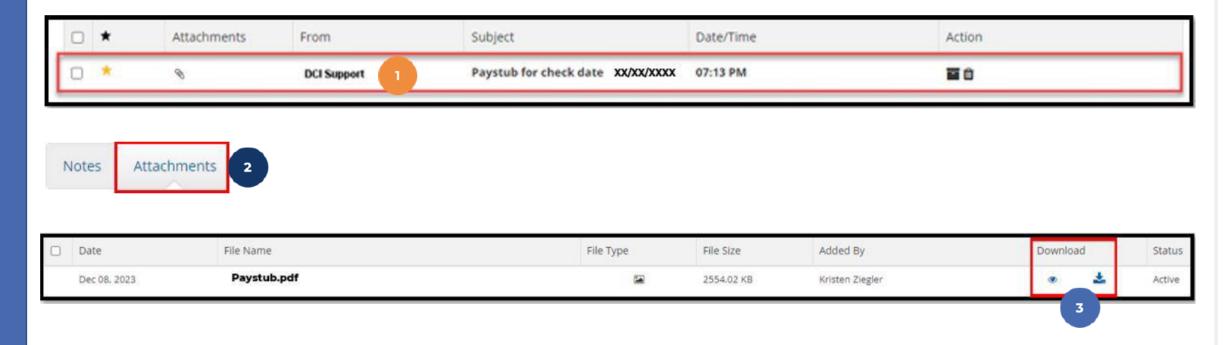




View Paystubs/Statements via Messaging Module



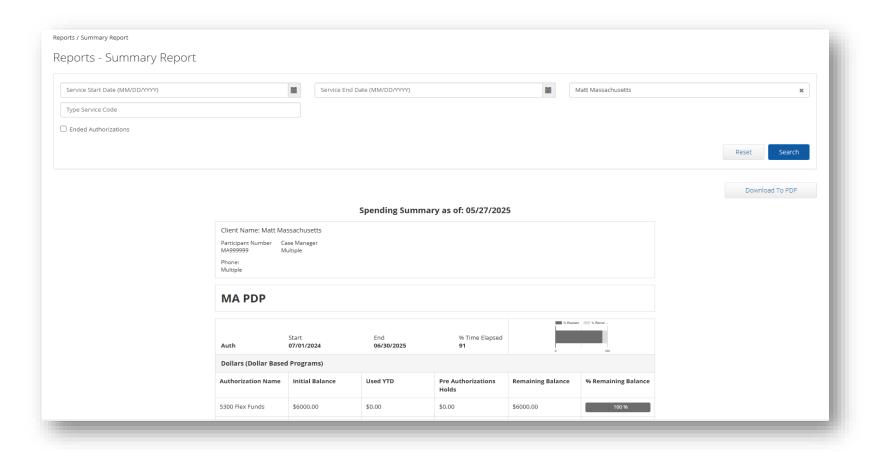
- 1. Locate the Paystub/Statement message in the inbox and click anywhere on the line to view it
- 2. Click the **Attachments** tab
- Click the eye icon in the download column to view the paystub/statement or the download icon to download it







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



Agent Directory



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