Massachusetts Time Entry Training for Employers & Employees (Workers)

Welcome to Acumen!

Thank you for joining the Acumen Family!

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DIRECT CARE INNOVATIONS

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Helping create a positive, long-lasting impact on people's lives.

Agenda

- ✓ Overview + Mobile App Download & Login
- ✓ Employee – Mobile App Entry & EVV/Client Attestation
- ✓ Employer – Mobile App – Manage Entries
- ✓ Employee – Web Portal Historical Entry & Edit Entries
- ✓ Employer – Web Portal – Manage Entries
- ✓ Troubleshooting
- ✓ Phone EVV (IVR) – Real time & Historical Entries

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Quick Resources

- **View short step-by-step resource documents on the [Massachusetts - Training Materials] page providing instructions for the punch entry and approval process.**
- **Employee Specific Resources:**
  - ✓ Employee Web Portal Entries
- **Employer Specific Resources:**
  - ✓ Employer Manage Entries
  - ✓ Employer Manage Budgets (Service Plan in Units)
- **Shared Resources:**
  - ✓ Download the DCI Mobile EVV App & Log In
  - ✓ Logging into the Web Portal or the Mobile App
  - ✓ Phone EVV IVR Real Time & Historical Entries
  - ✓ Business Rule Alerts – Quick Reference

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Critical Dates & Deadlines

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- December 22nd – January 4th: Employers and workers begin submitting time. Program workers and support brokers submit payment submission on behalf of the participant.
- December 30th: Deadline for program workers and support brokers to submit payment submission on behalf of the participant
- January 3rd: First payday with Acumen for payment submissions (reimbursements & vendor payments)
- January 6th: Deadline to submit time to Acumen
- January 10th: First payday with Acumen for hourly employees
- Time must be <u>entered and approved</u> online <u>by the due date</u>, *even if it falls on a weekend or holiday*.
  - ❖ Time entries approved after the due date will be processed on the following pay period's pay date
- Provider payment requests must be received by the Submissions Due date
  - ❖ Requests submitted after the due date will be processed on the following pay period's pay date
- After 30 days the entry will be prohibited as it will violate the timely filing business rule
  - ❖ All time entries must be <u>entered and approved</u> within <u>30 days of the date of service</u>
  - ❖ All vendor & reimbursement payment entries must be <u>submitted</u> within <u>30 days of the date of service</u>

What is EVV?

- The 21st Century Cures Act, signed into law December 13th, 2016, by President Obama, requires state agencies to use a system of **electronic visit verification** (EVV) for all Medicaid personal care services (PCS) and home health care services (HHCS) that require an in-home visit by a provider.
- EVV uses electronic devices to verify a provider's visit
- The following data is collected for each visit:
  - ✓ The date of the service
  - ✓ The location of the service delivery
  - ✓ The time the service begins and ends
  - ✓ The individual receiving the service
  - ✓ The individual providing the service
  - ✓ The type of service performed

Why DCI & EVV (Electronic Visit Verification)?

- DCI increases compliance with the 21st Century Cures Act by capturing real-time punch entries at Clock In/Out at the Start/End of the shift
- Greater accuracy in service tracking, reporting, and billing for in-home care workers.
- Reduction of manual work needed with paper processes
- Faster corrections of pay issues ensuring timely payment

Ways to Enter Time

Only use one per shift (each clock in/out)

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Mobile App

OR

Phone EVV

OR

Web Portal

- ***Preferred Method**
- Real Time Entry – **EVV compliant**
- Quick & Easy
- Mobile App Guide

- Landline
- Real Time Entry – **EVV compliant**
- Historical Entry – Non-EVV compliant
- Option when access to a mobile device or computer is limited

- **Only used for service interruptions**
- Time Management
- Historical Entry & Corrections – Non-EVV compliant
- Manual Time Approval
- Profile Settings
- ***Includes Mobile Web Portal –** Mobile-friendly web portal version accessed via smartphone or tablet

DCI Requirements

<u>Devices & Operating Systems (OS)</u>

Apple

- OS: iOS version 15.0 or later
  - ➢ Devices:
    - ✓ iPhone 6s or 6s Plus or later device
    - ✓ iPhone SE
    - ✓ iPod touch (7th generation)

Android

- OS: Android version 8.0 or later
  - ➢ Devices:
    - ✓ 4.6" screen or larger
    - ✓ Due to the wide range of Android devices, we are unable to provide a device list.

<u>Web Browsers</u>

- ✓ Google Chrome (DCI Preferred)
- ✓ Firefox
- ✓ Edge
- ✓ Safari

DCI Mobile App

*Preferred Time Entry Method

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Mobile App Basics

- The DCI Mobile App is used for real-time entries
- Preferred, EVV-compliant method
- Can be downloaded on a mobile device or tablet
- Use for clocking in & out
- Quick & easy
- View all entries including status & details

Download DCI Mobile EVV

1. Download the ***DCI Mobile EVV*** App

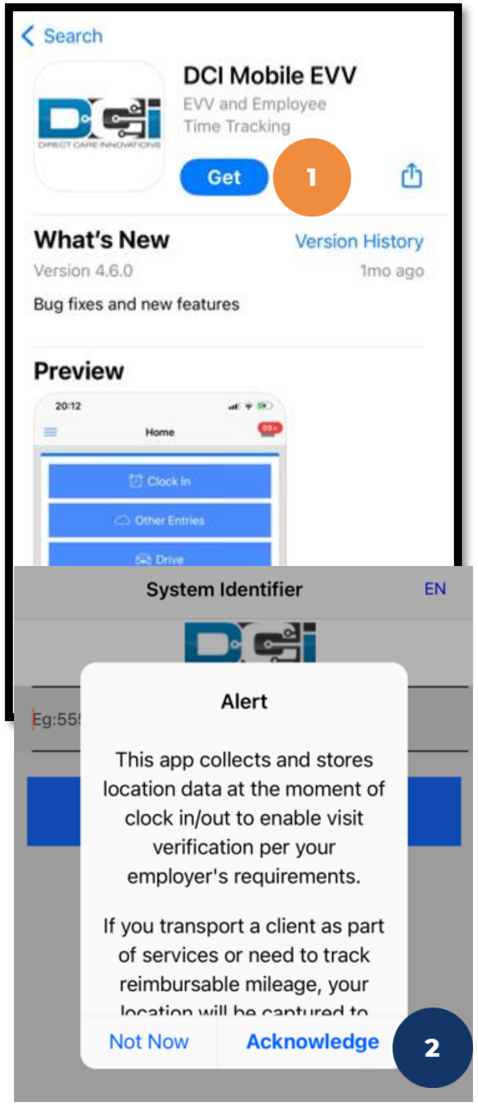
   Available on the App Store | GET IT ON Google Play

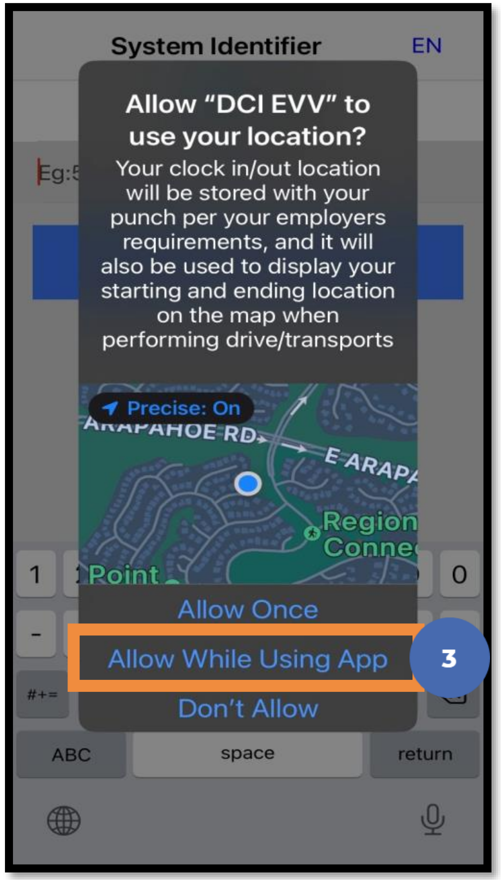
2. Select Acknowledge on the Alert
   - The alert states the app collects and stores location data at clock in and clock out, if you transport a client as part of services and/or need to track reimbursable mileage

3. Select **Allow While Using App** only when accessing the app for the first time or after a new download to give the app access to the device's location
   - Location is only captured at clock in & out

***Please note!**

- There is more than one DCI app available. Please be sure to select the one labeled **DCI Mobile EVV.**
- Users may need to set app permissions. Media access is not necessary.





Initial Agency Selection

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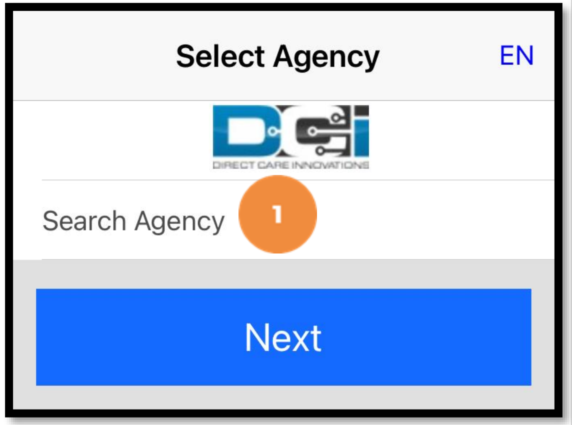
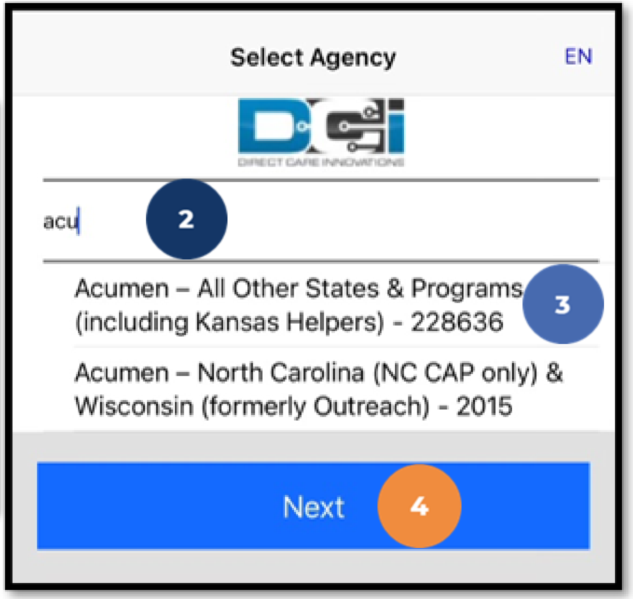
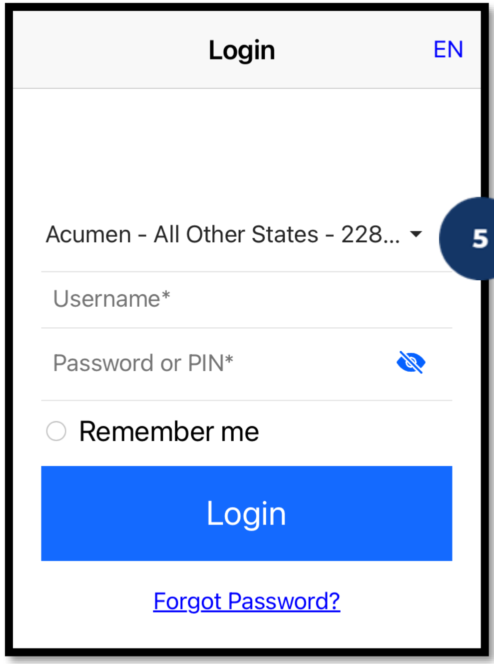
1. After downloading the app, the Select Agency screen appears with a Search Agency field.
2. **Type at least three consecutive characters of the agency name OR the system identifier** in the Search Agency field
   - ❖ The Acumen system identifier for All Other States & Programs (including Kansas Helpers) is **228636**
   - ❖ The consecutive characters can be located anywhere in the agency name or system identifier
3. **Select the agency** from the list
4. Click the blue **Next** button
5. The agency is now selected and appears on the login screen

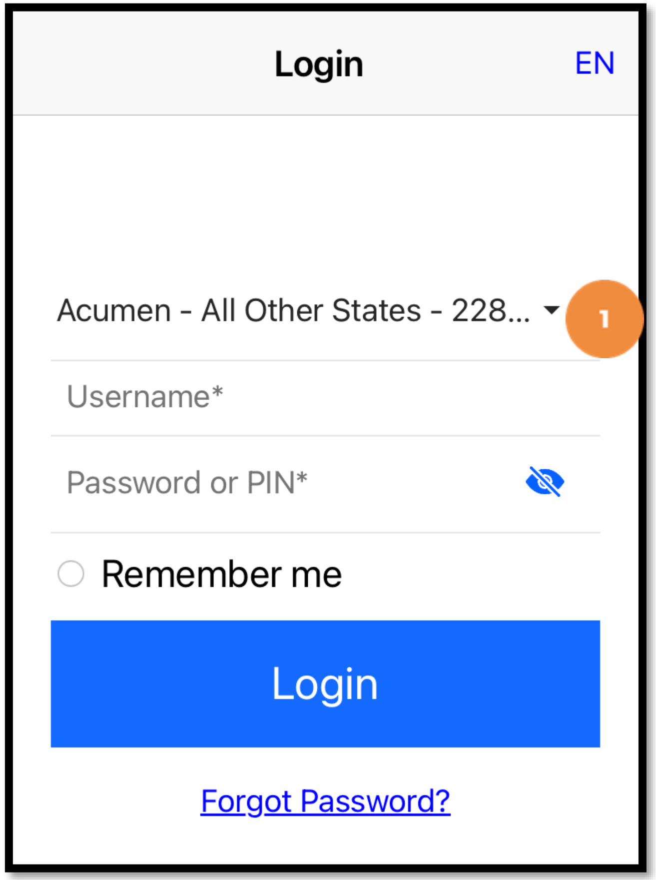


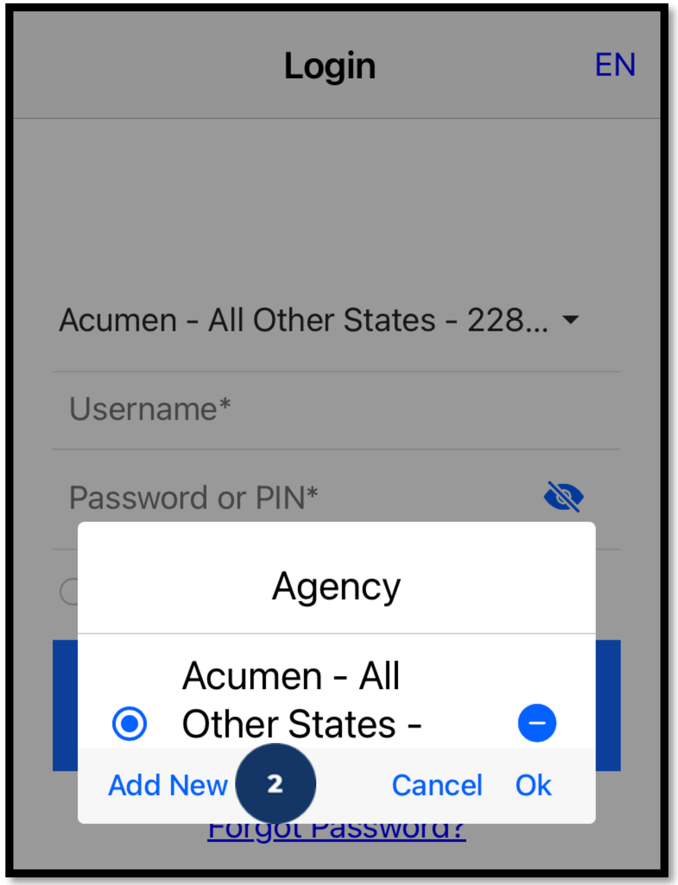




Add More Agencies

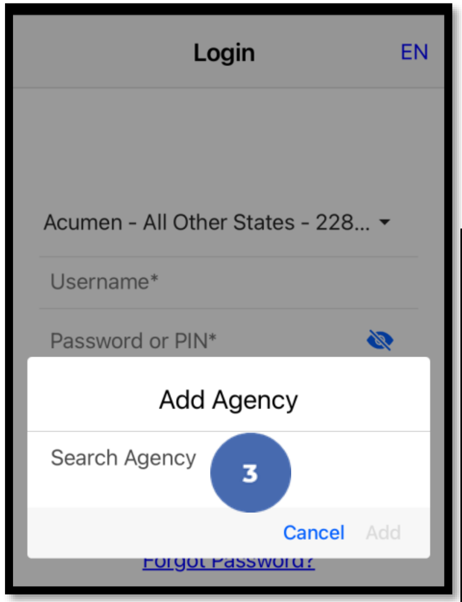
1. To add more agencies, click the **drop-down** on the agency field.
2. If the desired agency is not listed, click **Add New** on the Agency results list.

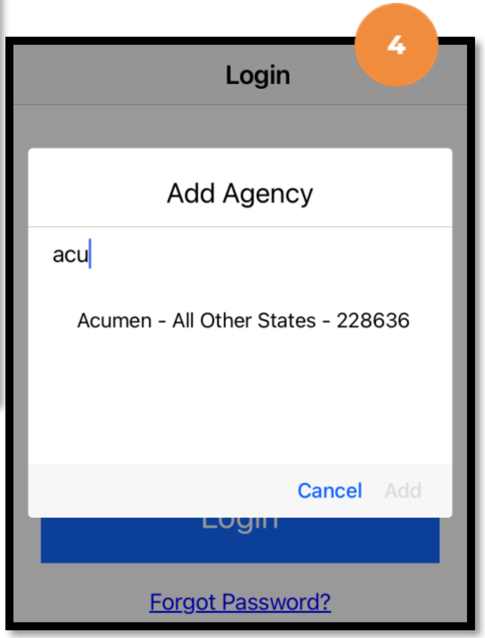


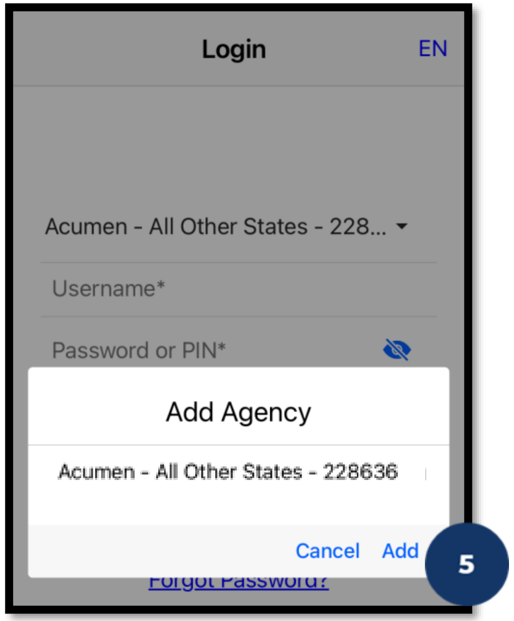


Add More Agencies

3. On the Add Agency window, **type at least three consecutive characters of the agency name OR the system identifier** in the Search Agency field.
   - ❖ The consecutive characters can be located anywhere in the agency name or system identifier
4. **Select the agency** from the list
5. Click **Add**







The agency is now added and displays on the agency drop-down menu.
At each log in, select the appropriate agency.

Log into the DCI Mobile EVV App

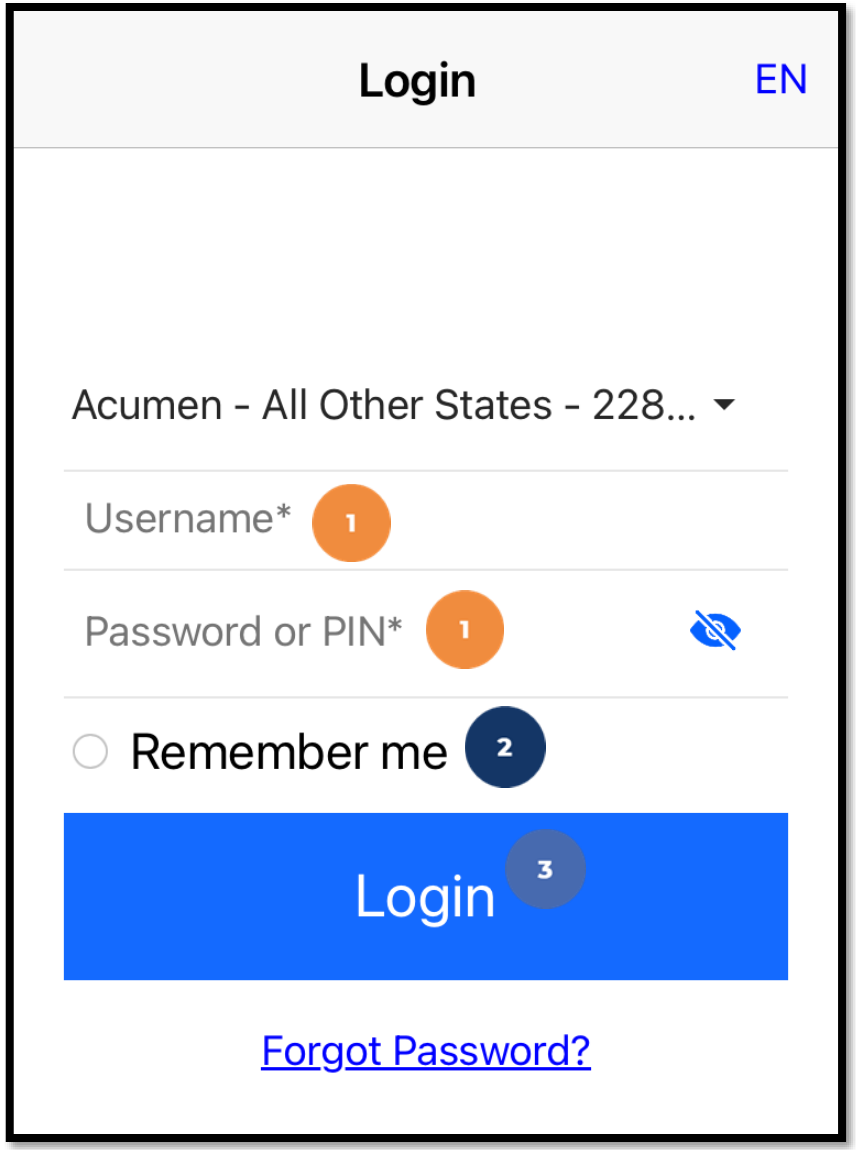
1. Enter employee credentials
   - ✓ Acumen provides a **username** and **password** on the Good to Go/Welcome letter

2. Optionally, select the **Remember me** button to remember the Username.

   ***Please note:** Do not use on a shared device

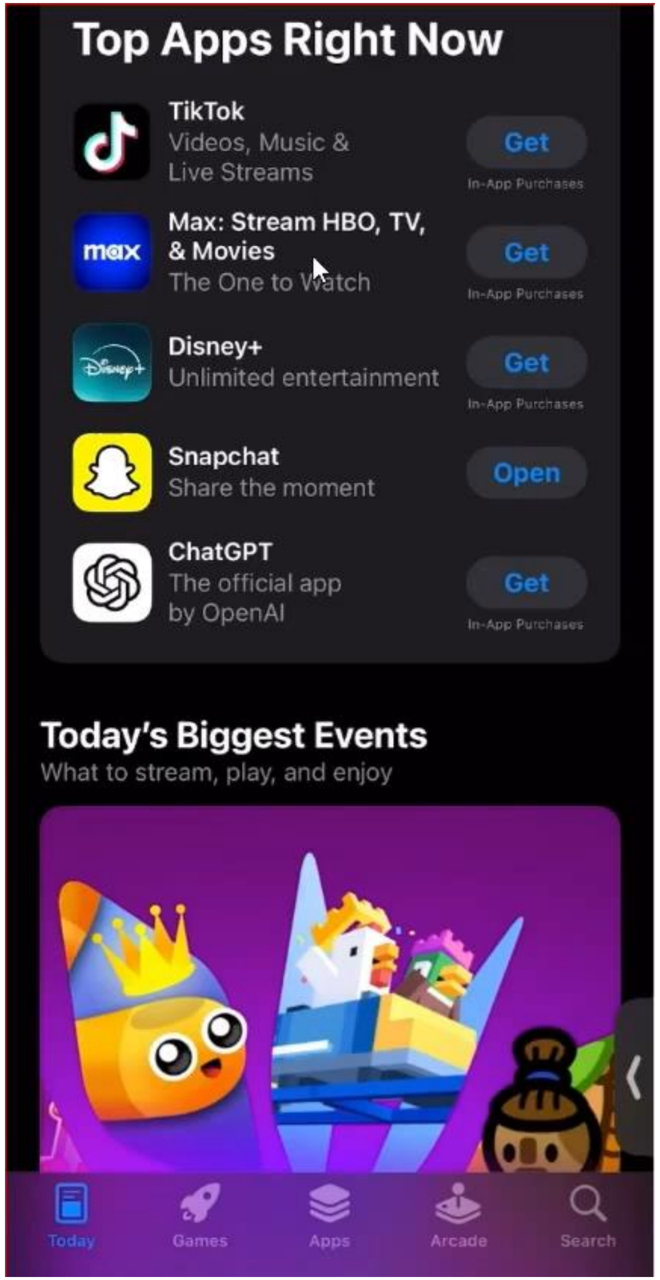
3. Click the blue **Login** button to access the mobile app
   - ✓ The **Forgot Password** link is available if necessary but requires a valid email address to be on file

***Please note:** Contact Acumen customer service or your support coordinator with any login issues



Mobile App Video

Download the DCI Mobile EVV App



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Employee Mobile App

Employee Clock In/Out Process

Overview Mobile App Clock In

Employee Arrives to Begin Shift

Open DCI Mobile EVV App on Smartphone or Tablet

Log in with Username & Password or PIN

Tap the blue "Clock In" button (top of the screen)

Select Client Name & Service Code then select the blue "Continue" button

Tap the blue "Confirm Clock In" button (time begins for the shift)

Overview Mobile App Clock Out

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End of Shift

Open DCI Mobile EVV App on Smartphone or Tablet

Log in with Username & Password or PIN

Tap the blue "Continue to Clock Out" button (top of screen) & then "Confirm"

Select one EVV Option:
- Client PIN or Password
- E-Signature
- Picture
- Voice
- Portal Signoff

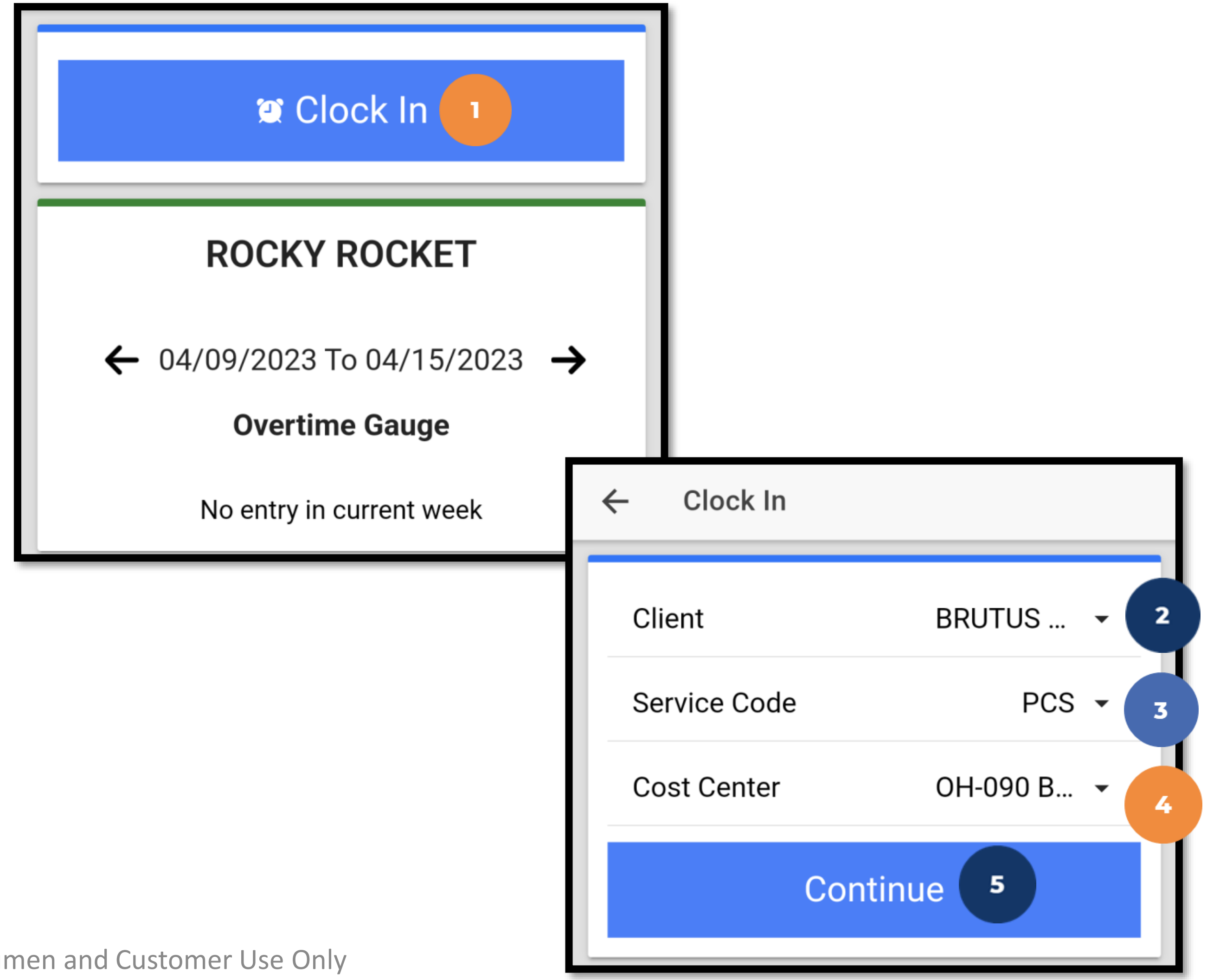
Ensure Verification Confirmation
- Alert will appear on screen

Optionally Add Notes or/and Attachments

Tap the blue "Confirm Clock Out" button (time ends for the shift)

Clock In on Mobile App

1. Click the blue **Clock In** Button
2. Select the Client's Name
   - Auto-fills for a single client
3. Select the Service Code
   - Auto-fills for a single service
4. Cost Center is always auto-filled
5. Click the blue **Continue** button

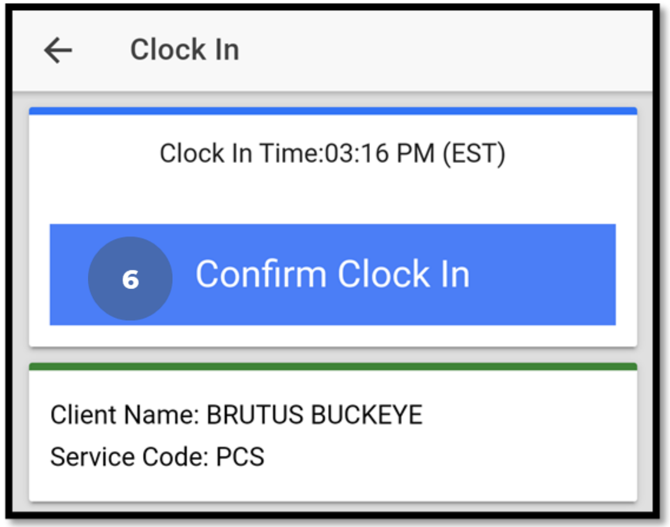


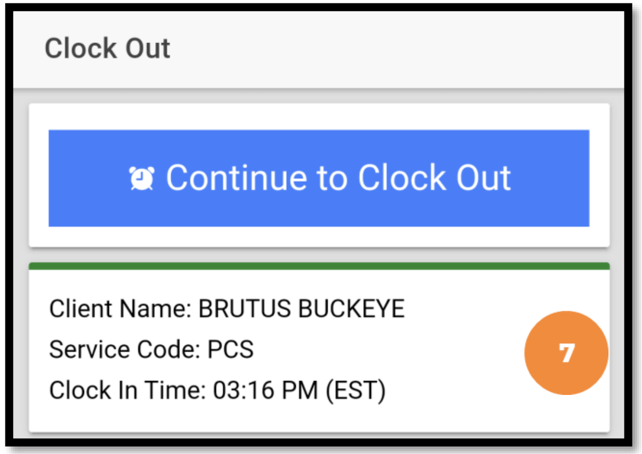
Clock In on Mobile App (cont.)

6. Select Confirm Clock In
   * *This will start the time for the shift*

7. Clock In Details Summary
   - Clock in is successful when the blue **Continue to Clock Out** button displays
   - Clock in details display in summary form

***Please note:** Users do not need to stay logged into the mobile app during their shift and cannot take any other action until clocked out.





Initial Clock Out Process

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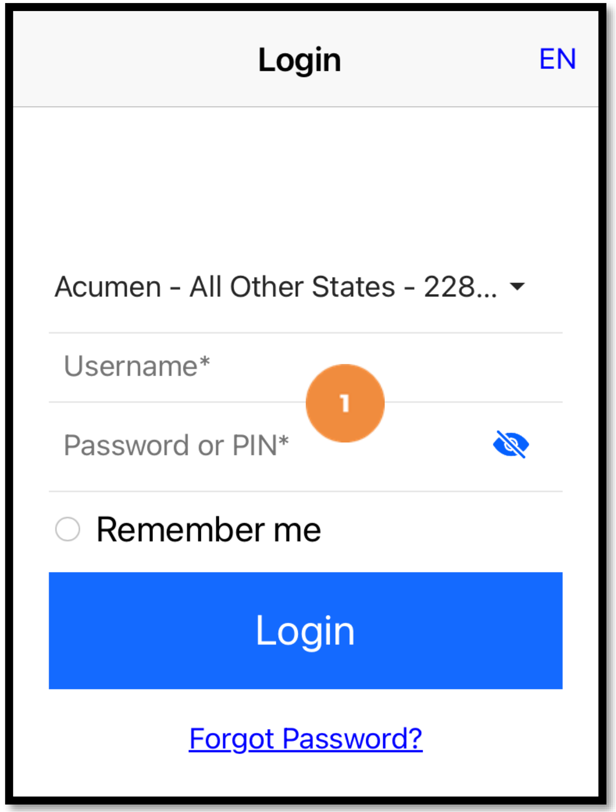
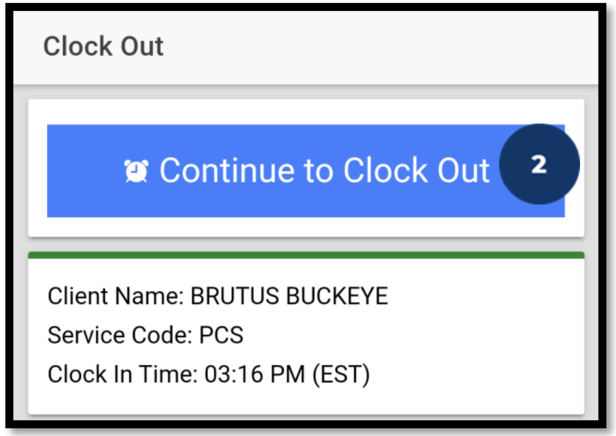
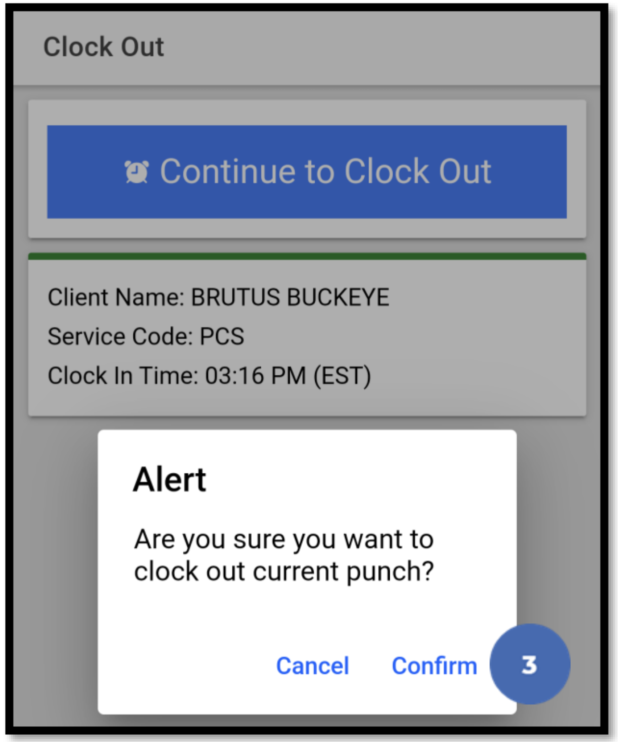
***The first three steps in the clock out process are the same regardless of the EVV (client attestation) option selected**

1. At the end of the shift, log in to the mobile app.
2. Click the blue **Continue to Clock Out** button
3. Select **Confirm** to proceed with clocking out







Mobile App – EVV Options (Client/Employer Attestation)

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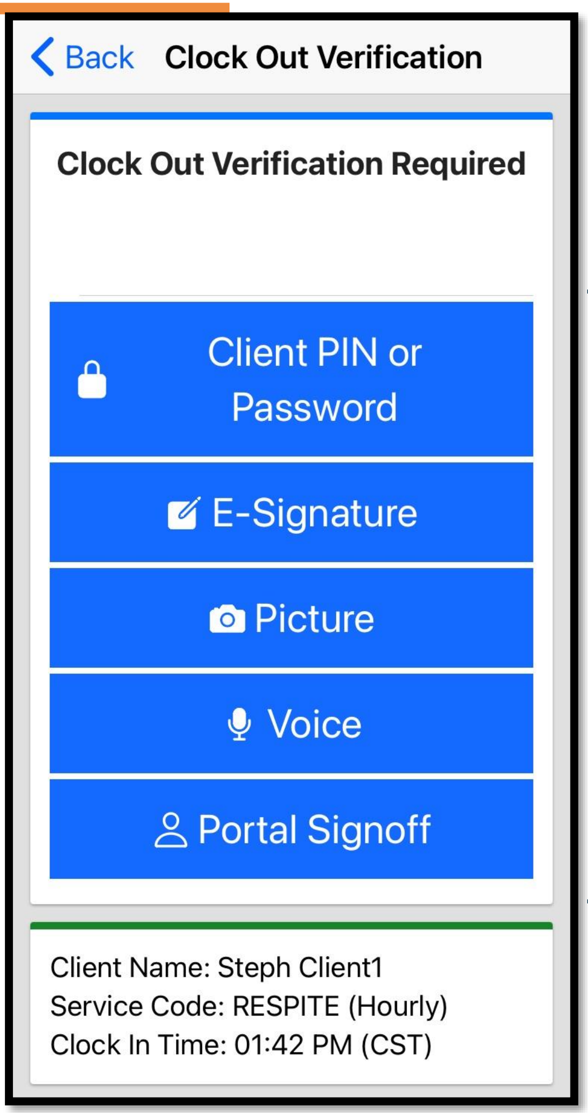
- EVV (client attestation) options are visible if required by the program. They allow the client to verify that they received service.
  - ✓ Choose only **one** option per shift (each clock out)
- Client attestation is an extra layer of protection against potential fraud because the client/employer is "signing off" on the punch in real time

***Please note:** The employer must still review and may need to approve punch entries in their Pending Entries tab each pay period.



Choose one at clock out

Clock Out Process After the EVV (Client Attestation) Option is Selected

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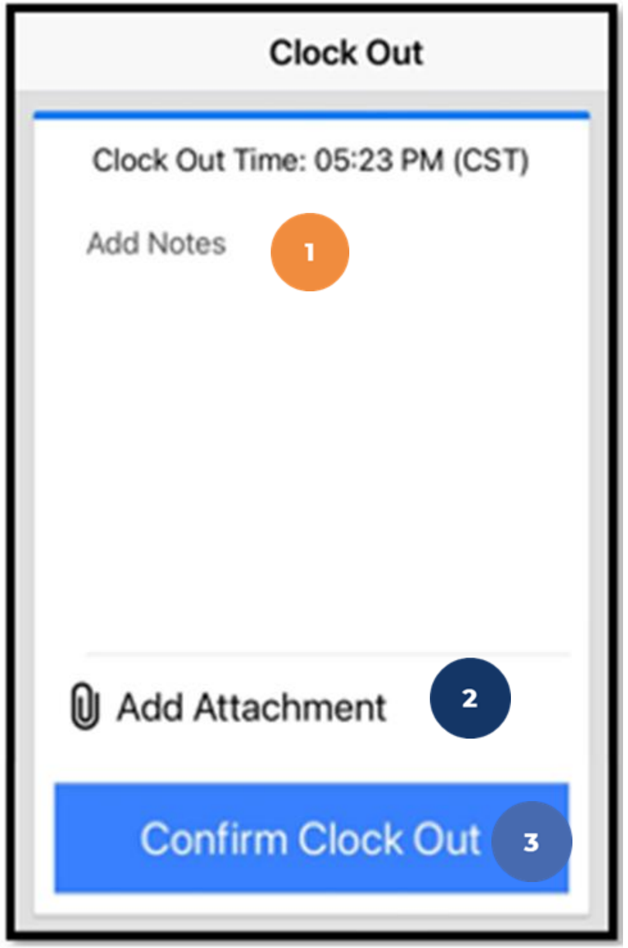
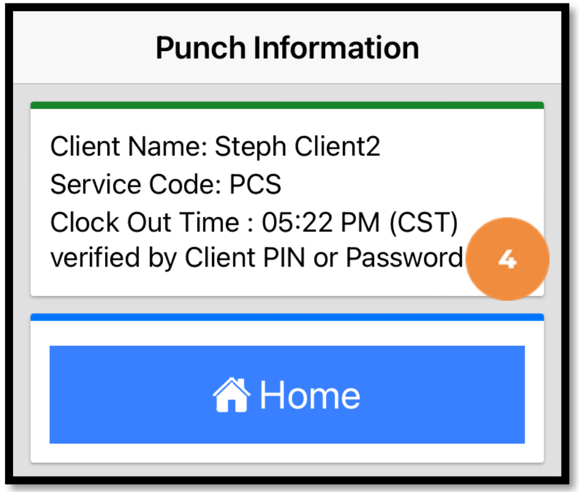
The employee:

1. Enters any notes for the punch (optional)
2. Adds an attachment for the punch (optional)
3. Clicks the blue **Confirm Clock Out** button when ready
   - ✓ *This will stop the time for the shift*
4. Punch Confirmation
   - ✓ Punch details, including verification option selected, display.
   - ✓ Optionally, click the blue **Home** button to return to the dashboard.





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EVV or Client Attestation Options

***There are up to five options.**

<u>Choose only one at clock out</u>:

- **Client PIN or Password**
- **E-Signature**
- **Picture**
- **Voice**
- **Portal Signoff**

Clock Out - EVV Option #1

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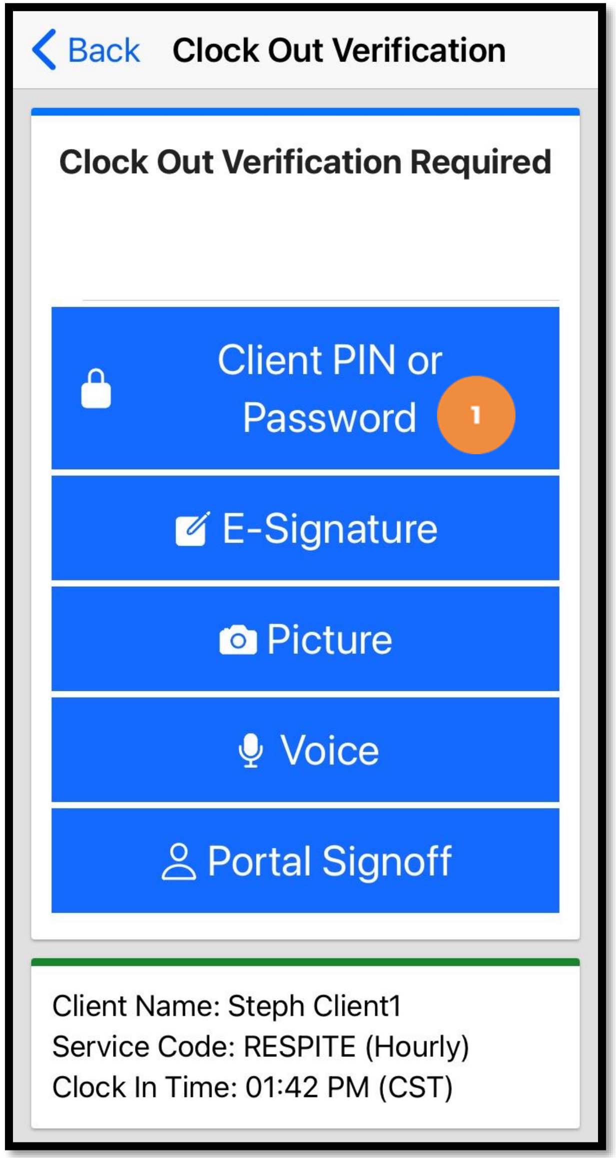
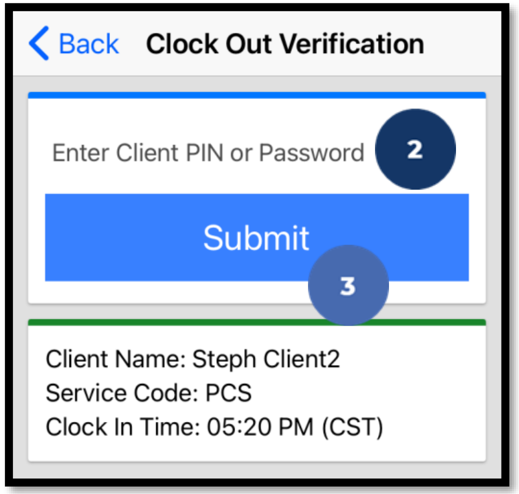
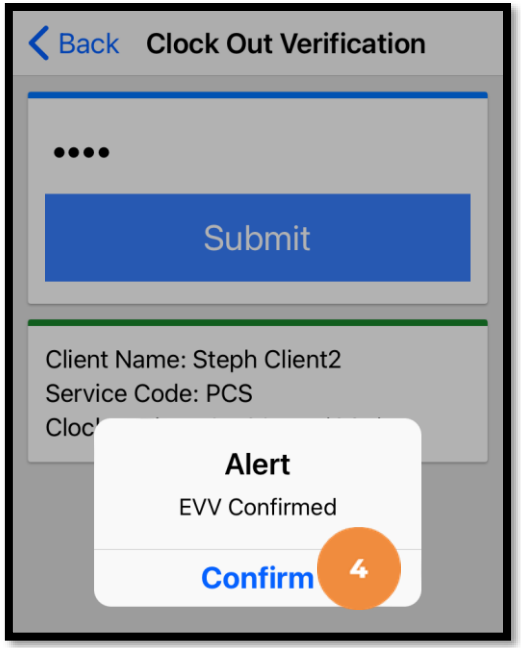
Client PIN or Password

1. Select the clock out verification type:
   ✓ Client PIN or Password
2. Hand the mobile device to the client or employer, who enters the Client PIN or Password (client PIN or password issued on the Employer Good to Go/Welcome letter).
3. The client or employer clicks the blue **Submit** button when ready
4. The client or employer clicks **Confirm** to validate the PIN or password and hands the mobile device back to the employee

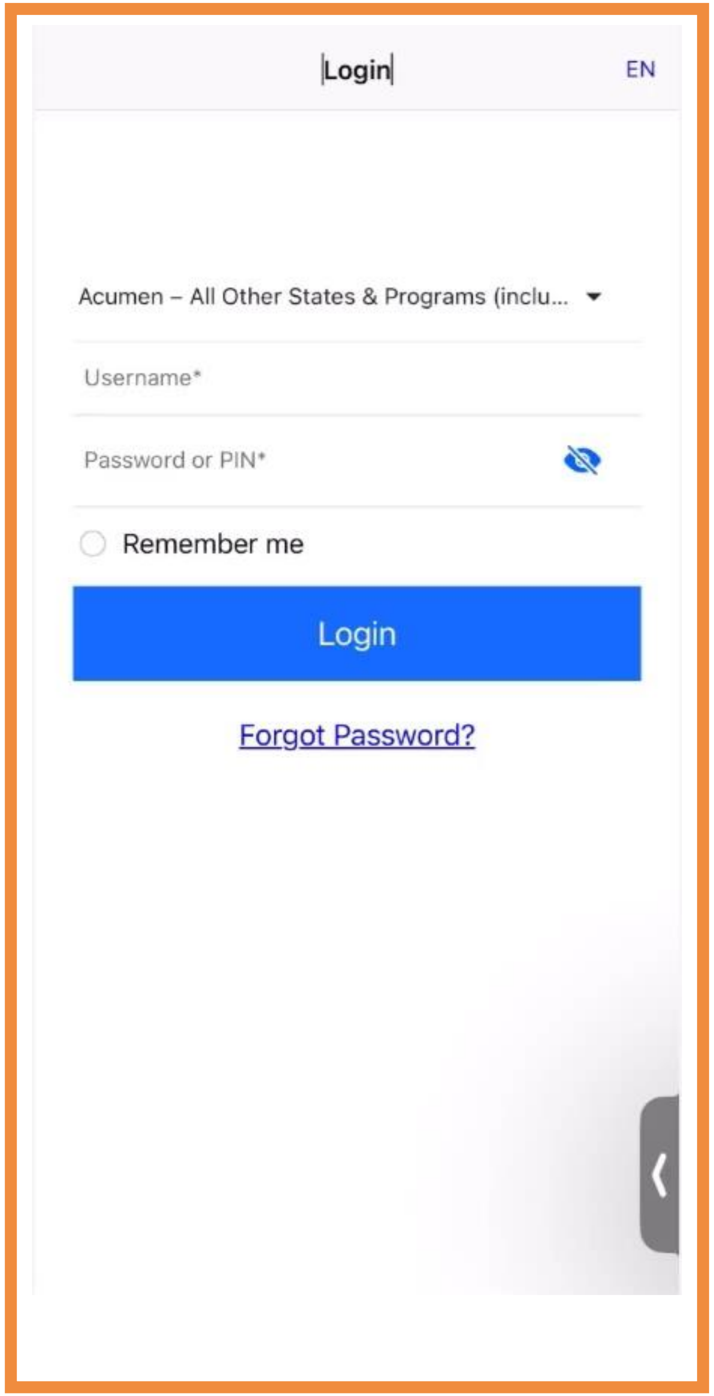






Mobile App Video

Clock in and Out Using Client PIN Option



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Clock Out - EVV Option #2

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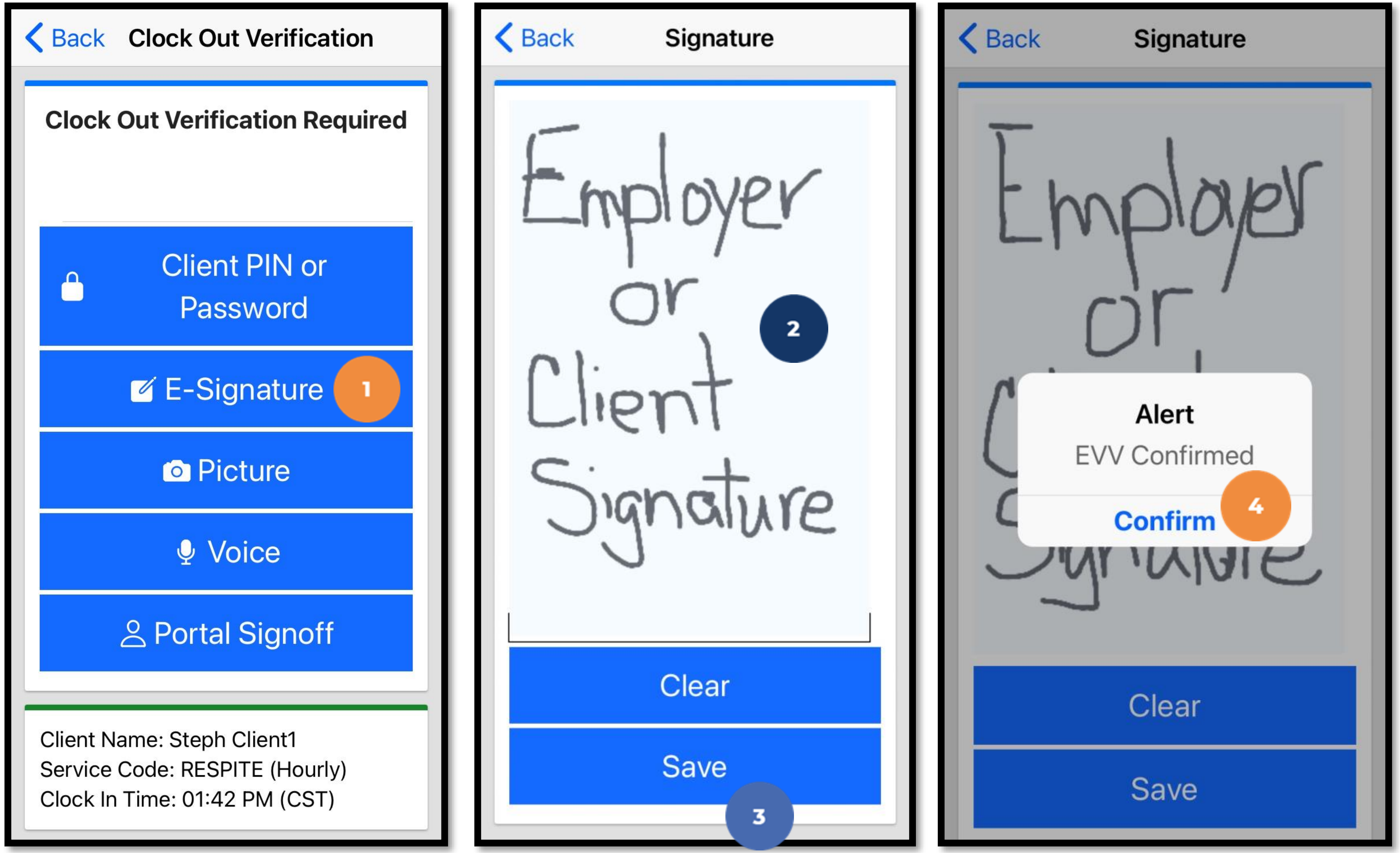
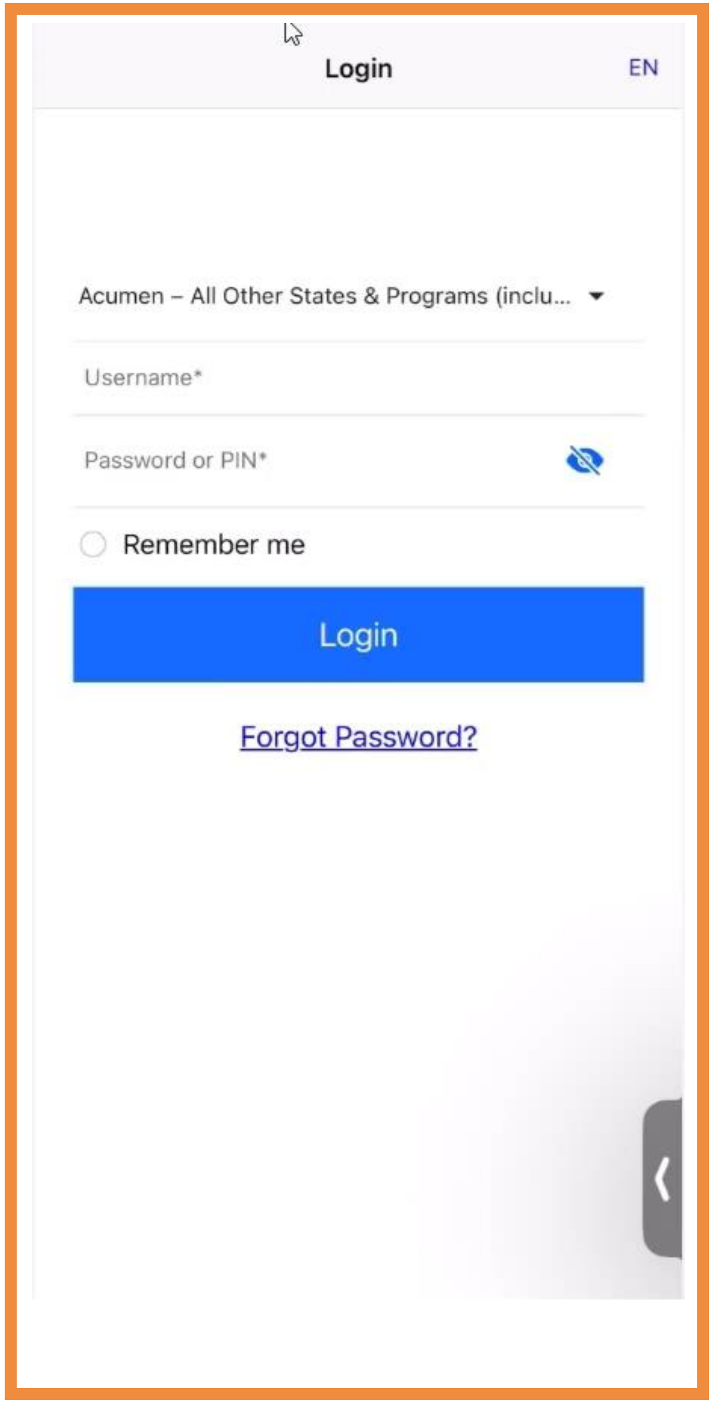
E-Signature

1. Select the clock out verification type:
   - ✓ E-Signature
2. Hand the mobile device to the client or employer, who signs their name on the device screen.
3. The client or employer clicks **Save** to accept the signature
   - ✓ Optionally, they may click **Clear** to rewrite their signature.
4. The client or employer clicks **Confirm** to validate the signature and hands the mobile device back to the employee



Mobile App Video
Clock in and Out Using E-Signature Option



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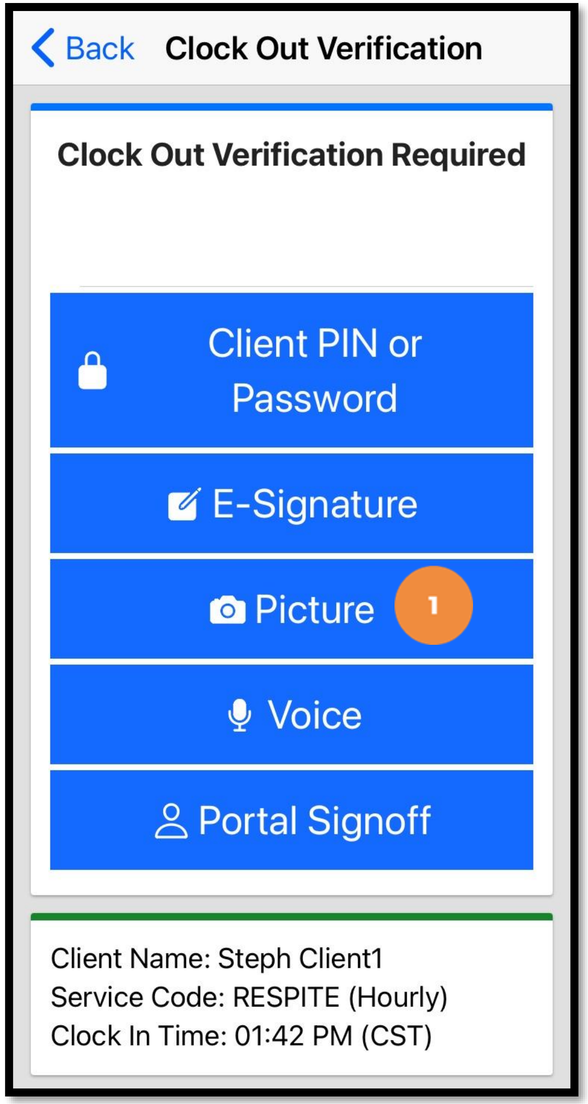
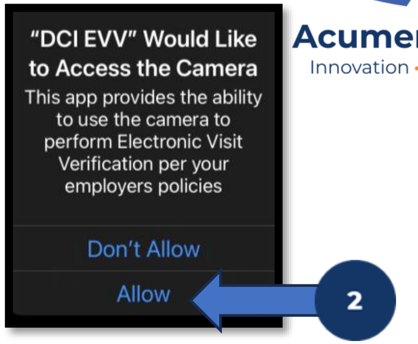
Clock Out - EVV Option #3

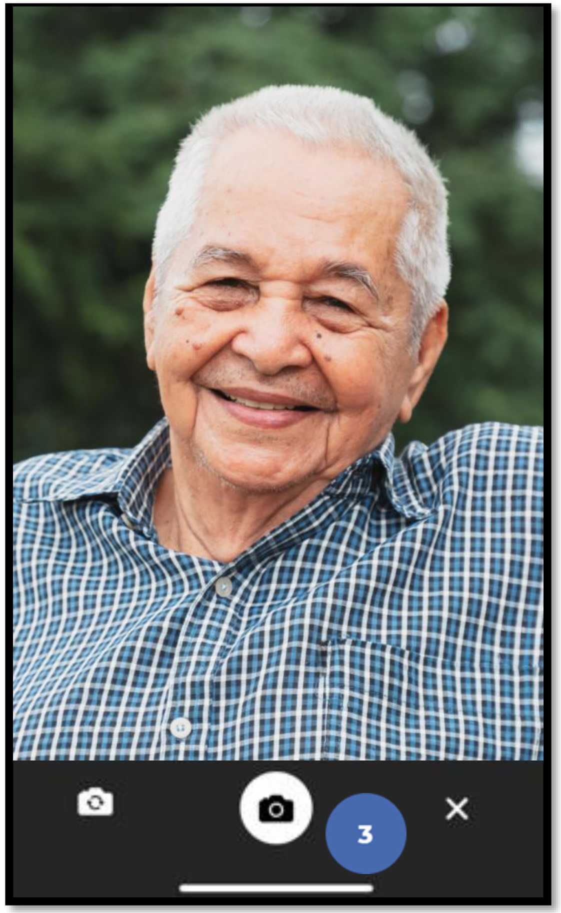
Picture

1. Select the clock out verification type:
   ✓ Picture
2. A pop-up stating “DCI EVV” Would Like to Access the Camera appears. Select **Allow**.
3. Click the **camera** icon to take a picture of the client

***Please note:** Client photos taken by the employee for electronic visit verification (EVV) are never stored on the employee’s cell phone when using the DCI Mobile App





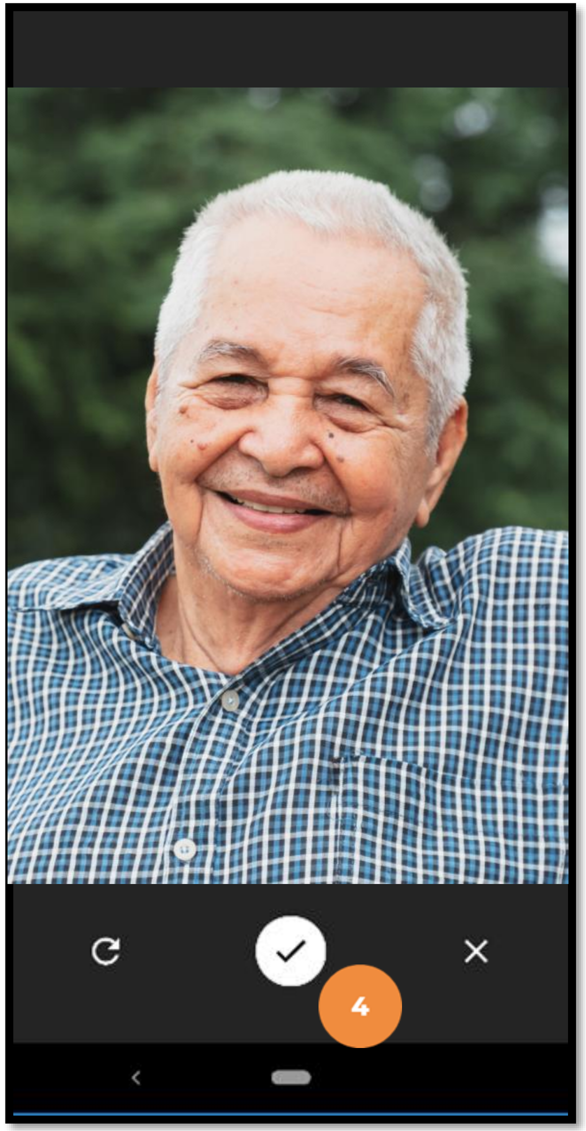


Clock Out - EVV Option #3

Picture

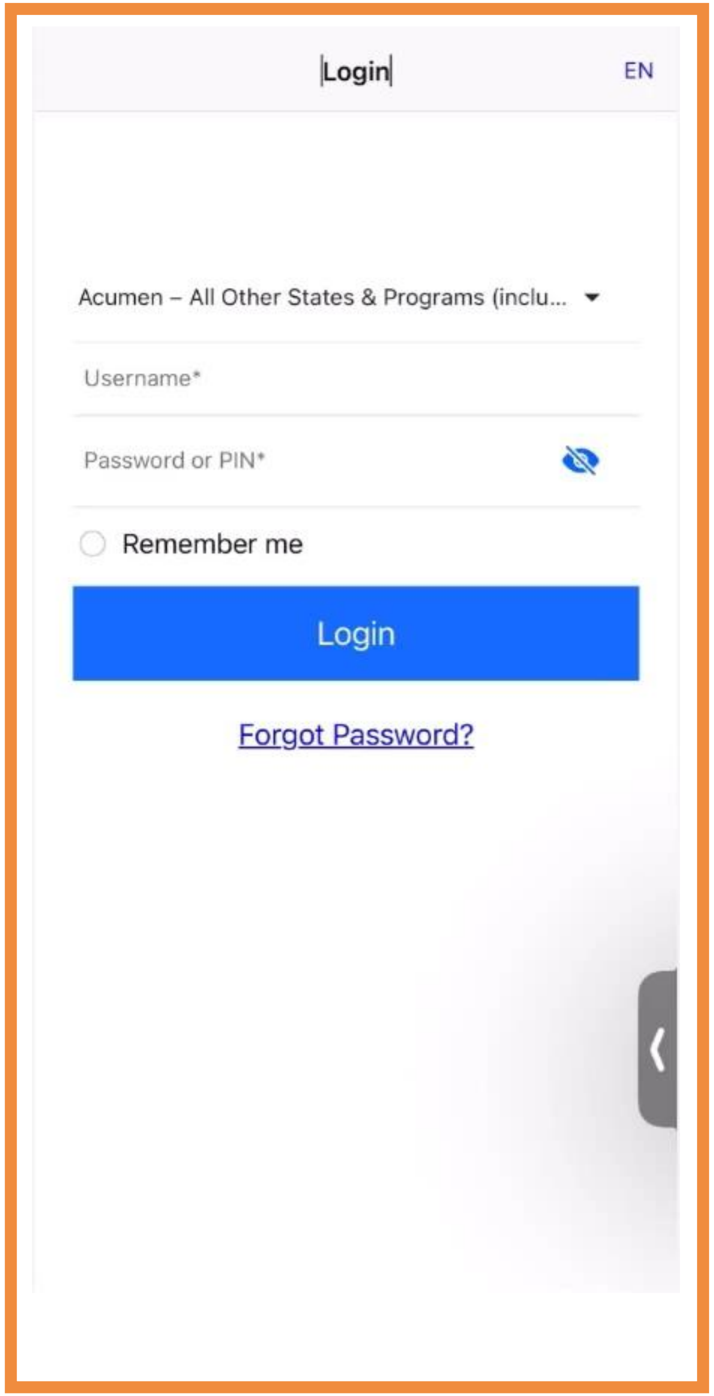
4. Click the **checkmark** to accept the picture, the X to cancel, or the circular arrow to retake the picture.
5. Click **Confirm** in the alert pop-up box to confirm the punch

***Please note:** Client photos taken by the employee for electronic visit verification (EVV) are never stored on the employee's cell phone when using the DCI Mobile App



Mobile App Video

Clock in and Out Using Picture Option



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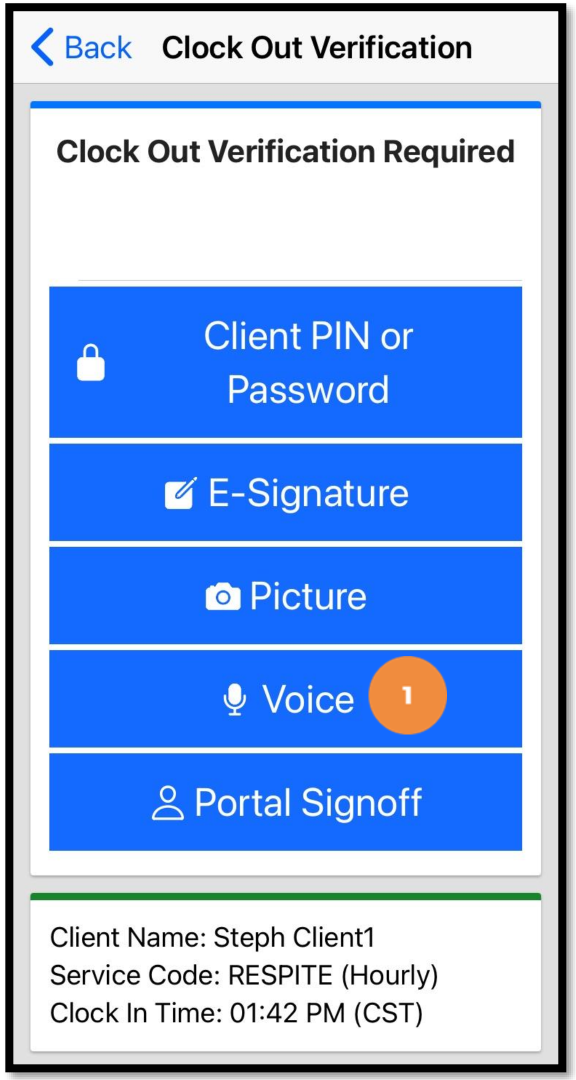
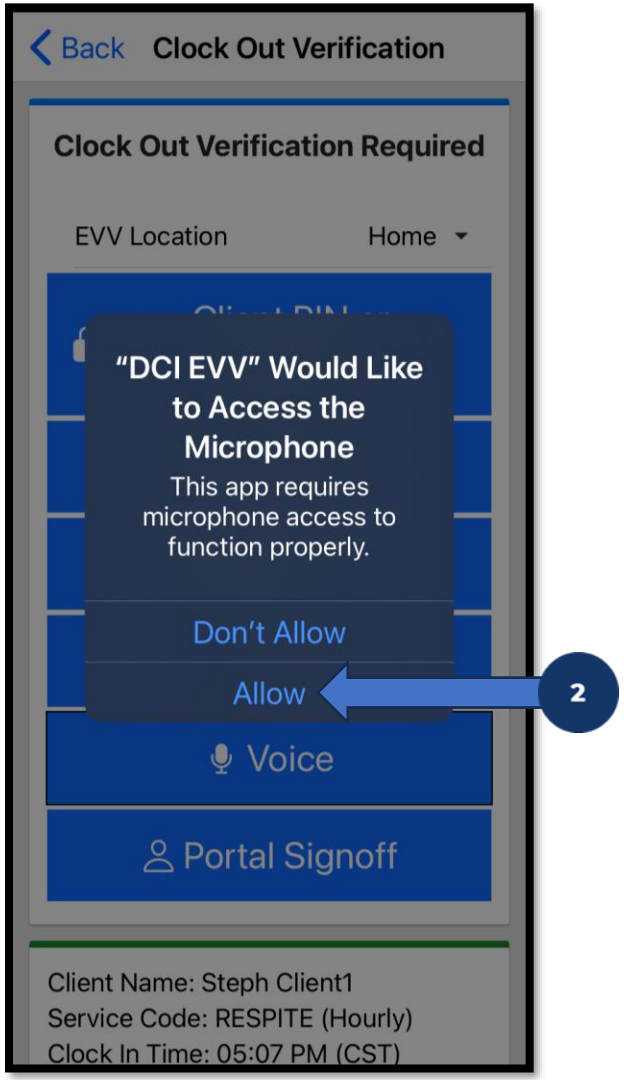
Clock Out - EVV Option #4

Voice

1. Select the clock out verification type:
   ✓ Voice
2. Hand the device to the client or employer. A pop-up stating “DCI EVV” Would Like to Access the Microphone appears. The client or employer selects **Allow**.

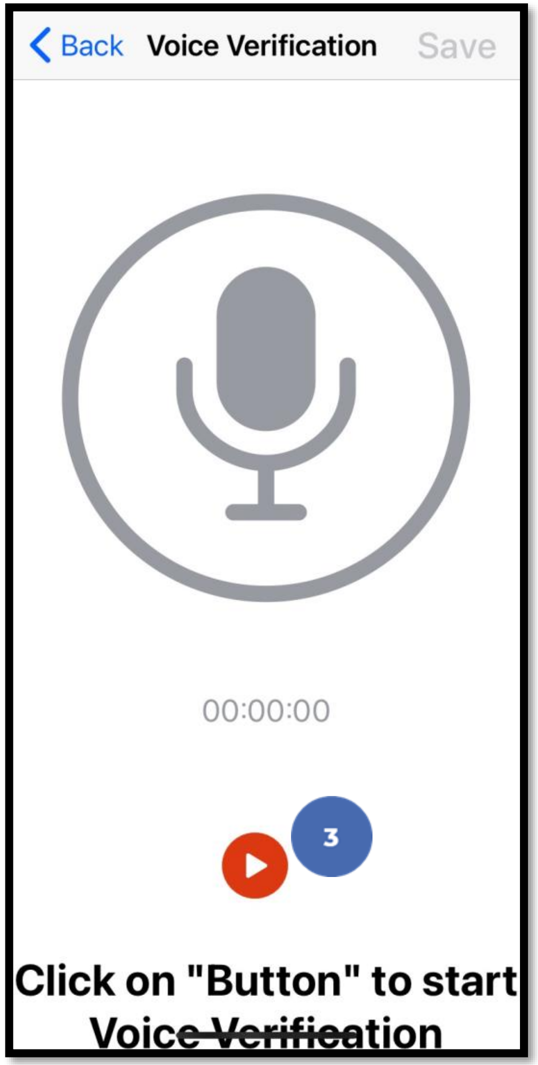




Clock Out - EVV Option #4

Voice

3. The client or employer clicks the **red play** button to start the voice verification
   - ✓ An automated voice will say “Please repeat after me. My name is (client name) and I am verifying this visit.”
4. The client or employer states “My name is (client or employer name) and I am verifying this visit.” When finished, they press the **red stop** button to stop the voice verification.



Clock Out - EVV Option #4

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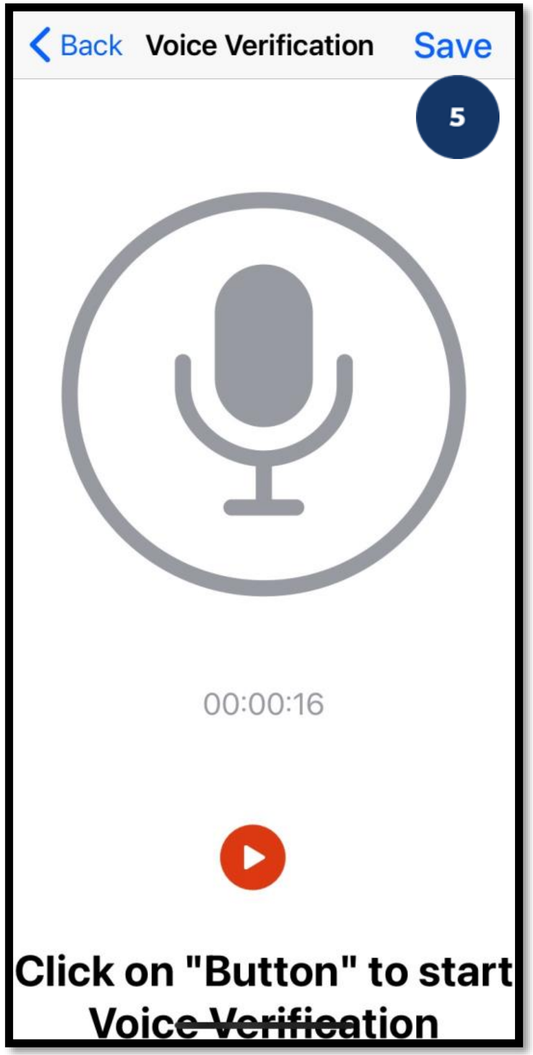
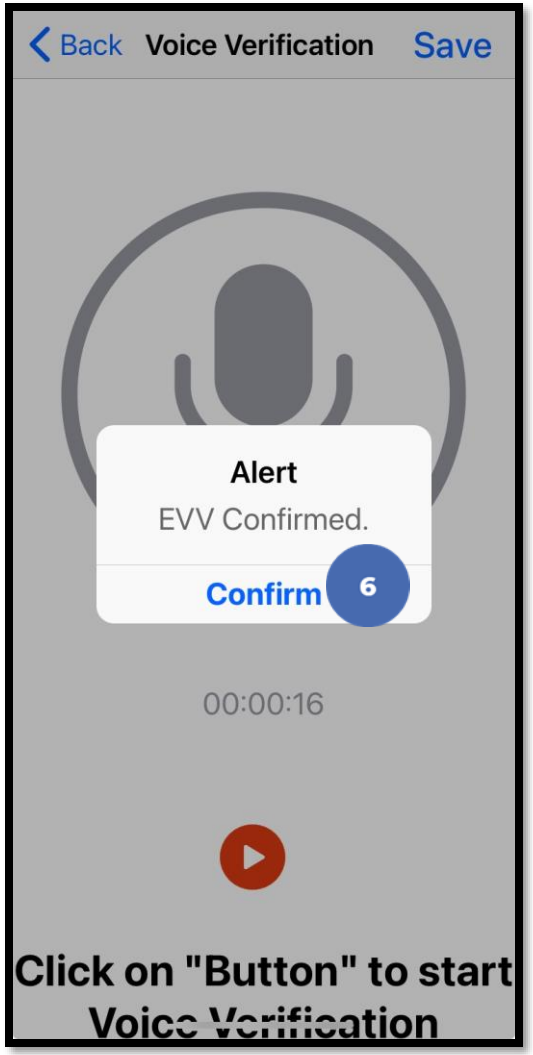
Voice

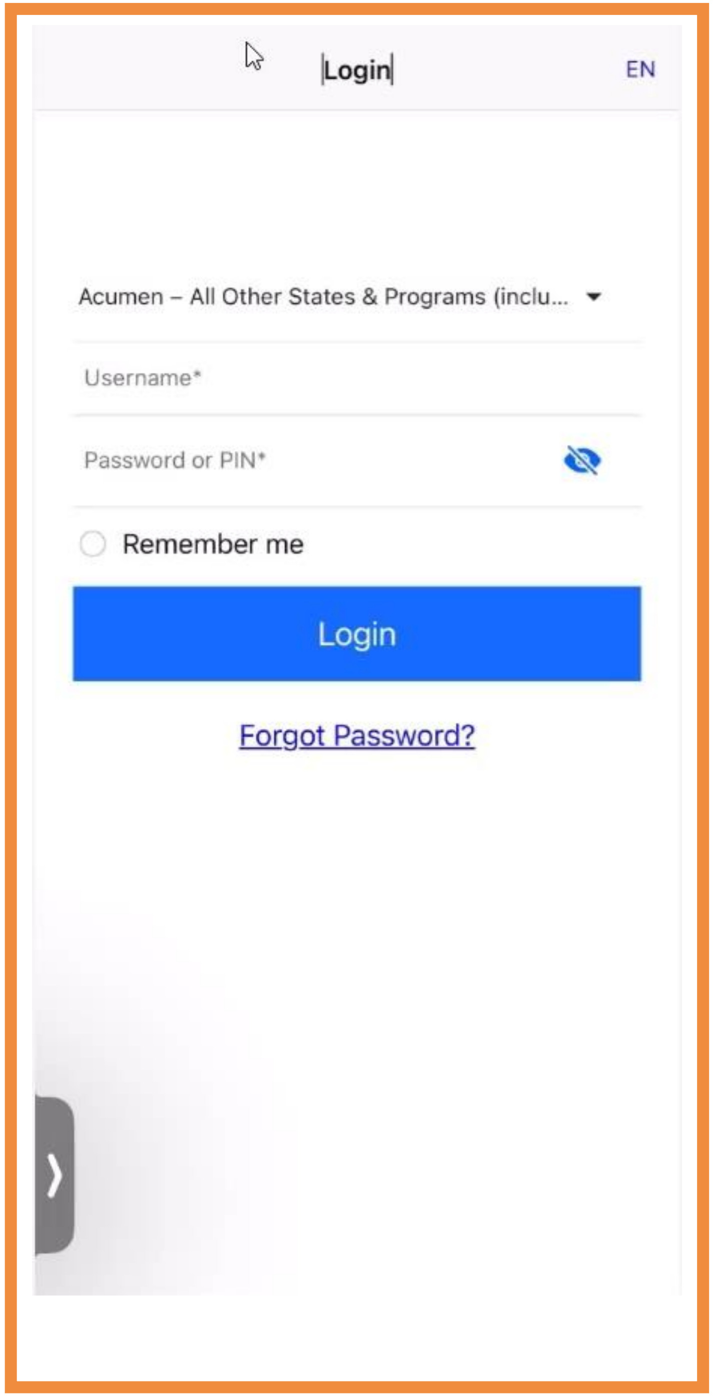
5. The client or employer clicks the blue **Save** button in the upper right corner to accept the voice verification, or the blue **<Back** button in the upper left corner to re-record it.
6. The client or employer clicks **Confirm** to validate the voice recording and hands the mobile device back to the employee





Mobile App Video

Clock in and Out Using Voice Option



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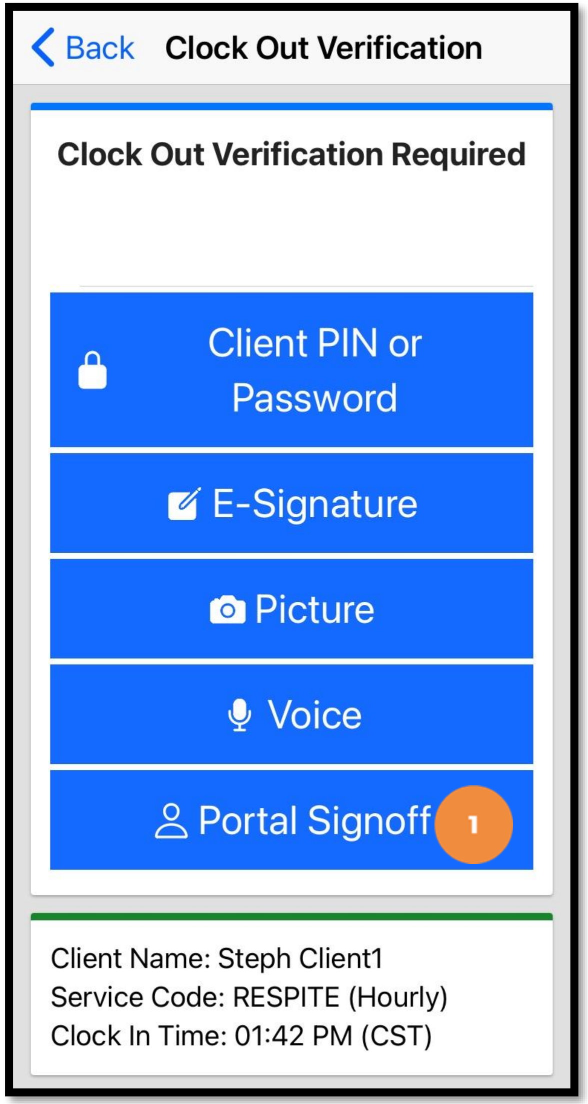
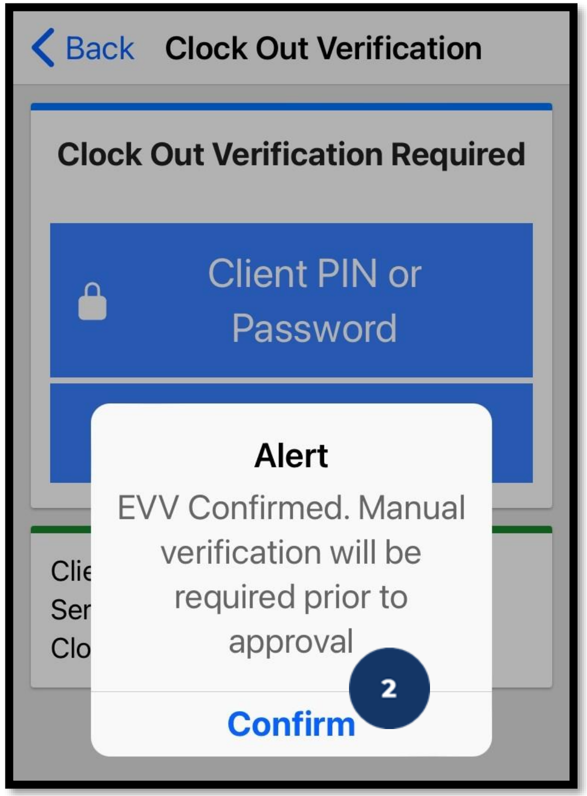
Clock Out - EVV Option #5

Portal Signoff

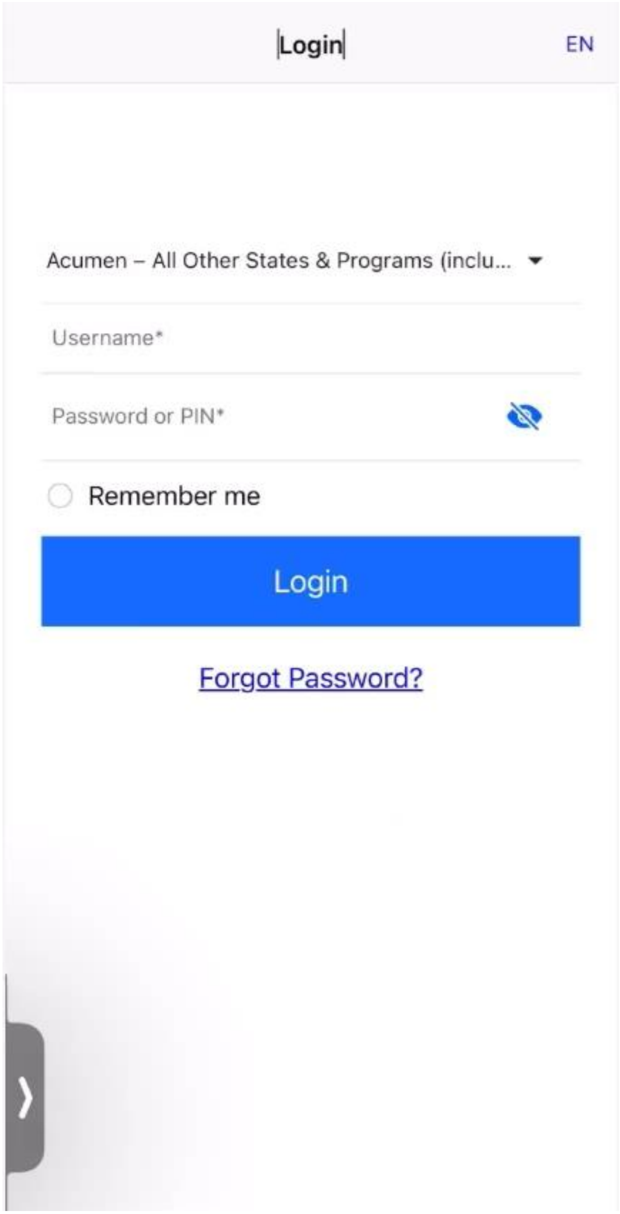
1. Select the clock out verification type:
   ✓ Portal Signoff
2. An alert will appear stating that EVV is confirmed, but manual verification will be required prior to approval. Click **Confirm.**





Mobile App Video

Clock in and Out Using Portal Signoff Option



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Mobile App Offline Mode

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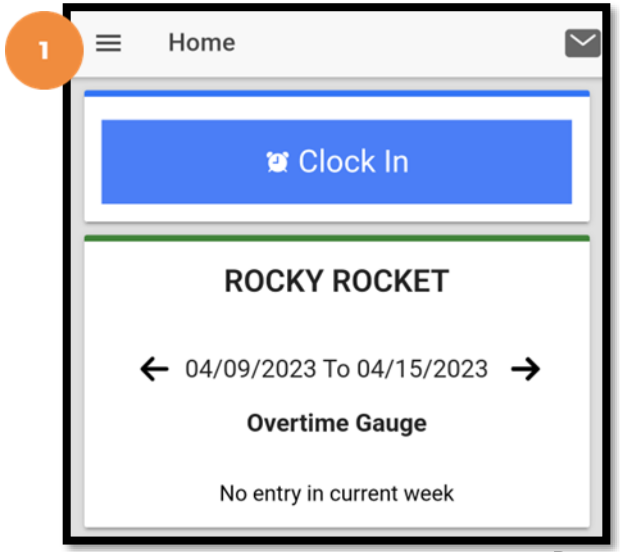
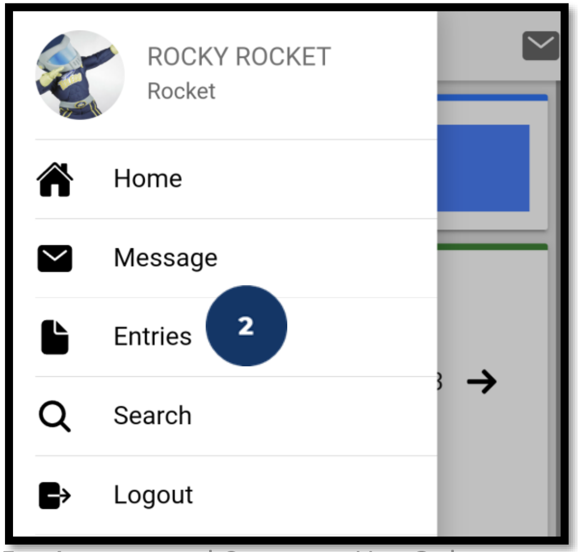
- Offline mode allows the employee to use the mobile app on a **registered device** when the device is not connected to the internet or loses connection while the app is in use
  - ✓ **Please note:** A device is registered automatically the first time the user logs into the mobile app while connected to a cellular network or internet
  - ✓ A user can only have one registered device
- Useful when there is limited or no cellular or Wi-Fi connection at the service location
- Limits users to only clock in and clock out
- Offline mode status is indicated by a red “**Offline**” bar at the top of the dashboard
- Punches made in offline mode are saved in the mobile app as offline punches, will automatically upload when the user connects to a cellular or wireless network, and will be listed under Entries.

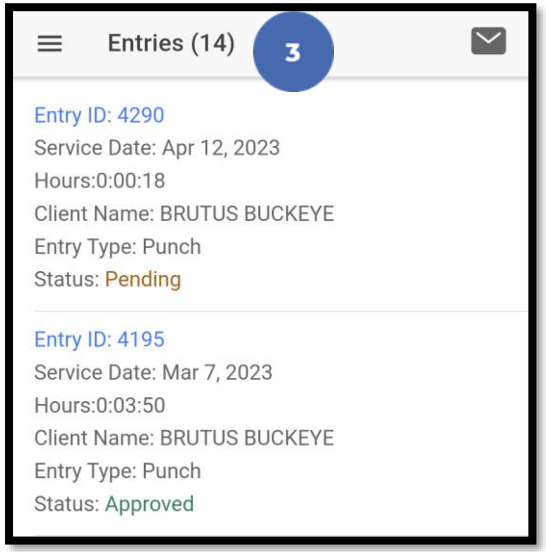
Review Entries

1. Click the **Menu** in the top left corner of the screen
2. Select **Entries** on the submenu
3. View the complete list of entries
   - Verify that all time is submitted
   - The employer approves the time as needed

***Please note:** Punches cannot be edited in the mobile app. Please edit the punch via the web portal.





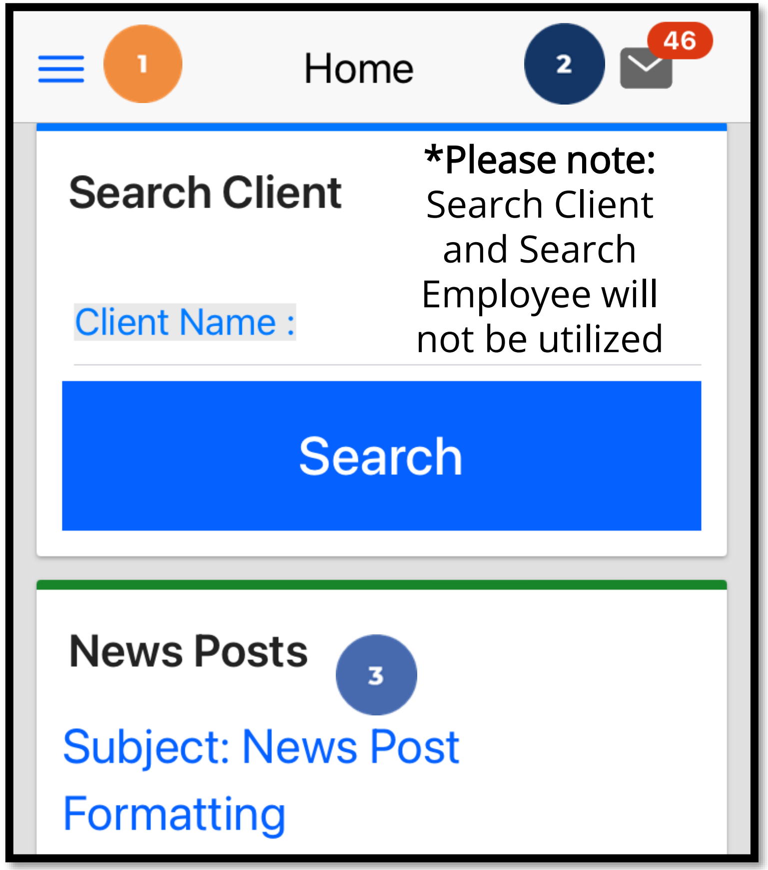


Employer Mobile App

Dashboard

After logging in, the Dashboard or home page, displays.

1. Click the **Menu** in the top left corner of the screen to access all available submenu items
2. Click the envelope icon to access the messaging module
   - ✓ View and send secure messages within DCI
3. Scroll down to view News Posts
   - ✓ Important information from the program
   - ✓ News Posts may also display as splash screens which show immediately after log-in. Read and click **OK** to acknowledge.



Review & Approve Entries

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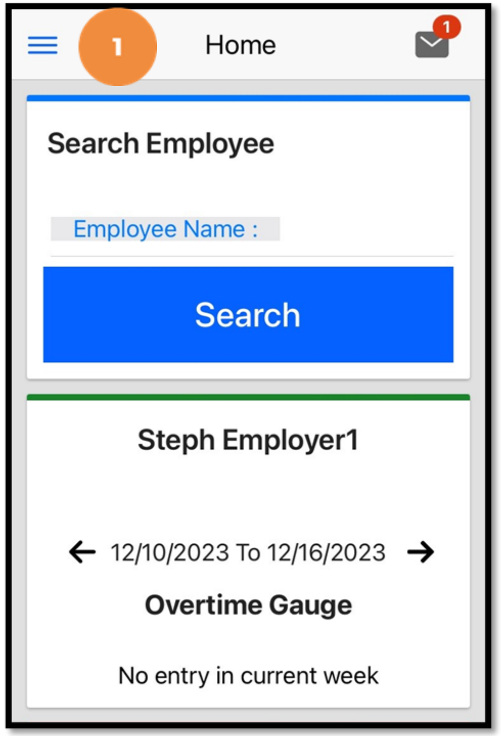
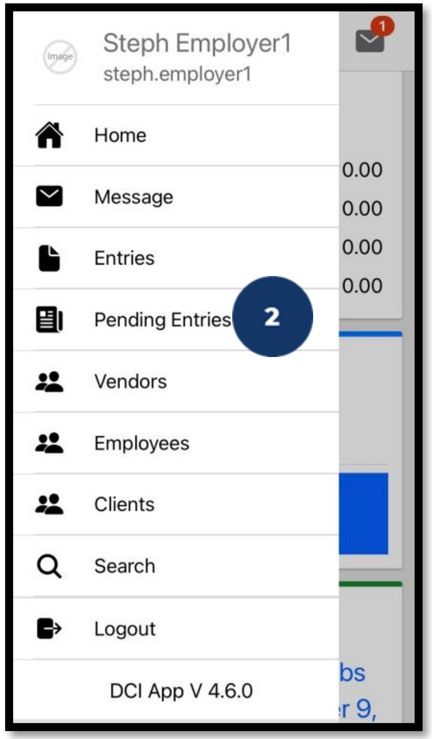
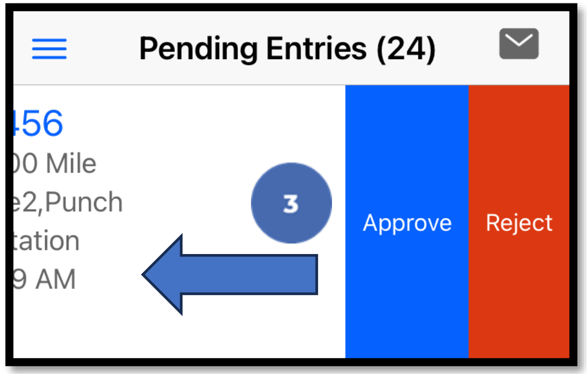
1. Click the **Menu** in the top left corner of the screen

2. Select **Pending Entries** on the submenu

3. **Swipe left** on the punch to select either the blue Approve button or the red Reject button







Review & Approve Entries (cont.)

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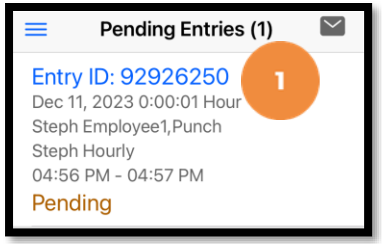
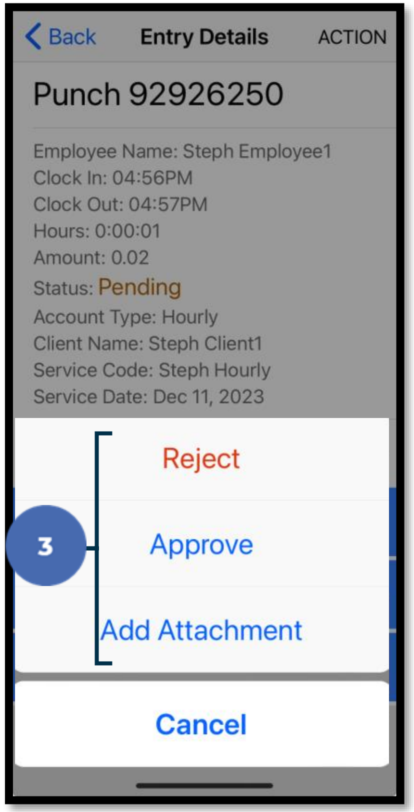
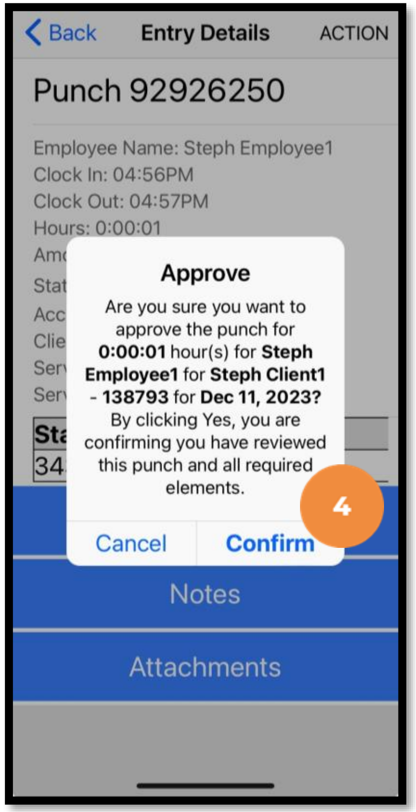
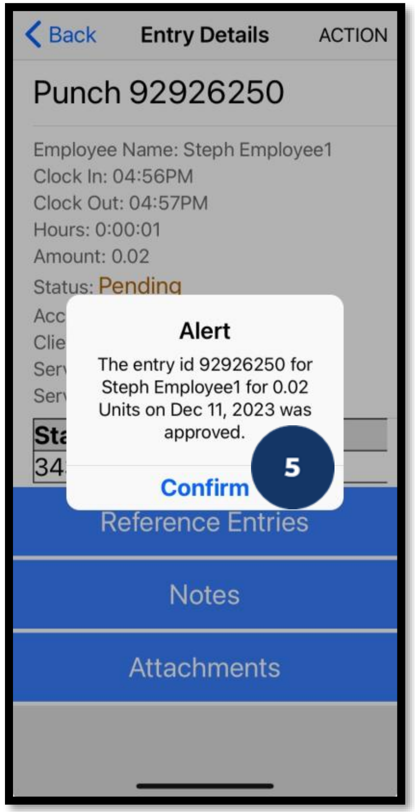
1. Alternatively, click the blue **entry ID** hyperlink to open the entry details and take action
2. Click **ACTION** in the top right corner
3. Select **Reject**, **Approve**, or **Add Attachment.**
4. On the pop-up alert window, view the punch details and Click **Confirm** to initiate the confirmation process.
5. On the pop-up alert window, click **Confirm** again to complete the confirmation process.









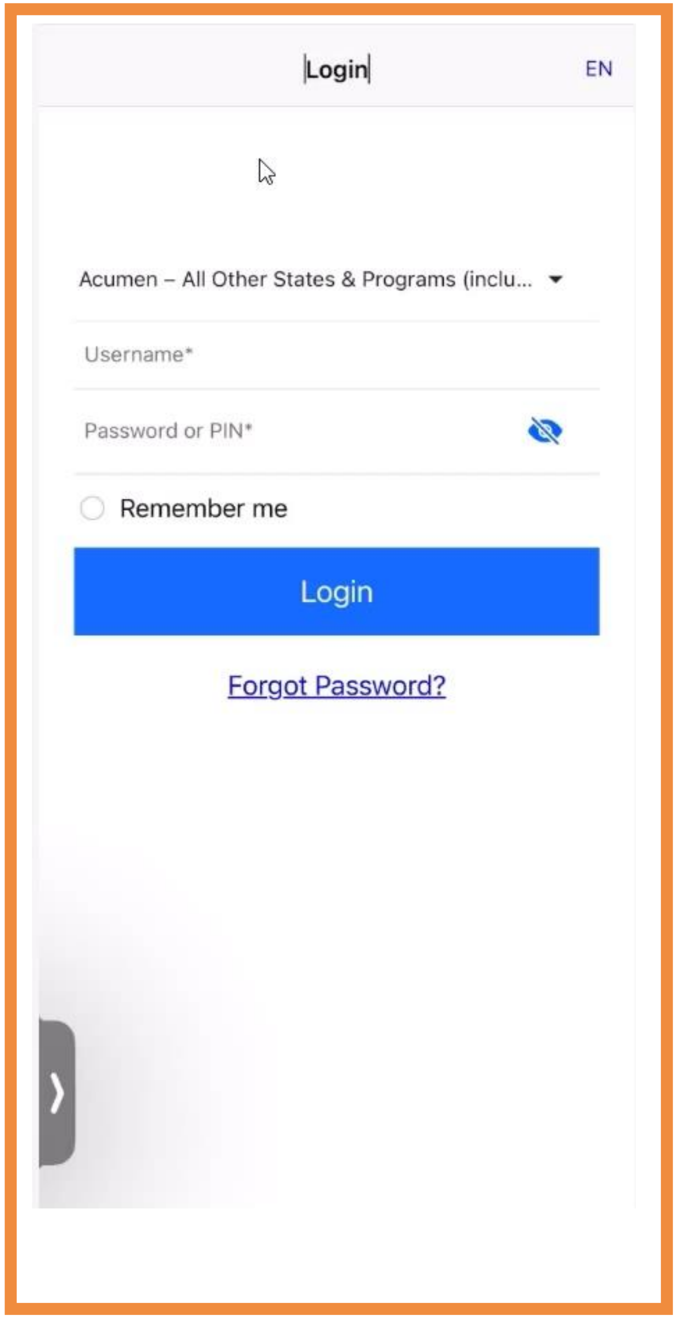
***Please note:**
If the action taken was to approve the entry, the status changes to Approved and the entry will be processed for payment.

***Entries must be approved within 30 days of the date of service.**

***After 30 days the approval will be prohibited as it will violate the timely filing business rule**

Mobile App Video

Employer Reviews & Approves Entries



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DCI Web Portal

Navigation

<u>Full Site</u> – Most compatible when accessed via desktop or laptop

Web Portal Basics

- The employer reviews and manages time
- Employees correct punches and/or enter historical time
- Users may update profile settings

Accessing the DCI Web Portal

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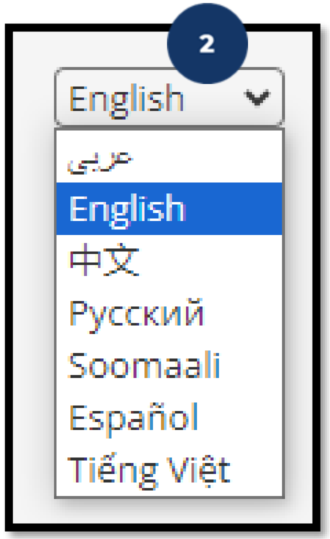
1. Open an internet browser on a computer or mobile device (Google Chrome is preferred) and navigate to the DCI Web Portal
2. Use the language drop-down in the top right corner to select the preferred language
   - The page will now display in the new language each time you log in
   - This feature is only available for employees
3. Enter **username** and **password**
   - Credentials provided by Acumen
4. Utilize the "**Forgot your password?**" link if needed
5. Click the blue **Sign In** button

***Please note:** Contact Acumen with login issues

1 acumen.dcisoftware.com



Profile Settings

***Please note!** Profile settings are only available on the full site

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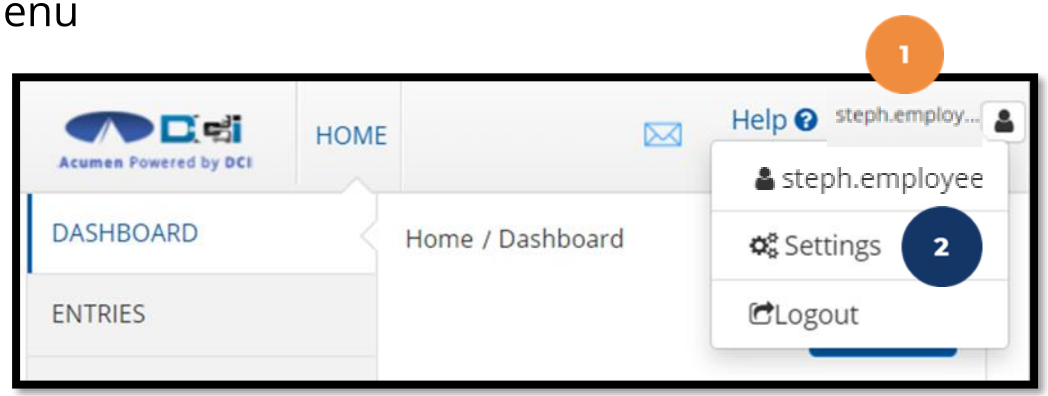
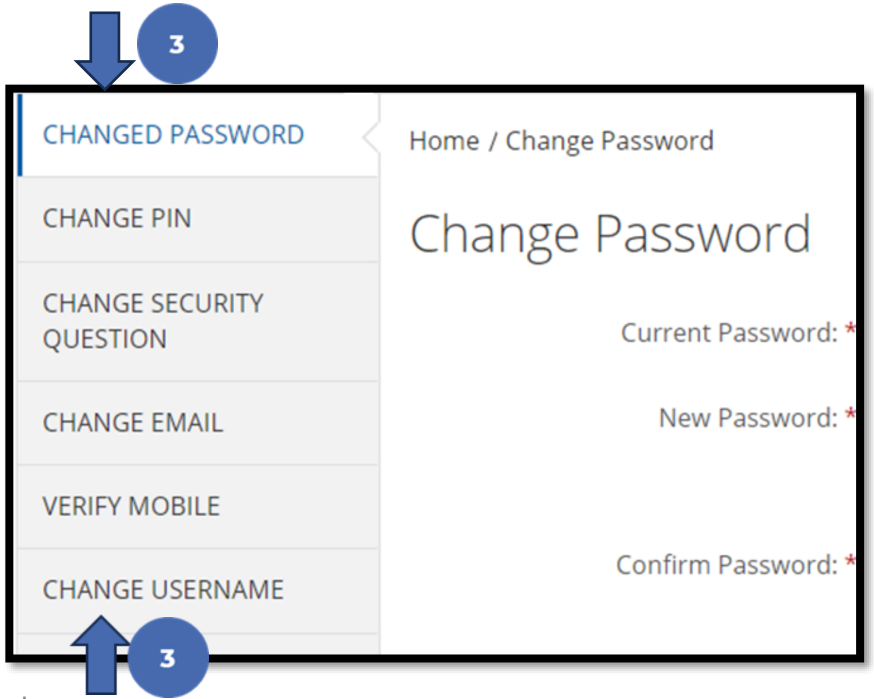
1. Click the **username** in the top right corner of the main menu

2. Click **Settings**

3. Select a submenu tab to update:

   - Change Password – Used for login
   - Change PIN – A number that can be used instead of a password when logging into the mobile app. ***Required for employees if using Phone EVV.***
   - Change Security Question
   - Change Email – A valid and correct email address is required for password recovery
   - Verify Mobile
   - Change Username – Used for login

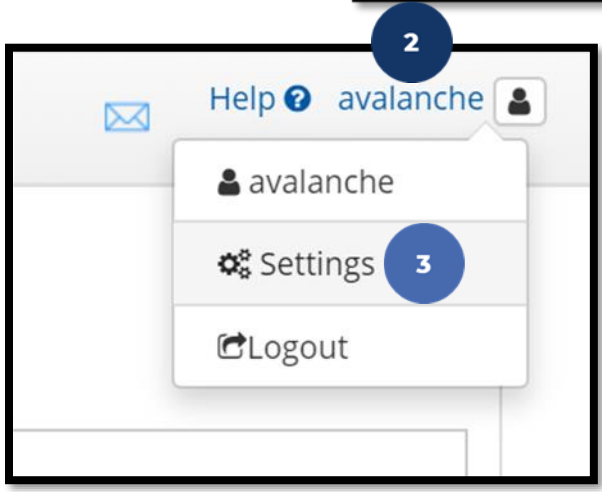


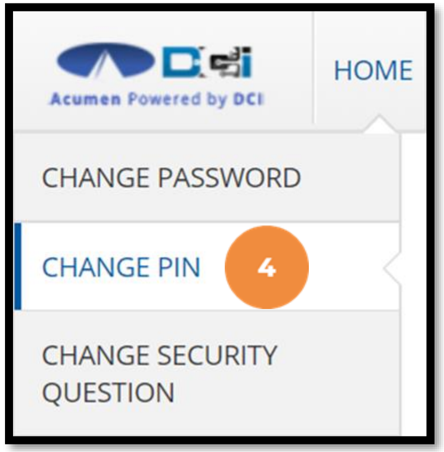


Add / Change PIN

***Please Note! The PIN can only be added or changed in the web portal**

1. Log in to the DCI web portal
2. Click the username in the top right corner of the main menu
3. Click **Settings** from the drop-down menu
4. Select **Change PIN** or **Add New PIN**
   - ✓ Add New PIN after a reset
   - ✓ Change PIN anytime
5. Enter password
6. Click the blue **Verify** button





Add / Change PIN (cont.)

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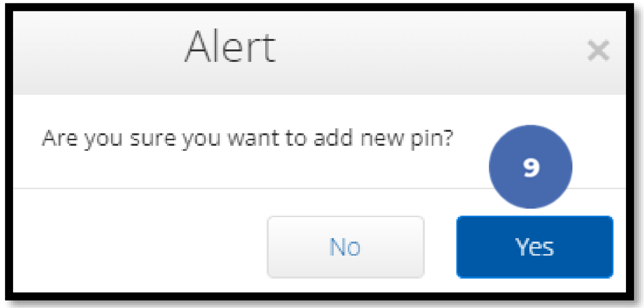
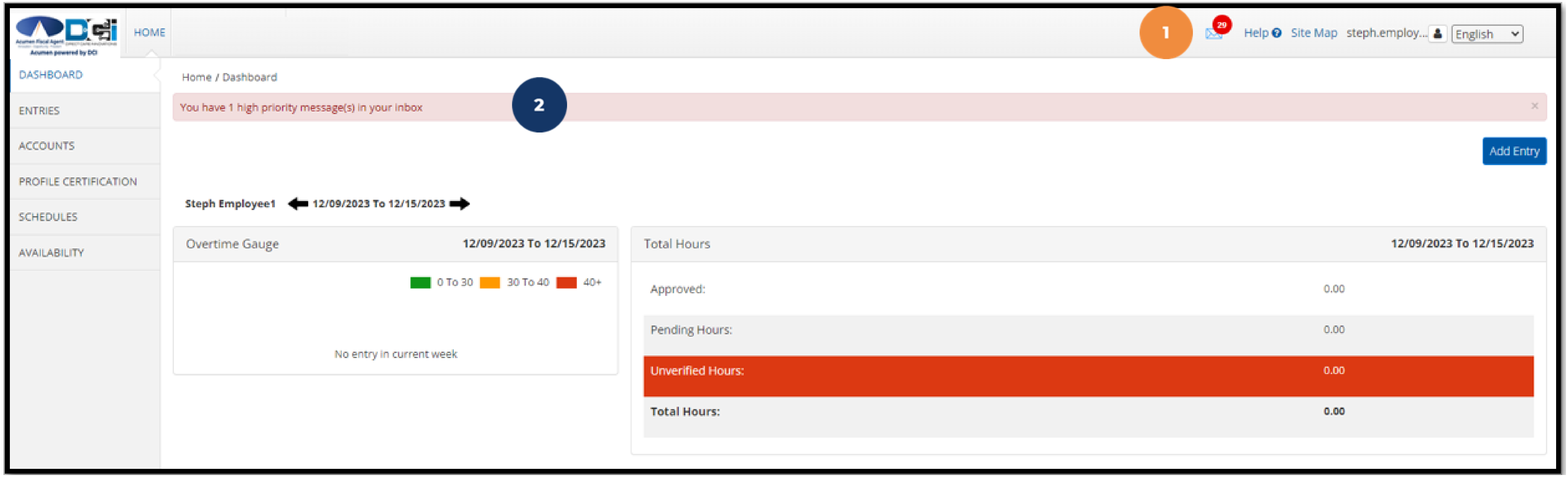
7. Complete the New Pin field and retype the pin in the Confirm Pin field
8. Click the blue **Change Pin** button
9. Select **Yes** to confirm the pin change
10. A green bar stating "Pin Changed Successfully!" appears

***Please Note!** The PIN can only be added or changed in the web portal



Web Portal Messaging Module

1. Click the **Mail** icon (envelope) in the top right corner of the main menu to access the inbox
2. Alternatively, if the red **high priority message banner** displays, click it to access the inbox.



Web Portal Messaging Module

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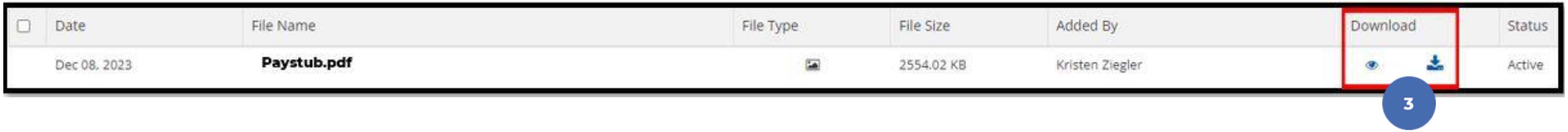
Select a message to view by clicking anywhere on the line

- ✓ 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
3. Click the **eye** icon in the download column to view the paystub/statement or the **download** icon to download it



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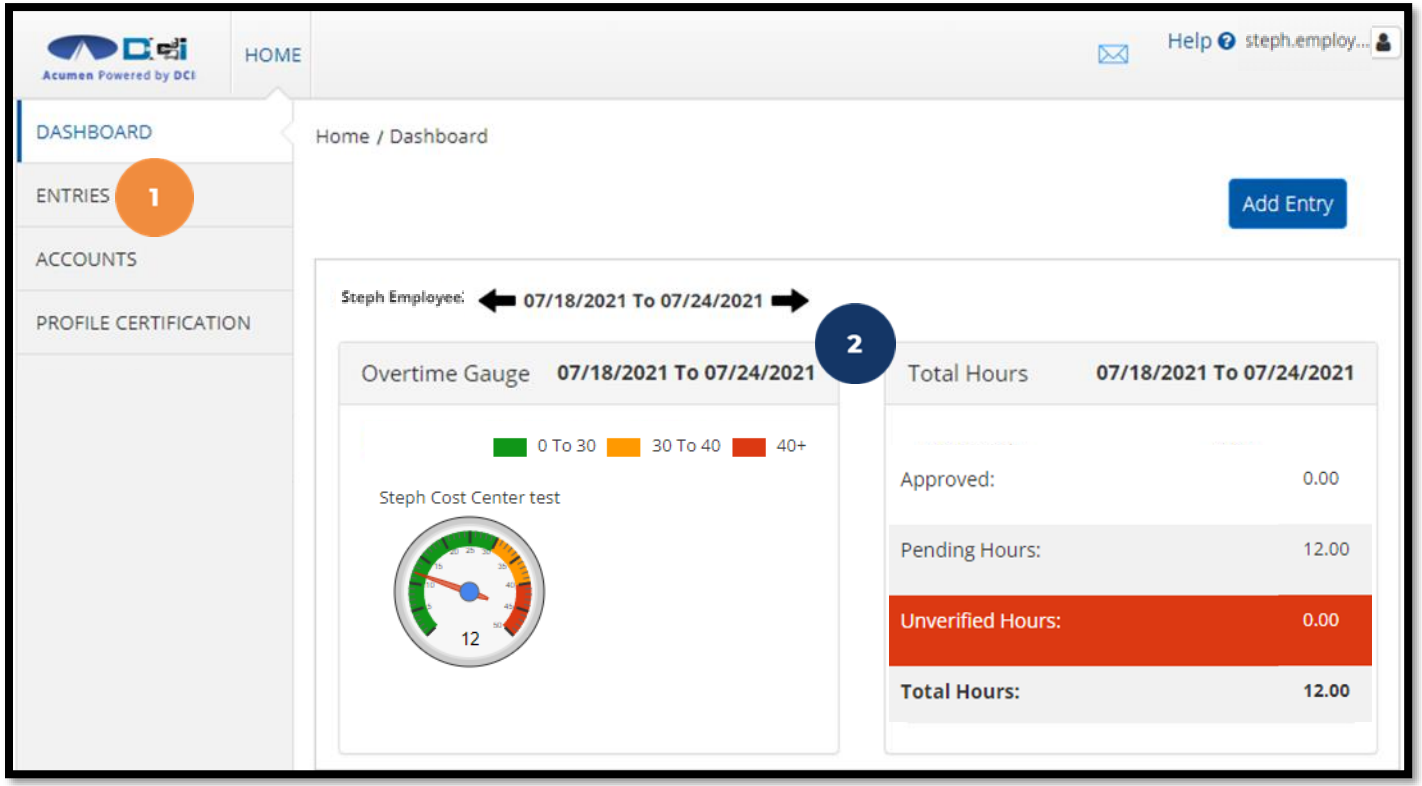
Employee Web Portal

***Please note!** Web Portal (historical) entries are only used for a missed punch or punch correction due to service interruption. The goal should always be to enter punches in real time (Mobile App) to maintain EVV compliance.

Home Tab Details - Employee

The **Dashboard** is the landing page

1. Select the **Entries** tab to view a complete list of submitted time entries
2. Overtime Gauge & Total Hours for the current calendar week



Add New Entry

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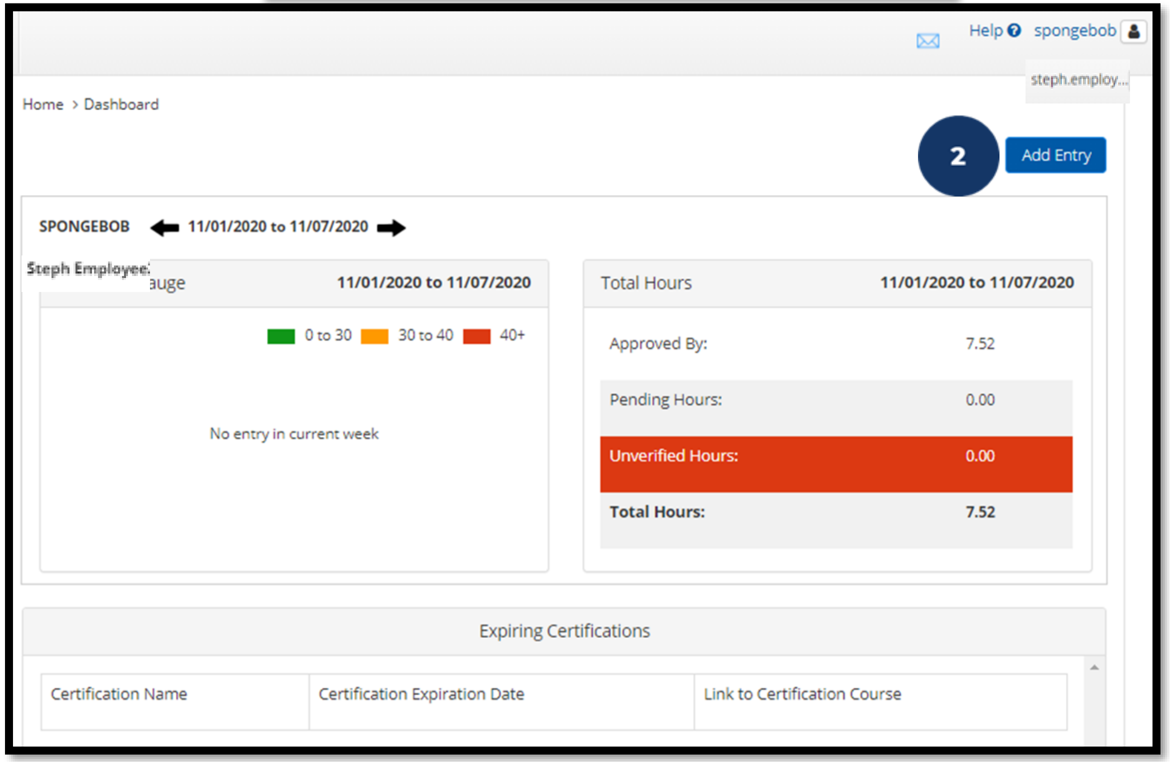
1. Log in to the [DCI Web Portal]
2. Click the blue **Add Entry** button



***Please note!** <u>Web Portal (historical) entries are only used for a missed punch or punch correction due to service interruption</u>. The goal should always be to enter punches in real time (Mobile App) to maintain EVV compliance.

Add New Entry (cont.)

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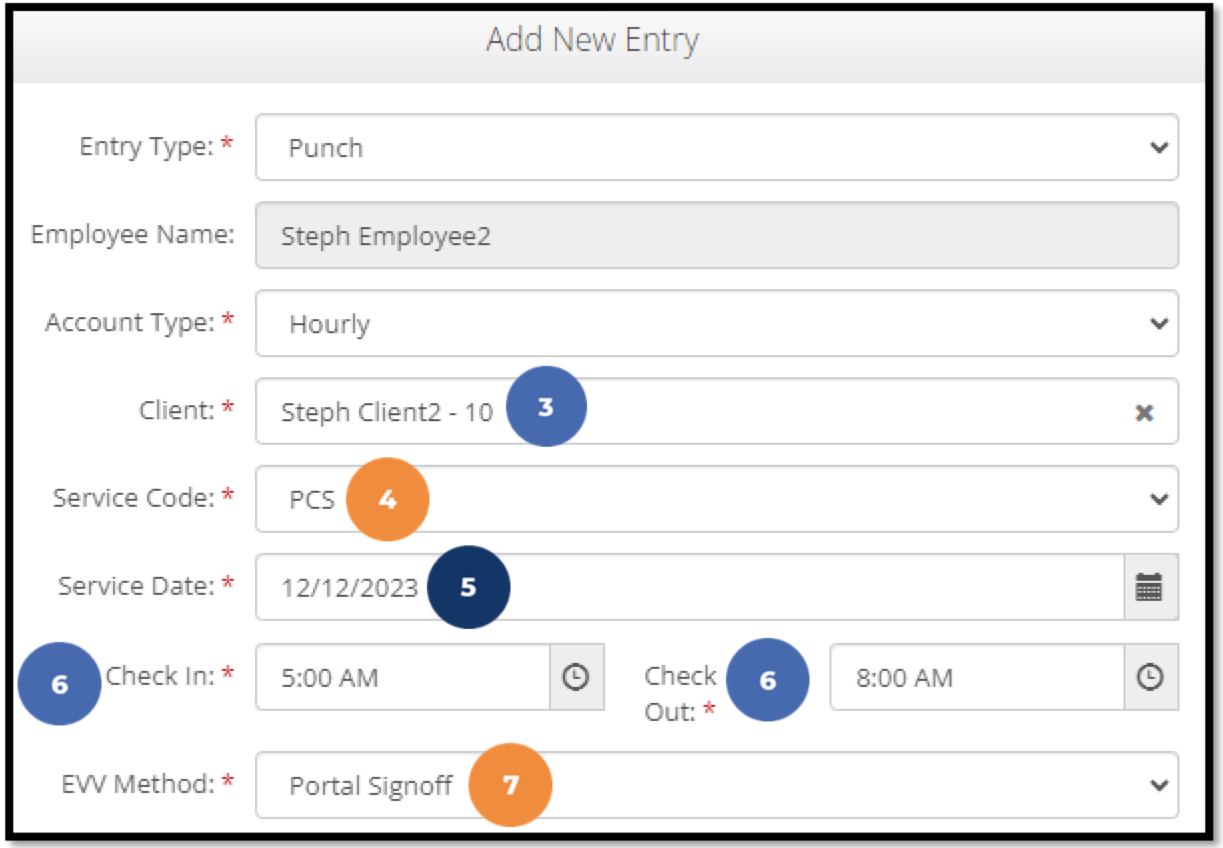
3. Type a minimum of three characters to generate results and select the Client's name from the list
4. Select the Service Code from the drop-down
5. Select the Service Date
6. Enter the Check In (start) and Check Out (end) times
7. Select Portal Signoff as the EVV Method



Add New Entry (cont.)

14

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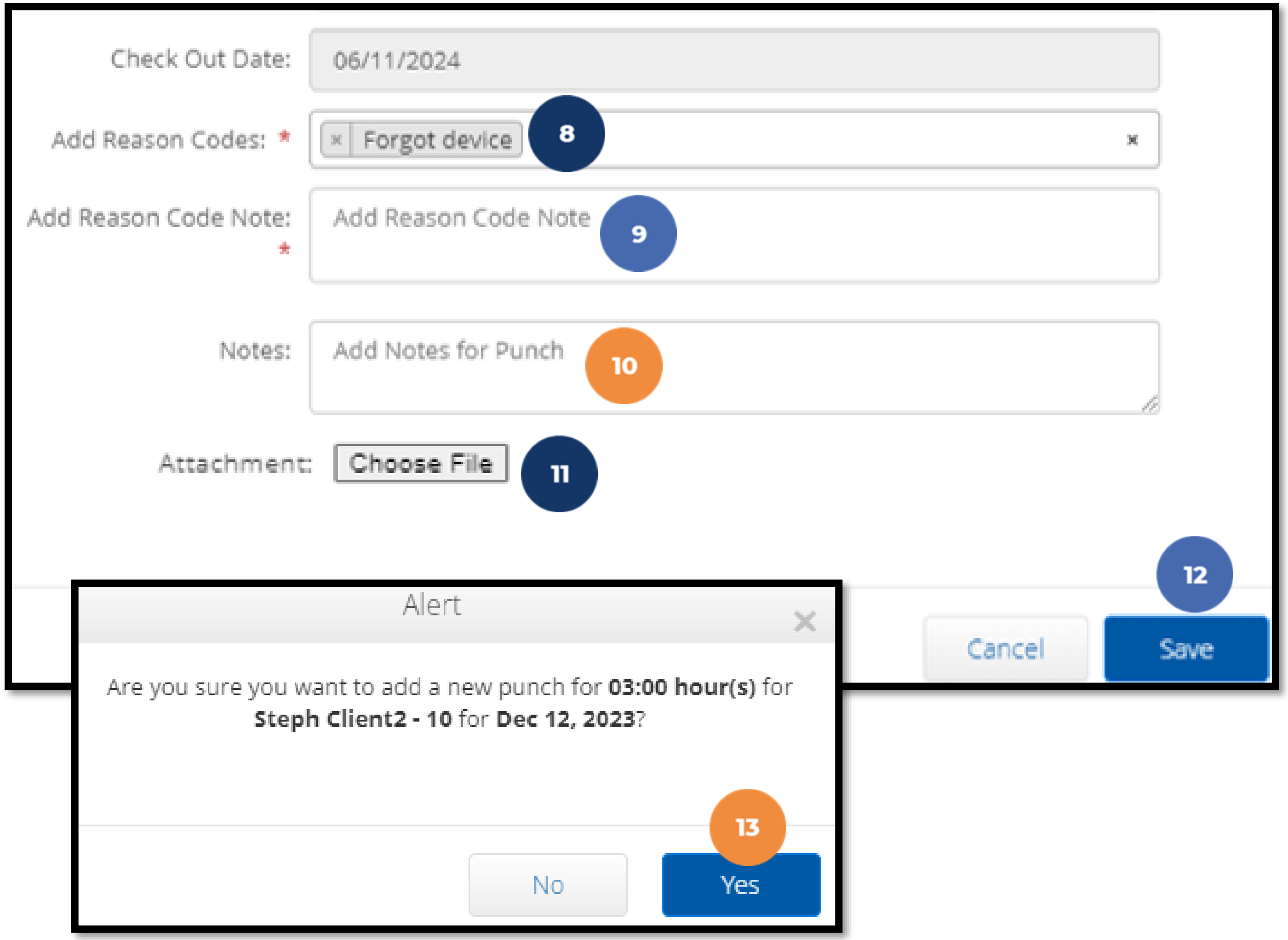
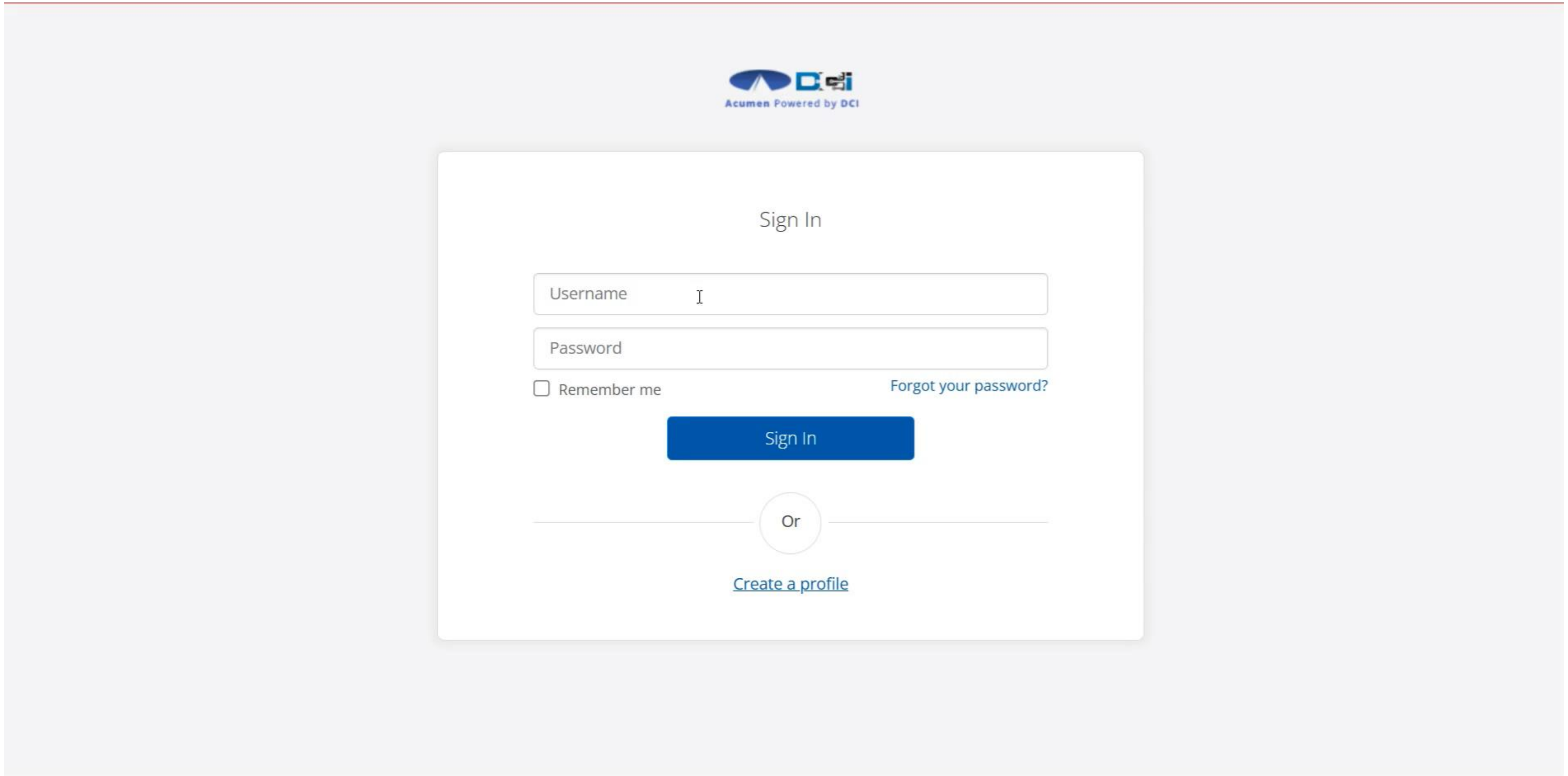
8. Select a Reason Code from the drop-down list
9. Add a Reason Code Note
10. Enter Notes for the punch (optional)
11. Click the **Choose File** button to select and upload Attachments (optional)
12. Click **Save**
13. Click **Yes** to submit



Web Portal Video
Employee Adds (Historical) Entry



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Edit Entry

***Please note!** Only entries in a <u>Pending</u> status can be edited by the employee. Contact Acumen for assistance if in any other status.

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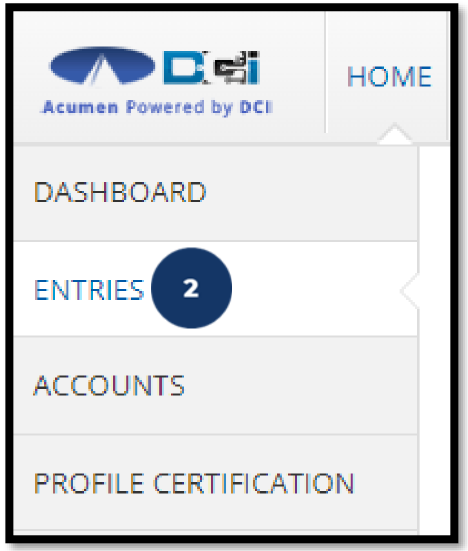
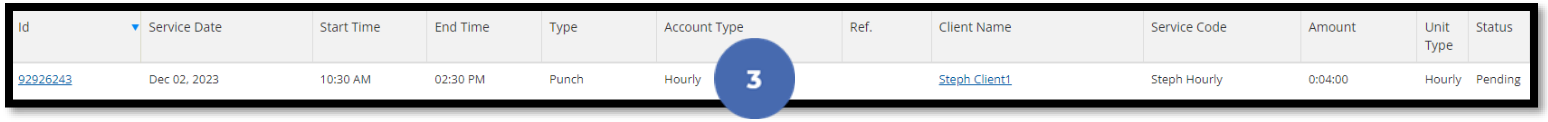
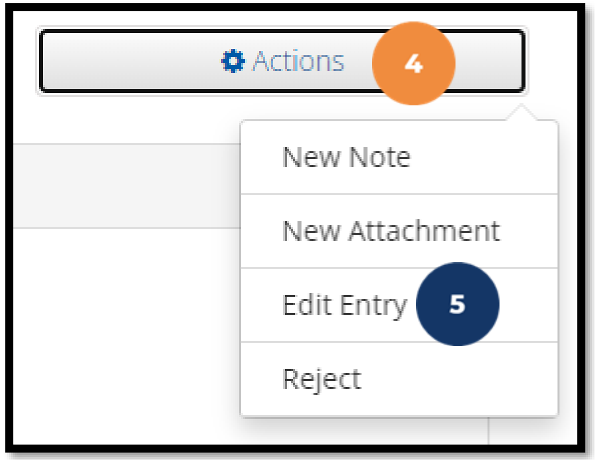
1. Log in to the [DCI Web Portal]
2. Click **Entries** on the submenu
3. Click anywhere on the line of the punch entry to be edited
4. Click the **Actions** button in the top right corner
5. Select **Edit Entry** from the drop-down menu





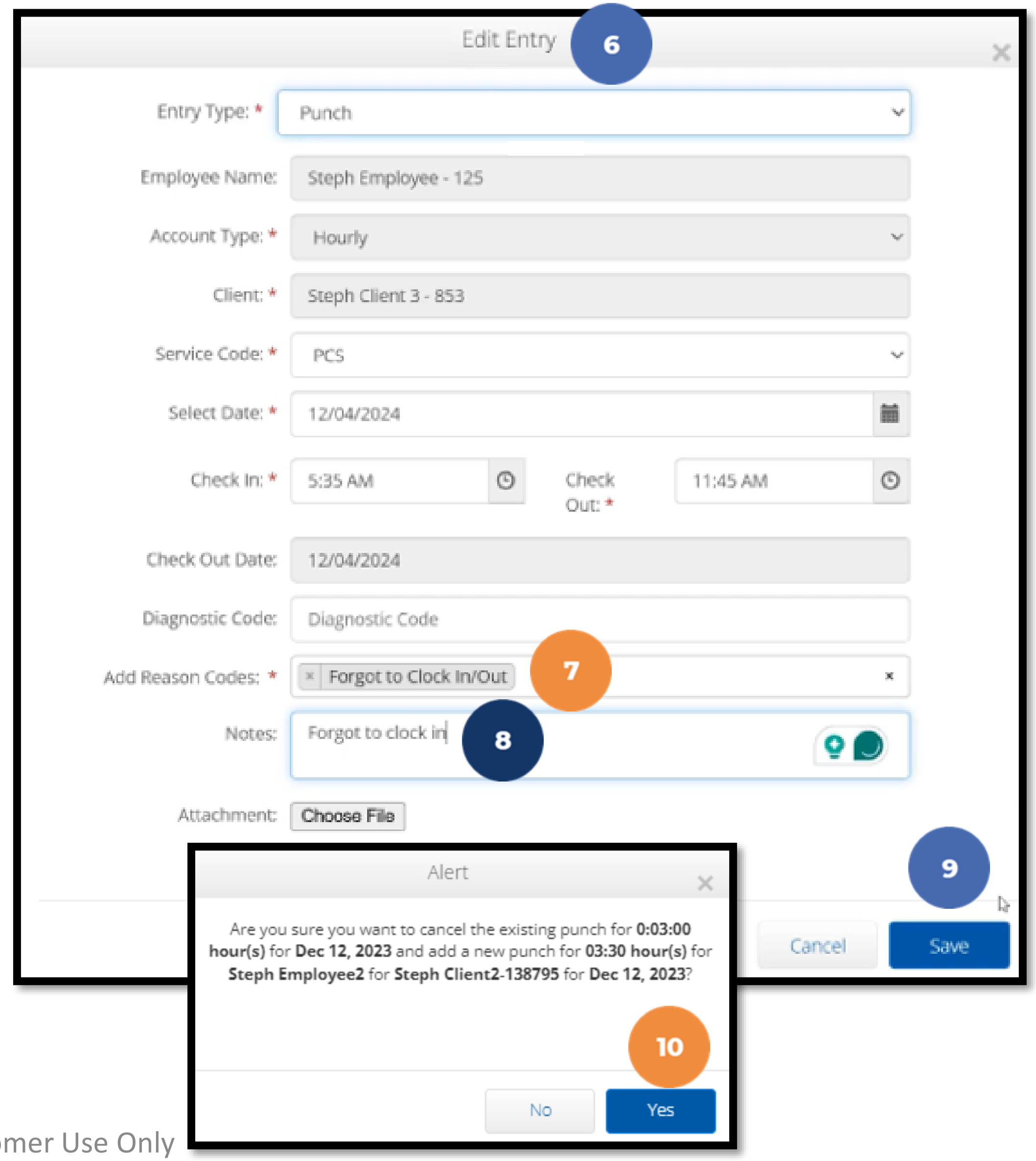


Edit Entry (cont.)

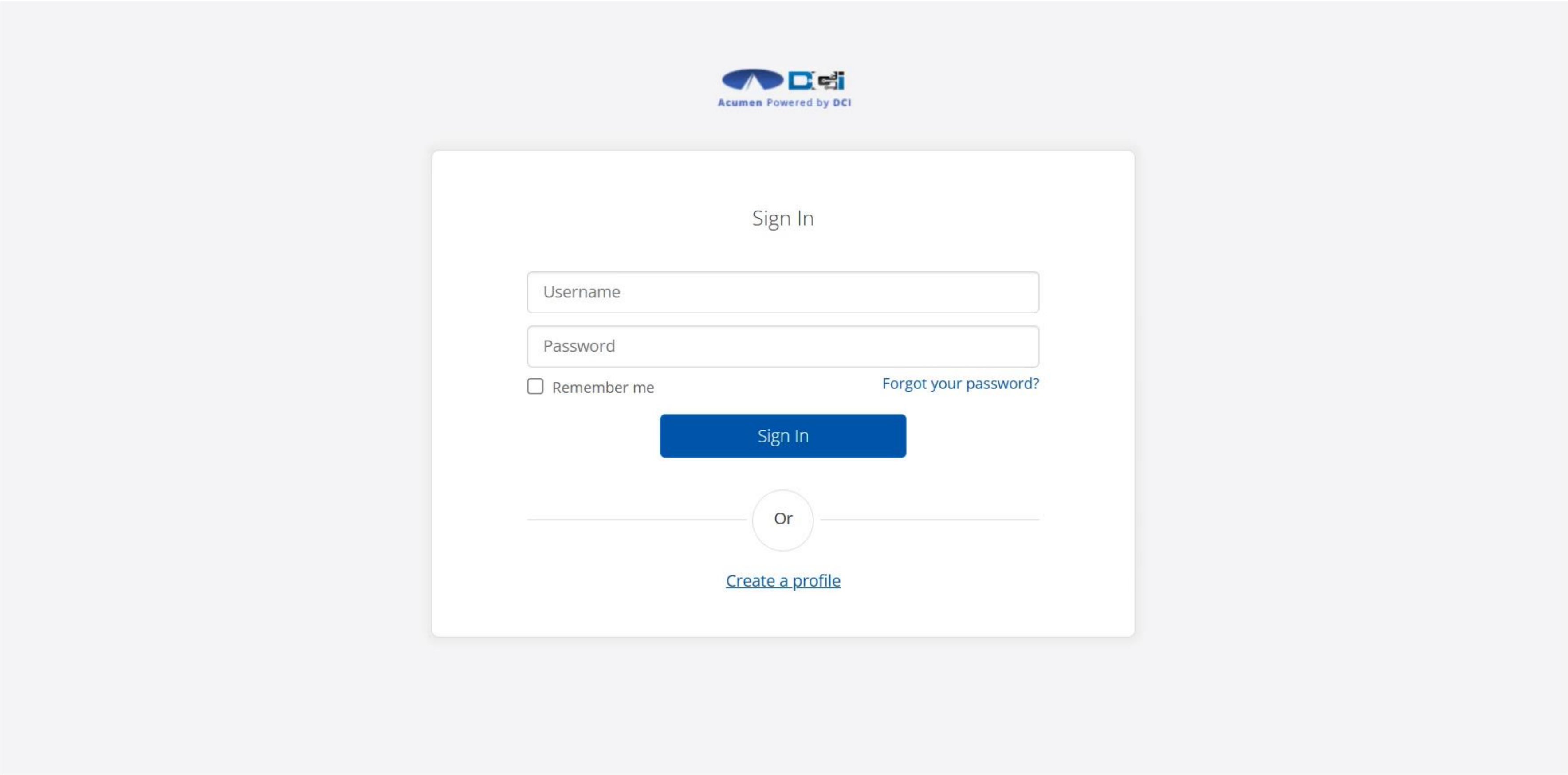
***Please note!** Only entries in a <u>Pending</u> status can be edited by the employee

6. Complete the necessary changes in the Edit Entry form wizard
7. Select a Reason Code from the drop-down list
8. Add Reason Code Note
9. Click **Save**
10. Click **Yes** to confirm the changes

The edited entry moves into a <u>Rejected</u> status, and a new (corrected) entry in <u>Pending</u> status is created.



Web Portal Video
Employee Edits (Historical) Entry



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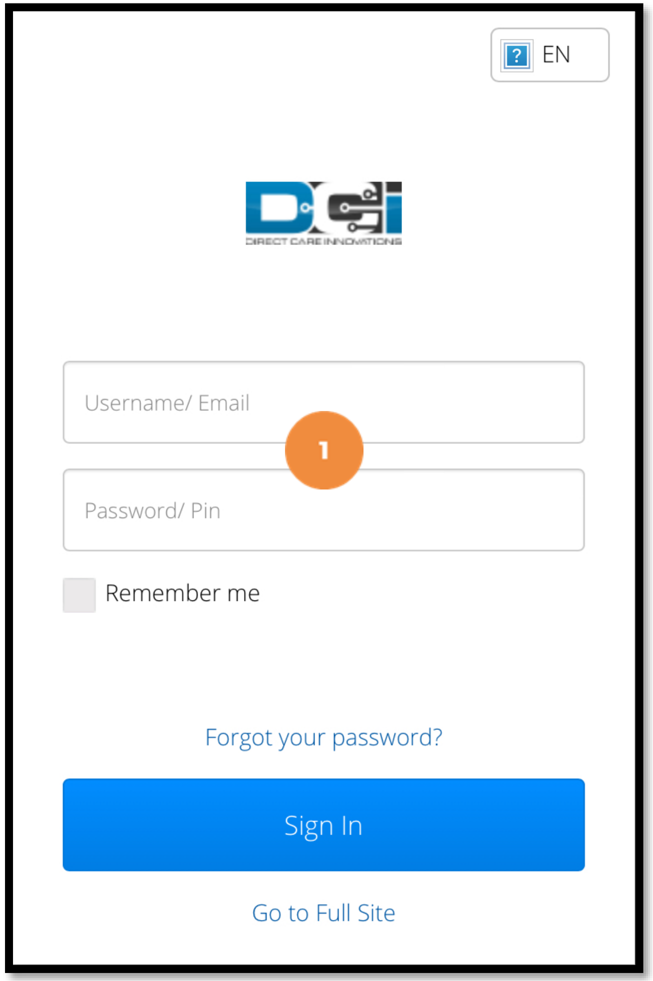
Employee Mobile Web Portal

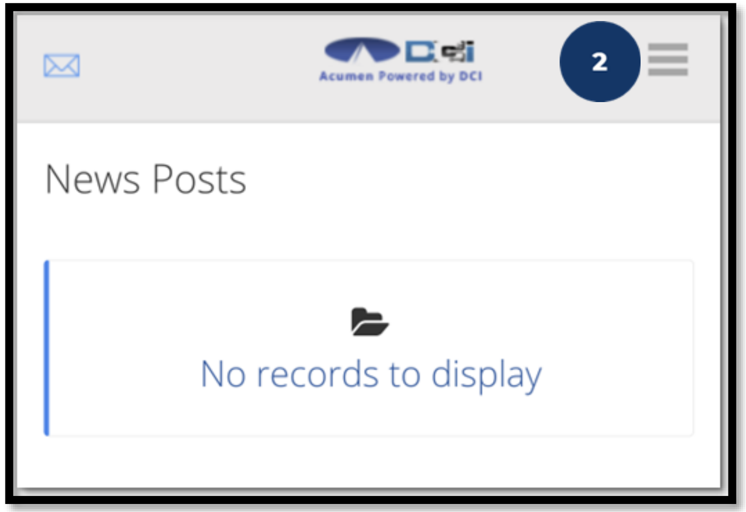
Accessed via smartphone or tablet

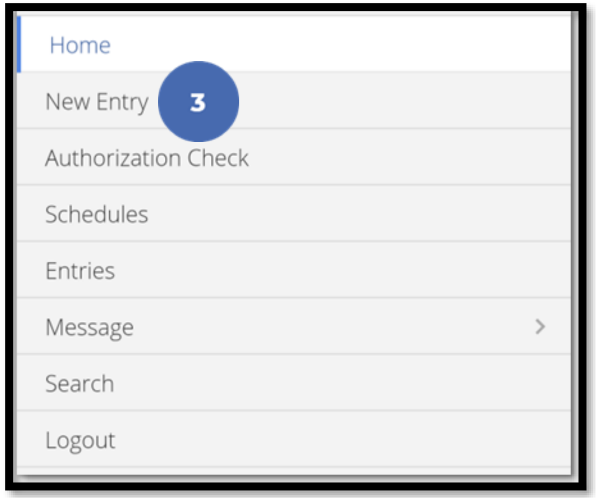
***Please note!** Mobile Web Portal (historical) entries are only used for a missed punch or punch correction due to service interruption. The goal should always be to enter punches in real time (Mobile App) to maintain EVV compliance.

Add New Entry - Mobile Web



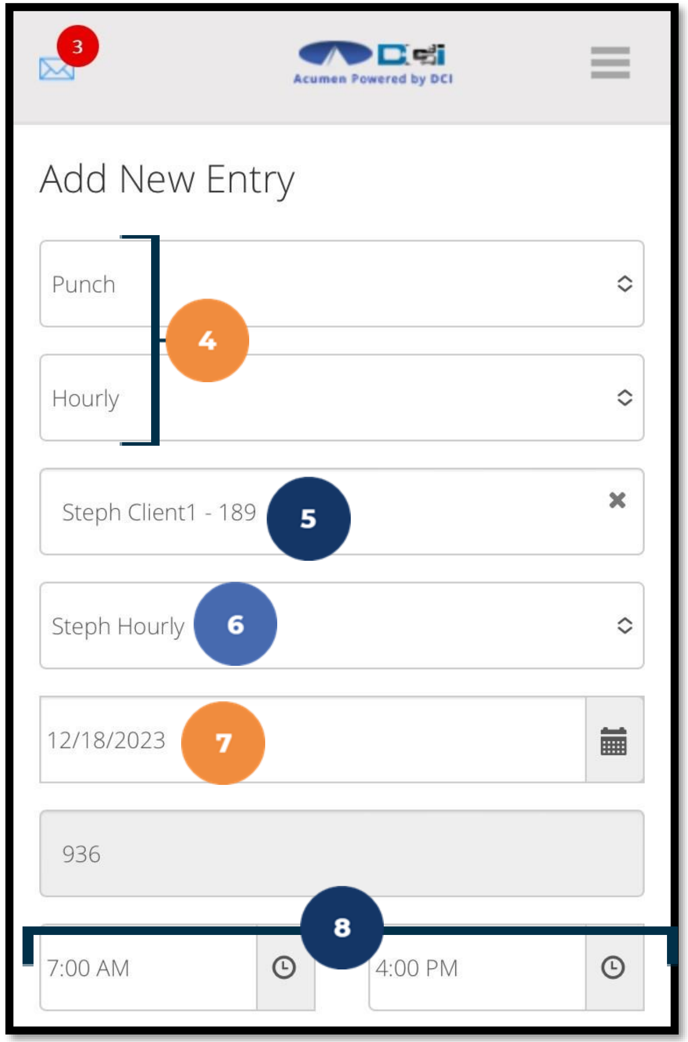
1. Log in to the DCI Web Portal on a mobile device
2. Click the **Menu** in the top right corner of the screen
3. Select the **New Entry** tab from the submenu





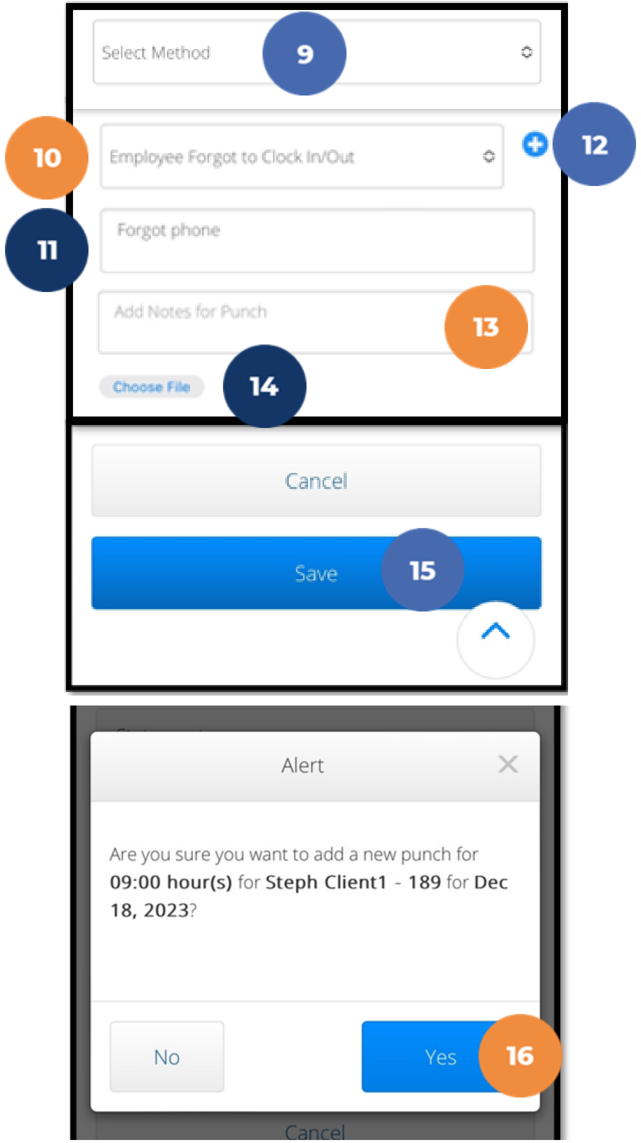
Add New Entry - Mobile Web (cont.)

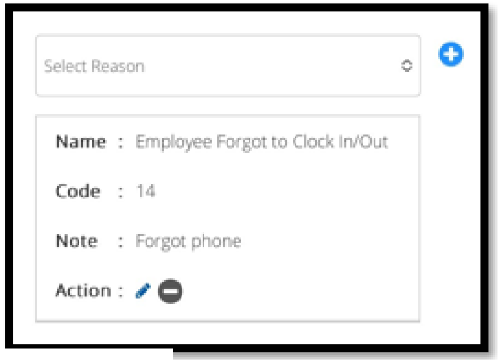
4. The first two fields are prefilled
5. Type a minimum of three characters to generate results and select the Client's name from the list
6. Select the Service Code from the drop-down
7. Select the Service Date
8. Enter the Check In (start) and Check Out (end) times

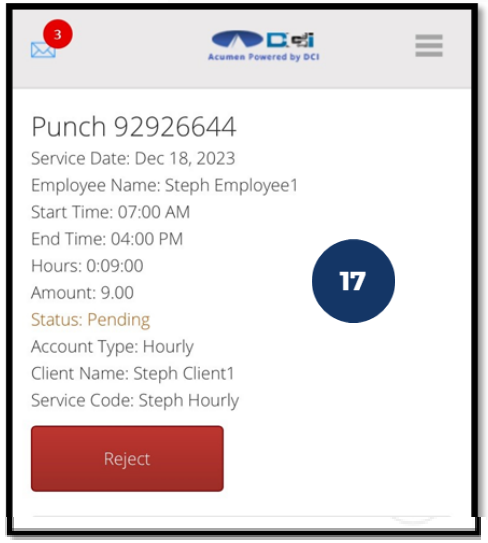


Add New Entry - Mobile Web (cont.)

9. Select Portal Signoff as the Method
10. Select a Reason Code from the drop-down list
11. Add a Reason Code Note
12. Click the blue **plus sign (+)** to populate the reason code details
13. Enter Notes for the punch (optional)
14. Click the **Choose File** button to select and upload Attachments (optional)
15. Click **Save**
16. Click **Yes** to submit
17. The punch has been submitted







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Employer Web Portal

Full Site – Most compatible when accessed via computer or laptop

***Please note!** Employer mobile web portal actions are similar to the web portal but are compatible with a mobile device and do not require horizontal scrolling.

Home Tab Details

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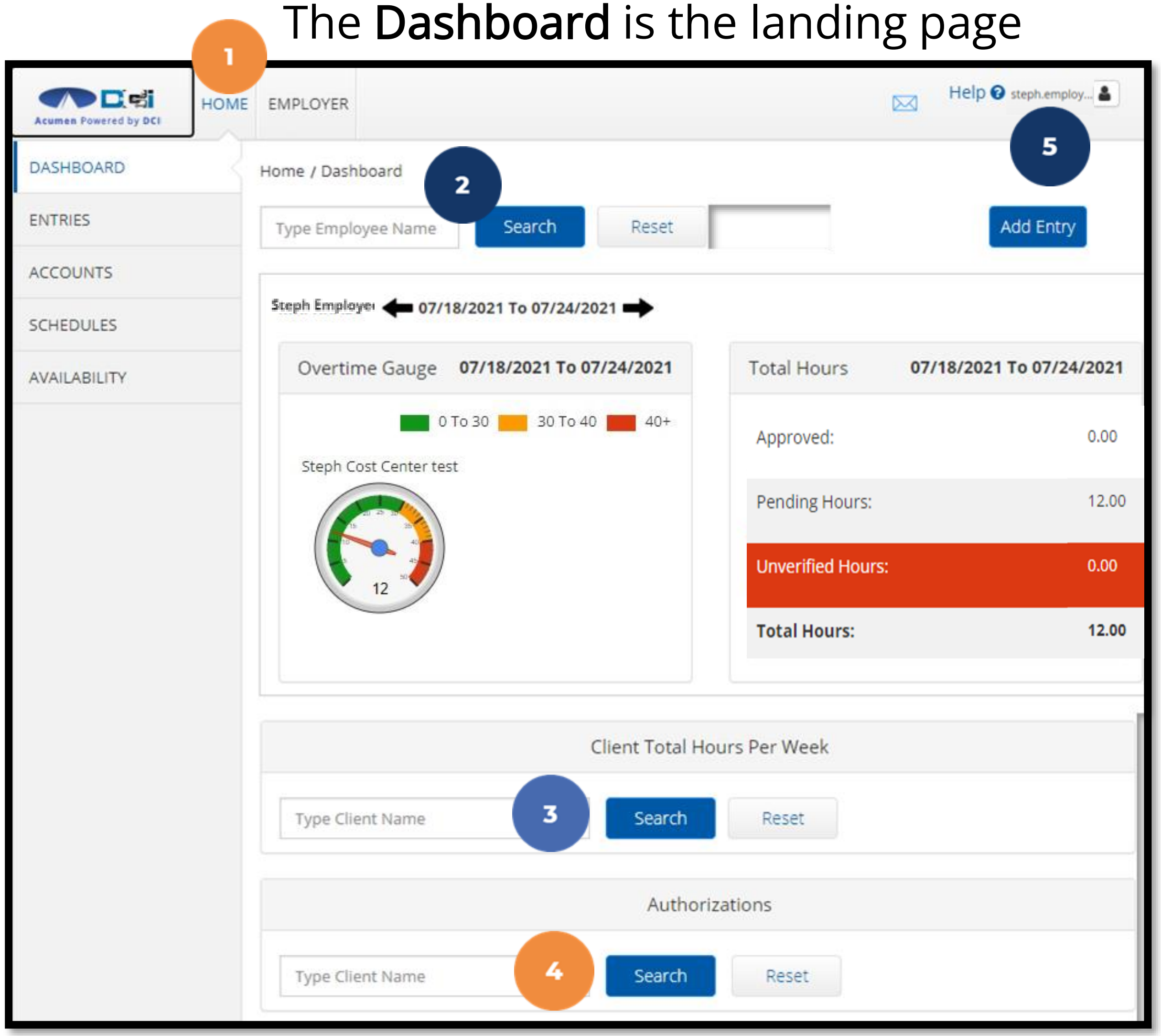
1. Select **Home** on the main menu
2. Enter an **employee name** and click the blue **Search** button to view the information below by week. Use the black arrows to toggle between weeks:
   - ✓ Overtime Gauge
   - ✓ Total Hours breakdown
3. Client Total Hours Per Week Widget
   - ✓ Enter the **client name** and click the blue **Search** button to view the total hours worked for the client by week
4. Authorizations (Budget) Widget
   - ✓ Enter the **client name** and click the blue **Search** button to view details of all active authorizations (budgets) detailed on next slide
5. Profile Settings

The **Dashboard** is the landing page



Authorizations (Service Plan) Widget

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- The authorizations (service plan) widget allows the user to search by client (required) or optionally use the date filter to view approved authorizations (service plan) in the past, present, or future.
- As employees clock in/out, their time (units) will be deducted from the authorization and placed into a pre-authorization hold.
- Units in a pre-authorization hold remain in that status until billing and payroll have been processed. After payroll and billing completion, the units that were previously in a pre-authorization hold status will be deducted from the remaining balance and an updated remaining balance will be displayed.

Authorizations

KZ Client2 - T45158 | 06/18/2024 | Search | Reset | Display as Time

Authorizations display as units. Click to display as time.

Authorization for Client: **KZ Client2**

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
PCSED	01/01/2024	01/01/2025	10000.00 Units	9928.00 Units	68.00 Units	9860.00 Units	833.00 Units	208.00 Units	30.00 Units

Authorizations

KZ Client2 - T45158 | 06/18/2024 | Search | Reset | Display as Units

Authorizations display as time. **Click to display as units.**

Authorization for Client: **KZ Client2**

Service Code	Start Date	End Date	Initial Balance (1)	Remaining Balance (2)	Pre Authorization Holds (3)	Current Available Balance (4)	Monthly Max	Weekly Max	Daily Max
PCSED	01/01/2024	01/01/2025	2500 Hours, 0 Minutes	2482 Hours, 0 Minutes	17 Hours, 0 Minutes	2465 Hours, 0 Minutes	208 Hours, 15 Minutes	52 Hours, 0 Minutes	7 Hours, 30 Minutes

1. Initial Balance - Total amount of authorization
2. Remaining Balance - Amount remaining after pre-authorization holds have been processed for billing and payment
3. Pre-Authorization Holds - Amount deducted from the authorization that has not yet been processed for billing and payment
4. Current Available Balance - The total of the remaining balance minus any pre-authorization holds

Navigate to Pending Entries

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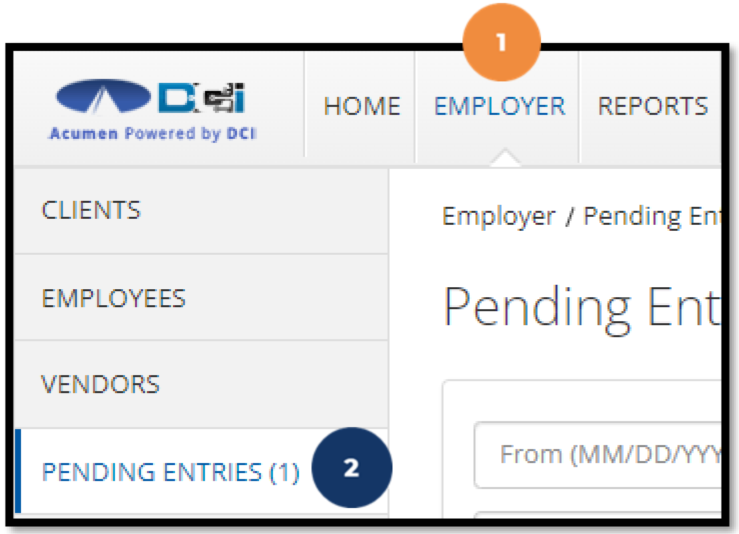
1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
   - ✓ The number of pending entries displays in parenthesis on the submenu



All entries requiring review/action appear in the table

Approve	Punch ID	Service Date	Start Time	End Time	Cost Center	Client/ Program Name	Employee/ Program Name	Service Code/Type	Amount	EVV	Needs Review
A R	68312	Dec 19, 2023	01:06 PM	01:10 PM	JVK Cost Center - JVKCostCenter			EVVRequired	0:00:04	No	
A R	68310	Dec 19, 2023	12:47 PM	12:51 PM	JVK Cost Center - JVKCostCenter			EVVRequired	0:00:04	YES	
A R	68306	Dec 19, 2023	11:57 AM	12:46 PM	Kenneth Cost Center - KEN			Hourly	0:00:49	YES	
A R	68304	Dec 19, 2023	01:18 PM	01:18 PM	Default Cost Center - 00-000			DPI Hourly	0:00:00	YES	

Facial Recognition Setup

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1. Take a picture of the client (participant). Photos must comply with the requirements below:
   - Participant is the only individual in the photo
   - Participant is facing the camera directly with a full face in view
   - Participant is not wearing sunglasses, hat, or any other accessory that alters the Participant's appearance.
   - Photos are taken with a solid color background
   - Photo size is 2MB or less
   - JPG format
2. Email the picture to Acumen Customer Service at customerservice@acumen2.net
   - ***Please note!** A valid email must be on file for the employer/client (participant) to set up facial recognition. The photo must be sent from the email on file.*
   - Type "Photo - Facial Recognition Setup" in the email subject line
   - Enter the client's name, state, and program (Kansas) in the body of the email
   - Acumen will send notification when setup is complete
     - ✓ Your employee will now be able to use Picture as an EVV option at clock out when using the mobile app

How does facial recognition work?

Facial recognition is the process of identifying or verifying a person's identity by comparing their face to a collection of pictures of them. It "learns" over time and becomes more accurate with each submission. Acumen will collect, but not share photos. Photos are stored in a secure business cloud and are only used by our facial recognition technology to verify that the client was present for the employee's visit.

Verify Picture

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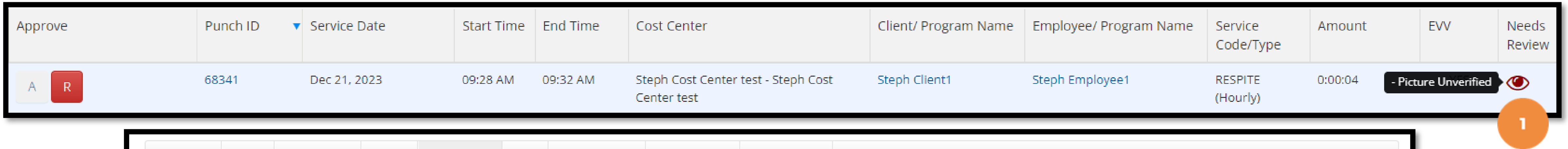
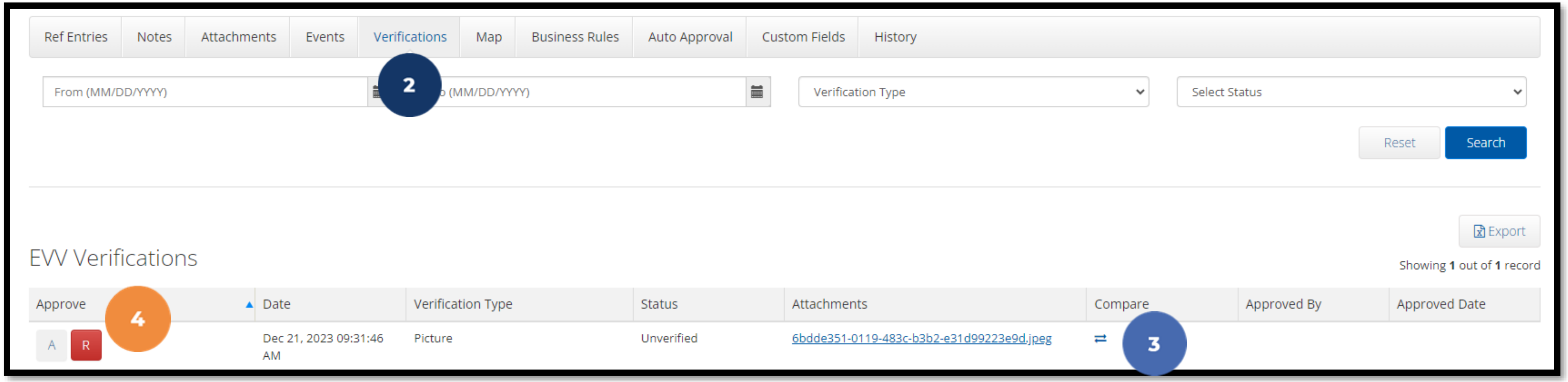
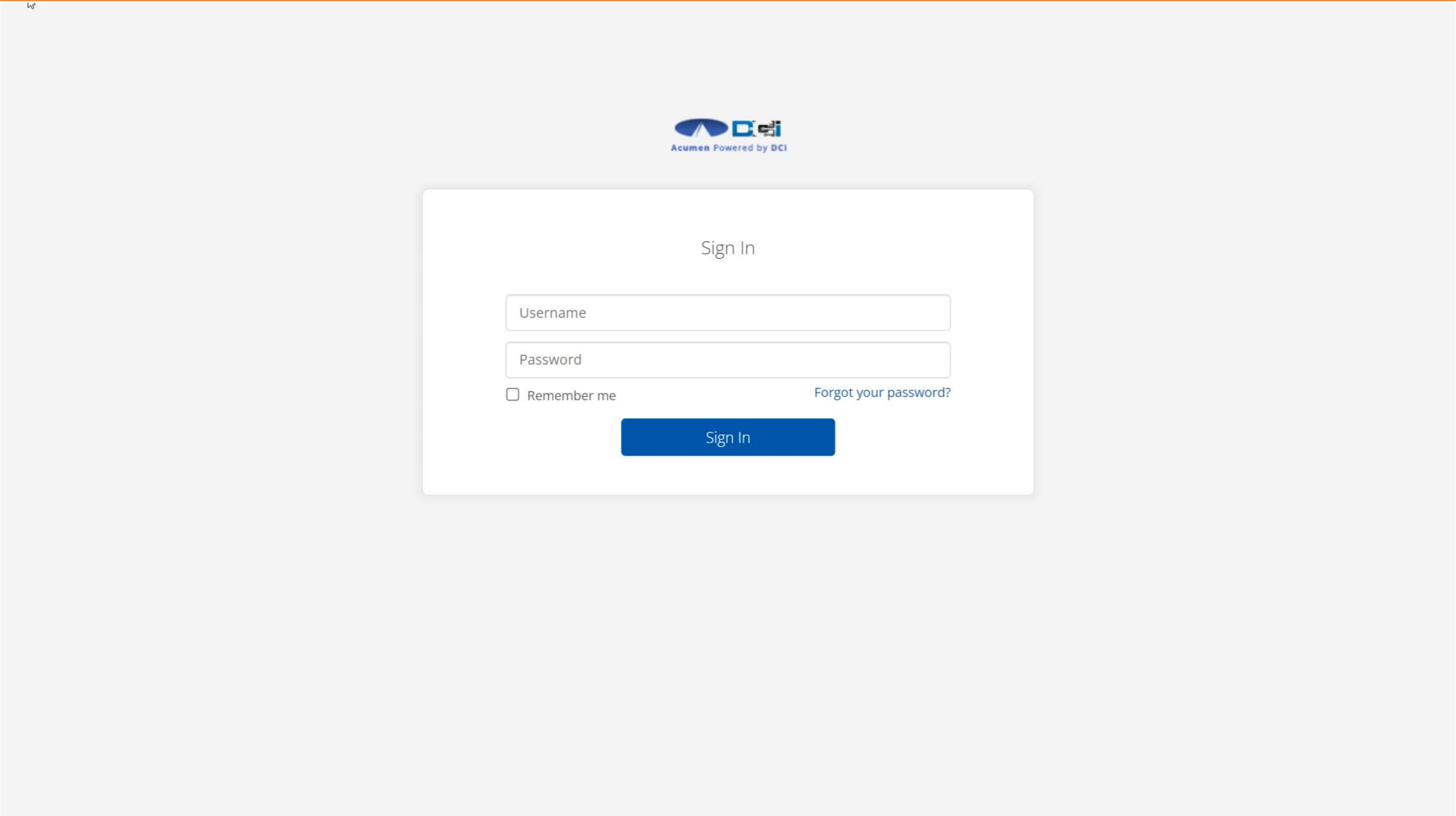
1. If an entry has a red eye icon in the Needs Review column, hover over it to see why it needs review. If it states, “Picture Unverified”, **click anywhere on the entry row** to open the punch details page.
2. Select the **Verifications** tab
3. Click the **double arrows** in the Compare column to compare the client’s profile picture with the EVV picture taken by the employee during the shift
4. Click the **A** to approve the picture or the red **R** to reject it. The punch may now be approved or rejected.





Employer Web Portal Video
Verify Picture



Proprietary: For Acumen and Customer Use Only

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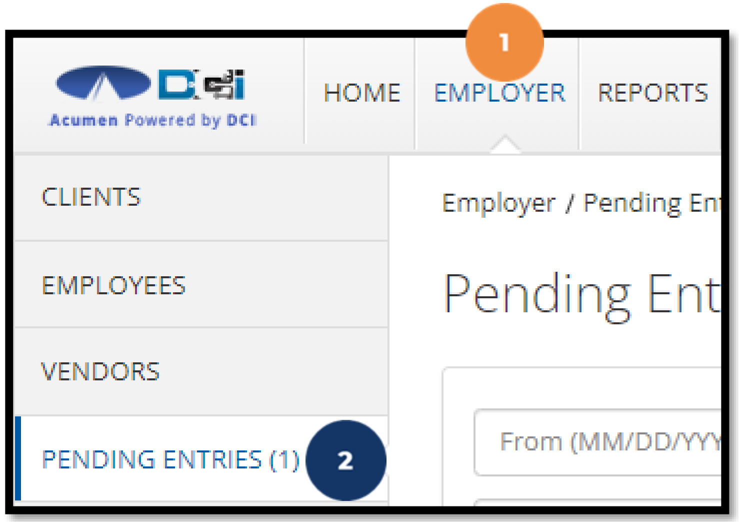
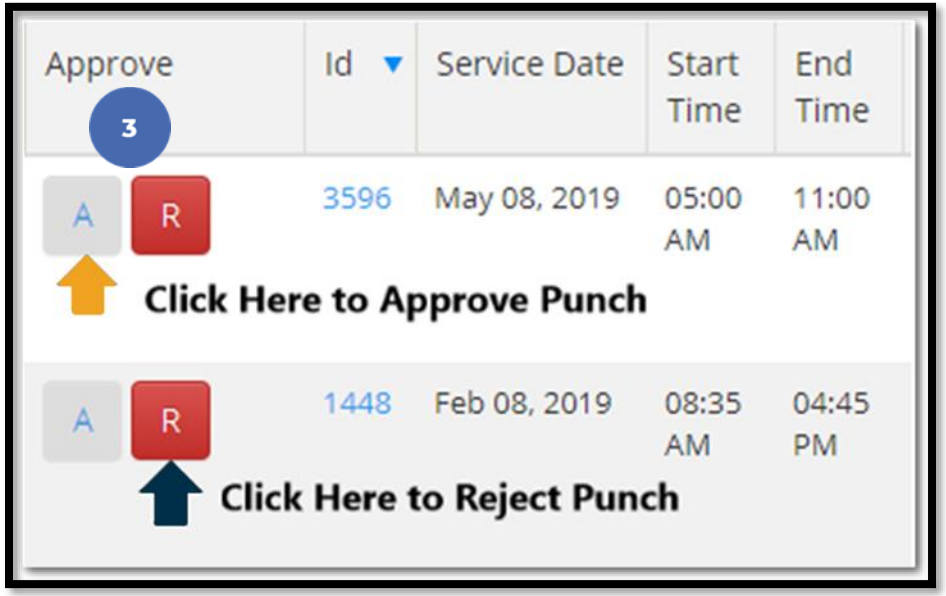
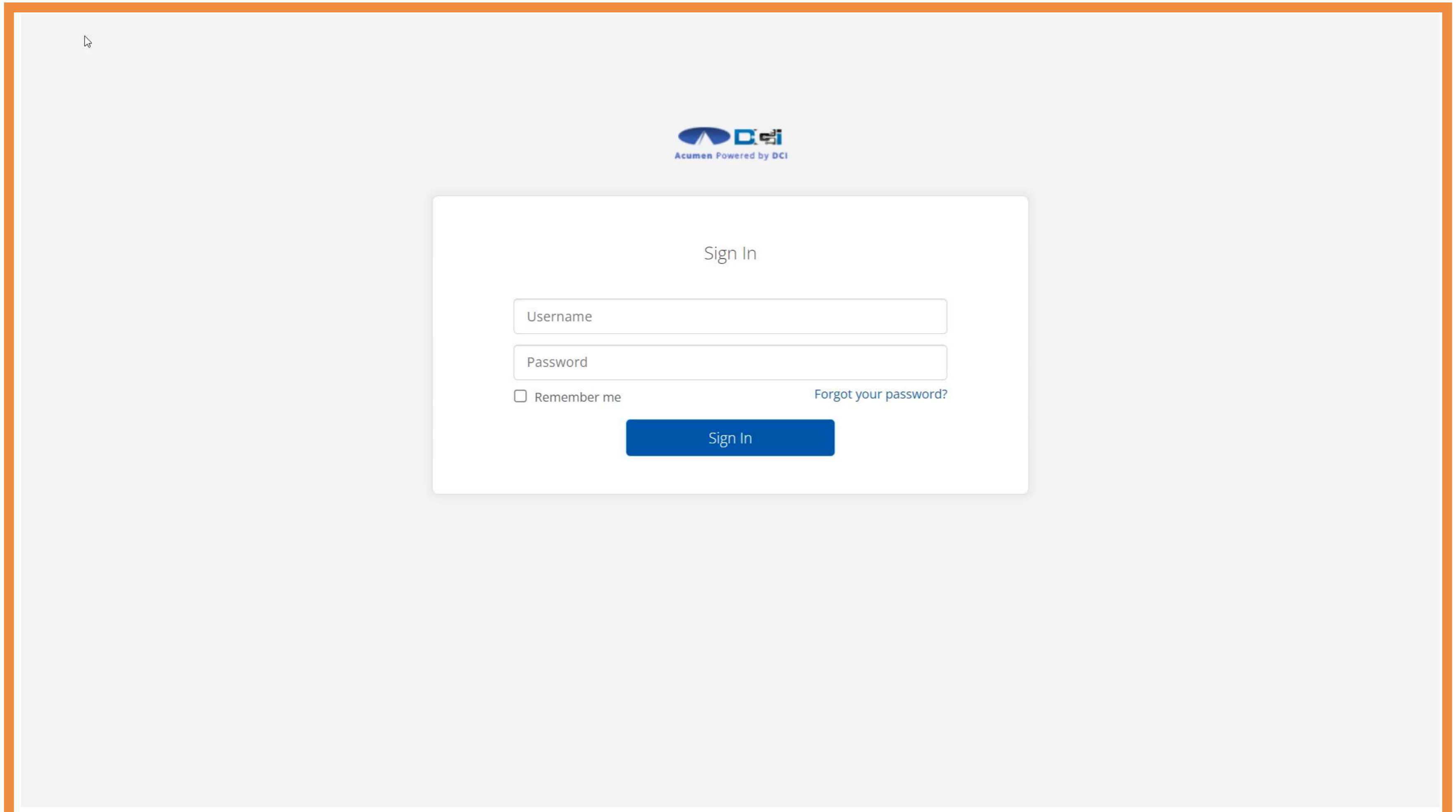
Manage Pending Entries

1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
   - ✓ The number of pending entries displays in parenthesis on the submenu
3. Any punch that requires approval is listed here
   - ✓ Review each entry
     - ➢ Click on the entry to view all details
   - ✓ Approve or reject
     - ➢ Click the **A** on the entry line to approve
       - ❖ **Entries must be approved within 30 days of the date of service**
       - ❖ **After days the approval will be prohibited as it will violate the timely filing business rule**
     - ➢ Click the red **R** on the entry line to reject
       - ❖ If an entry is rejected, ask the employee to re-enter the time correctly in the DCI web portal.





Employer Web Portal Video
Manage Entries



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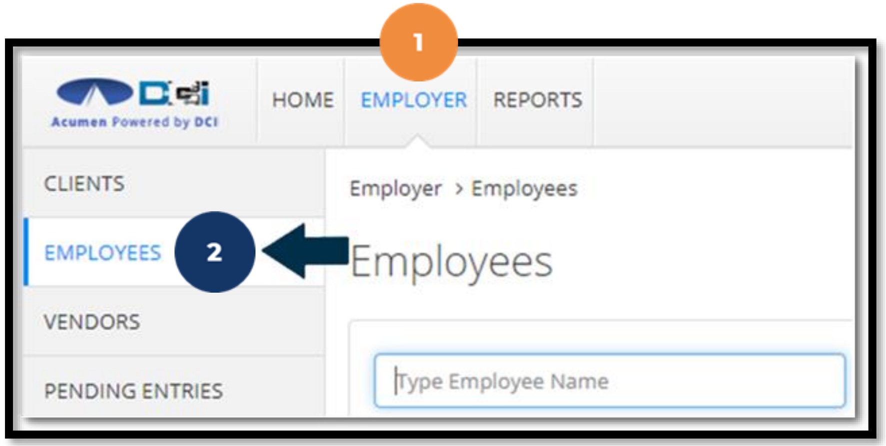
Using the Employees Page

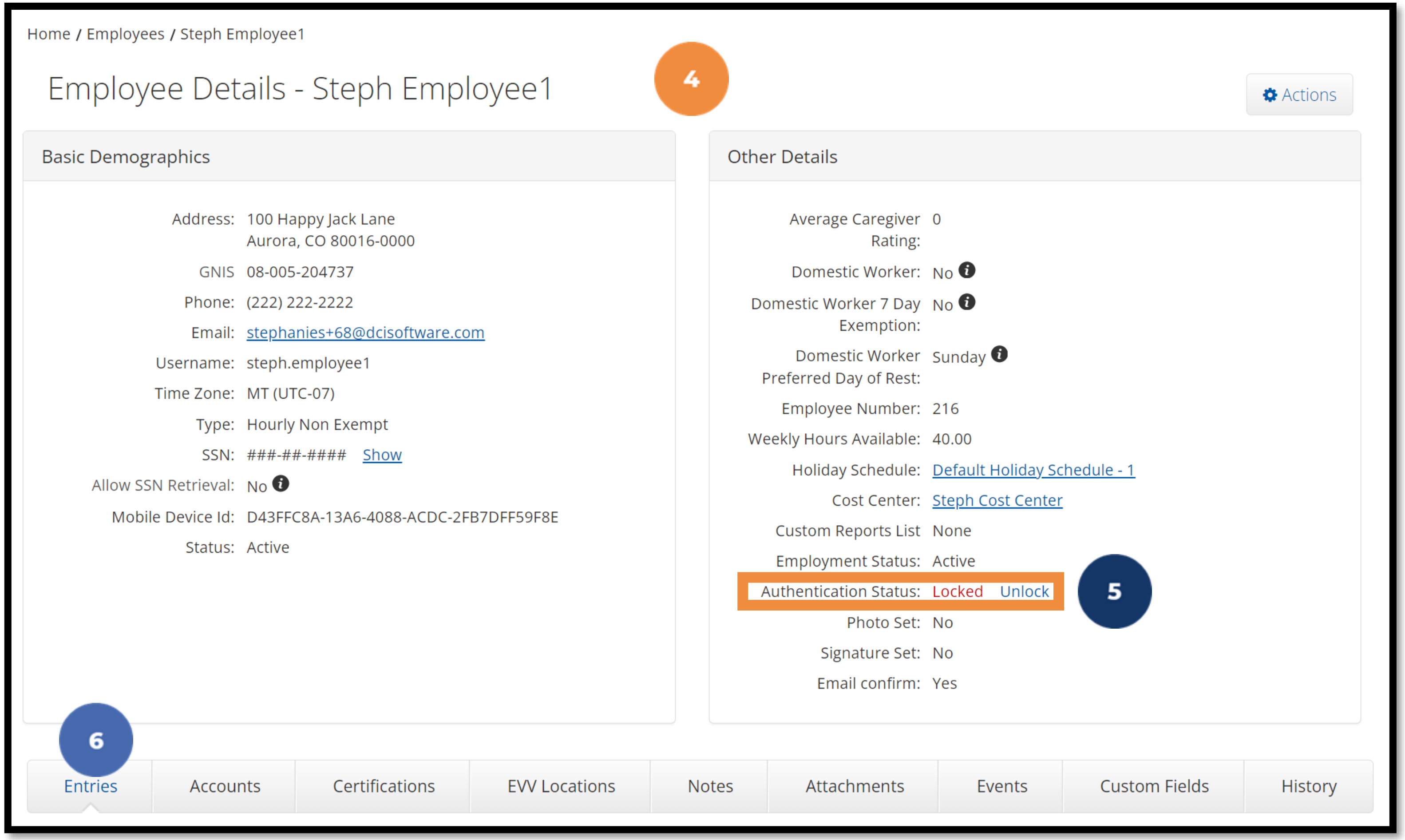
1. Click **Employer** on the main menu
2. Select the **Employees** tab from the submenu
3. Click anywhere on the selected employee's line



Name	Employee #	Phone #	Email	Time Zone	Type	Status
Steph Employee1 (3)	721	(222) 222-2222	stephanies+320@dcisoftware.com	MT (UTC-07)	Hourly Non Exempt	Active

Using the Employees Page (cont.)

4. View the employee details page
5. Unlock Employee Profile if needed
6. Scroll down to the Entries tab



Using the Employees Page (cont.)

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7. View the punch entries for the employee

8. Ensure all time for the pay period is <u>entered</u> and <u>approved</u> before the submission due date

Entries | Accounts | Certifications | EVV Locations | Notes | Caregiver Ratings | Attachments | Custom Fields | History

From (MM/DD/YYYY) | To (MM/DD/YYYY) | Type Punch Id | Type Client Name
Type Service Code | Select Account Type | Select Status

Reset | Search

Entries 7

Export

Showing **13** out of **13** records

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
1897873	Jul 12, 2023			Client Transportation	1897872	Steph Cost Center - 75	Steph Client1	Client Transportation	0.00	Approved
1894616	Jun 07, 2023	05:00 AM	08:00 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:03:00	Approved
1894612	Jun 04, 2023	04:00 PM	05:00 PM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:01:00	Approved
1894611	Jun 03, 2023	04:00 PM	06:00 PM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:02:00	Approved
1897872	Jul 12, 2023	06:22 AM	06:25 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:00:03	Pending
1894620	Jun 23, 2023	07:18 AM	07:19 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:00:01	Pending

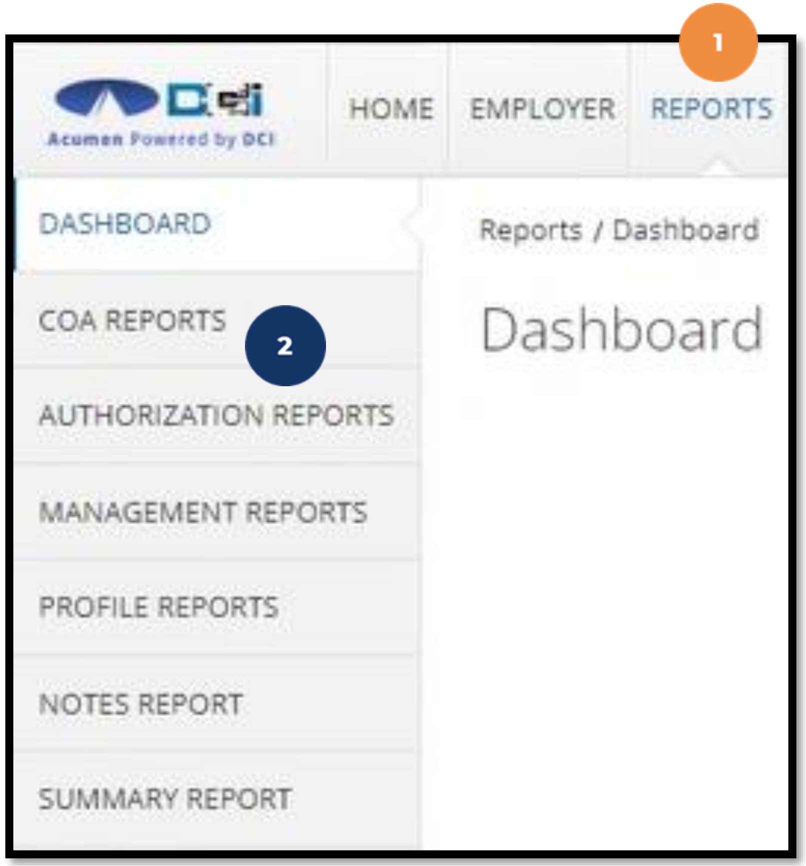
8

Entry Status

- **Unverified:** Entries that the Employer or Admin (someone other than the employee) enters or edits on behalf of an employee. The employee must resolve the unverified entries so the employer can review.
- **Unvalidated:** Temporary status. Entries that are waiting for the business rule validation process to complete. This process runs multiple times an hour. Moves to pending or rejected status after processes run.
- **Pending:** Entries that are awaiting review and approval by the Employer. Display on the Pending Entries page.
- **Rejected:** Entries that have been rejected by the Employer or a system process
- **Approved:** Entries that have been approved by the Employer and are ready to be processed
- **Batched:** An approved entry that has been included in a pending payroll batch
- **Processed:** Entries that have been processed and are ready for payroll

Using Reports

1. Select **Reports** on the main menu
2. Select a report category from the submenu
   - ✓ COA Reports
     - ➢ Punch Entries Report – Use the filters to locate specific entries
   - ✓ Authorization (Service Plan) Reports
     - ➢ Authorization Run Rate Report – View the service plan usage breakdown by client, account type, or service code.
   - ✓ Notes Reports
     - ➢ Punch Entry Notes Report - Pull service notes entered on punches
   - ✓ **Summary Report** - Breakdown of punches and percentages of service plan units remaining

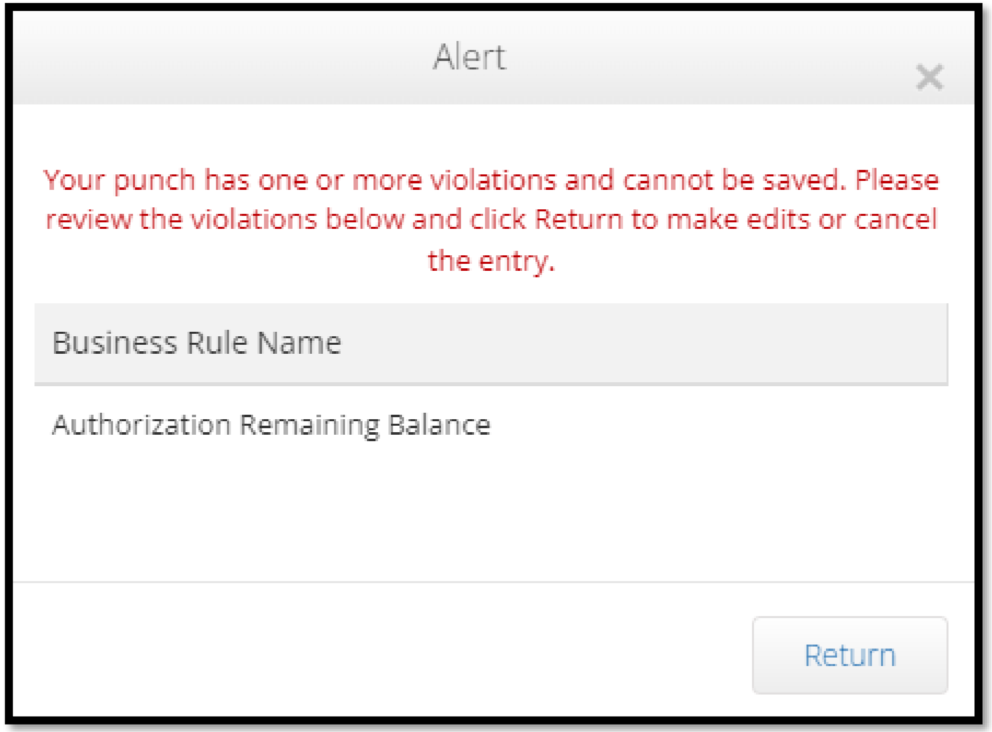


Troubleshooting

Alerts

Business rules are a tool used by your organization to validate, by service code, specific requirements mandated by that service. When a punch violates a business rule, the employee will receive an alert explaining the violation and what action needs to be taken.

One of the most common business rules is the **Authorization Remaining Balance** rule. This rule checks to see that there are enough funds in the authorization/service plan to cover the punch.



- The employee will receive this alert and cannot save the punch
- They must edit the punch or cancel the entry
- The employer should review their unit utilization

Alerts

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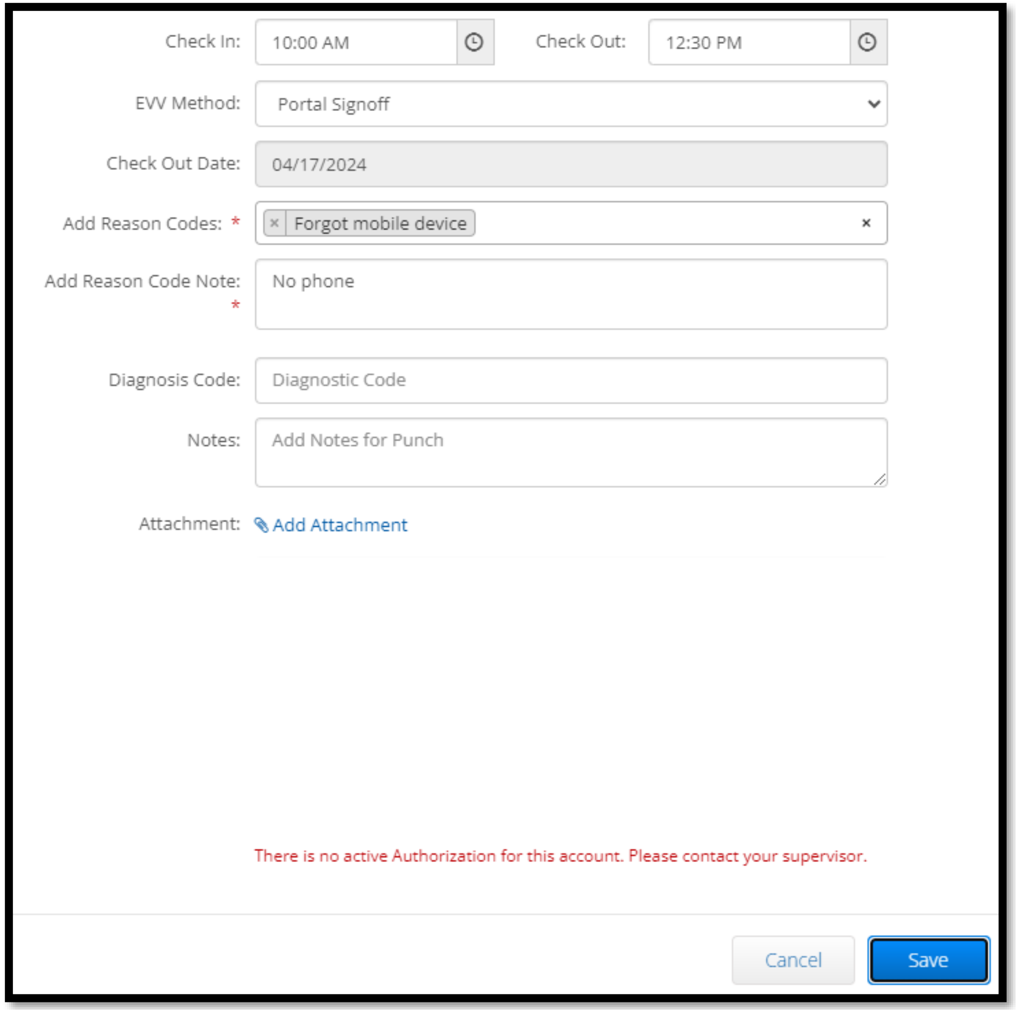
Many other business rules pertain to the authorization/service plan such as the **Authorization Expiration Date** rule.



- The employee will receive this alert when attempting to punch for a date after the authorization/service plan has expired
- They cannot save the punch
- The employee should contact the employer
- The employer should verify their authorization data in DCI

Alerts

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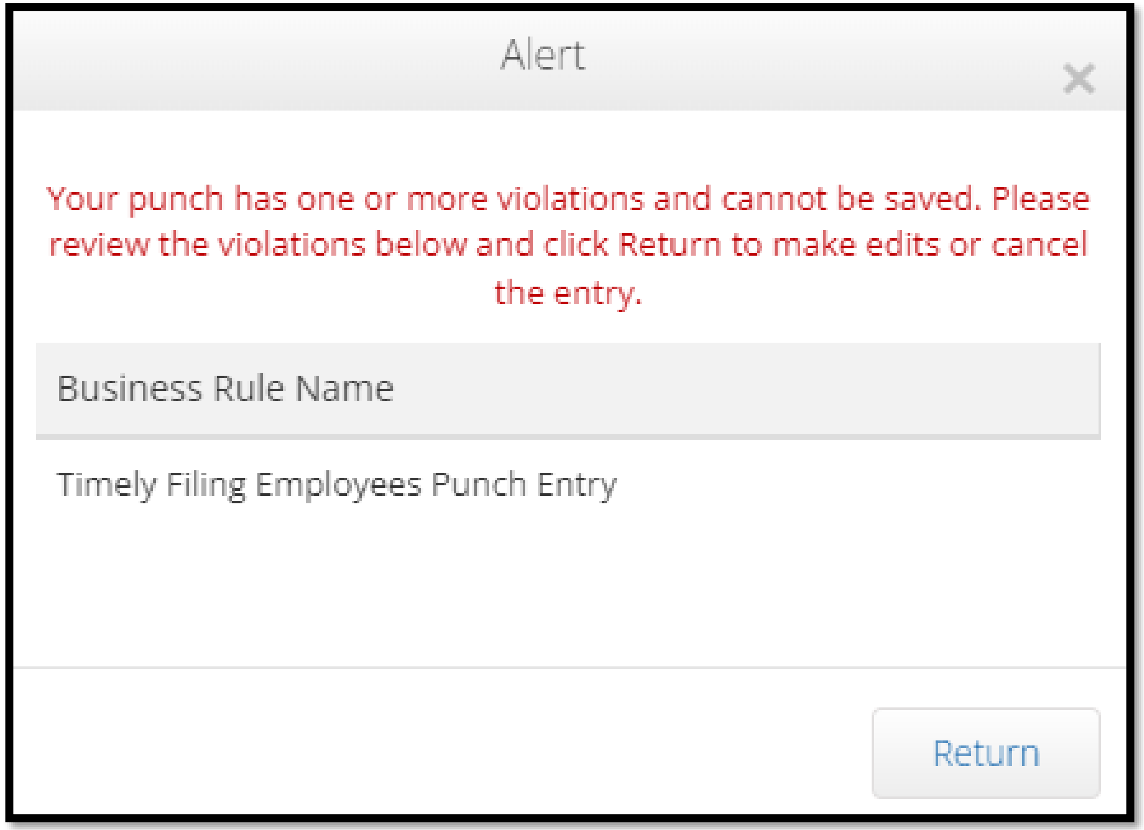
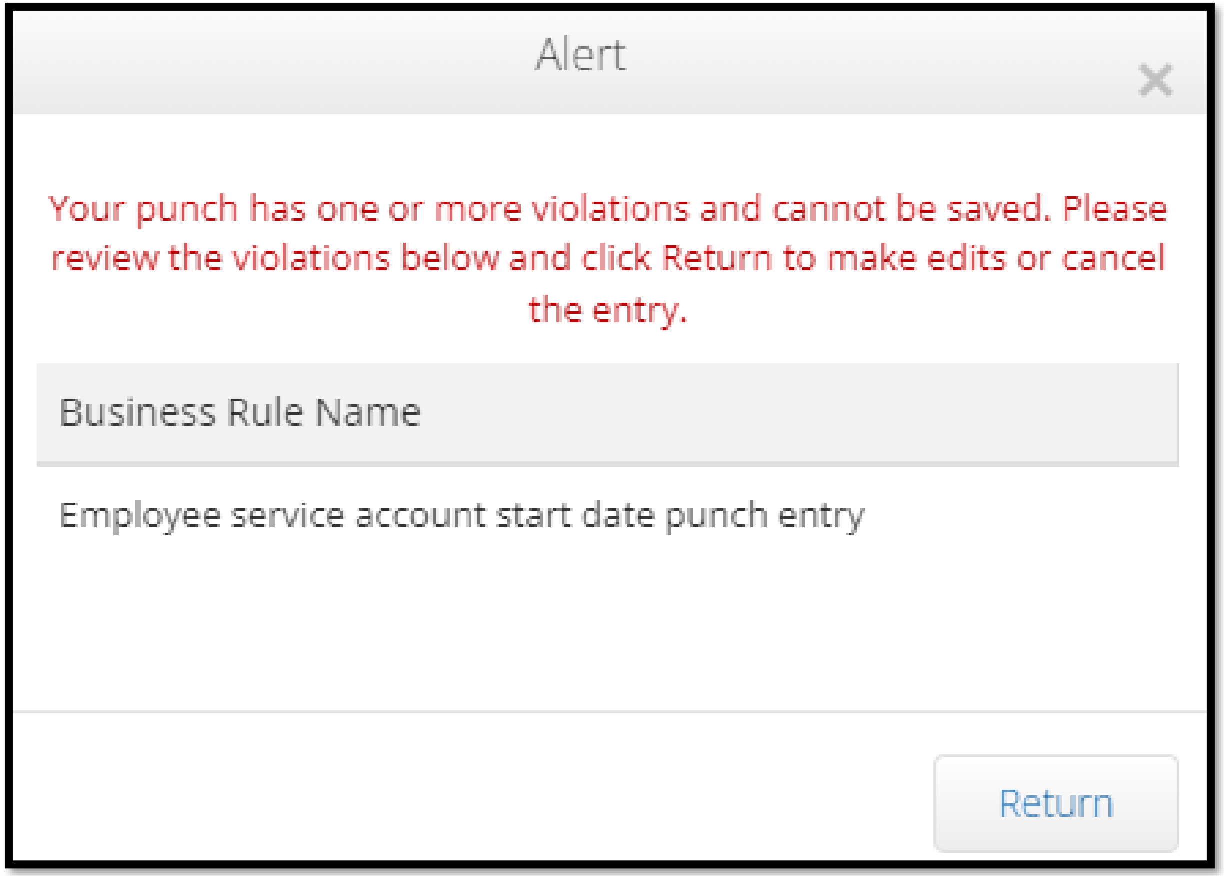
Punches must be **entered AND approved** within 30 days of the date of service. After 30 days the **Timely Filing Employees Punch Entry** or the **Timely Filing Employee Punch Approval** rules will prohibit the punch from being saved.



- The employee will receive this alert when attempting to punch for a date that is more than 30 days after the date of service
  - ➢ The Timely Filing Employee Punch Approval alert would show if the punch was created within the timeframe, but the employer was attempting to APPROVE the punch more than 30 days after the date of service.
- The employee cannot save the punch
  - ➢ Or, in the case of the Timely Filing Employee Punch Approval alert, the employer would be unable to approve the punch.
- No action can be taken

Alerts

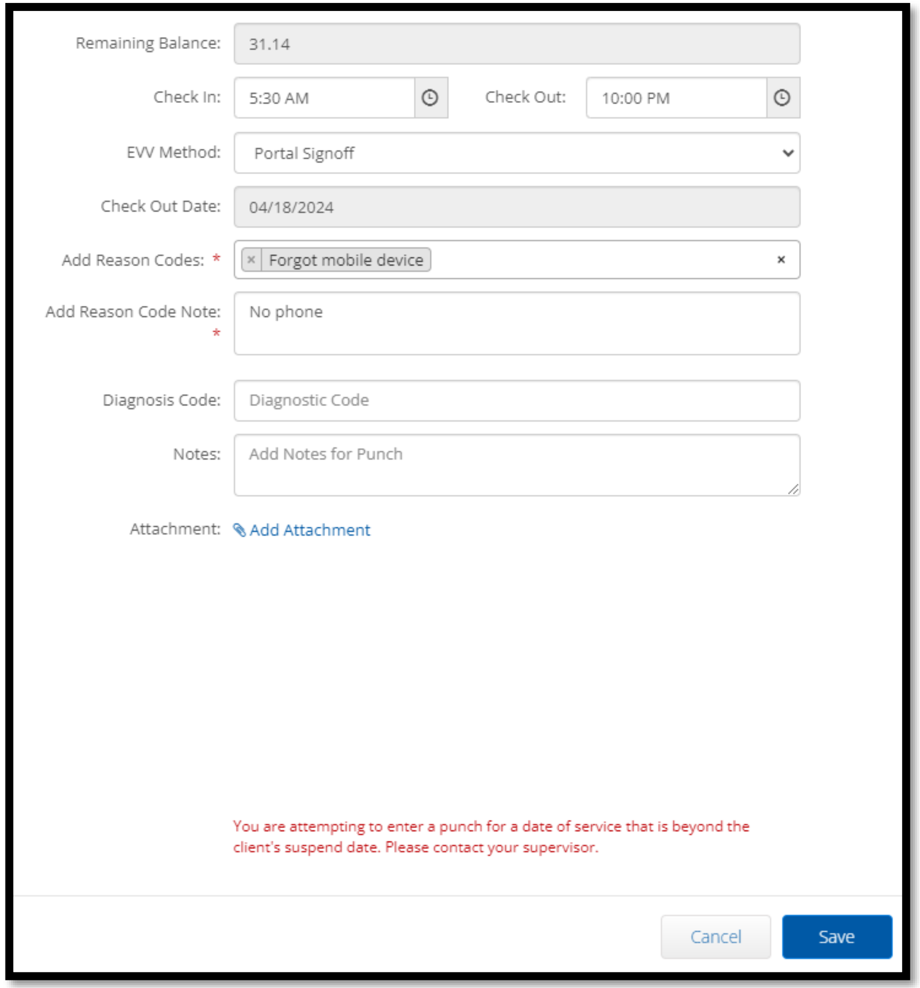
Punches may only be entered for an active service account. If the employee attempts to enter a punch before the start date or after the end date of the service account, they cannot save the punch. This triggers either the **Employee Service Account Start Date Punch Entry** rule or the **Employee Service Account End Date Punch Entry** rule.



- The employee cannot save the punch
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

Alerts

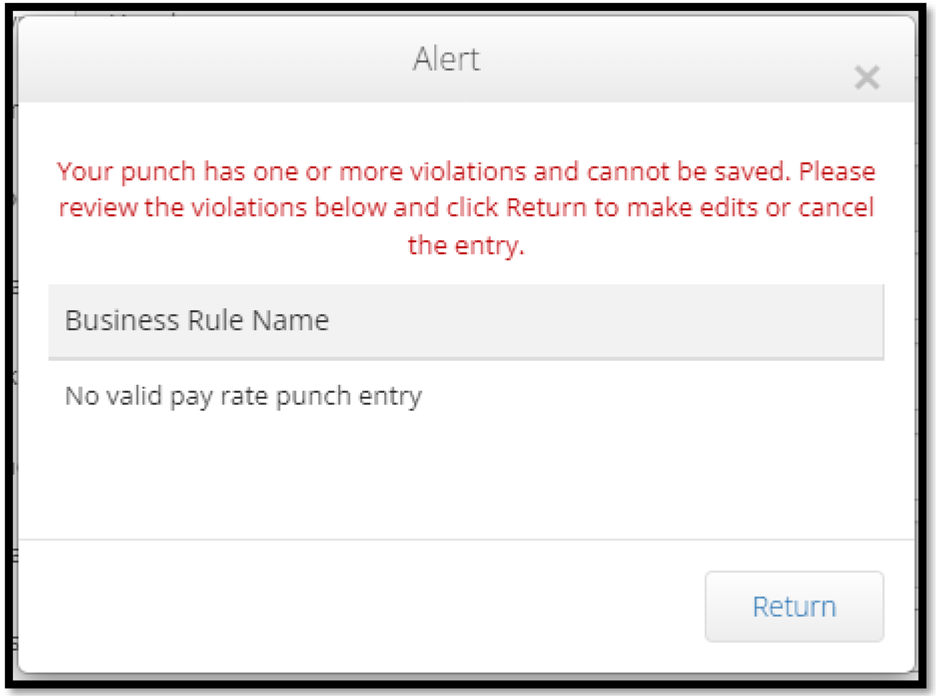
If enrollment is on hold, or the client cannot receive service, the client profile will be suspended. Punch entries cannot be added after the suspension date.



- The employee cannot save the punch
  - While the system allows the employee to log in on the mobile app, they cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

Alerts

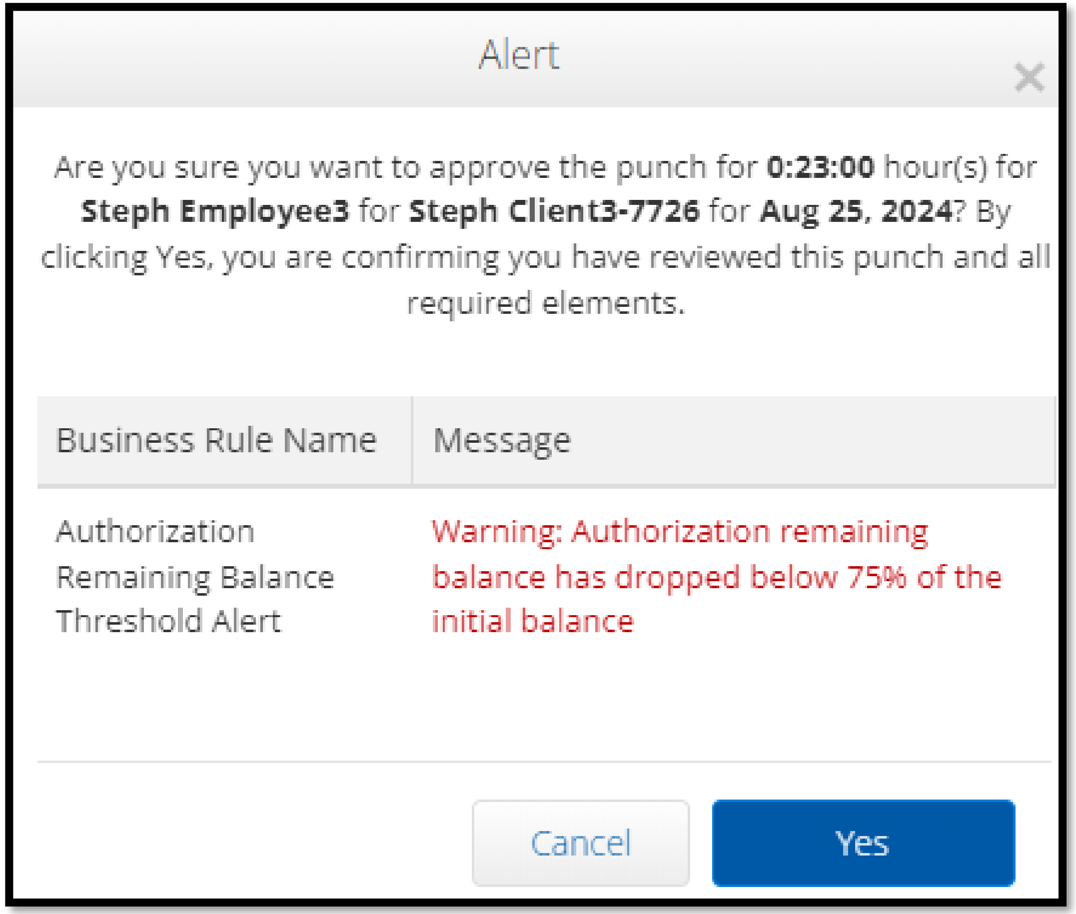
If enrollment was on hold, or the client couldn't receive service for a period of time, the employee would have no valid pay rate for that date range. The date of service the employee is attempting to enter a punch entry for has no valid pay rate.



- The employee cannot save the punch
  - ➢ While the system allows the employee to clock in on the mobile app, they cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

Alerts

If the punch causes the authorization remaining balance to drop below 75% of the initial balance, an alert displays at the time of approval. It does not stop the punch from being approved.



Phone IVR
(Interactive Voice Response)

*Option when access to a mobile device or computer is limited

Phone EVV Basics

- **Employer - Confirm the <u>landline</u> phone number on file with Acumen is for the client**
  - ✓ Employees must call from a recognized number only

    ***Please note!** If calling from a number not associated with the client, the employee will receive an error message.
- **Employee - Will be asked to validate the following information:**
  - ✓ Last four digits of their social security number
  - ✓ PIN (add in the web portal under user settings)
  - ✓ MMDD of their birthday
  - ✓ Client Name & Service Code for the shift
- **Client or Employer – Need client PIN for historical (non-EVV-compliant) phone entries**
  - ✓ Client PIN is on the Employer Good To Go letter

Clock In: Real Time Entry

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1. Sign in:
   - ✓ Call (855) 807-9595 from the client's landline to start the shift
   - ✓ Enter the last four digits of the social security number
   - ✓ Enter PIN
   - ✓ Enter month/day of birth (MMDD)
2. Press 1 for hourly
3. Confirm the client's name with the prompt given
4. Press 1 for real time entry
5. Select the service code with the prompts given
6. Depending on program settings, the available balance may be announced. Press 1 to continue.
7. Select "none" for the clock in EVV location
8. Press 1 to confirm and save the punch
9. The recording will read back the punch details and then disconnect

Clock Out: Real Time Entry

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1. Sign in:
   - ✓ Call (855) 807-9595 from the client's landline to end the shift
   - ✓ Enter the last four digits of the social security number
   - ✓ Enter PIN
   - ✓ Enter month/day of birth (MMDD)

2. The system announces that there is an open punch. When prompted, press 1 to confirm closing the punch.

4. Select "none" for the clock out EVV location

5. The punch is now closed, and the employee is clocked out. Press 2 to disconnect or 1 to open a new punch.

Historical Entry

***Please note!** Historical entries are only used for a missed punch or punch correction due to service interruption. The goal should always be to enter punches in real time to maintain EVV compliance.

The client or employer must be present at the end of this process.

1. Sign in:
   - ✓ Call (855) 807-9595 from the client's landline to enter the shift
   - ✓ Enter the last four digits of the social security number
   - ✓ Enter PIN
   - ✓ Enter month/day of birth (MMDD)
2. Press 1 for hourly
3. Confirm the client's name with the prompt given
4. Press 2 for historical entry
5. Select the service code with the prompts given
6. Depending on program settings, the available balance may be announced. Press 1 to continue.

Historical Entry (cont.)

7. Enter the date of service in MMDDYYYY format (i.e., September 18, 2024 = 09182024)
8. Enter the clock-in time in HH:MM (i.e., 0830)
9. Select 1 for AM or 2 for PM
10. Enter the clock-out time in HH:MM (i.e., 0530)
11. Select 1 for AM or 2 for PM
12. Select “none” for the clock in EVV location
13. Select ”none” for the clock out EVV location
14. The system will read back the punch details. Press 1 to confirm or 2 to edit.

Historical Entry (cont.)

***Please Note!** The client or employer <u>must</u> be present for the following final steps:

15. Hand the phone to the client/employer who presses 1 when ready
16. The client/employer reviews the punch details and presses 1 to accept or 2 to reject the entry
17. The client/employer will validate the call using the client PIN
18. The punch is created
19. The phone disconnects and the shift is recorded

Troubleshooting

- **Is the employee having trouble signing in?**
  - ✓ PIN not working? Update under profile settings
  - ✓ Employee can call Acumen to confirm their date of birth & last four digits of their social security number on their profile
- **Is the employee having trouble clocking in?**
  - ✓ Only call from the client's landline
    - ➢ Call Acumen to confirm the client's number
- **Is the employee having trouble adding historical entries?**
  - ✓ Enter the date & time in the correct format (MM/DD/YYYY & HH:MM)
  - ✓ Do not overlap with other employee's shifts
- **Is the client having trouble validating the entry?**
  - ✓ Employer calls Acumen to reset their client PIN
- **Does the employee need to edit or reject an entry?**
  - ✓ Entries cannot be edited or rejected using Phone EVV. The employee must use the web portal instead.

Payroll Schedule & Deadlines

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Important Reminders!

- December 22nd – January 4th: Employers and workers begin submitting time. Program workers and support brokers submit payment submission on behalf of the participant.
- December 30th: Deadline for program workers and support brokers to submit payment submission on behalf of the participant
- January 3rd: First payday with Acumen for payment submissions (reimbursements & vendor payments)
- January 6th: Deadline to submit time to Acumen
- January 10th: First payday with Acumen for hourly employees
- Time must be **entered and approved** online **by the due date**, *even if it falls on a weekend or holiday*.
  - ❖ Time entries approved after the due date will be processed on the following pay period's pay date
- Provider payment requests must be received by the Submissions Due date
  - ❖ Requests submitted after the due date will be processed on the following pay period's pay date
- After 30 days the entry will be prohibited as it will violate the timely filing business rule
  - ❖ All time entries must be **entered and approved** within **30 days of the date of service**
  - ❖ All vendor & reimbursement payment entries must be **submitted** within **30 days of the date of service**

Provider Payment Schedule

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- Ensure time entries are received by the Submissions Due Date
- Time submitted after the due date will be processed in the following pay period
- First paycheck from Acumen will be January 10th, 2025.
- Pay day is every other Friday
- Time must be **entered and approved** within **30 days of the date of service**
- Questions? Contact Acumen customer service at (866) 427-1739 or email enrollment@acumen2.net

Please keep a copy in a safe place for easy reference.

"Payment Period End Date" is the last day of services in

"MONTH" refers to the month that services were provided

"Submissions Due Date - NO Later Than" is the last date that your clock-in time/time entry can be submitted and approved, for the pay period to be paid as scheduled.

"Direct Deposit/ Check Date" shows the date that payment will be issued. For those payees that have selected electronic fund transfers, this is also the date that funds will be available in their accounts.

MONTH	Payment Period End Date	Submissions Due Date NO Later Than	Direct Deposit/Check Date
January	Sat, 01/04/25	Mon, 01/06/25	Fri, 01/10/25
	Sat, 01/18/25	Mon, 01/20/25	Fri, 01/24/25
February	Sat, 02/01/25	Mon, 02/03/25	Fri, 2/07/25
	Sat, 02/15/25	Mon, 02/17/25	Fri, 02/21/25
March	Sat, 03/01/25	Mon, 03/03/25	Fri, 03/07/25
	Sat, 03/15/25	Mon, 03/17/25	Fri, 03/21/25
	Sat, 03/29/25	Mon, 03/31/25	Fri, 04/04/25
April	Sat, 04/12/25	Mon, 04/14/25	Fri, 04/18/25
	Sat, 04/26/25	Mon, 04/28/25	Fri, 05/02/25
May	Sat, 05/10/25	Mon, 5/12/25	Fri, 05/16/25
	Sat, 05/24/25	Mon, 5/26/25	Fri, 05/30/25
June	Sat, 06/07/25	Mon, 06/09/25	Fri, 06/13/25
	Sat, 06/21/25	Mon, 06/23/25	Fri, 06/27/25
July	Sat, 07/05/25	Mon, 07/07/25	Fri, 07/11/25
	Sat, 07/19/25	Mon, 07/21/25	Fri, 07/25/25
August	Sat, 08/02/25	Mon, 08/04/25	Fri, 08/08/25

Please keep a copy in a safe place for easy reference.

Purchasing Items, Submitting Vendor Payments & Reimbursements

- This process is staying the same! Continue to work with your support broker to purchase items, and to request vendor payments and reimbursements.
  - ✓ Submit itemized receipt (with payment date and amount) or an invoice to your support broker
- Support broker submits it to Acumen for payment

Vendor Payment Schedule (vendor payments & reimbursements)

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- Ensure provider payment requests are received by the Submissions Due Date
- Requests submitted after the due date will be handled in the following pay period
- First paycheck from Acumen will be January 3rd, 2025.
- Pay day is every Friday
- Vendor payments must be **<u>entered and approved</u>** within **<u>30 days of the date of service</u>**
- Questions? Contact Acumen customer service at (866) 427-1739 or email vendor-ma@acumen2.net

Payment Period End Date last day of services in pay period

Month that services were provided in

MONTH	Payment Period End Date	Submissions Due NO Later Than	Direct Deposit/Check Date
December	Sat, 12/28/2024	Mon, 12/30/24	Fri, 01/03/25
January	Sat, 01/04/25	Mon, 01/06/25	Fri, 01/10/25
	Sat, 01/11/25	Mon, 01/13/25	Fri, 01/17/25
	Sat, 01/18/25	Mon, 01/20/25	Fri, 01/24/25
	Sat, 01/25/25	Mon, 01/27/25	Fri, 01/31/25
February	Sat, 02/01/25	Mon, 02/03/25	Fri, 2/07/25
	Sat, 02/08/25	Mon, 02/10/25	Fri, 02/14/25
	Sat, 02/15/25	Mon, 02/17/25	Fri, 02/21/25
	Sat, 02/22/25	Mon, 02/24/25	Fri, 02/28/25
March	Sat, 03/01/25	Mon, 03/03/25	Fri, 03/07/25
	Sat, 03/08/25	Mon, 03/10/25	Fri, 03/14/25
	Sat, 03/15/25	Mon, 03/17/25	Fri, 03/21/25
	Sat, 03/22/25	Mon, 03/24/25	Fri, 03/28/25
	Sat, 03/29/25	Mon, 03/31/25	Fri, 04/04/25
April	Sat, 04/05/25	Mon, 04/07/25	Fri, 04/11/25
	Sat, 04/12/25	Mon, 04/14/25	Fri, 04/18/25
	Sat, 04/19/25	Mon, 04/21/25	Fri, 04/25/25
	Sat, 04/26/25	Mon, 04/28/25	Fri, 05/02/25
May	Sat, 05/03/25	Mon, 5/05/25	Fri, 05/09/25
	Sat, 05/10/25	Mon, 05/12/25	Fri, 05/16/25
	Sat, 05/17/25	Mon, 05/19/25	Fri, 05/23/25
	Sat, 05/24/25	Mon, 05/26/25	Fri, 05/30/25
June	Sat, 05/31/25	Mon, 06/02/25	Fri, 06/06/25
	Sat, 06/07/25	Mon, 06/09/25	Fri, 06/13/25
	Sat, 06/14/25	Mon, 06/16/25	Fri, 06/20/25
	Sat, 06/21/25	Mon, 06/23/25	Fri, 06/27/25
July	Sat, 06/28/25	Mon, 06/30/25	Thu, 07/03/25
	Sat, 07/05/25	Mon, 07/07/25	Fri, 07/11/25
	Sat, 07/12/25	Mon, 07/14/25	Fri, 07/18/25
	Sat, 07/19/25	Mon, 07/21/25	Fri, 07/25/25
August	Sat, 07/26/25	Mon, 07/28/25	Fri, 08/01/25

Please keep a copy in a safe place for easy reference.

Submissions Due No Later Than is the last date that your vendor payment request can be submitted, to be paid

Direct Deposit \ Check Date is the date the payment will be issued. Payees that have selected direct deposit, this is also the date that funds will be available.

Where to go for help?

- **Utilize the website acumenfiscalagent.zendesk.com for more help**
  - This will give you a full list of Training Materials for DCI

Acumen – (866) 427-1739

https://acumenfiscalagent.com/state/massachusetts/

For payment or other questions, please complete the Contact Us form at www.acumenfiscalagent.com/contact or email us at enrollment@acumen2.net.

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DIRECT CARE INNOVATIONS
Acumen powered by DCI

Questions?

Thank you!

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