Massachusetts Training for Participants and Families

Acumen Fiscal Agent

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Agenda

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- ✓ Overview & Requirements
- ✓ Mobile App
- ✓ Web Portal
- ✓ Payroll Schedule & Deadlines
- ✓ Resources

Quick Resources

- **Short step-by-step resource documents have been added to the [Massachusetts – Training Materials](#) page providing instructions for reviewing budgets, reports, and viewing vendor payment entries submitted by your state representative for program support in the web portal.**

- **Resources:**
  - ✓ Download the DCI Mobile EVV App & Log In
  - ✓ Logging into the Web Portal or the Mobile App
  - ✓ Employer Manage Budgets

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DCI
DIRECT CARE INNOVATIONS
Acumen powered by DCI

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>

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

DCI Mobile App

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Mobile App Basics

- Can be downloaded on a mobile device or tablet
- Quick, easy, and convenient!
- View all entries including status & details

Download DCI Mobile EVV

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1. [Download](#) the ***DCI Mobile EVV*** App

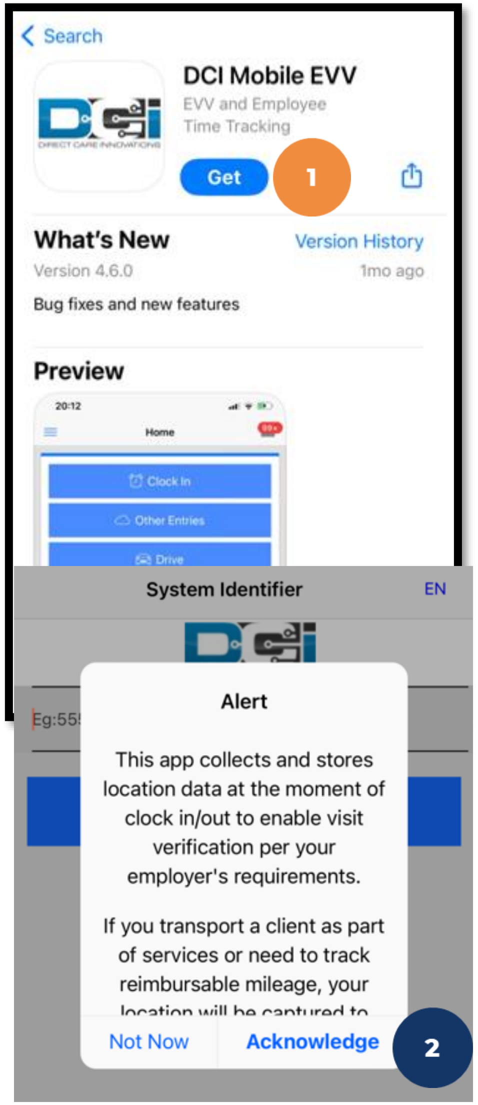
Available on the App Store | GET IT ON Google Play

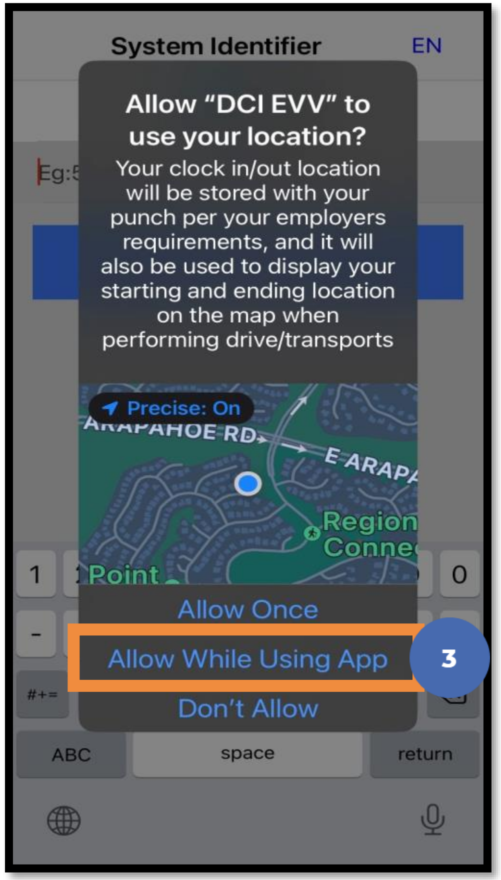
2. Select Acknowledge on the Alert
   - The alert states the app collects and stores location data at clock in and clock out, if you transport a client as part of services and/or need to track reimbursable mileage

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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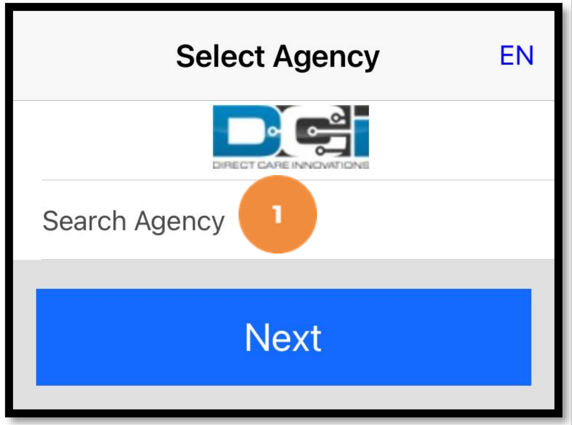
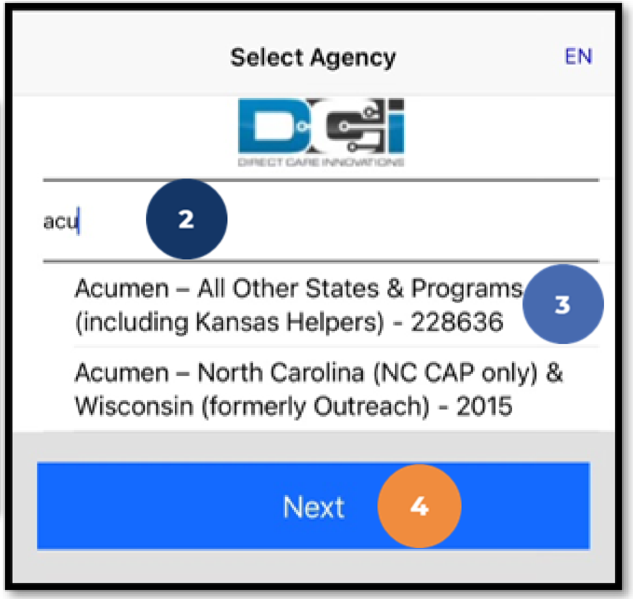
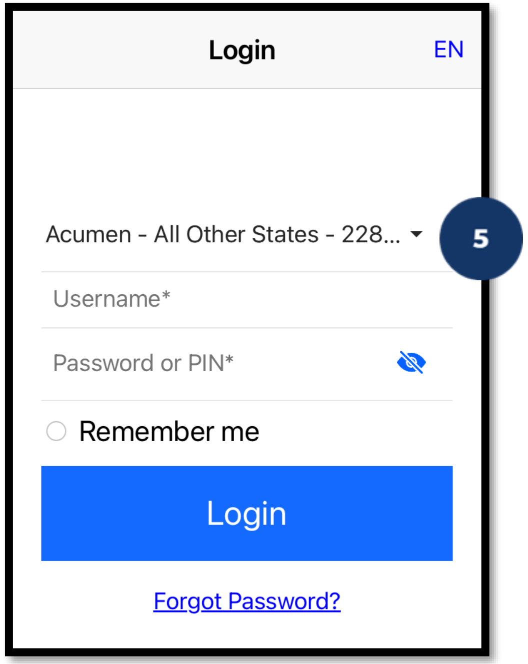
1. After downloading the app, the Select Agency screen appears with a Search Agency field.
2. **Type at least three consecutive characters of the agency name OR the system identifier** in the Search Agency field.
   - ❖ The Acumen system identifier for All Other States & Programs (including Kansas Helpers) 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

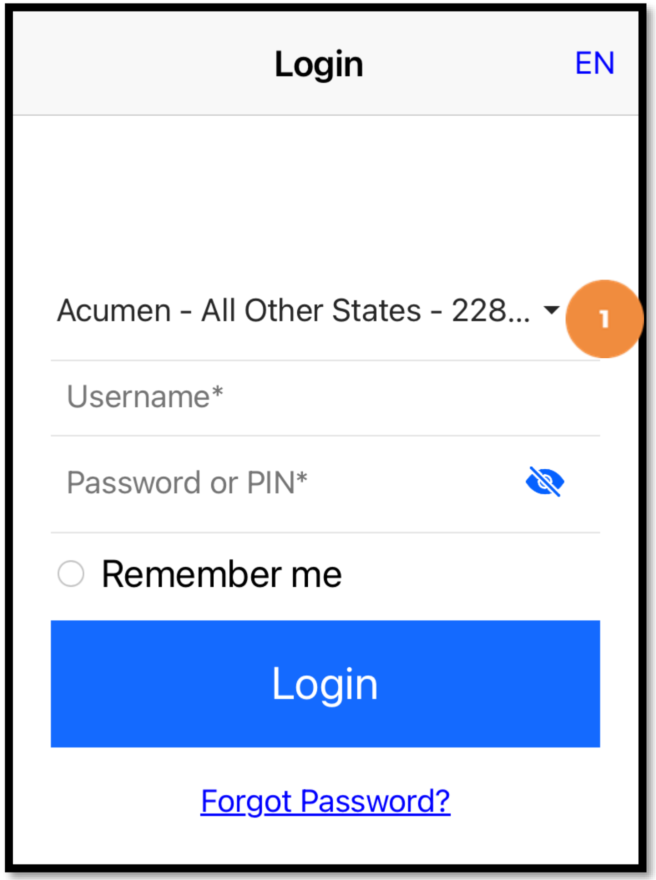


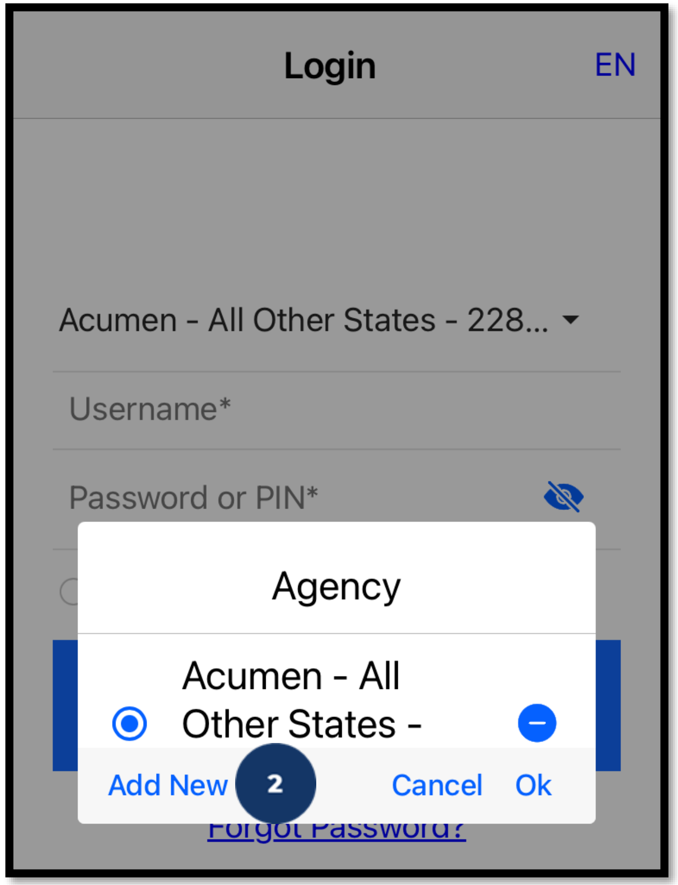




Add More Agencies

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

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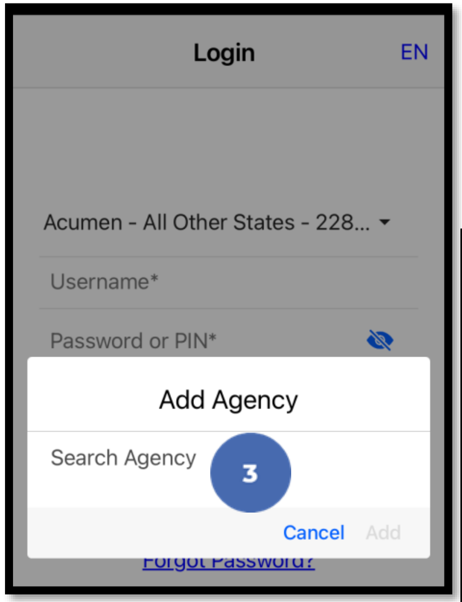
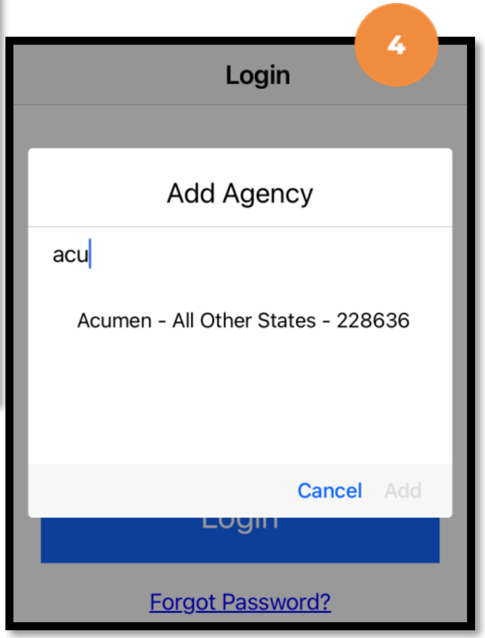
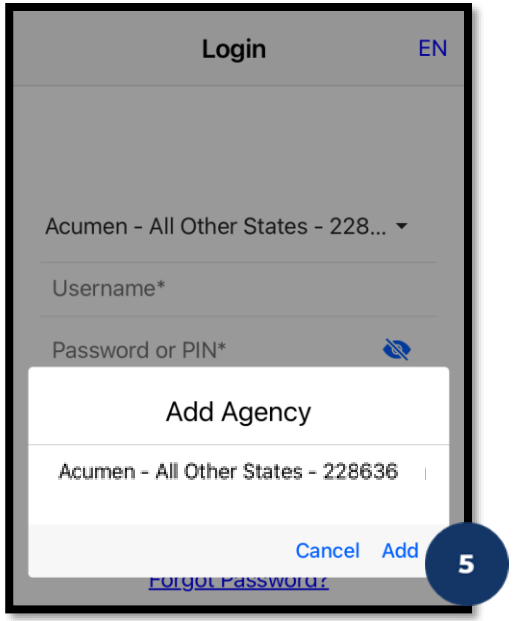
3. On the Add Agency window, **type at least three consecutive characters of the agency name OR the system identifier** in the Search Agency field.
   - ❖ The consecutive characters can be located anywhere in the agency name or system identifier
4. **Select the agency** from the list
5. Click **Add**







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

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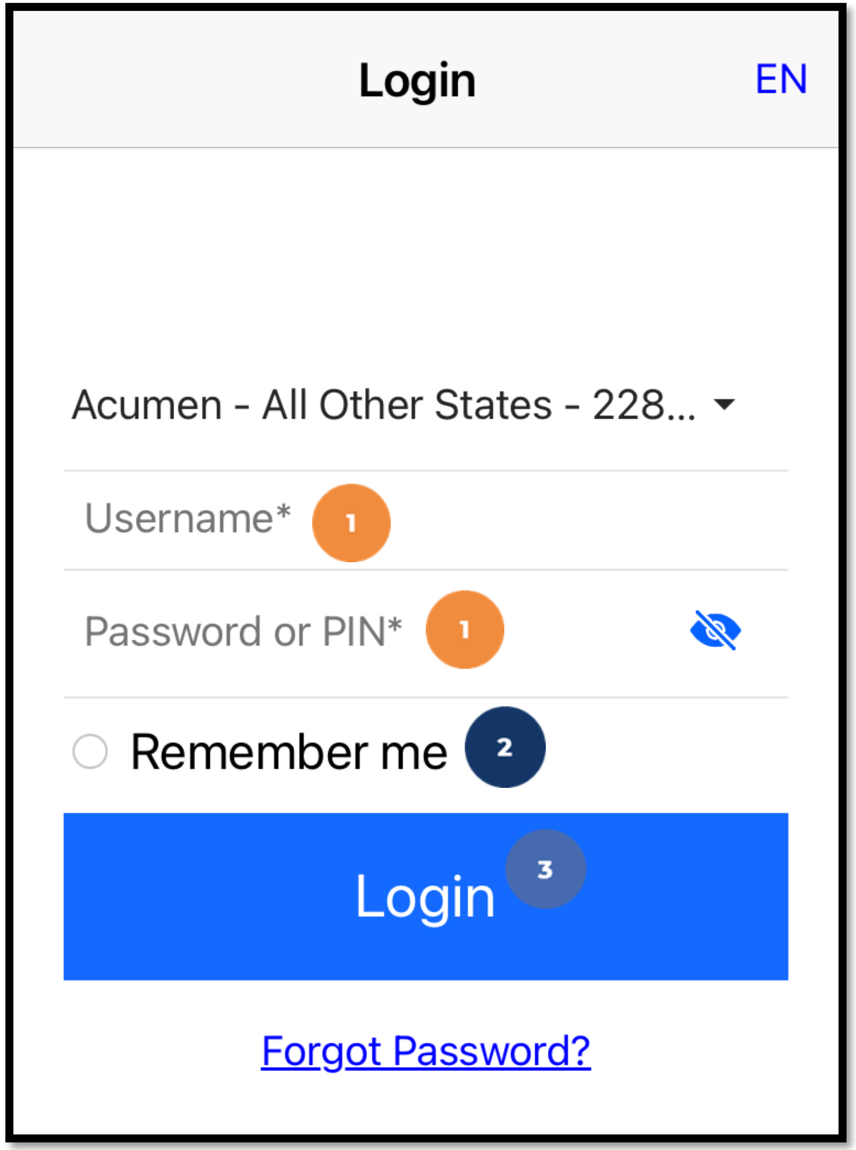
1. Enter employee credentials
   ✓ Acumen provides a **username** and **password** on the Good to Go/Welcome letter
2. Optionally, select the **Remember me** button to remember the Username.

   ***Please note:** Do not use on a shared device
3. Click the blue **Login** button to access the mobile app

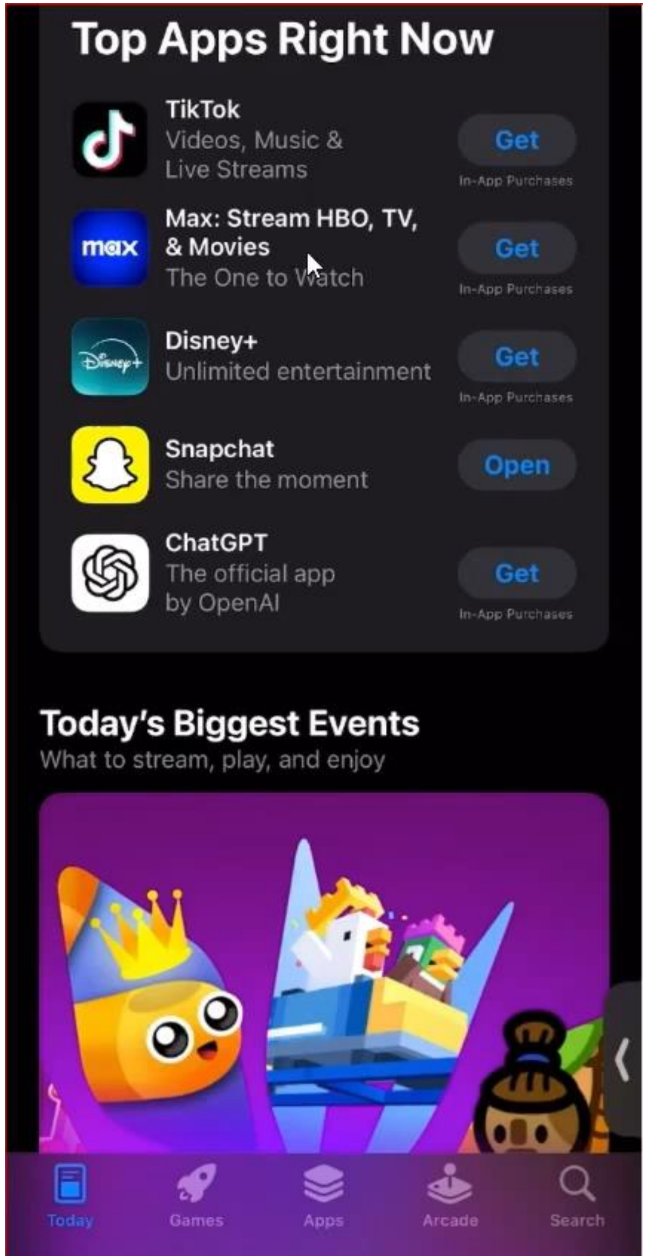
   ✓ The **Forgot Password** link is available if necessary but requires a valid email address to be on file

***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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View Vendor Payment Entries

Authorized support brokers and program staff will submit vendor payments and goods and services requests to Acumen for payment on your behalf based upon program requirements

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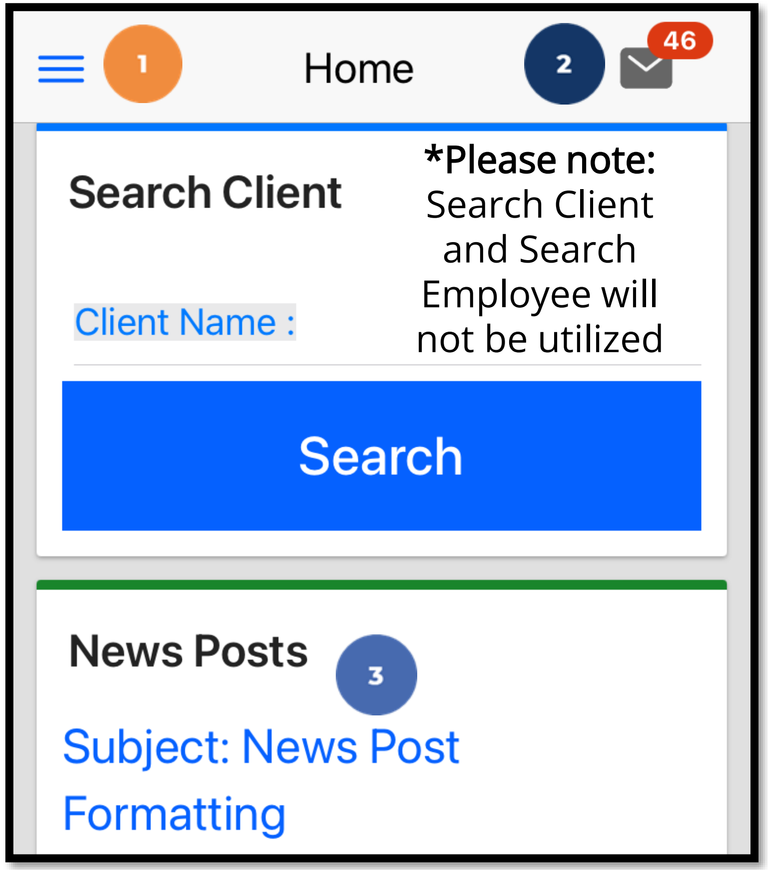
Dashboard

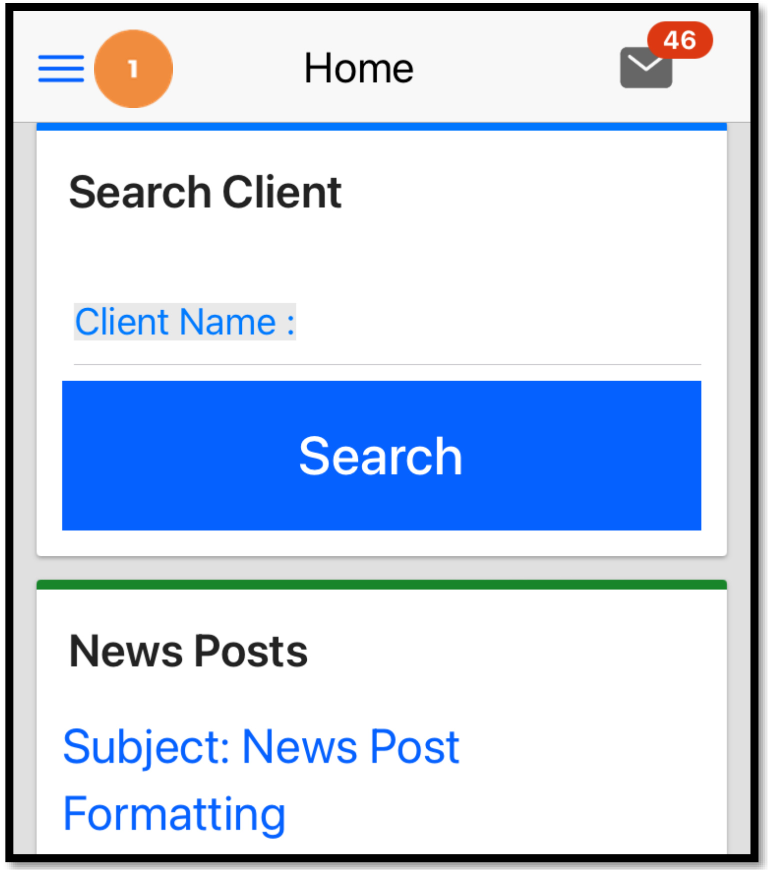
After logging in, the Dashboard or home page, displays.

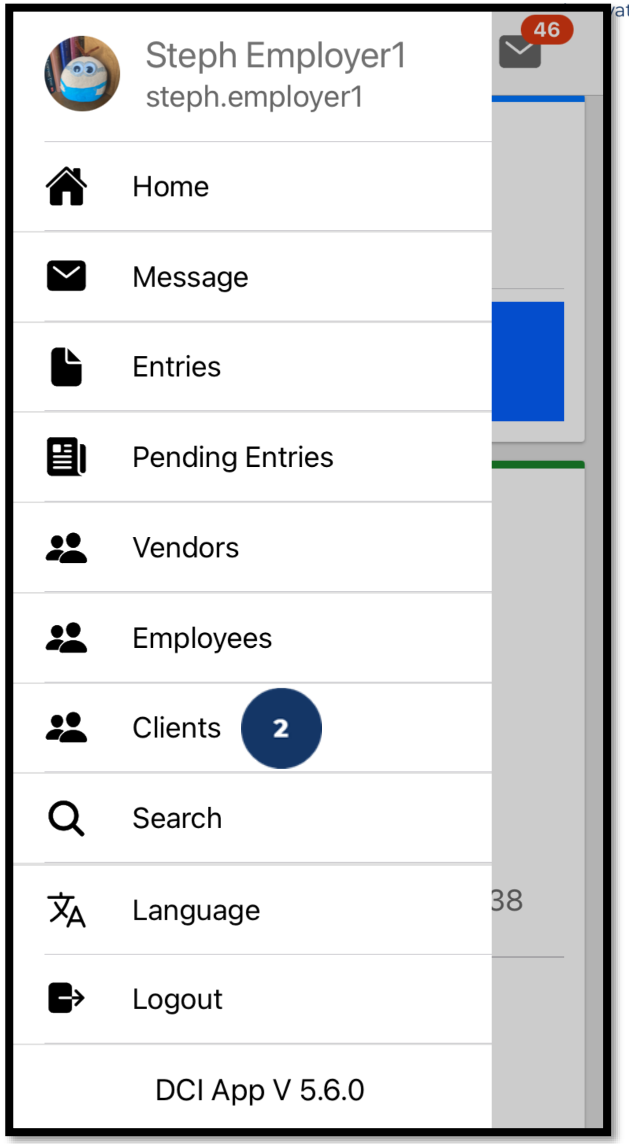
1. Click the **Menu** in the top left corner of the screen to access all available submenu items
2. Click the envelope icon to access the messaging module
   - ✓ View and send secure messages within DCI
3. Scroll down to view News Posts
   - ✓ Important information from the program
   - ✓ News Posts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



View By Client

1. Click the **Menu** in the top left corner of the screen
2. Select **Clients** on the submenu





View By Client

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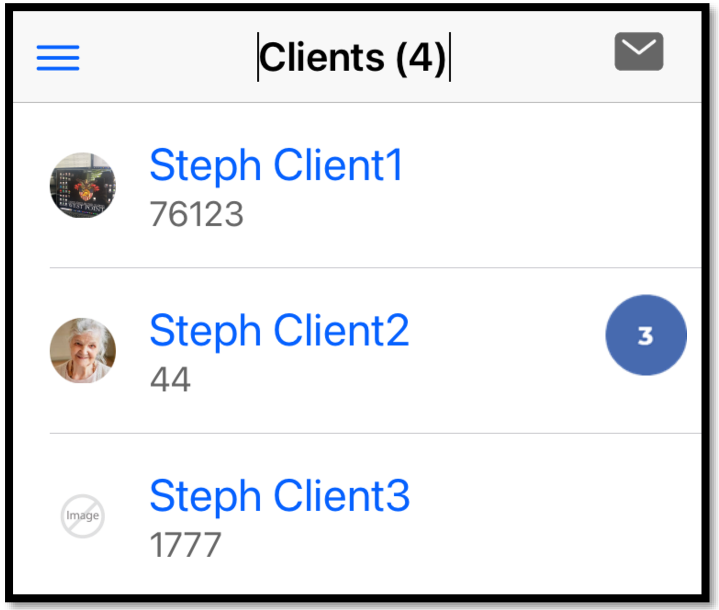
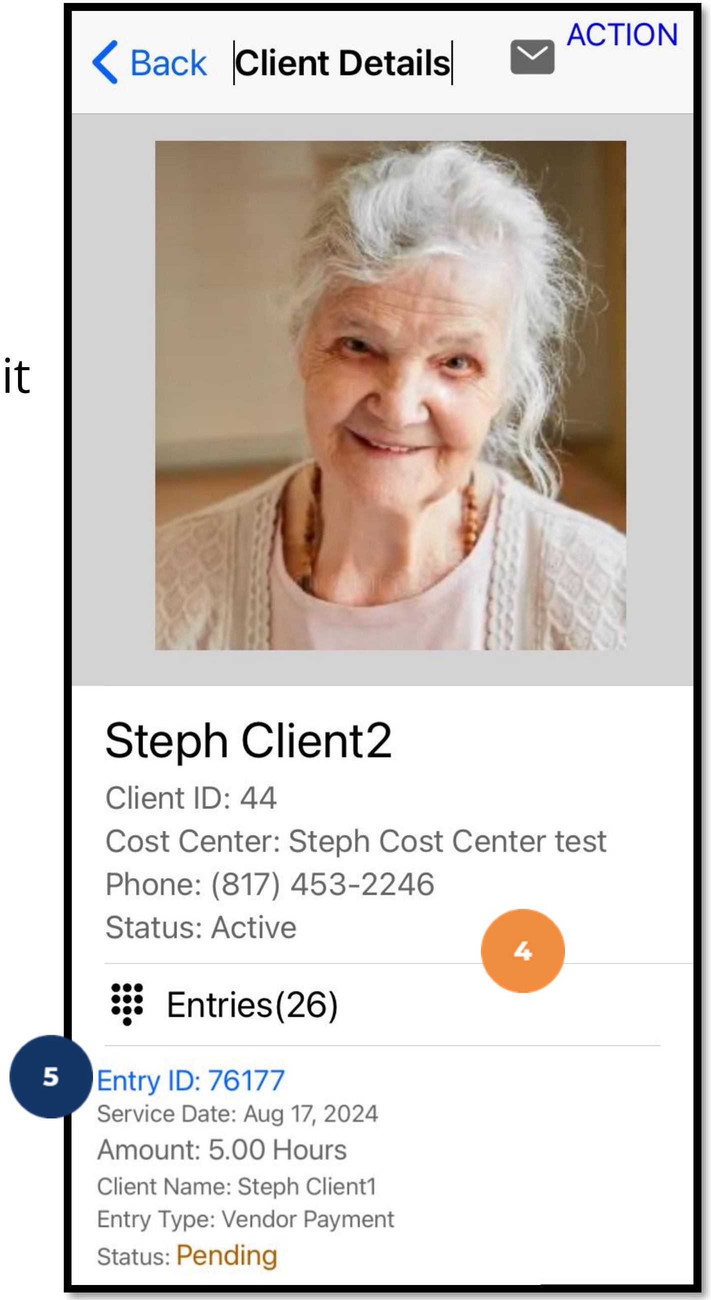
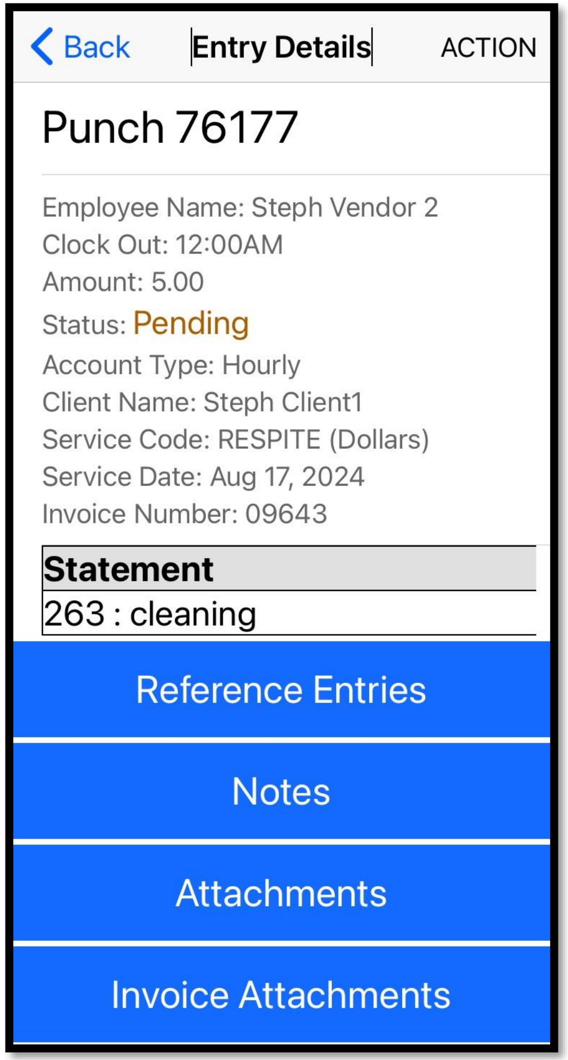
3. View the list of clients and click on the client's name (blue hyperlink) to select it
4. View the client details and entries
5. Select the blue hyperlink Entry ID to view the vendor entry details



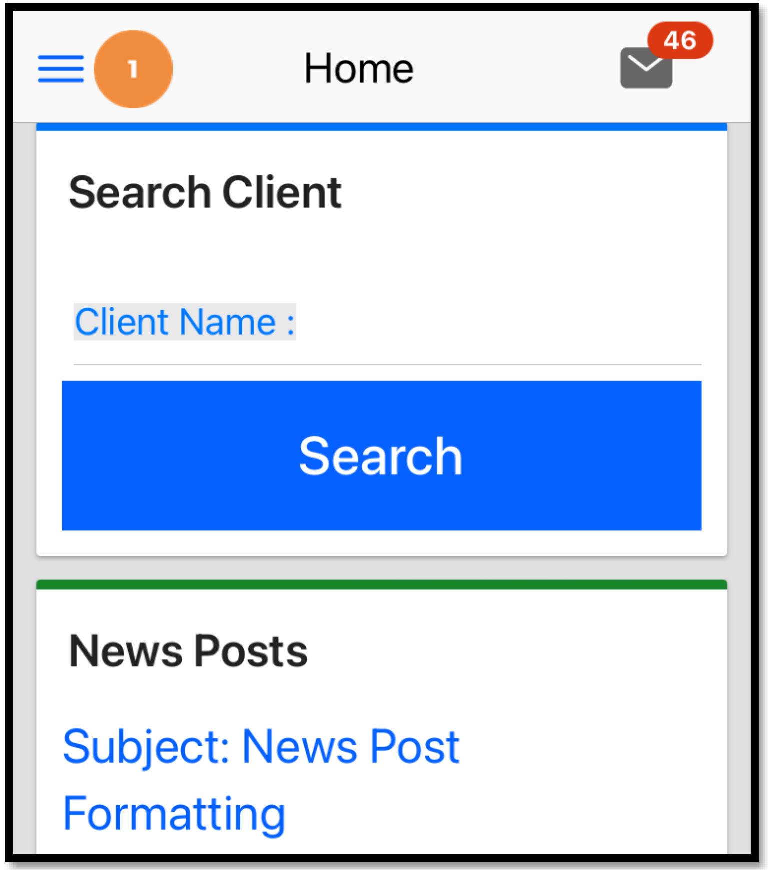


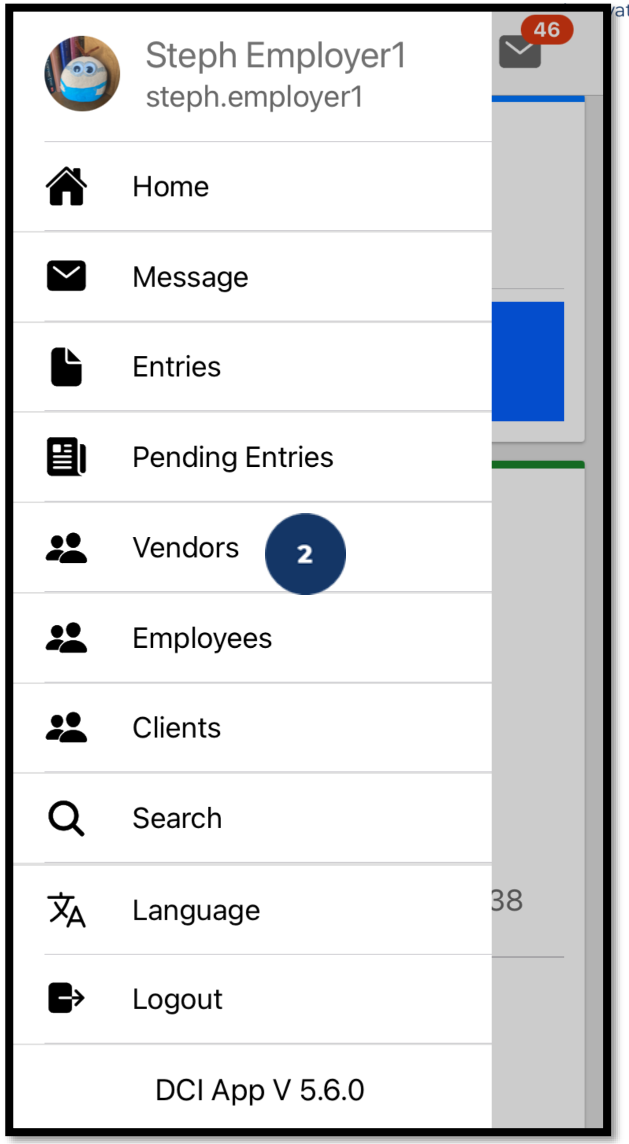


View By Vendor

To check the status of the vendor payment entry:

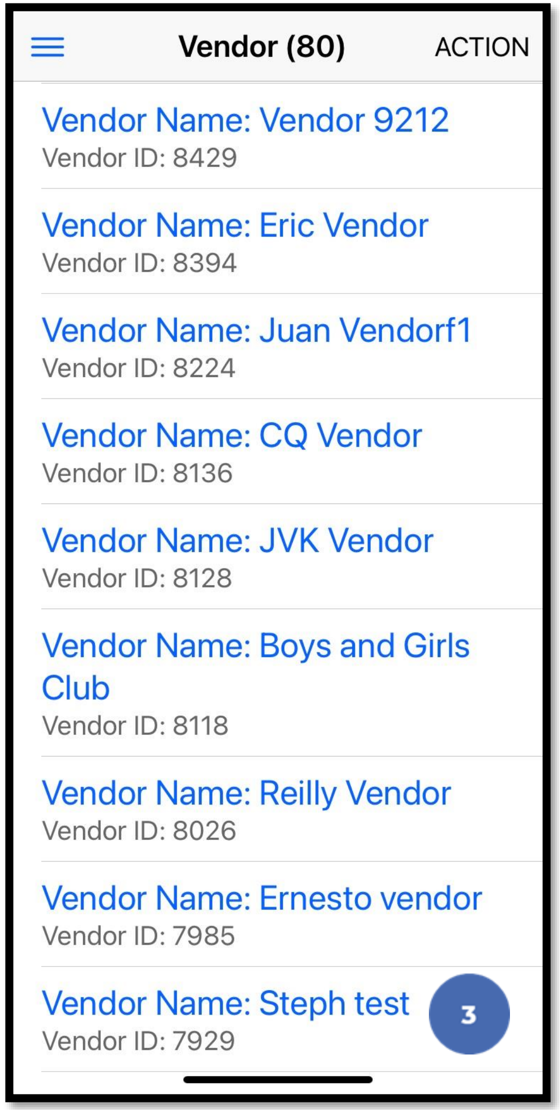
1. Click the **Menu** in the top left corner of the screen
2. Select **Vendors** on the submenu

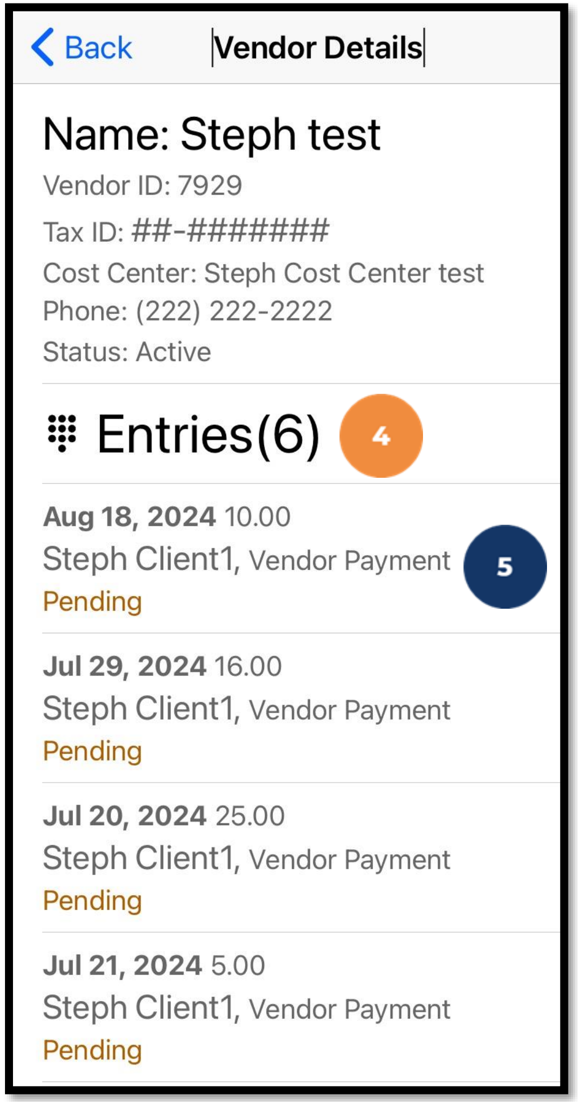


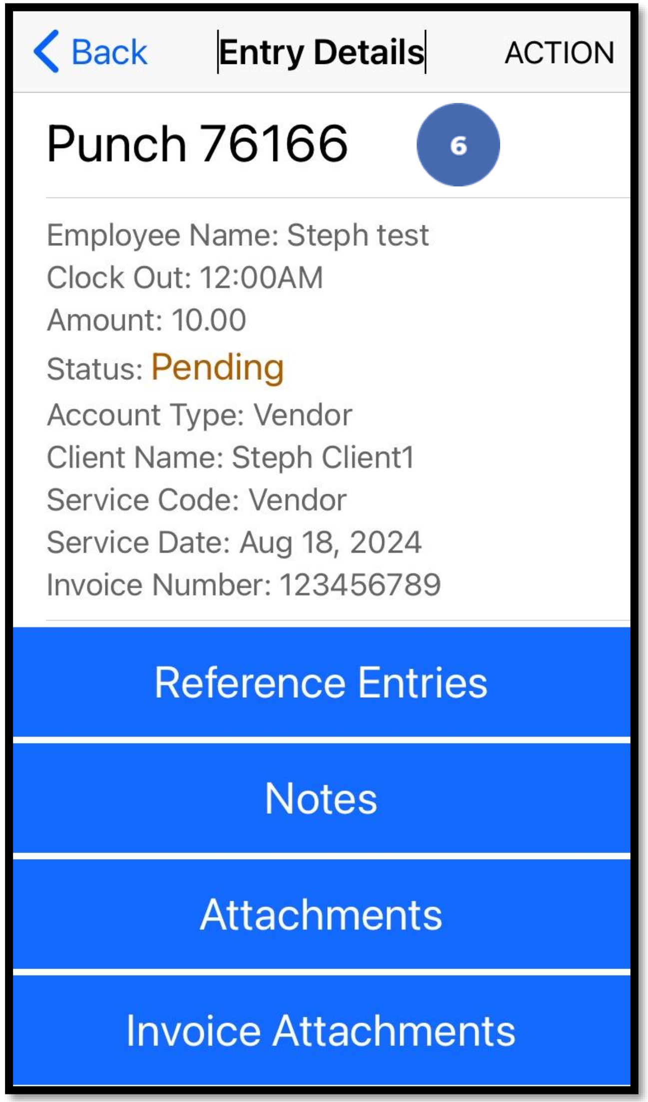


View By Vendor

3. Click on the vendor's name (blue hyperlink) to select it
4. View the list of entries for that vendor
5. Click on an entry to select it
6. View the Entry Details page







View By Vendor

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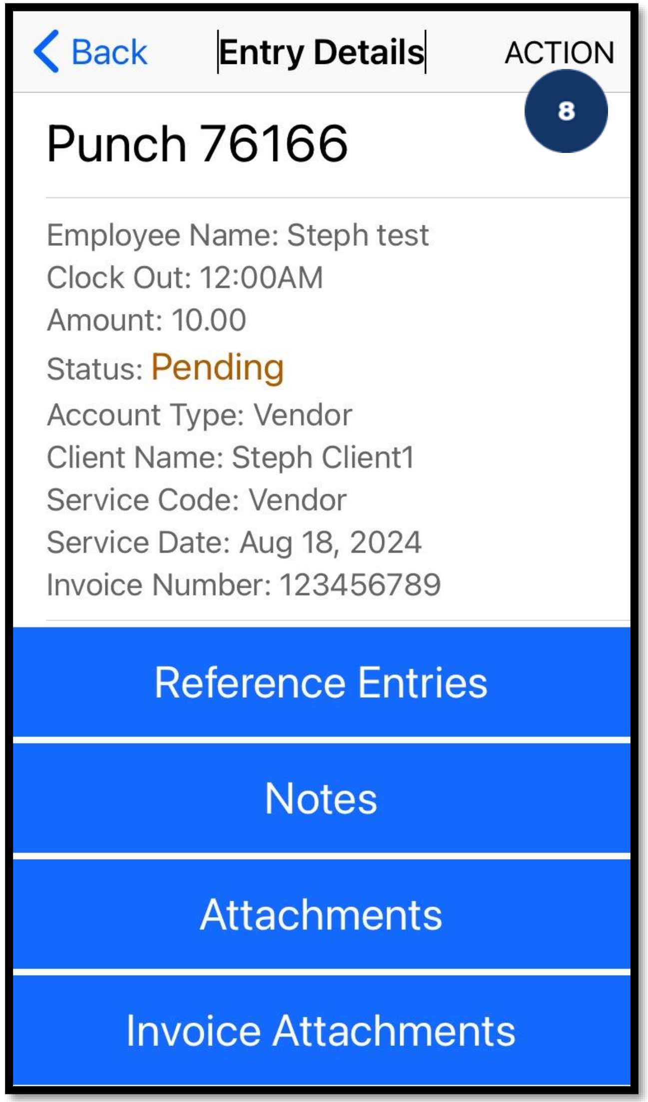
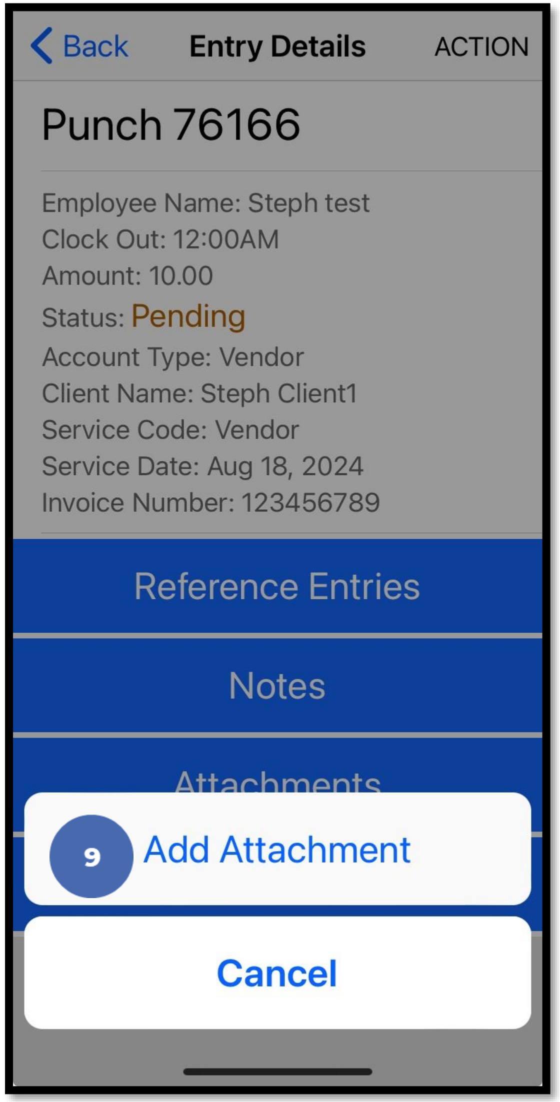
7. Optionally click on any of the blue buttons to view or add additional information:
   - ✓ Reference Entries (view)
   - ✓ Notes (view or add)
   - ✓ Attachments (view)
   - ✓ Invoice Attachments (view)
8. Optionally click **ACTION** in the upper right corner
9. Optionally select **Add Attachment** to access the device camera and add an attachment to the entry

7





DCI Web Portal

Navigation

Full Site – Most compatible when accessed via desktop or laptop

Web Portal Basics

- The employer (ER)/designated representative (DR) views vendor payments
- Users may update profile settings

Accessing the DCI Web Portal

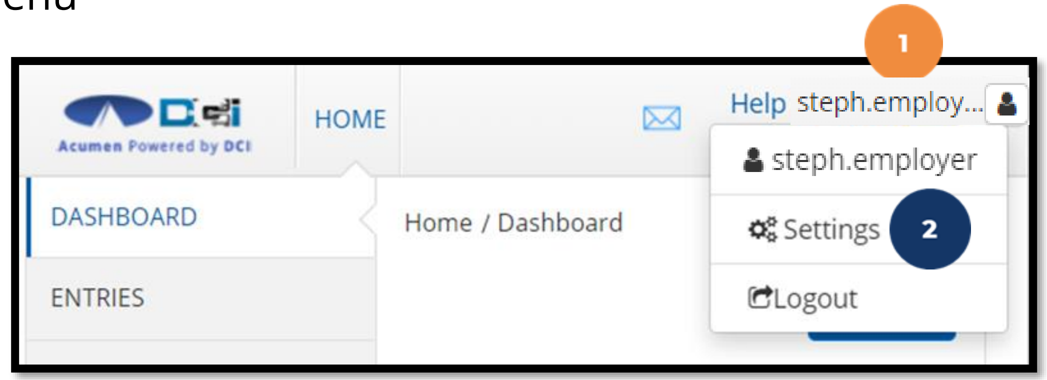
1. Open an internet browser on a computer or mobile device (Google Chrome is preferred) and navigate to the DCI Web Portal
2. Enter **username** and **password**
   - Credentials provided by Acumen
3. Utilize the "**Forgot your password?**" link if needed
4. Click the blue **Sign In** button

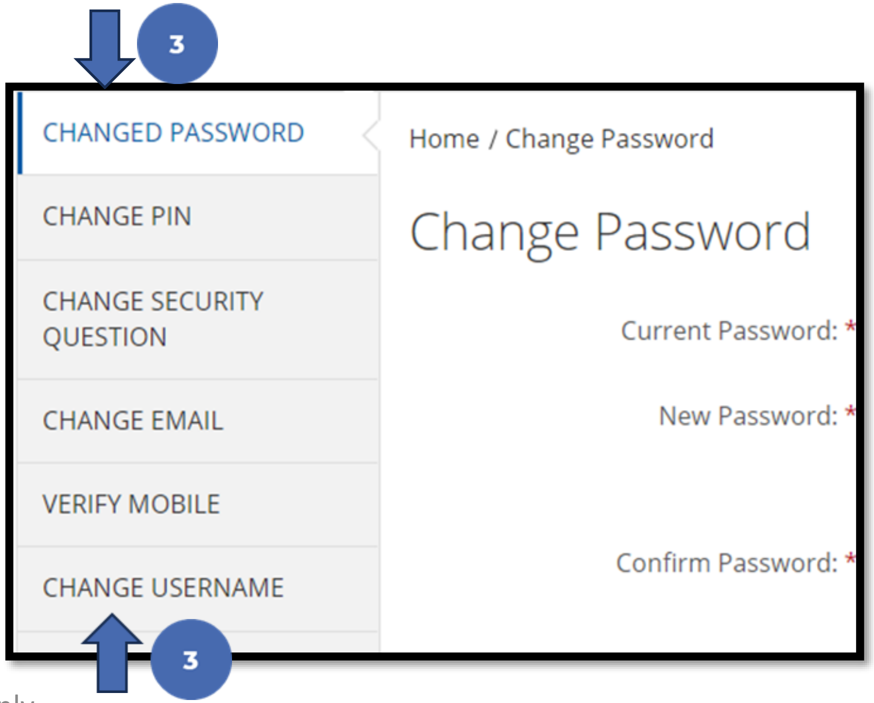
***Please note:** Contact Acumen with login issues

Profile Settings

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

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.
    - Change Security Question
    - Change Email – A valid and correct email address is required for password recovery
    - Verify Mobile
    - Change Username – Used for login

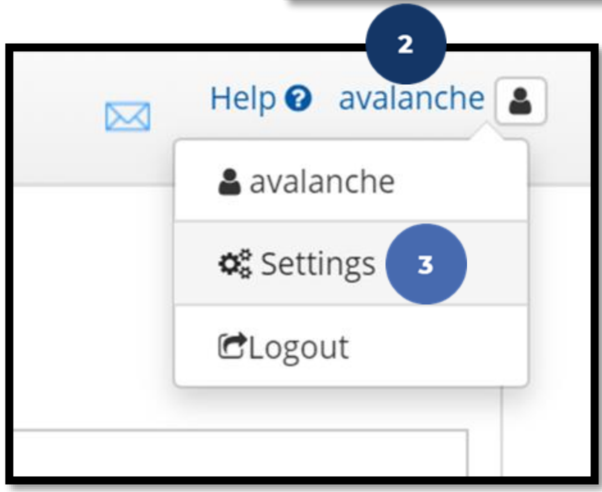


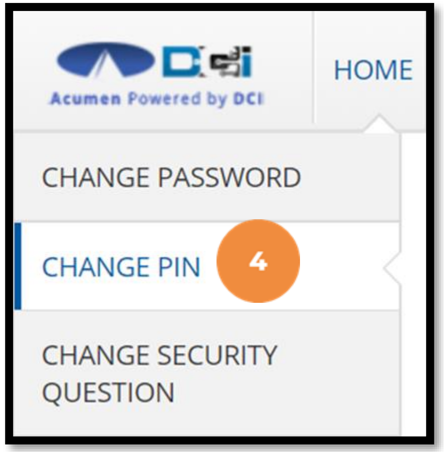


Add / Change PIN

***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

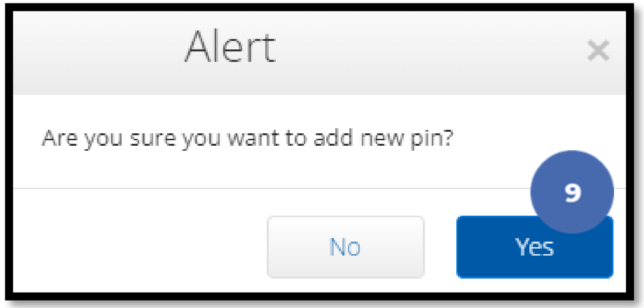




Add / Change PIN (cont.)

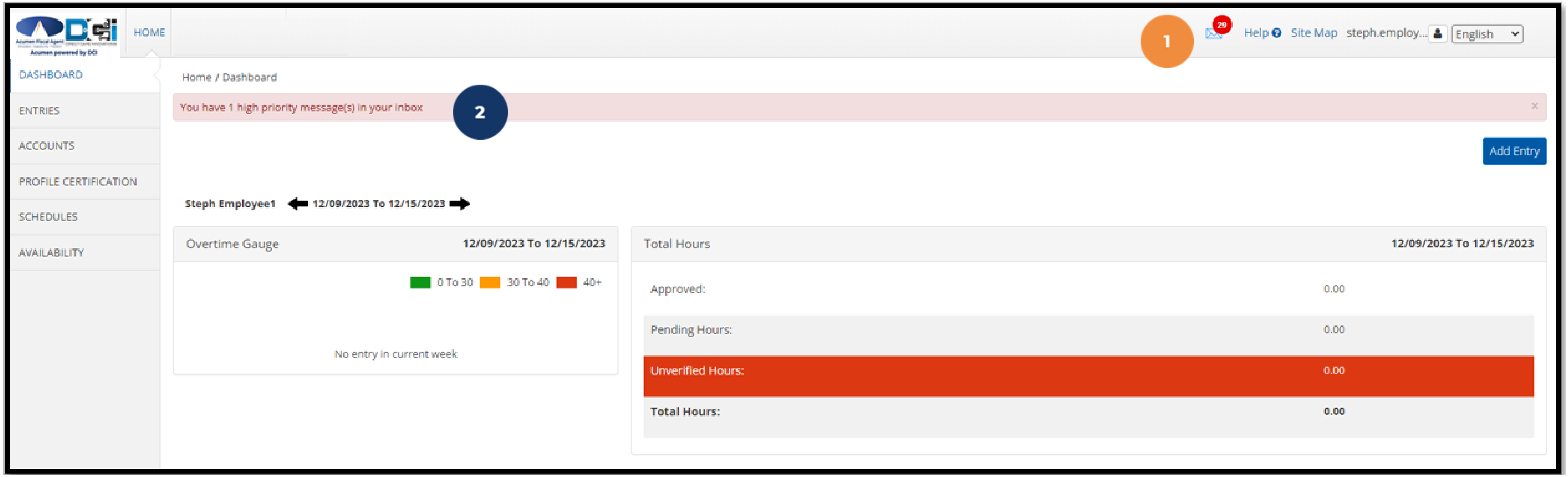
7. Complete the New Pin field and retype the pin in the Confirm Pin field
8. Click the blue **Change Pin** button
9. Select **Yes** to confirm the pin change
10. A green bar stating "Pin Changed Successfully!" appears

***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

Archive Delete Export

Showing **7** out of **7** records

	★	Attachments	From	Subject	Date/Time	Action
☐		📎	DCI Support	Account Statement	07:42 AM	
☐	★		**DCI Support**	**Pin Added**	**06/04/2024 03:28 PM**	
☐	★		DCI Support	User Profile Unlocked	12/05/2023 02:53 PM	
☐	★		DCI Support	User Locked Out	12/05/2023 02:48 PM	

View Statements via Messaging Module

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1. Locate the 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 statement or the **download** icon to download it

	★	Attachments	From	Subject	Date/Time	Action
			DCI Support	Account Statement	07:42 AM	

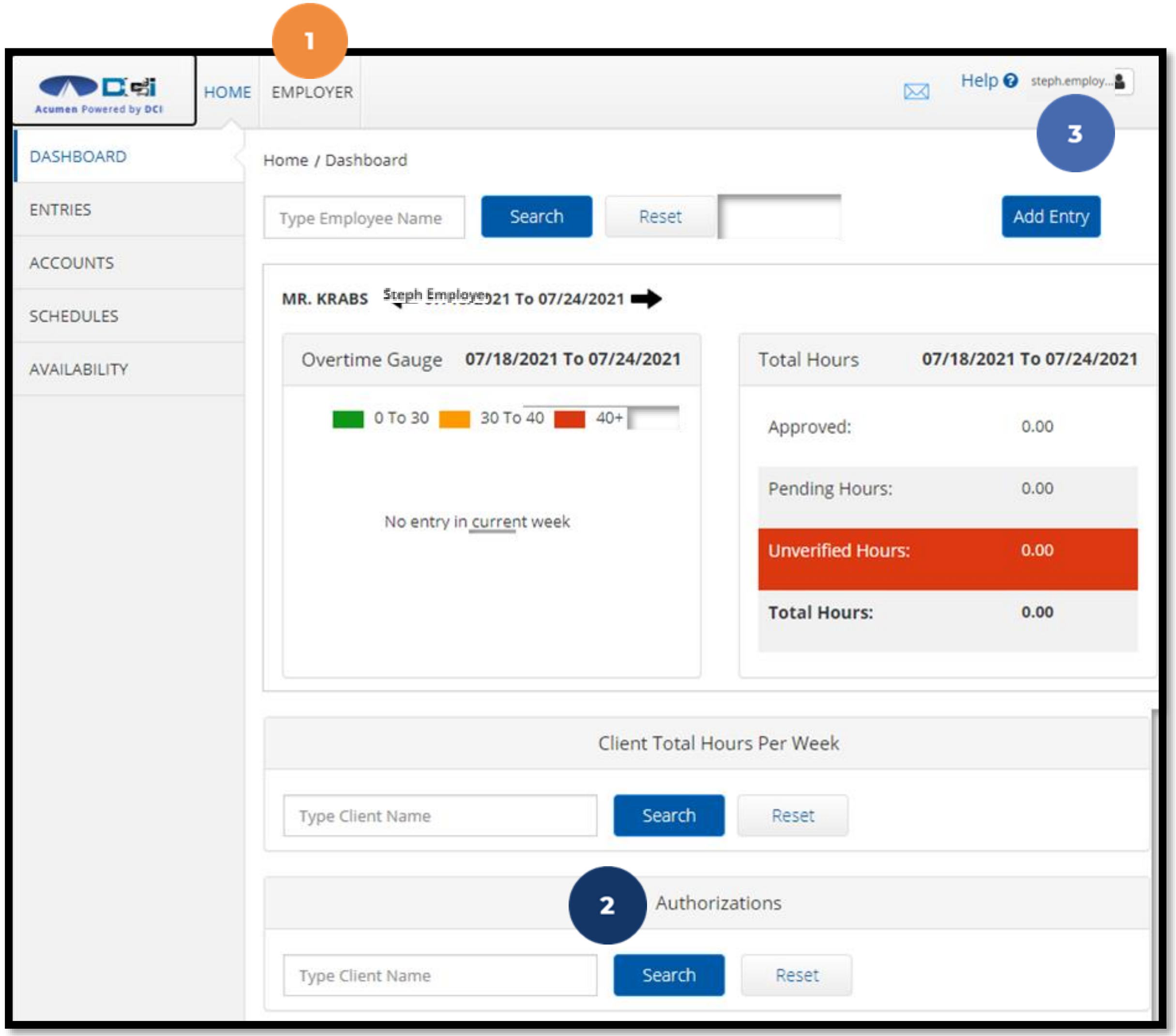
Notes | Attachments

	Date	File Name	File Type	File Size	Added By	Download	Status
	Aug 27, 2024	Account Statement.pdf		82.16 KB	Stephanie Smith		Active

Home Tab Details

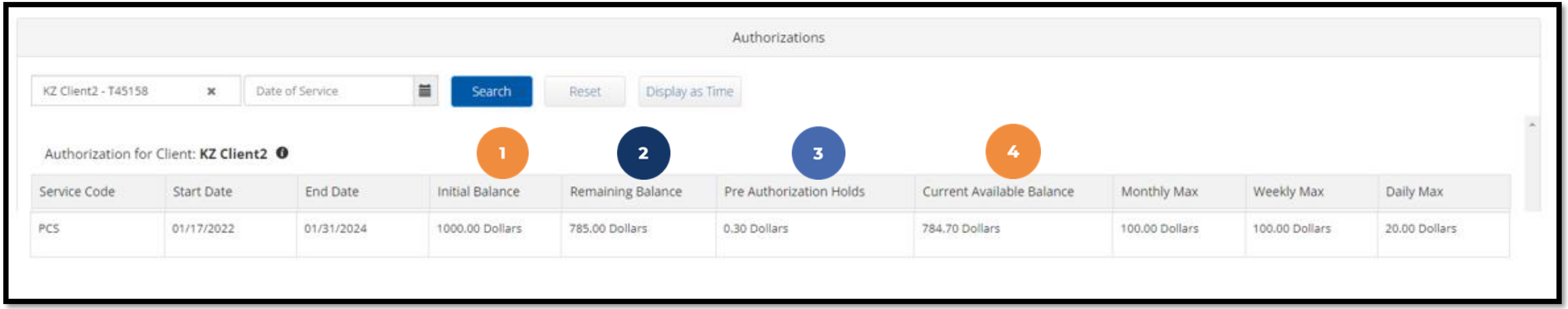
The **Dashboard** is the landing page

1. Select **Home** on the main menu
2. 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
3. Profile Settings



Authorizations (Budget) Widget

- The authorizations (budget) widget allows the user to search by client (required) or optionally use the date filter to view approved authorizations (budgets) in the past, present, or future.
- As vendor payments are submitted, they will be deducted from the authorization and placed into a pre-authorization hold.
- Dollars in a pre-authorization hold remain in that status until billing and payroll have been processed. After payroll and billing completion, the dollars that were previously in a pre-authorization hold status will be deducted from the remaining balance and an updated remaining balance will be displayed.



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

Using Reports

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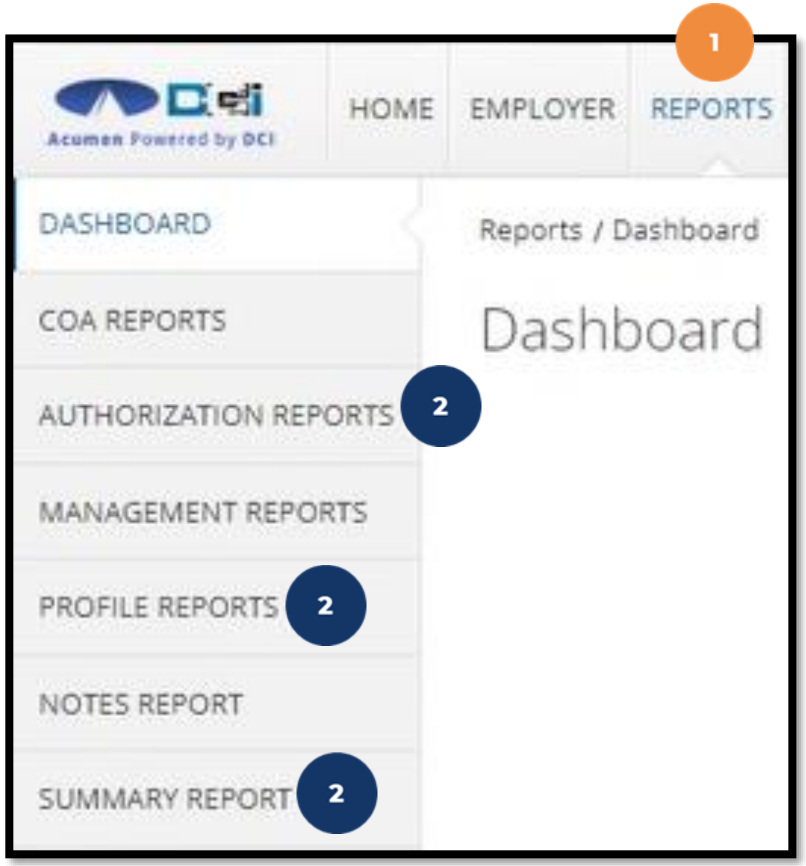
1. Select **Reports** on the main menu
2. Select a report category from the submenu
   - ✓ **Authorization (Budget) Reports**
     - ➢ Authorization Run Rate Report – View the budget usage breakdown by client, account type, or service code.
   - ✓ **Profile Reports**
     - ➢ Vendors Report – View approved vendors
   - ✓ **Summary Report** - Breakdown of punches and percentages of budget remaining



View Clients & Submitted Entries

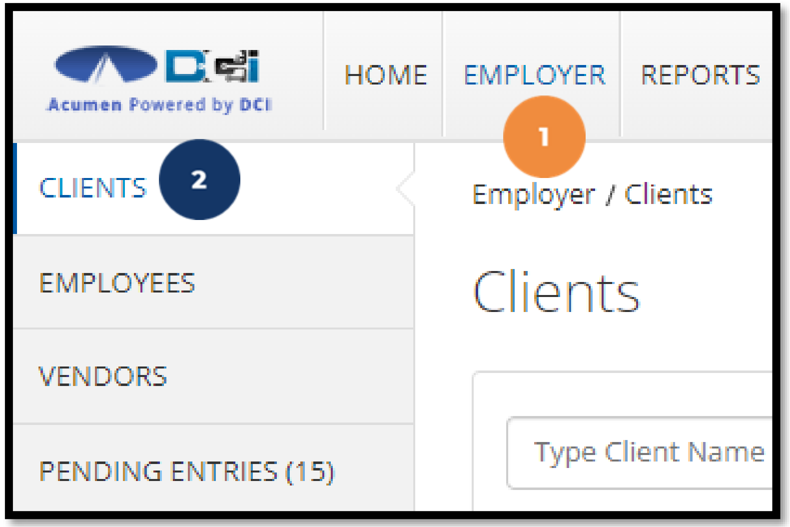
View Clients & Submitted Entries

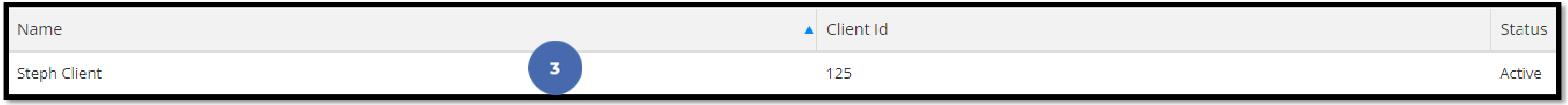
To view clients and check the status of their vendor payment entries:

1. Click **Employer** on the main menu

2. Select the **Clients** tab from the submenu

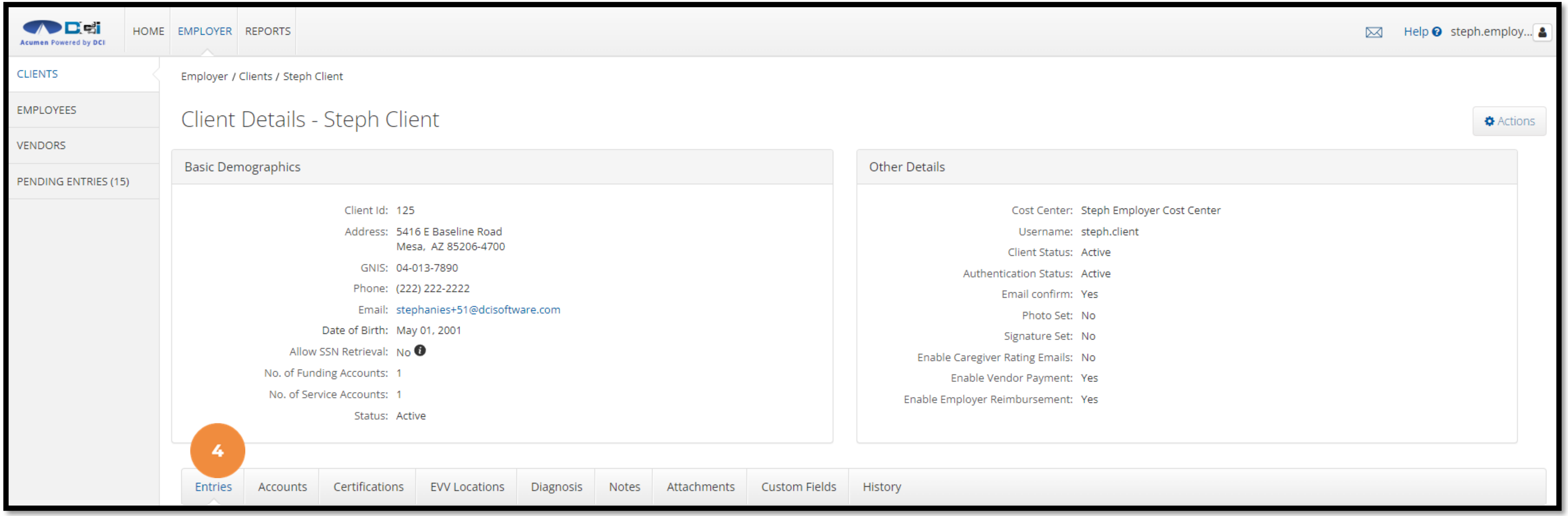
3. Click anywhere on the **client row**





View Submitted Entry

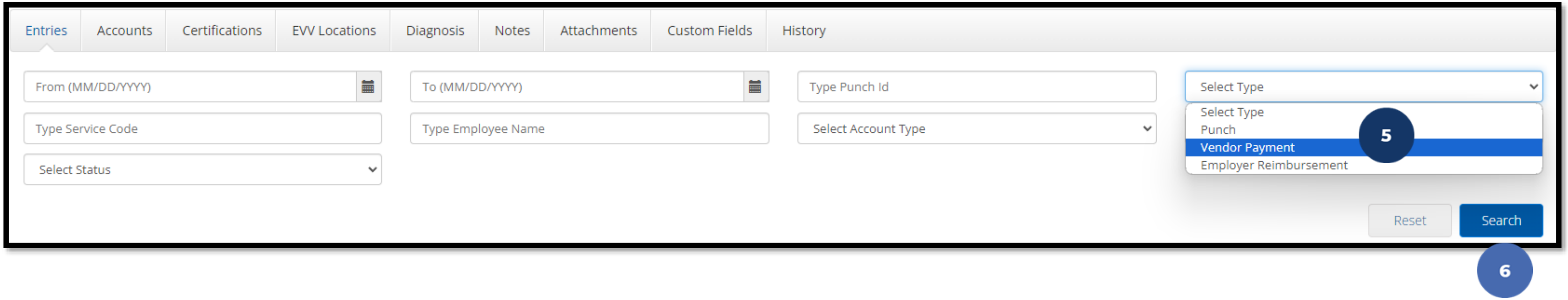
4. From the Client Details page, scroll down to select the **Entries** tab.



View Submitted Entry

5. Select **Vendor Payment** from the Select Type filter

6. Click the blue **Search** button to return results



View Submitted Entry

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If more than one Date of Service was entered for the vendor payment, an entry is created for each and the entry for the total amount is canceled.

Entries

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client Name	Service Code	Amount	Status
75689	Jul 29, 2024			Vendor		Steph Cost Center test - Steph Cost Center test	Steph Client1	Steph Vendor 2	16.00	Pending
75316	Jul 20, 2024			Vendor	75314	Steph Cost Center test - Steph Cost Center test	Steph Client1	Steph Vendor 2	25.00	Pending
75315	Jul 21, 2024			Vendor	75314	Steph Cost Center test - Steph Cost Center test	Steph Client1	Steph Vendor 2	5.00	Pending
75314	Jul 20, 2024			Vendor		Steph Cost Center test - Steph Cost Center test	Steph Client1	Steph Vendor 2	30.00	Canceled

If only one Date of Service was entered for the vendor payment, only one entry is created.

75689	Jul 29, 2024	7	Vendor	Steph Cost Center test - Steph Cost Center test	Steph Client1	Steph Vendor 2	16.00	Pending

7. Click anywhere on the entry row to view the details

View the entry status

Payroll Schedule & Deadlines

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

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 **entered and approved** within **30 days of the date of service**
- 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.

Provider Payment Schedule

Acumen Fiscal Agent
Innovation • Opportunity • Freedom

- 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.

"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.

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

"MONTH" refers to the month that services were provided

"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.

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 phone: (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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Questions?

Thank you!

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