



February 2021 Release Notes

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This guide provides details of the feature enhancements for the DCI Release. The table of contents is hyperlinked. Select any of the topics below to jump to that feature.

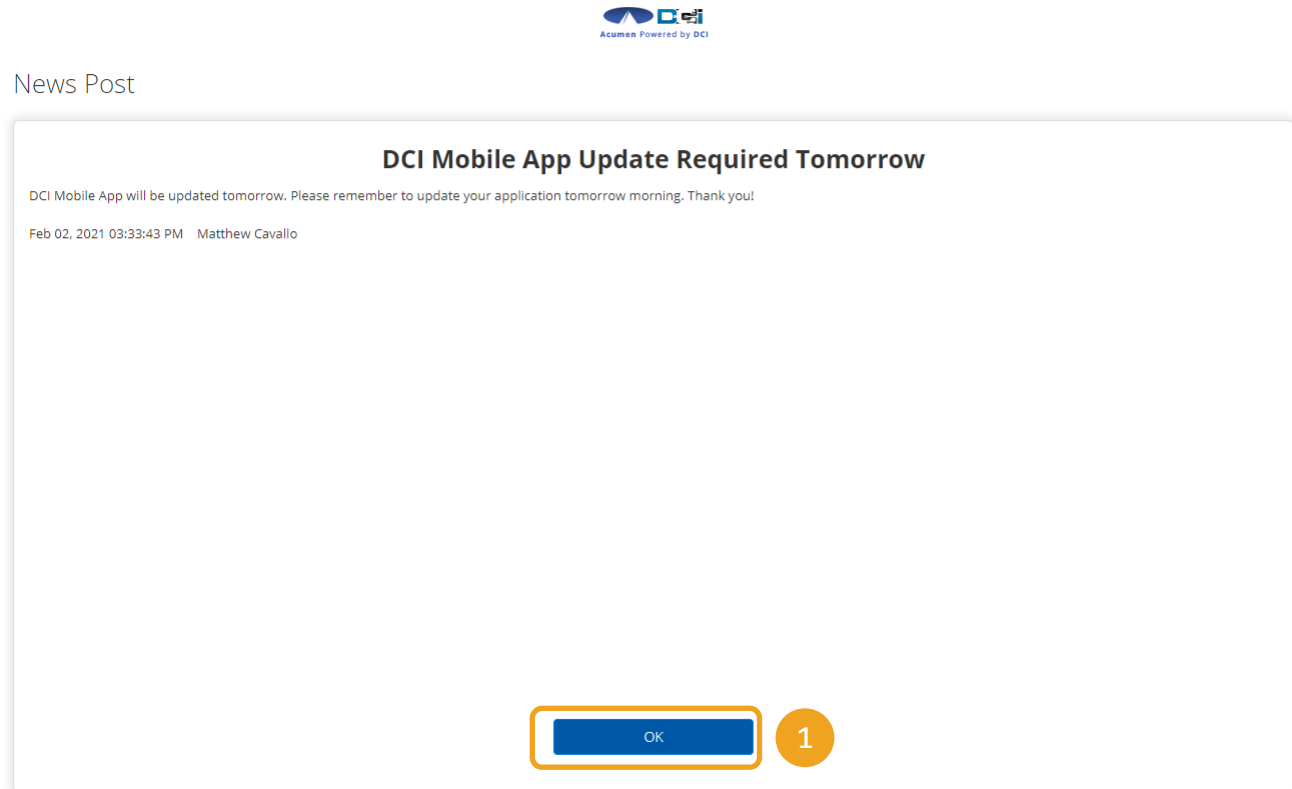
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News Posts

News Post Splash Screen

News Posts can now be displayed on a Splash Screen that will be visible after login, but before the user advances to the DCI Home Screen

1. To acknowledge the news post and move to the next screen, select OK
 - a. There may be multiple News Posts



News Post Display Location

When creating a new News Post, the user can select the display location. The options are Dashboard, Splash Screen or Both.

- Dashboard – the News Post will only display on the dashboard
- Splash Screen – the News Post will only display on the Splash Screen
- Both – the News Post will display on both the dashboard and splash screen

1. When adding a new News Post from the Settings Module, select Dashboard, Splash Screen or Both from the Display Location dropdown menu

The screenshot shows the 'Add News Post' form in the DCI system. The form includes the following fields:

- Profile Type: Employee
- Subject: DCI Mobile App Update Required Tomorrow
- Display Location: Both (dropdown menu is open, showing options: Both, Dashboard, Splash Screen, Both. The 'Splash Screen' option is highlighted in blue. A yellow circle with the number '1' is next to the dropdown menu.)
- Display Frequency: (empty)

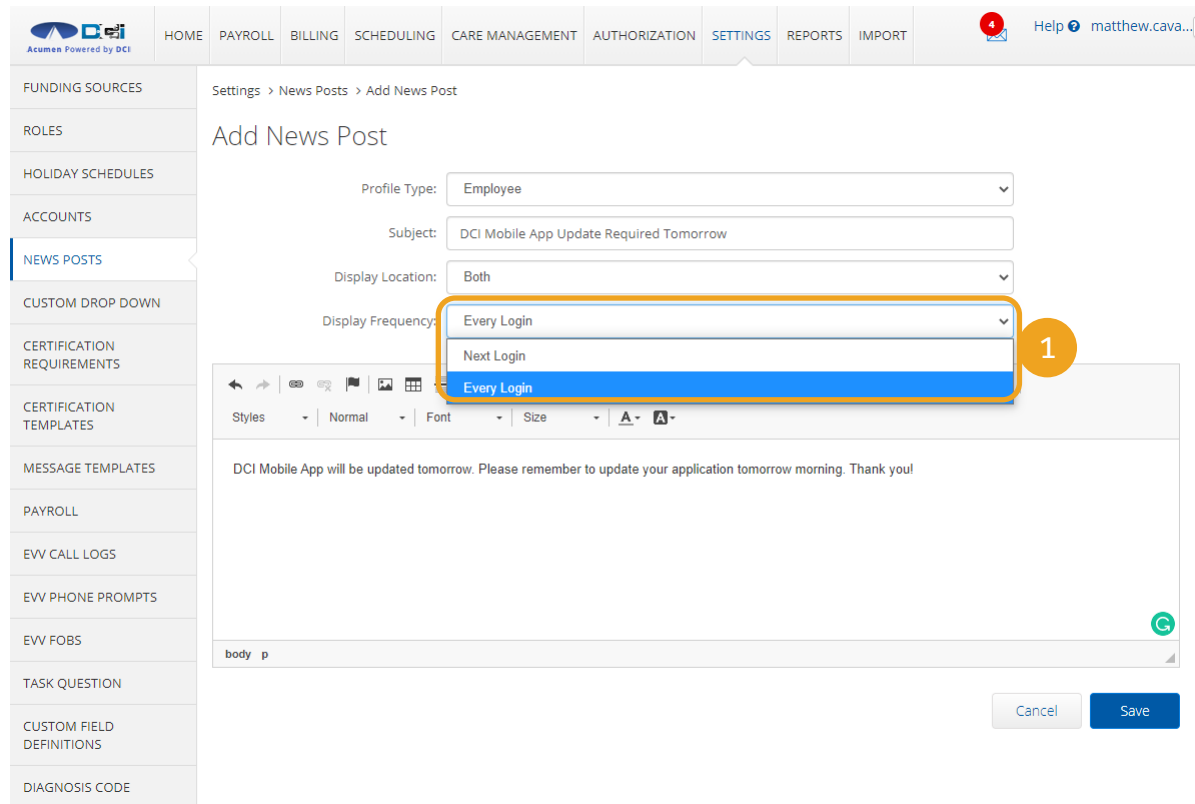
The form also includes a rich text editor with the text: "DCI Mobile App will be updated tomorrow. Please remember to update your application tomorrow morning. Thank you!" and buttons for "Cancel" and "Save".

News Post Display Frequency

When creating a new News Post, the user can select the display frequency. The options are Next Login or Every Login

- Next Login – the News Post will only at the next login
- Every Login – the News Post will display on every login

1. When adding a new News Post from the Settings Module, select Next Login or Every Login from the Display Frequency dropdown menu



The screenshot shows the 'Add News Post' form in the DCI system. The form includes fields for Profile Type (Employee), Subject (DCI Mobile App Update Required Tomorrow), Display Location (Both), and Display Frequency. The Display Frequency dropdown menu is open, showing 'Every Login' and 'Next Login' options. A red circle with the number '1' highlights the 'Every Login' option. The form also includes a text area for the message content, which contains the text: 'DCI Mobile App will be updated tomorrow. Please remember to update your application tomorrow morning. Thank you!'. The form has 'Cancel' and 'Save' buttons at the bottom right.

News Post Log

DCI will keep a log of News Posts that have been created

The News Post creator can drill down on a news post and edit or change the status of a news post

The screenshot displays the DCI News Post Log interface. The top navigation bar includes links for HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. The user is logged in as matthew.cava. The left sidebar menu lists various system components, with 'NEWS POSTS' highlighted. The main content area shows the 'News Posts' page with search filters for Profile Type, Creator name, and Status. Below the filters is a table of news posts, showing 30 out of 85 records.

| News Post Id | Profile Type | Creator | Created | Status | Subject |
|--------------|---------------------|-----------------|------------|----------|---|
| 85 | Employee | Craig Morford | 02/11/2021 | Inactive | Time Zone Test2 |
| 84 | Employee | CM Employee6 | 02/11/2021 | Inactive | Time Zone Test |
| 83 | Employee | Matthew Cavallo | 02/02/2021 | Active | Office Closed on Friday |
| 82 | Employee | Matthew Cavallo | 02/02/2021 | Active | DCI Mobile App Update Required Tomorrow |
| 81 | Client | John Allen | 12/07/2020 | Inactive | This is a test! |
| 80 | Case Worker | Mason Menges | 06/25/2020 | Active | Test 06252020 |
| 79 | Residential Program | Mason Menges | 06/25/2020 | Active | Test 06252020 Res |
| 78 | Parenting Program | Mason Menges | 06/25/2020 | Active | Test 06252020 PRNT |
| 77 | Day Program | Mason Menges | 06/25/2020 | Active | Test 06252020 Day |
| 76 | Guardian | Mason Menges | 06/25/2020 | Active | Test 06252020 Guardian |

News Post Details

1. The creator of the News Post has the ability to Edit or Deactivate the News Post
 - a. Only the creator of the post has the ability to make these changes
2. The events will display who has viewed and acknowledged the News Post

Settings > News Posts > Office Closed on Friday

News Post Details - Office Closed on Friday

News Post Details

Subject: Office Closed on Friday
Created Date: Feb 02, 2021 03:38:43 PM
Profile Type: Employee
Created By: Matthew Cavallo
Message: The office will be closed on Friday. We will be back in the office on Monday.
Display Location: Both
Display Frequency: Every Login

Events History

From (MM/DD/YYYY) To (MM/DD/YYYY) Subject Type Added By

Reset Search

Events Showing 30 out of 956 records

| Date | Subject | Description | Input Type | OS | OS Version | App Version | Added By |
|--------------------------|--------------|--|------------|----|------------|-------------|---------------------------------|
| Feb 15, 2021 02:38:21 PM | Acknowledged | Matthew Cavallo acknowledged News Post | Web Portal | | | | Matthew Cavallo |
| Feb 15, 2021 02:11:36 PM | Acknowledged | Don Burke acknowledged News Post | Web Portal | | | | Don Burke |

News Post Admin Permission

- New Post Admin permission has been created to grant user access to New Post functions
- Currently only a Super User can create a News Post and only the Super User who created a News Post can edit it
- This permission allows both Super User and user with News Post Admin permission can create and edit any News Post regardless of who created it

1. To add this permission, open the employee details, select Manage Permission and then select Miscellaneous Permissions
2. Select News Post Admin and then Save the user to grant the permission

The screenshot shows the 'Manage Permissions' dialog box for user 'Ann Perkins'. The 'Miscellaneous Permissions' tab is selected and highlighted with a yellow box and a red circle containing the number '1'. Under the 'Permissions' section, the 'News Post Admin' checkbox is checked and highlighted with a blue box and a blue circle containing the number '2'. Other permissions listed include Support User, Training Admin, Plan Of Care Admin, Custom Field Admin, Holiday Schedule Admin, and Notes Sub-Type Admin. The dialog has 'Cancel' and 'Save' buttons at the bottom right.

Permissions

Manage Permissions Wizard

Three New Tabs

The Manage Permissions Wizard has been updated to include three different tabs:

1. Global Permissions
2. Least Privilege Permissions
3. Miscellaneous Permissions

Manage Permissions

Global Permissions 1 Least Privilege Permissions 2 Miscellaneous Permissions 3

Name: Sara Supervisor

Permissions:

- Authorization Admin
- Case Worker Admin
- Client Admin
- Cost Center Admin
- Day Program Admin
- Permissions Admin
- Role Admin
- Import Admin
- Other Payment Admin
- Parenting Program Admin
- Residential Program Admin
- Employee Admin
- Funding Source Admin
- Group Service Admin

Cancel Save

Global Permissions

The Global Permissions tab is the default tab and will display permissions that exist in DCI today including:

- Authorization Admin
- Case Worker Admin
- Client Admin
- Cost Center Admin
- Day Program Admin
- Employee Admin
- Funding Source Admin
- Group Service Admin
- Import Admin
- Other Payment Admin
- Parenting Program Admin
- Vendor Admin
- Permission Admin
- Role Admin

Manage Permissions

Global Permissions Least Privilege Permissions Miscellaneous Permissions

Name: Sara Supervisor

Permissions:

| | |
|--|--|
| <input type="checkbox"/> Authorization Admin | <input type="checkbox"/> Import Admin |
| <input type="checkbox"/> Case Worker Admin | <input type="checkbox"/> Other Payment Admin |
| <input type="checkbox"/> Client Admin | <input type="checkbox"/> Parenting Program Admin |
| <input type="checkbox"/> Cost Center Admin | <input type="checkbox"/> Residential Program Admin |
| <input type="checkbox"/> Day Program Admin | <input type="checkbox"/> Employee Admin |
| <input type="checkbox"/> Permissions Admin | <input type="checkbox"/> Funding Source Admin |
| <input type="checkbox"/> Role Admin | <input type="checkbox"/> Group Service Admin |

Cancel Save

Miscellaneous Permissions

The Miscellaneous Permissions tab will display permissions that exist in DCI today including:

- Support User
- Training Admin
- Plan of Care Admin
- Custom Field Admin
- Holiday Schedule Admin
- Notes Sub Type Admin
- News Post Admin

Manage Permissions

Global Permissions Least Privilege Permissions Miscellaneous Permissions

Name: Sara Supervisor

Permissions:

| | |
|--|---|
| <input type="checkbox"/> Support User | <input type="checkbox"/> Holiday Schedule Admin |
| <input type="checkbox"/> Training Admin | <input type="checkbox"/> Notes Sub Type Admin |
| <input type="checkbox"/> News Post Admin | <input type="checkbox"/> Custom Field Admin |

Cancel Save

Least Privilege Permissions

- Least Privilege Permissions are new permissions, which limit the amount of information that a user with this privilege can see
- The new permission detail is listed below:

Manage Permissions

Global Permissions Least Privilege Permissions Miscellaneous Permissions

Name: Sara Supervisor

Permissions:

| | |
|--|--|
| <input type="checkbox"/> Client Admin - Least Privilege | <input type="checkbox"/> Parenting Program Admin - Least Privilege |
| <input type="checkbox"/> Employee Admin - Least Privilege | <input type="checkbox"/> Group Service Admin - Least Privilege |
| <input type="checkbox"/> Case Worker Admin - Least Privilege | <input type="checkbox"/> Role Admin - Least Privilege |
| <input type="checkbox"/> Day Program Admin - Least Privilege | <input type="checkbox"/> Permission Admin - Least Privilege |
| <input type="checkbox"/> Residential Program Admin - Least Privilege | |

Cancel Save

- **Client Admin - Least Privilege:** This is essentially the same as the existing Client Admin permission except that it should not give the user the ability to see all Clients in the system. The permission should still allow user to create Clients and if the user also has a role that allows them to see Clients the permission should be allow them to edit Clients that their role allows them to see.
- **Employee Admin - Least Privilege:** This is essentially the same as the existing Employee Admin permission except that it should not give the user the ability to see all Employees in the system. The permission should still allow user to create Employees and if the user also has a role that allows them to see Employees the permission should be allow them to edit Employees that their role allows them to see.
- **Case Worker Admin - Least Privilege:** This is essentially the same as the existing Case Worker Admin permission except that it should not give the user the ability to see all Case Worker in the system. The permission should still allow user to create Case Workers and if the user also has a role that allows them to see Case Workers the permission should be allow them to edit Case Workers that their role allows them to see.

Least Privilege Permissions Continued

- **Day Program Admin - Least Privilege:** This is essentially the same as the existing Day Program Admin permission except that it should not give the user the ability to see all Day Programs in the system. The permission should still allow user to create Day Programs and if the user also has a role that allows them to see Day Programs the permission should be allow them to edit Day Programs that their role allows them to see.
- **Residential Program Admin - Least Privilege:** This is essentially the same as the existing Residential Program Admin permission except that it should not give the user the ability to see all Residential Programs in the system. The permission should still allow user to create Residential Programs and if the user also has a role that allows them to see Residential Programs the permission should be allow them to edit Residential Programs that their role allows them to see.
- **Parenting Program Admin - Least Privilege:** This is essentially the same as the existing Parenting Program Admin permission except that it should not give the user the ability to see all Parenting Programs in the system. The permission should still allow user to create Parenting Programs and if the user also has a role that allows them to see Parenting Programs the permission should be allow them to edit Parenting Programs that their role allows them to see.
- **Group Service Admin - Least Privilege:** This is essentially the same as the existing Day Program Admin permission except that it should not give the user the ability to see all Day Programs in the system. The permission should still allow user to create Day Programs and if the user also has a role that allows them to see Day Programs the permission should be allow them to edit Day Programs that their role allows them to see.
- **Role Admin - Least Privilege:** This is essentially the same as the existing Role Admin permission in that it should give the user the ability to assign roles to Employees via the Settings > Roles function but not allow them to see any Employees via the Settings > Roles function. If the user also has a role that allows them to see Employees they should see Employees in the Roles function, and they should see the profile details > Actions > Manage Roles action.

Report Downloads

Report Downloads

Report Download functionality has been enhanced so that a user can determine which columns of data to download, as well as, set their download preference type.

Accessing the report download is the same, simply open the reports module and select the report you wish to download.

Once the Download has been selected a new Report Wizard will open.

The screenshot shows the Acumen Reports interface. The navigation menu includes: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. The user is logged in as matthew.cava. The current report is 'CoA Reports - Punch Entries Report'. The report wizard includes the following fields:

- From (MM/DD/YYYY): [Empty]
- To (MM/DD/YYYY): [Empty]
- Select Account Type: [Dropdown]
- Type Client Name: [Text]
- Type Employee Name: [Text]
- Type Service Code: [Text]
- Colorado Cost Center: [Text] (Colorado Cost Center)
- Select Activity: [Dropdown]
- Select Status: [Dropdown]
- Select Entry Type: [Dropdown]
- Include Canceled and Rejected Punches

Buttons: Reset, Search, Download (highlighted with an orange box).

Showing 188 out of 188 records

| Punch ID | Pay We... | Date of Serv... | Account Type | General Acti... | Employee/V... | Employee Num... | Client/ Resi... |
|----------|-----------|-----------------|--------------|-----------------|-----------------|-----------------|-----------------|
| 994720 | 11 | 03/11/2020 | Vendor | | AZ Swim Less... | | April Ludg... |
| 994719 | 6 | 02/06/2020 | Vendor | | AZ Swim Less... | | April Ludg... |
| 994714 | 44 | 10/27/2020 | Hourly | | Ann Perkins | CO2233 | April Ludg... |
| 994710 | 44 | 10/28/2020 | Hourly | | Ann Perkins | CO2233 | Andy Dwy... |
| 990875 | 23 | 06/02/2020 | Vendor | | AZ Swim Less... | | April Ludg... |
| 990874 | 1 | 01/02/2020 | Vendor | | AZ Swim Less... | | April Ludg... |
| 990868 | 43 | 10/23/2020 | Hourly | | Ann Perkins | CO2233 | April Ludg... |

Download Report Wizard

The Download Report Wizard allows the user to control what data they wish to view.

Simply select Columns on the left and use the arrow buttons to move the columns to the right.

To move only selected columns use the ► button

To move all columns to the right, select the ►► button

The image displays two screenshots of the 'Download Report Wizard' interface. The top screenshot shows the 'Columns' tab with 'Available Columns' on the left and 'Selected Columns' on the right. The 'Available Columns' list includes Hours, Amount, EVV, EVV Method, Status, and Entry Type. The 'Selected Columns' list includes Punch ID, Date of Service, and Employee/Vendor Name. A yellow box highlights the '►' button between the lists. The bottom screenshot shows the same interface with 'Date of Service', 'Employee/Vendor Name', 'Hours', 'Amount', and 'EVV Method' in the 'Selected Columns' list. A yellow box highlights the 'Selected Columns' list, and an orange arrow points from the '►' button in the top screenshot to this box. The bottom screenshot also shows 'Cancel' and 'Next' buttons at the bottom right.

Report Download Options

1. Report Download options allow the user to select the format and orientation for which they would like to view the report including Excel, PDF, CSV and tab delimited
2. Orientation allows the user to define whether the report will be portrait or landscape
 - PDFs cannot have more than 10 columns selected for Portrait orientation
 - PDFs cannot have more than 15 columns selected for Landscape orientation
 - The column sizing for PDF format should be optimized for the # of columns selected
 - If the user has more than allowed columns selected they should see an error informing that “Max of [x] columns allowed in PDF format”
 - PDFs will have report title and date as their header
3. Save as Report Download Preference allows the user to save their preferences for the selected report

Download Report Wizard

Columns Options

1 Format: * PDF

Orientation: * Select Format

Excel

PDF

CSV

Tab Delimited

Back Download

Download Report Wizard

Columns Options

Format: * PDF

2 Orientation: * Portrait

3 Save as Report Download Preference

Back Cancel Download

Pre-Formatted Reports

The following reports are pre-formatted and will be excluded from the new download functionality:

- Employer Punch Entries Report PDF (run by users with ER role)
- Residential Billing Absentee Report
- Parenting Billing Absentee Report
- Summary Report
- Pay week total hours Report
- Total Daily Hours Report
- Raw Data Dump Report

Notes

Custom Field Definition – Note Type

Note Type was added to Customer Field Definitions. The purpose of this element will be to allow a user to designate which Note type they are targeting for a Custom Field definition. This data element shall:

- UI label = Note Type
- Note Type dropdown includes:
 - Note
 - Comment
 - Error
 - Authentication
 - Custom
- Note type is editable/settable if the Custom Field ItemType = Note
- Note type is available on both the Add/Edit Custom Field wizards
- Note type is added to the Custom Field Definitions Report

The screenshot shows a dialog box titled "Add New Custom Field" with a close button (X) in the top right corner. The form contains the following fields and options:

- Item Type:** Note (dropdown)
- Note Type:** Select Type (dropdown menu is open, showing options: Select Type, Note, Comment, Error, Authentication, Custom)
- Name:** (empty text field)
- Label:** Comment
- Description:** Error
- Help Text:** Custom
- Input Type:** Select Input Type (dropdown)
- RegEx:** RegEx
- Default Value:** Default Value
- EDI:** Yes (radio), No (radio, selected)
- Status:** Active (dropdown)

At the bottom right, there are two buttons: "Cancel" and "Save".

Custom Field Definition – Note Sub Type

Note Sub Type was added to Customer Field Definitions. The purpose of this element will be to allow a user to further designate which Note type they are targeting for a Custom Field definition. This data element shall:

- UI label = Note Sub Type
- The values are created in the Custom Dropdown Item with a type of Note Sub Type
- Note Sub Type is editable/settable if the Custom Field ItemType = Note and Note Type = Custom
- Note Sub Type is available on both the Add/Edit Custom Field wizards
- Note Sub Type is added to the Custom Field Definitions Report

Note - if a Custom Field is defined for a specific Note Type and Sub Type that the custom fields only show up for that designated note sub type. The custom field should not show up on other note types/sub types

The image displays two screenshots of a software configuration interface. The top screenshot shows a dialog box titled "Add New Custom Drop Down Item" with the following fields: "Item Type" (Note Sub Type), "Item Name" (Compliant), and "Item Status" (Active). The bottom screenshot shows a dialog box titled "Add New Custom Field" with the following fields: "Item Type" (Note), "Note Type" (Custom), "Note Sub Type" (Select Sub Type), "Name" (Select Sub Type), "Label" (Kudos), "Description" (Add Description for Custom Field), "Help Text" (Help Text), "Input Type" (Select Input Type), "RegEx" (RegEx), "Default Value" (Default Value), "EDI" (Yes/No), and "Status" (Active). An orange arrow points from the "Add New Custom Drop Down Item" dialog to the "Note Sub Type" dropdown in the "Add New Custom Field" dialog.

Events – Note Viewed

DCI will now record an event when the note was viewed.

Acumen Powered by DCI

HOME PAYROLL BILLING SCHEDULING CARE MANAGEMENT AUTHORIZATION SETTINGS REPORTS IMPORT

Enable Employer No Reimbursement:

Entries Accounts Certifications EV Locations Notes Attachments **Events** Custom Fields History

From (MM/DD/YYYY) To (MM/DD/YYYY) Subject Type Added By

Reset Search

Export

Events Showing 60 out of 298 records

| Date | Subject | Description | Input Type | OS | OS Version | App Version | Added By |
|--------------------------|-------------------------|---|------------|----|------------|-------------|---------------------------------|
| Feb 19, 2021 03:09:10 PM | Viewed | Andy Dwyer was viewed | Web Portal | | | | Matthew Cavallo |
| Feb 19, 2021 02:22:40 PM | Viewed | Andy Dwyer was viewed | Web Portal | | | | Leslie Knope |
| Feb 19, 2021 02:22:25 PM | Viewed | Andy Dwyer was viewed | Web Portal | | | | Leslie Knope |
| Feb 19, 2021 02:22:02 PM | Punch Created | 1063124 - 5214 - EBD was created for Andy Dwyer | Web Portal | | | | Ann Perkins |
| Feb 18, 2021 04:00:27 PM | Viewed | Andy Dwyer was viewed | Web Portal | | | | Leslie Knope |
| Feb 18, 2021 12:15:56 PM | Punch Approved | Ann Perkins-Punch-1063052- was approved | Web Portal | | | | Matthew Cavallo |
| Feb 18, 2021 12:15:56 PM | Client SignOff Override | Ann Perkins- Punch -1063052- was override | Web Portal | | | | Matthew Cavallo |
| Feb 18, 2021 12:13:30 PM | Viewed | Andy Dwyer was viewed | Web Portal | | | | Leslie Knope |
| Feb 18, 2021 12:10:10 PM | Viewed | Andy Dwyer was viewed | Web Portal | | | | Leslie Knope |

Caseworker Profile

Can View Notes and Attachments

1. Can View Notes allows a caseworker to see notes linked to clients and punch entries created by a base employee or employer
2. Can View Attachments allows a caseworker to view attachments linked to clients and punch entries

The screenshot displays the DCI software interface. The top navigation bar includes 'HOME', 'PAYROLL', 'BILLING', 'SCHEDULING', 'CARE MANAGEMENT', 'AUTHORIZATION', 'SETTINGS', 'REPORTS', and 'IMPORT'. A red notification icon with the number '4' is in the top right corner. The left sidebar menu is expanded to 'CASE WORKERS'. The main content area shows a form with the following fields:

- Country: USA
- Time Zone: MT (UTC-07)
- Phone: (999) 999-9999
- Alternate Phone: xxx-xxx-xxxx
- Email: matthewc+205@dcisoftware.com
- Cost Center: Colorado Cost Center - Colorado Cost Center
- Funding Source: Select Funding Source
- Custom Reports List: None
- Profile Reference: Profile Reference
- Can View Notes: Yes No
- Can View Attachments: Yes No
- CaseWED11: [Empty field]
- Status: Active

At the bottom right, there are 'Cancel' and 'Save' buttons. Two callout boxes are overlaid on the form: a yellow circle with the number '1' pointing to the 'Can View Notes' field, and a blue circle with the number '2' pointing to the 'Can View Attachments' field.

Notes and Attachments Tabs

1. The Notes tab was added to the client profile and punch entry details for a caseworker with can view notes enabled
2. The Attachments tab was added to the client profile and punch entry details for a caseworker with can view attachments enabled

The screenshot shows a web application interface with a navigation bar at the top containing 'HOME', 'CARE MANAGEMENT', and 'REPORTS'. A user profile 'leslie.knope' is visible in the top right. The main content area features a sidebar on the left and a central panel with a list of status items (e.g., 'Clock out EVV', 'Employee Fail') and a tabbed interface with 'Notes' and 'Attachments' tabs. Below the tabs are search filters for 'From', 'To', 'Subject', and 'Type Added By', along with 'Reset' and 'Search' buttons. An 'Export' button is located at the bottom right of the search area. A table titled 'Notes' displays two records from February 19, 2021, with columns for Date, Type, Sub Type, Subject, Body, and Added By.

| Date | Type | Sub Type | Subject | Body | Added By |
|--------------|------|----------|---------------|--|-------------|
| Feb 19, 2021 | Note | | Punch Created | Andy was pleasant and participated in all activities. He is progressing towards his goals. | Ann Perkins |
| Feb 19, 2021 | Note | | Punch Created | Power Outage | Ann Perkins |

Punch Entry Notes And Canned Statement Report

DCI is adding the Reports > Notes > Punch Entry Notes and Canned Statement Report for Caseworkers with the following enhancements:

1. The Client Name filter should be properly limited to only clients they are allowed to see
2. The Employee Name filter should be properly limited to only employees they are allowed to see
3. The Cost Center filter should be greyed out and inactive
4. The results for a report should be limited to notes created by base users or users with the Employer role. Notes created by users with other roles or Super Users should not be included in the results

The screenshot shows the DCI Reports interface. The left sidebar contains a navigation menu with options: SUMMARY REPORT, CARE MANAGEMENT REPORTS, NOTES REPORT (selected), AUTHORIZATION RUN RATE REPORT, and PUNCH ENTRY DETAILS REPORT. The main content area displays the report title 'Punch Entry Notes And Canned Statement Report' and a configuration form with the following fields:

- From (MM/DD/YYYY) and To (MM/DD/YYYY) date pickers
- Select Account Type dropdown
- Type Client Name text input
- Type Employee Name text input
- Type Service Code text input
- Select Status dropdown
- Select Entry Type dropdown
- Include Canceled and Rejected Punches
- Reset and Search buttons
- Download button

Below the form, it indicates 'Showing 7 out of 7 records' and displays a table with the following data:

| Id | Cost Center | Start Date | End Date | Statements | Canned Statements | Entry Type |
|----|------------------|------------------|------------------|------------------------------|-------------------|------------|
| | Colorado Cost... | 02/19/2021 08... | 02/19/2021 12... | 1:-Power Outage 2--Andy ... | | Punch |
| | Colorado Cost... | 02/18/2021 08... | 02/18/2021 12... | 1:-Power Outage 2--Andy ... | | Punch |
| | Colorado Cost... | 10/19/2020 08... | 10/19/2020 10... | 1:-Power Outage | | Punch |
| | Colorado Cost... | 08/27/2020 01... | 08/27/2020 03... | 1:-Power Outage, Satellit... | | Punch |
| | Colorado Cost... | 08/27/2020 05... | 08/27/2020 06... | 1:-Network Outage | | Punch |
| | Colorado Cost... | 08/26/2020 10... | 08/26/2020 02... | 1:-No Cell Coverage, Pow... | | Punch |
| | Colorado Cost... | 08/19/2020 09... | 08/19/2020 05... | 1:-Network Outage | | Punch |

Travel Time

Travel Time

- Travel Time is a new element available for hourly service codes only
- Travel Time allows users the ability to track travel time if enabled for the service code
- Travel Time is a Yes/No setting with the default set to No
- Travel Time is available for both adding and editing hourly service codes
- Travel Time is now a new required field on the Service Code Import
- Travel Time has been added to the Service Codes Report

The screenshot shows the 'Edit Service Code' form with the following fields and settings:

- Enable Geofencing: Yes No
- Has Daily Rate: Yes No
- Default Auth Specs:
- Reference Fields:
- GL Code:
- Description:
- Status:
- Canned Statements:
- Default CPT Code:
- Default HCPCS Code:
- Certification Template:
- Is Travel Time: Yes No
- Display Monthly Budget Link:

Buttons: Cancel, Save

Travel Time Bookend Validation Business Rule

The purpose is to validate that this entry is surrounded by a valid hourly service punch by this employee for any client within [x] minutes prior to and after this entry

- **Phase 3**
- **Parameter 1** – Required, Represents mode
 - Mode 1 – Do not allow entries that are not bookended by valid client service punches
 - Mode 2 – Allow with warning
- **Parameter 2** – Required, represents threshold in minutes (referred to as [x] above) in which a client service punch must exist prior to and after the entry being evaluated
- **Data Set** – All Hourly punches by the same employee excluding rejected, cancelled, Write off, Void and flag compensated by this employee
- **Logic** – Using the data set validate this entry is surrounded/bookended by hourly service punches both before and after the entry and within the designated threshold (declared in parameter 2)
- **End user punch failure message Mode 1** – "Error: Unable to approve punch because there is no valid punch within [X] minutes before and after this travel time entry."
- **End user punch failure message Mode 2** – "Warning: You are approving a punch with that is not bookended within [X] minutes before and after this travel time entry."

Travel Time Hours Total Percentage Payroll Validation

The purpose of this validation is to test that travel time entries (Service Code - isTravelTime = Yes) do not exceed a configurable threshold [x] of total hours for employee in the batch.

- **Parameter 1:** Required, Represents threshold as a percentage. Will be an integer # (eg 10% will be entered as 10)
- **Dataset:** All punches by the same employee in the batch
- **Logic:** Using the data set sum the travel time hours and then divide that # by the total hours for the employee. If the result is $\geq [x]$ the validation fails.
 - If validation fails, the entry and all other entries for that employee within the batch should be moved into an exception batch and the reason noted on the exception log attached to the batch.
- This validation should execute after the negative hours validation

Business Rules

Max Hours Per Week Per Employee

The purpose is to validate that employees do not exceed max weekly hours allowed as configured on their employee profile for pay week as specified in instance setting

- **Phase 2**
- **Parameter 1** – Required, Represents mode
 - Mode 1 – Reject punch
 - Mode 2 – Allow with warning
- **Data Set** – All time-based punches (excluding those in rejected, cancelled, void and flag compensated) for the employee for given week
- **Logic** – If total hours for the week exceeds the max weekly hours defined on employee profile this business rule should fail
- **End user punch failure message Mode 1** – "Error: This punch, plus existing punches in the system, violates the max weekly allowed hours for the employee"
- **End user punch failure message Mode 2** – "Warning: This punch, plus existing punches in the system, violates the max weekly allowed hours for the employee."
- If a punch fails, the Max Hours Per Week Per Employee business rule in mode 2, the auto approval process does not approve the punch

Needs Review

Needs Review

Punch entries that fail Mode 2 Business Rules will now have a Needs Review icon displaying the failed Business Rule when the mouse hovers over the Red Eye icon (pictured) on the Pending Entries screen

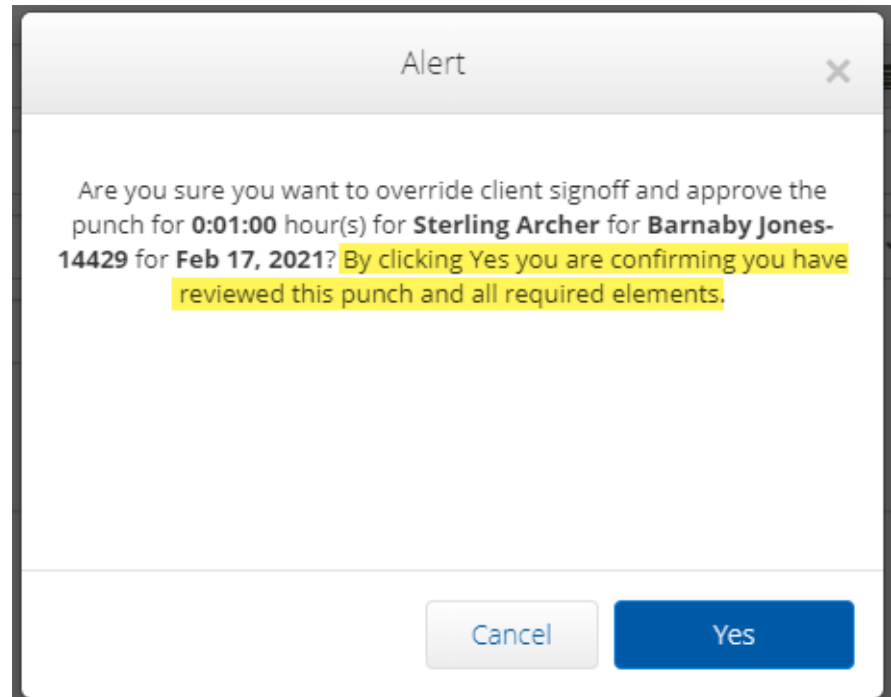
| Acumen Powered by DCI | | | | | | | | | | | | HOME | | PAYROLL | BILLING | SCHEDULING | CARE MANAGEMENT | AUTHORIZATION | SETTINGS | REPORTS | IMPORT | 4 | Help | matthew.cava |
|-----------------------|----------|--------------|--------------|----------|-------------|-----------------------------|-----------------------|-------------------|---------------------------------------|---------|--------------|------|--|---------|---------|------------|-----------------|---------------|----------|---------|--------|---|------|--------------|
| 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 | 1062625 | Jan 03, 2021 | 05:00 AM | 05:30 AM | QLI Mark Cost Center - QLIM | Api1 Client | Bill Someone1 | service code 1 | 0:00:30 | N/A | | | | | | | | | | | | | |
| A | R | 1062624 | Jan 03, 2021 | 04:00 AM | 04:30 AM | QLI Mark Cost Center - QLIM | Api1 Client | Bill Someone1 | service code 1 | 0:00:30 | N/A | | | | | | | | | | | | | |
| A | R | 1062623 | Jan 03, 2021 | 03:00 AM | 03:30 AM | QLI Mark Cost Center - QLIM | Api1 Client | Bill Someone1 | service code 1 | 0:00:30 | N/A | | | | | | | | | | | | | |
| A | R | 1062622 | Jan 03, 2021 | 02:00 AM | 02:30 AM | QLI Mark Cost Center - QLIM | Api1 Client | Bill Someone1 | service code 1 | 0:00:30 | N/A | | | | | | | | | | | | | |
| A | R | 1062621 | Jan 03, 2021 | 01:00 AM | 01:30 AM | QLI Mark Cost Center - QLIM | Api1 Client | Bill Someone1 | service code 1 | 0:00:30 | N/A | | | | | | | | | | | | | |
| A | R | 1062620 | Feb 11, 2021 | 03:17 PM | 03:17 PM | Infernum - Infernum | Rhea | INF Day | Transportation | 1.00 | N/A | | | | | | | | | | | | | |
| A | R | 1062618 | Feb 11, 2021 | 03:17 PM | 03:17 PM | Infernum - Infernum | Fortuna | INF Day | Transportation | 1.00 | N/A | | | | | | | | | | | | | |
| A | R | 1062613 | Feb 11, 2021 | 12:09 PM | 12:17 PM | MD Cost Center - MD-000 | Darth Vader | Thor Odinson | Hourly Dollar | 0:00:08 | - | | | | | | | | | | | | | |
| A | R | 1062612 | Nov 04, 2020 | 09:00 AM | 05:00 PM | CM Cost Center - CMCC01 | CM Client12 | CM Employee14 | - Authorization Weekly Max failure | | | | | | | | | | | | | | | |
| A | R | 1062598 | Feb 03, 2021 | 03:00 PM | 04:00 PM | CM Cost Center - CMCC01 | CM Client10 | CM Employee11 | Hourly Units - EVV Not Required CMF03 | 0:01:00 | N/A | | | | | | | | | | | | | |
| A | R | 1062597 | Feb 10, 2021 | 09:00 AM | 11:00 AM | CM Cost Center - CMCC01 | CM Client10 | CM Employee11 | Hourly Units - EVV Not Required CMF03 | 0:02:00 | N/A | | | | | | | | | | | | | |
| A | R | 1062590 | Feb 09, 2021 | 12:00 AM | 12:30 AM | MC Cost - MCCCC | Hot1 Client | Hot1 Ployee | Hourly Unit_EVV Req_ | 0:00:30 | No | | | | | | | | | | | | | |

Appended Verbiage on Manually Approving Pending Entries

Appended Verbiage on Manually Approving Pending Entries

System shall support appending the verbiage on the Approval confirmation alert that displays when manually approving a pending entry to include the statement:

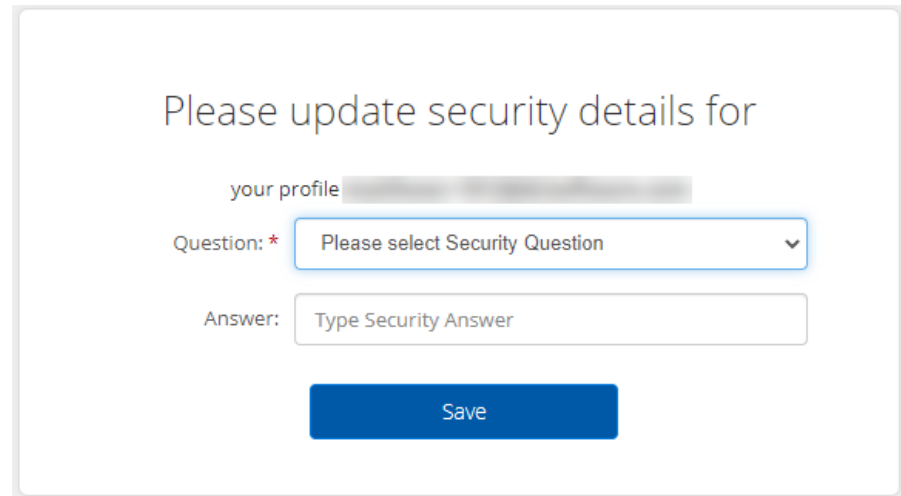
“By clicking Yes you are confirming you have reviewed this punch and all required elements.”



Password Reset Required On Import

Password Reset Required On Import

- DCI has a new instance level setting named "Password Reset Required On Import"
- When this feature is turned on, DCI will require imported users to update their password, and security question upon initial login to the system
- The default setting for this feature is that it is turned off
- To enable this feature, please contact your DCI account representative



Please update security details for
your profile [redacted]

Question: * Please select Security Question ▼

Answer: Type Security Answer

Save

Phone IVR Canned Statements

Phone IVR Canned Statements

DCI will now support canned statements via the phone IVR.

- Upon punch clock out, the system will check if the Service Code has Canned Statements associated with it
- Then the system will read the canned statements and allow for user to choose yes or no (i.e. enter 1 for yes, 2 for no) for each Canned Statement
- EE must say yes to at least one canned statement or punch will not be allowed to be ended



Fiscal Intermediary(FI) Specific Features

Supervisor/Auditor/View Only Role View Dashboard

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see information in the Dashboard that is linked to their profile via Cost Center
- Employee Search widget (part of the OT Gauge and Total Hours Widget) is limited to only employees they are linked to via profile default cost center or service account
- Authorizations widget is limited to only clients they are linked to via profile default cost center or service account

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HOME SCHEDULING CARE MANAGEMENT SETTINGS REPORTS Help sara.supervi.

DASHBOARD

ENTRIES

ACCOUNTS

PROFILE CERTIFICATION

SCHEDULES

AVAILABILITY

CLIENTS

EMPLOYEES

RESIDENTIAL PROGRAMS

DAY PROGRAMS

CASE WORKERS

GROUP SERVICES

PARENTING PROGRAMS

GUARDIANS

COST CENTERS

PENDING ENTRIES (6)

Home > Dashboard

Type Employee Name Search Reset Add Entry

Sara Supervisor ← 02/14/2021 to 02/20/2021 →

Overtime Gauge 02/14/2021 to 02/20/2021

0 to 30 30 to 40 40+

No entry in current week

Total Hours 02/14/2021 to 02/20/2021

| | |
|-------------------|------|
| Approved By: | 0.00 |
| Pending Hours: | 0.00 |
| Unverified Hours: | 0.00 |
| Total Hours: | 0.00 |

Authorizations

Type Client Name Search Reset

Overdue Care Notes Widget

No records to display

Expiring Certifications

Supervisor/Auditor/View Only Role View Clients Profiles

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see the clients for Cost Centers where the user has this role
- Client Name filter is restricted to only Clients they are related to via profile default cost center or service account cost center
- Client ID filter is restricted to only Clients they are related to via profile default cost center or service account cost center
- Cost Center filter is restricted to only Cost Centers for Clients they are allowed to see in the listing table below
- Regardless of any filter values the results listed in the Clients table are restricted to only Clients they are related to via profile default cost center or service account cost center

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HOME SCHEDULING CARE MANAGEMENT SETTINGS REPORTS Help sara.supervi..

DASHBOARD

ENTRIES

ACCOUNTS

PROFILE CERTIFICATION

SCHEDULES

AVAILABILITY

CLIENTS

EMPLOYEES

RESIDENTIAL PROGRAMS

DAY PROGRAMS

CASE WORKERS

GROUP SERVICES

PARENTING PROGRAMS

GUARDIANS

COST CENTERS

PENDING ENTRIES (6)

Home > Clients

Clients

Type Client Name Type Client Id Type Cost Center

Select State Select Status Select Funding Source

Reset Search

Export

Showing 21 out of 21 records

| Name | Client Id | State | Region | Cost Center | Status |
|----------------|-----------|-------|--------------|---|--------|
| Andy Dwyer | CO12345 | AZ | South Region | Colorado Cost Center - Colorado Cost Center | Active |
| April Ludgate | CO21001 | AZ | South Region | Colorado Cost Center - Colorado Cost Center | Active |
| AQUA MAN | CO5667 | CO | | Colorado Cost Center - Colorado Cost Center | Active |
| BAT MAN | CO4667 | CO | | Colorado Cost Center - Colorado Cost Center | Active |
| Chris Traeger | 234321 | AZ | | Colorado Cost Center - Colorado Cost Center | Active |
| Dolly Parton | A12346 | CO | | Colorado Cost Center - Colorado Cost Center | Active |
| Donkey Kong | CO8989 | CO | | Colorado Cost Center - Colorado Cost Center | Active |
| Dr Dre | COdre | AZ | | Colorado Cost Center - Colorado Cost Center | Active |
| DWIGHT SCHRUTE | CO4567 | CO | | Colorado Cost Center - Colorado Cost Center | Active |

Supervisor/Auditor/View Only Role View Employee Profiles

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see the employees for Cost Centers where the user has this role
- Employee Name filter is restricted to only Employees they are related to via profile default cost center or service account cost center
- Employee ID filter is restricted to only Clients they are related to via profile default cost center or service account cost center
- Cost Center filter is restricted to only Cost Centers for Employees they are allowed to see in the listing table below
- Regardless of any filter values the results listed in the Employees table are restricted to only Employees they are related to via profile default cost center or service account cost center

Acumen Powered by DCI | HOME | SCHEDULING | CARE MANAGEMENT | SETTINGS | REPORTS | Help | sara.supervi..

Home > Clients

Clients

Type Client Name: Type Client Id: Type Cost Center:

Select State: Select Status: Select Funding Source:

Reset Search

Export

Showing 21 out of 21 records

| Name | Client Id | State | Region | Cost Center | Status |
|----------------|-----------|-------|--------------|---|--------|
| Andy Dwyer | CO12345 | AZ | South Region | Colorado Cost Center - Colorado Cost Center | Active |
| April Ludgate | CO21001 | AZ | South Region | Colorado Cost Center - Colorado Cost Center | Active |
| AQUA MAN | CO5667 | CO | | Colorado Cost Center - Colorado Cost Center | Active |
| BAT MAN | CO4667 | CO | | Colorado Cost Center - Colorado Cost Center | Active |
| Chris Traeger | 234321 | AZ | | Colorado Cost Center - Colorado Cost Center | Active |
| Dolly Parton | A12346 | CO | | Colorado Cost Center - Colorado Cost Center | Active |
| Donkey Kong | CO8989 | CO | | Colorado Cost Center - Colorado Cost Center | Active |
| Dr Dre | COdre | AZ | | Colorado Cost Center - Colorado Cost Center | Active |
| DWIGHT SCHRUTE | CO4567 | CO | | Colorado Cost Center - Colorado Cost Center | Active |

Supervisor/Auditor/View Only Role View for Employee Entries

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see the entries in a Profile Details tab for Cost Centers where the user has this role

The screenshot displays the 'Entries' view in the Acumen software. The top navigation bar includes 'HOME' and 'REPORTS' tabs. The main content area features a filter panel with the following fields:

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

Buttons for 'Reset' and 'Search' are located below the filter panel. An 'Export' button is visible in the top right of the table area. The table shows 30 out of 105 records. The table columns are: Id, Service Date, Start Time, End Time, Account Type, Ref., Cost Center, Client/ Program Name, Service Code, Amount, and Status.

| Id | Service Date | Start Time | End Time | Account Type | Ref. | Cost Center | Client/ Program Name | Service Code | Amount | Status |
|------------------------|--------------|------------|----------|--------------|------|---|-------------------------------|--------------|---------|---------|
| 994714 | Oct 27, 2020 | 08:00 AM | 10:00 AM | Hourly | | Colorado Cost Center - Colorado Cost Center | April Ludgate | EBD | 0:02:00 | Pending |
| 994710 | Oct 28, 2020 | 08:00 AM | 12:00 PM | Hourly | | Colorado Cost Center - Colorado Cost Center | Andy Dwyer | EBD | 0:04:00 | Pending |
| 990868 | Oct 23, 2020 | 10:00 AM | 12:00 PM | Hourly | | Colorado Cost Center - Colorado Cost Center | April Ludgate | EBD | 0:02:00 | Pending |
| 989758 | Oct 23, 2020 | 04:00 AM | 06:00 AM | Hourly | | Colorado Cost Center - Colorado Cost Center | Andy Dwyer | EBD | 0:02:00 | Pending |
| 989757 | Oct 21, 2020 | 08:00 AM | 10:00 AM | Hourly | | Colorado Cost Center - Colorado Cost Center | Andy Dwyer | EBD | 0:02:00 | Pending |

Supervisor/Auditor/View Only Role View Caseworker Profiles

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see the caseworkers for Cost Centers where the user has this role
- Case Worker Name filter is restricted to only Case Workers they are related to via profile default cost center
- Cost Center filter is restricted to only Cost Centers they have a role for
- Regardless of any filter values the results listed in the Case Worker table are restricted to only Case Worker they are related to via profile default cost center

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HOME SCHEDULING CARE MANAGEMENT SETTINGS REPORTS Help sara.supervi..

DASHBOARD ENTRIES ACCOUNTS PROFILE CERTIFICATION SCHEDULES AVAILABILITY CLIENTS EMPLOYEES RESIDENTIAL PROGRAMS DAY PROGRAMS CASE WORKERS GROUP SERVICES PARENTING PROGRAMS GUARDIANS COST CENTERS PENDING ENTRIES (6)

Home > Case Workers

Case Workers

Type Case Worker Name Type Cost Center Select Status

Reset Search

Export

Showing 1 out of 1 record

| Name | Phone | Email | Cost Center | Status |
|--------------|----------------|----------------------------------|--|--------|
| Leslie Knope | (999) 999-9999 | matthewc+205@dcisoftwar e.com | Colorado Cost Center - Colorado Cost Center | Active |

Supervisor/Auditor/View Only Role View Guardian Profiles

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see the guardian for Cost Centers where the user has this role
- Guardian Name filter is restricted to only Guardian they are related to a profile default cost center
- Cost Center filter is restricted to only Cost Centers they have a role for
- Regardless of any filter values the results listed in the Guardian table are restricted to only Guardian they are related to via profile default cost center

The screenshot shows the Acumen software interface. The top navigation bar includes 'HOME', 'SCHEDULING', 'CARE MANAGEMENT', 'SETTINGS', and 'REPORTS'. The left sidebar menu lists various sections: DASHBOARD, ENTRIES, ACCOUNTS, PROFILE CERTIFICATION, SCHEDULES, AVAILABILITY, CLIENTS, EMPLOYEES, RESIDENTIAL PROGRAMS, DAY PROGRAMS, CASE WORKERS, GROUP SERVICES, PARENTING PROGRAMS, GUARDIANS (highlighted), COST CENTERS, and PENDING ENTRIES (6). The main content area is titled 'Guardians' and features a search bar with three filters: 'Type Guardian Name', 'Type Cost Center', and 'Select Status'. Below the search bar is an 'Export' button. A table displays one record for 'April Dwyer' with columns for Name, Phone, Email, Cost Center, and Status.

| Name | Phone | Email | Cost Center | Status |
|-------------|----------------|------------------------------|---|--------|
| April Dwyer | (855) 514-9938 | matthewwc+75@dcisoftware.com | Colorado Cost Center - Colorado Cost Center | Active |

Supervisor/Auditor/View Only Role View Reporting Module

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see data linked to their cost center
- This includes all search filters (e.g., Client, Employee, Cost Center, etc.) as well as search result
- This includes if a wildcard (*) is used in a cost center filter

Acumen Powered by DCI | HOME | REPORTS | Help | sara.supervi...

Reports > CoA Reports > Punch Entries Report

CoA Reports - Punch Entries Report

From (MM/DD/YYYY) To (MM/DD/YYYY) Select Account Type

Type Client Name Type Employee Name Type Service Code

Colorado Cost Center Select Activity Select Status

Select Entry Type

Include Canceled and Rejected Punches

Reset Search

Download

Showing 188 out of 188 records

| Punch ID | Pay We... | Date of Serv... | Account Type | General Acti... | Employee/V... | Employee Num... | Client/ Resi... |
|----------|-----------|-----------------|--------------|-----------------|-----------------|-----------------|-----------------|
| 994720 | 11 | 03/11/2020 | Vendor | | AZ Swim Less... | | April Ludg... |
| 994719 | 6 | 02/06/2020 | Vendor | | AZ Swim Less... | | April Ludg... |
| 994714 | 44 | 10/27/2020 | Hourly | | Ann Perkins | CO2233 | April Ludg... |
| 994710 | 44 | 10/28/2020 | Hourly | | Ann Perkins | CO2233 | Andy Dwy... |
| 990875 | 23 | 06/02/2020 | Vendor | | AZ Swim Less... | | April Ludg... |
| 990874 | 1 | 01/02/2020 | Vendor | | AZ Swim Less... | | April Ludg... |
| 990868 | 43 | 10/23/2020 | Hourly | | Ann Perkins | CO2233 | April Ludg... |
| 989758 | 43 | 10/23/2020 | Hourly | | Ann Perkins | CO2233 | Andy Dwy... |
| 989757 | 43 | 10/21/2020 | Hourly | | Ann Perkins | CO2233 | Andy Dwy... |
| 989745 | 12 | 03/19/2020 | Vendor | | AZ Swim Less... | | April Ludg... |
| 989744 | 12 | 03/16/2020 | Vendor | | AZ Swim Less... | | April Ludg... |
| 989739 | 43 | 10/22/2020 | Hourly | | Ann Perkins | CO2233 | April Ludg... |
| 989734 | 43 | 10/20/2020 | Hourly | | Ann Perkins | CO2233 | April Ludg... |
| 989722 | 32 | 08/05/2020 | Vendor | | AZ Swim Less... | | April Ludg... |

Supervisor/Auditor/View Only Role View Cost Centers

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see their linked cost centers
- Cost Center Name filter is restricted to only Cost Center they have a role for
- Cost Center Code filter is restricted to only Cost Centers they have a role for
- Regardless of any filter values the results listed in the Cost Center table are restricted to only Cost Center they are related to

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HOME SCHEDULING CARE MANAGEMENT SETTINGS REPORTS Help sara.supervi...

Home > Cost Centers

Cost Centers

Type Cost Center Name Type Cost Center Code Select State

Select Status

Reset Search

Export

Showing 1 out of 1 record

| Name | Cost Center Code | State | Cost Center Reference | Cost Center Reference2 | Status |
|----------------------|----------------------|-------|-----------------------|------------------------|--------|
| Colorado Cost Center | Colorado Cost Center | CO | | | Active |

Supervisor/Auditor/View Only Role View Pending Entries

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see pending entries linked to their cost centers
- Client Name filter is restricted to only Clients they are related to via profile default cost center or service account cost center
- Employee Name filter is restricted to only Employees they are related to via profile default cost center or service account cost center
- Cost Center filter is restricted to only Cost Centers they have a role for
- Regardless of any filter values the results listed in the Pending Entries table are restricted to only entries they are related to

The screenshot shows the Acumen software interface for a user with the role of Supervisor/Auditor/View Only. The page is titled "Cost Centers" and is located under the "Home" menu. The left sidebar contains a navigation menu with the following items: DASHBOARD, ENTRIES, ACCOUNTS, PROFILE CERTIFICATION, SCHEDULES, AVAILABILITY, CLIENTS, EMPLOYEES, RESIDENTIAL PROGRAMS, DAY PROGRAMS, CASE WORKERS, GROUP SERVICES, PARENTING PROGRAMS, GUARDIANS, COST CENTERS (highlighted), and PENDING ENTRIES (6). The main content area shows a search filter section with the following fields: "Type Cost Center Name", "Type Cost Center Code", "Select State", and "Select Status". There are "Reset" and "Search" buttons. Below the search filter, there is an "Export" button. The table below shows one record for "Colorado Cost Center".

| Name | Cost Center Code | State | Cost Center Reference | Cost Center Reference2 | Status |
|----------------------|----------------------|-------|-----------------------|------------------------|--------|
| Colorado Cost Center | Colorado Cost Center | CO | | | Active |

Supervisor/Auditor/View Only Role View Residential and Other Programs/Services

- A user with the Supervisor/Auditor/View Only role for one or more Cost Centers will only see the program for Cost Centers where the user has this role
- Program Name filter is restricted to only Programs they are related to via profile default cost center or service account cost center
- Cost Center filter is restricted to only Cost Centers they have a role for
- Regardless of any filter values the results listed in the Programs table are restricted to only Programs they are related to via profile default cost center
- These changes also apply to the following:
 - Parenting Programs
 - Day Programs
 - Group Services

The screenshot shows a web application interface for 'Residential Programs'. The navigation menu on the left includes: DASHBOARD, ENTRIES, ACCOUNTS, PROFILE CERTIFICATION, SCHEDULES, AVAILABILITY, CLIENTS, EMPLOYEES, RESIDENTIAL PROGRAMS (selected), DAY PROGRAMS, CASE WORKERS, GROUP SERVICES, PARENTING PROGRAMS, GUARDIANS, COST CENTERS, and PENDING ENTRIES (6). The main content area shows a search filter with three input fields: 'Type Residential Program Name', 'Type Cost Center', and 'City', along with a 'Select Status' dropdown menu. Below the filter is a 'Reset' button and a blue 'Search' button. An 'Export' button is located at the bottom right of the filter section. The table below the filter shows one record:

| Name | Cost Center | City | Total Employees | Total Clients | Status |
|------------------------|--|------|-----------------|---------------|--------|
| Adult Residential Care | Colorado Cost Center - Colorado Cost Center | Mesa | 1 | 1 | Active |

Showing 1 out of 1 record

Authorization Role – Approved Authorizations

- A user with the Authorization role for one or more Cost Centers will only see the approved authorizations for Cost Centers where the user has this role
- Client Name filter is restricted to only Clients they are related to via profile default cost center or funding account cost center
- Cost Center filter is restricted to only Cost Centers they have a role for
- Regardless of any filter values the results listed in the Authorizations table are restricted to only Authorizations they are related to via cost center

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HOME CARE MANAGEMENT AUTHORIZATION REPORTS Help sara.supervi.

Authorization > Approved Authorizations

Approved Authorizations

From (MM/DD/YYYY) To (MM/DD/YYYY) Type Entry Id

Type Client Name Type Service Code Initial Balance

Type Cost Center Select Status

Reset Search

Export

Showing 30 out of 33 records

| Id | Start Date | End Date | Client | Service Code | FundingType | Bill Rate | Cost Center | Remaining Balance | Holds |
|---------|--------------|--------------|----------------|--------------|-------------|-----------|----------------------|-------------------|--------|
| 1063050 | Feb 01, 2021 | Jan 31, 2025 | Andy Dwyer | EBD | Dollars | | Colorado Cost Center | 100000.00 | 69.38 |
| 989715 | Jan 01, 2020 | Dec 31, 2020 | April Ludgate | Vendor | Dollars | | Colorado Cost Center | 1000.00 | 800.00 |
| 972971 | Oct 01, 2020 | Sep 30, 2021 | Ottis Redding | HM | Dollars | | Colorado Cost Center | 12453.80 | 0.00 |
| 972970 | Oct 01, 2020 | Sep 30, 2021 | Ottis Redding | SLS | Dollars | | Colorado Cost Center | 23465.85 | 0.00 |
| 972961 | Oct 01, 2020 | Sep 30, 2021 | Paul McCartney | HM | Dollars | | Colorado Cost Center | 13837.15 | 0.00 |
| 972960 | Oct 01, 2020 | Sep 30, 2021 | Paul McCartney | SLS | Dollars | | Colorado Cost Center | 33309.90 | 0.00 |

Authorization Role – Pending Authorizations

- A user with the Authorization role for one or more Cost Centers will only see the pending authorizations for Cost Centers where the user has this role
- Client Name filter is restricted to only Clients they are related to via profile default cost center or funding account cost center
- Cost Center filter is restricted to only Cost Centers they have a role for
- Regardless of any filter values the results listed in the Authorizations table are restricted to only Authorizations they are related to via cost center

The screenshot shows the Acumen system interface. The top navigation bar includes 'HOME', 'CARE MANAGEMENT', 'AUTHORIZATION', and 'REPORTS'. The user is logged in as 'sara.supervi.'. The main content area is titled 'Authorization > Pending Authorizations'. On the left sidebar, 'PENDING AUTHORIZATIONS (0)' is selected. The main area contains a search form with the following fields: 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Entry Id', 'Type Client Name', 'Type Service Code', 'Initial Balance', and 'Type Cost Center Name'. There are 'Reset' and 'Search' buttons. Below the search form, a message states 'No records to display'.

Authorization Role – Funding Accounts

- A user with the Authorization role for one or more Cost Centers will only see the funding accounts for Cost Centers where the user has this role
- Client Name filter is restricted to only Clients they are related to via profile default cost center or funding account cost center
- Cost Center filter is restricted to only Cost Centers they have a role for
- Regardless of any filter values the results listed in the Authorizations table are restricted to only Authorizations they are related to via cost center

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HOME CARE MANAGEMENT AUTHORIZATION REPORTS Help sara.supervi.

Authorization > Funding Accounts

Funding Accounts

Actions

Type Client Name Type Service Code Select Unit

Type Cost Center Name Active Select Funding Type

Reset Search

Export

Showing 30 out of 31 records

| Client | Account Type | Service Code | Funding Type | Cost Center | Unit | Status |
|---------------|----------------|--------------|--------------|---|--------|--------|
| April Ludgate | Client Funding | Vendor | Dollars | Colorado Cost Center - Colorado Cost Center | Dollar | Active |
| April Ludgate | Client Funding | EBD | Dollars | Colorado Cost Center - Colorado Cost Center | Dollar | Active |
| AQUA MAN | Client Funding | HM | Dollars | Colorado Cost Center - Colorado Cost Center | Dollar | Active |
| AQUA MAN | Client Funding | SLS | Dollars | Colorado Cost Center - Colorado Cost Center | Dollar | Active |
| BAT MAN | Client Funding | EBD | Dollars | Colorado Cost Center - Colorado Cost Center | Dollar | Active |
| Chris Traeger | Client Funding | HM | Dollars | Colorado Cost Center - Colorado Cost Center | Dollar | Active |
| Chris Traeger | Client Funding | SLS | Dollars | Colorado Cost Center - Colorado Cost Center | Dollar | Active |
| Donkey Kong | Client Funding | SLS | Dollars | Colorado Cost Center - Colorado Cost Center | Dollar | Active |
| Donkey Kong | Client Funding | HM | Dollars | Colorado Cost Center - Colorado Cost Center | Dollar | Active |

Authorization Role – Pending Fees and Adjustments

- A user with the Authorization role for one or more Cost Centers will only see the pending fees and adjustments for Cost Centers where the user has this role
- Client Name filter is restricted to only Clients they are related to via profile default cost center or funding account cost center
- Regardless of any filter values the results listed in the Pending Fees and Adjustments table are restricted to only entries they are related to via cost center

The screenshot shows the Acumen Powered by DCI web application interface. The top navigation bar includes 'HOME', 'CARE MANAGEMENT', 'AUTHORIZATION', and 'REPORTS'. The user is logged in as 'sara.supervi.'. The sidebar on the left has the following menu items: 'APPROVED AUTHORIZATIONS', 'PENDING AUTHORIZATIONS (0)', 'FUNDING ACCOUNTS', 'PENDING FEES AND ADJUSTMENTS' (which is highlighted), and 'CLIENT FEES AND ADJUSTMENTS'. The main content area is titled 'Authorization > Pending Fees and Adjustments'. Below the title is a search form with the following fields: 'From (MM/DD/YYYY)' with a calendar icon, 'To (MM/DD/YYYY)' with a calendar icon, 'Type Client Name', 'Select Account Type' (a dropdown menu), 'Type Amount', and 'Select Entry Type' (a dropdown menu). There are 'Reset' and 'Search' buttons at the bottom right of the search form. Below the search form, a message box displays 'No records to display' with a blue arrow icon pointing to the right.

Authorization Role – Client Fees and Adjustments

- A user with the Authorization role for one or more Cost Centers will only see the client fees and adjustments for Cost Centers where the user has this role
- Client Name filter is restricted to only Clients they are related to via profile default cost center or funding account cost center
- Cost Center filter is restricted to only Cost Centers they have a role for
- Regardless of any filter values the results listed in the Authorizations table are restricted to only Authorizations they are related to via cost center

The screenshot shows the Acumen system interface. The top navigation bar includes 'HOME', 'CARE MANAGEMENT', 'AUTHORIZATION', and 'REPORTS'. The user is logged in as 'sara.supervi.'. The main content area is titled 'Client Fees and Adjustments' and features several search filters: 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Client Name', 'Select Account Type', 'Type Amount', and 'Select Entry Type'. There are 'Reset' and 'Search' buttons. Below the filters, there is an 'Export' button and a table showing 2 records. The table has columns for Id, Entry Type, Date, Client Name, Account Type, Amount, Unit, and Entry Status.

| Id | Entry Type | Date | Client Name | Account Type | Amount | Unit | Entry Status |
|--------|------------|--------------|---------------|--------------|----------|--------|--------------|
| 659681 | Adjustment | Jun 05, 2020 | Chris Traeger | Hourly | 517.55 | Dollar | Approved |
| 655558 | Adjustment | Jun 05, 2020 | Chris Traeger | Hourly | -8202.97 | Dollar | Approved |

Payroll Role – Batches

- A user with the Payroll role for one or more cost centers are still able to create batches for entries from any cost center
 - This would be achieved by not declaring a Cost Center on this Create Batch wizard
- A user with the Payroll role for one or more cost centers that the user is able to see all batches under the Payroll > Batches function, and the user should also be allowed to view all batch details pages

Acumen Powered by DCI | HOME | PAYROLL | CARE MANAGEMENT | SETTINGS | REPORTS | Help | sara.supervi.

Payroll > Payroll Batches

Batches

From (MM/DD/YYYY) To (MM/DD/YYYY) Batch Id

Type Batch Name Entries Units

Select Status

Reset Search

Export

Showing 30 out of 2855 records

| Batch ID | Batch Name | Created Date | Created By | Cut-off Date | Entries | Units | Status |
|----------|---------------------------------|--------------|-------------------|--------------|---------|-------|-------------|
| 4039 | CM FI Default Paycom enabled | Feb 18, 2021 | Craig Morford | Feb 09, 2021 | 4 | 16.00 | Transmitted |
| 4038 | CM Travel Time Percent div by 0 | Feb 18, 2021 | Craig Morford | Feb 17, 2021 | 4 | 10.00 | Transmitted |
| 4037 | Rebill process First try | Feb 17, 2021 | Maribel Cervantes | Feb 08, 2021 | 2 | 0.33 | Reconciled |
| 4035 | 2-17 | Feb 17, 2021 | Bakugo Katsuki | Feb 17, 2021 | 4 | 2.00 | Transmitted |
| 4030 | 0216-1 | Feb 16, 2021 | Don Burke | Feb 14, 2021 | 2 | 10.00 | Transmitted |
| 4029 | CM 0215 VII | Feb 15, 2021 | Craig Morford | Feb 08, 2021 | 2 | 2.00 | Transmitted |
| 4028 | CM 0215 VI | Feb 15, 2021 | Craig Morford | Feb 08, 2021 | 2 | 6.00 | Transmitted |
| 4027 | CM 0215 V | Feb 15, 2021 | Craig Morford | Feb 10, 2021 | 4 | 9.00 | Transmitted |

Payroll Role – Batch Details

- A user with the Payroll role for one or more cost centers that when viewing the Batch Details page they can see all entries in the batch, but that if they click on a punch or employee hyperlink that they are only allowed to reach the details page if they punch or employee is linked to their cost center
- The system limits the entries visible on the following screens to only those which are linked to the users cost center:
 - Payroll > Punch Entries
 - Payroll > Payroll Entries
 - Payroll > Previously Paid Entries

Acumen Powered by DCI | HOME | **PAYROLL** | CARE MANAGEMENT | SETTINGS | REPORTS | Help | sara.supervi..

Batch Details - CM FI Default Paycom enabled [Actions]

Batch Details [Reconcile]

Batch Id: 4039
 Date: Feb 18, 2021
 Status: Transmitted
 No. of Credit Entries: 2
 No. of Debit Entries: 2
 Credit Total: 16.00
 Debit Total: -16.00
 No. of Employees/Vendors: 1

Entries | Notes | Attachments | Events | Custom Fields | History

From (MM/DD/YYYY) [calendar] To (MM/DD/YYYY) [calendar] Select Account Type [v] Select Profile Type [v]
 Type Cost Center [input] Type Employee/Vendor Name [input] Select Unit [v] Select Entry Type [v]
 Select Status [v]

[Reset] [Search]

Entries [Export] Showing 4 out of 4 records

| Id | Service Date | Employee/Vendor | Ref. | Entry Type | Cost Center | Account Type | Profile Type | Unit Type | Amount | Pay Rate | Status |
|---------|--------------|-----------------|---------|------------|-------------|--------------|--------------|-----------|--------|----------|----------|
| 1063020 | Feb 09, 2021 | CM Employee13 | 1062441 | Payroll | CM Cost | Employee | Client | Hourly | -8.00 | 10.00 | Approved |

Payroll Role – Employees

- A user with the Payroll role for one or more cost centers that the system limits the Employees visible on the Payroll > Employees screen to only those are linked to the users cost center via default profile cost center or employee service account.

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HOME PAYROLL CARE MANAGEMENT SETTINGS REPORTS Help sara.supervi.

BATCHES
PUNCH ENTRIES
PAYROLL ENTRIES
PREVIOUSLY PAID ENTRIES
EMPLOYEES
RECONCILE

Payroll > Employees

Employees

Type Employee Name Type Cost Center Employee Number
Select Employee Type Select Status
Reset Search

Export

Showing 16 out of 16 records

| Name | Employee # | Phone # | Email | Time Zone | Type | Cost Center | Status |
|--------------------|------------|----------------|------------------------------|-------------|-------------------|---|---------|
| Ann Perkins | CO2233 | (999) 999-9999 | matthewc+207@dcisoftware.com | MT (UTC-07) | Hourly Non Exempt | Colorado Cost Center - Colorado Cost Center | Active |
| Ben Wyatt | CO65432 | (480) 616-2385 | matthewc+209@dcisoftware.com | MT (UTC-07) | Hourly Non Exempt | Colorado Cost Center - Colorado Cost Center | Active |
| CO Employer | A9988 | (555) 555-5555 | matthewd+81@dcisoftware.com | MT (UTC-07) | Hourly Non Exempt | Colorado Cost Center - Colorado Cost Center | Active |
| CO Employer2 | A78787 | (555) 555-5555 | matthewd+41@dcisoftware.com | MT (UTC-07) | Hourly Non Exempt | Colorado Cost Center - Colorado Cost Center | Active |
| Donna Meagle | CO23456 | (480) 616-2385 | matthewc+210@dcisoftware.com | MT (UTC-07) | Hourly Non Exempt | Colorado Cost Center - Colorado Cost Center | Active |
| Gabrielle Steckman | | (719) 963-6129 | gabrielles@acumen2.net | MT (UTC-07) | Hourly Non Exempt | Colorado Cost Center - Colorado Cost Center | Pending |
| George Harrison | CO23460 | (877) 211-3738 | matthewc+71@dcisoftware.com | MT (UTC-07) | Hourly Non Exempt | Colorado Cost Center - Colorado | Active |

Thank you!