



October 2020 Release Notes

Table of Contents

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

- [Batching Mixed Units](#)
- [SSN](#)
- [Reason Codes](#)
- [Texas Reports](#)
- [Regions](#)
- [No Account ID Imports](#)
- [Misc. Feature Requests](#)
- [Multiple Reimbursements](#)
- [Vendor Updates](#)

Batching Mixed Units

Create Batch: Units Dropdown Removed

The Units dropdown was removed from the Create Batch screen to allow for the addition of the Entry Type dropdown

The screenshot shows the 'Create Batch' screen in a software application. The navigation bar at the top includes 'HOME', 'PAYROLL', 'BILLING', 'SCHEDULING', 'CARE MANAGEMENT', 'AUTHORIZATION', 'SETTINGS', 'REPORTS', and 'IMPORT'. The breadcrumb trail is 'Payroll > Payroll Batches > New Batch'. The main heading is 'Create Batch'. Below this, there are two tabs: 'Criteria' and 'Batch Summary'. The 'Criteria' tab is active. The form contains several fields: 'Name' (Type Batch Name), 'Description' (Add Description for Batch), 'Up to Date' (10/20/2020), 'Cost Center Code' (Type Cost Center), 'Account Type' (All), 'Profile Type' (All), 'Service Code' (Type Service Code), and 'Employee Type' (All). The 'Units' dropdown menu is open, showing options: Hourly, Daily, Monthly, Miles, and Dollar. The 'Hourly' option is highlighted in blue. A yellow checkmark icon is visible to the right of the dropdown.

Create Batch: Mixed Units

DCI can now create batches with multiple unit types

The Entry Type dropdown allows a user to select multiple entry types when creating a batch

The default is set to All Entry Types

Simply click on the checkbox to deselect a unit type that you do not want to include in a batch

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HOME PAYROLL BILLING SCHEDULING CARE MANAGEMENT AUTHORIZATION SETTINGS REPORTS IMPORT Help matthew.cava.

PREVIOUSLY PAID ENTRIES

EMPLOYEES

RECONCILE

Criteria Batch Summary

Name: Type Batch Name

Description: Add Description for Batch

Up to Date: 10/20/2020

Cost Center Code: Type Cost Center

Account Type: All

Profile Type: All

Service Code: Type Service Code

Employee Type: All

Entry Type: All Entry Type

Employee Name:

- All Entry Type
- Punch
- Employer Reimbursement
- Vendor Payment
- Bonus Payment
- Accrued Time Off

Punch Entries Unit Dropdown Removed

The Units dropdown was removed from the Punch Entries Payroll screen to allow for the addition of the Entry Type dropdown

The screenshot shows the DCI Payroll system interface. The top navigation bar includes: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, IMPORT, and a Help icon with the user name 'matthew.cava.'. The left sidebar contains menu items: BATCHES, PUNCH ENTRIES (highlighted), PAYROLL ENTRIES, PREVIOUSLY PAID ENTRIES, EMPLOYEES, and RECONCILE. The main content area is titled 'Punch Entries' and contains several input fields: 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Punch Id', 'Entry Type' (dropdown), 'Type Cost Center Code', 'Type Employee/Vendor Name', 'Employee Number', 'Pay Rate', and 'Select Status' (dropdown). At the bottom are 'New Batch' and 'Add to Existing Batch' buttons. A dropdown menu is open over the 'Select Unit' field, listing options: 'Select Unit' (highlighted), 'Hourly', 'Daily', 'Monthly', 'Miles', and 'Dollar'. A checkmark icon is visible to the right of the dropdown.

Punch Entries: Mixed Units

DCI can now create batches with multiple unit types

The Entry Type dropdown allows a user to select multiple entry types when creating a batch

The default is set to All Entry Types

Simply click on the checkbox to deselect a unit type that you do not want to include in a batch

The screenshot displays the DCI web application interface for creating punch entries. The top navigation bar includes links for HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. A user profile for 'matthew.cava.' is visible in the top right corner. The main content area is titled 'Punch Entries' and features a sidebar with navigation options: BATCHES, PUNCH ENTRIES (selected), PAYROLL ENTRIES, PREVIOUSLY PAID ENTRIES, EMPLOYEES, and RECONCILE. The main form includes fields for 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Punch Id', 'Type Cost Center Code', 'Type Employee/Vendor Name', 'Pay Rate', and 'Select Status'. A dropdown menu for 'All Entry Type' is open, showing a list of entry types with checkboxes: All Entry Type, Punch, Employer Reimbursement, Vendor Payment, Bonus Payment, and Accrued Time Off. A yellow circle highlights the 'All Entry Type' option, and a yellow checkmark icon is positioned next to it. At the bottom of the form, there are buttons for 'New Batch', 'Add to Existing Batch', 'Reset', 'Search', and 'Export'.

SSN

Retain SSN

- As part of the rollout of EVV across the country some states are electing to require that providers (e.g. our customers) aggregate SSNs for employees/clients or both
- DCI now can store a short SSN of the last 5 characters of a client or employee SSN as plain text
- DCI will display only the last 4 characters of a client or employee SSN in the following format: ###-##-XXXX
- SSN information is encrypted and protected in DCI

Employee Profiles Import

The following has been added or changed in the Employee Profile Import:

- Date of Hire
- PIN
- Profile Status
- Retain SSN

The screenshot shows the Acumen HR system interface. The top navigation bar includes: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. The left sidebar has: DASHBOARD, SETTINGS, and PROFILES. The main content area is titled 'Import > Employees Profile'. A tooltip is displayed over the page, listing the required columns for import:

Required columns list:
FirstName, LastName, FullName, Address, Address2, City, State, PostalCode, CountryCode, Phone, AltPhone, MobilePhone, Email, TimeZone, CostCenterId, DOB, Username, Password, ProfileReference, EmployeeType, EmployeeNumber, SSN, ProfessionalId1, ProfessionalId2, PayrollId, WeeklyHours, HolidayScheduleId, TemplateId, DomesticWorker, OneDayRestIn7Exemption, PreferredDayOfRest, RetainSSN, HireDate, Pin, ProfileStatus

Client Profiles Import

The following has been added or changed in the Client Profile Import:

- PIN
- Profile Status
- Retain SSN

Acumen Powered by DCI

HOME PAYROLL BILLING SCHEDULING CARE MANAGEMENT AUTHORIZATION SETTINGS REPORTS **IMPORT**

DASHBOARD

SETTINGS

PROFILES

Import > Client Profile

Required columns list:
FirstName, LastName, FullName, Address, Address2, City, State, PostalCode, CountryCode, Phone, AltPhone, MobilePhone, Email, TimeZone, CostCenterId, DOB, Username, Password, ProfileReference, ClientNumber, MedicaidNumber, InsuranceNumber, InsurancePlan, InsuranceGroup, InsurancePayerId, ClientCode, RegionId, SSN, TemplateId, Fee, DiagnosisCode, CostShare, EnableCaregiverRatingEmails, ReceivedDate, RetainSSN, Pin, ProfileStatus

Update Employee Profile - Import

Current State:

- Employee profiles can be updated by going to the Import Module and selecting "Update Employee Profile" from the side menu.

Future State:

- ✓ Employee profiles can be updated by going to the import module, then to Profiles, and then selecting Update Employee Profile.

The screenshot shows the DCI (Direct Care Innovations) system interface. The top navigation bar includes HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. The left sidebar menu includes DASHBOARD, SETTINGS, PROFILES, ENTRIES, AUTHORIZATIONS, ACCOUNTS, and TRAINING. The 'UPDATE EMPLOYEE PROFILE' option in the sidebar is highlighted with an orange box and a checkmark. The main content area displays 'Import Details - Update Employee Profile' with fields for 'Import Name: Update Employee Profile', 'Attachments', 'Events', 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'File Name', 'Type Added By', and 'Active'.

The screenshot shows the DCI (Direct Care Innovations) system interface. The top navigation bar includes HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. The left sidebar menu includes DASHBOARD, SETTINGS, PROFILES, ENTRIES, and AUTHORIZATIONS. The 'UPDATE EMPLOYEE PROFILE' option in the sidebar is highlighted with a blue box and a checkmark. The main content area displays 'Import Details - Update Employee Profile' with a dropdown menu showing 'CLIENT PROFILE' and 'EMPLOYEES PROFILE'. The 'UPDATE EMPLOYEE PROFILE' option is also visible in the main content area.

Allow SSN Retrieval On Setup Wizards

Current State:
No option to Allow SSN Retrieval on client and employee wizards

Future State:
Radio button to Allow SSN Retrieval will be added to the client and employee wizards

The screenshot displays a multi-step wizard interface. The first step, 'Basic Demographics', is active and highlighted in blue. Other steps include 'Client Information', 'EVW Location', and 'Authentication Information'. Below the step indicators is a 'Review Summary' button. The form contains several input fields: 'Profile Reference' (text input), 'Training System Reference' (text input), 'SSN' (three masked input boxes: 'xxx', 'xx', 'xxxx'), and 'Verify SSN' (three masked input boxes: 'xxx', 'xx', 'xxxx'). At the bottom, there is a radio button selection for 'Allow SSN Retrieval', with 'No' selected. A yellow checkmark icon is placed to the left of this selection. An information icon (i) is next to the 'No' option, with a tooltip that reads: 'Yes = the SSN will be stored in retrievable format for use in EW aggregation. Only select Yes if this person will work under or be funded by a Funding Source that requires SSN to be aggregated'. Below the radio buttons is a 'Photo: Add Photo' link.

SSN Changes Reflected in History

SSN changes will be reflected in the Data Change History on profiles

The screenshot shows a web application interface with a navigation bar at the top containing tabs for 'Entries', 'Accounts', 'Certifications', 'EW Locations', 'Notes', 'Attachments', 'Events', 'Custom Fields', and 'History'. Below the navigation bar are search filters: 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', and 'Type Username'. There are 'Reset' and 'Search' buttons. An 'Export' button is located to the right of the table. The table has three columns: 'Modified Date', 'Field Name', and 'Changed By'. A single record is displayed, which is highlighted with an orange border and a checkmark icon. The record shows a modification on Oct 16, 2020 at 01:26:27 PM for the field 'SSN , Short SSN , Allow SSN Retrieval' by user 'DCI DEV'. The text 'Showing 1 out of 1 record' is visible to the right of the table.

Modified Date	Field Name	Changed By
Oct 16, 2020 01:26:27 PM	SSN , Short SSN , Allow SSN Retrieval	DCI DEV

Update Employee Profile Element Import

An import will be added to update specific elements of the employee's profile, such as SSN, EmployeeNumber, RetainSSN, Profile Reference, and Authentication Status

This import is located in the Imports > Profile Menu

The screenshot displays the Acumen Powered by DCI web application interface. The top navigation bar includes links for HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, and R. The left sidebar menu is expanded to show the 'PROFILES' section, which is highlighted. The main content area shows the breadcrumb 'Import > Update Employee Profile Element' and the title 'Import Details - Update Employee Profile Element'. Below this, a box titled 'Import Details' contains the following information:

- Import Name: Update Employee Profile Element
- Description: The purpose of this import is to allow the update of specific data elements on the Employee profile. The data element names you provide must exactly match one of the following:
 - SSN
 - EmployeeNumber
 - RetainSSN
 - ProfileReference
 - AuthenticationStatus

Update Employee Client Element Import

An import will be added to update specific elements of the client's profile, such as SSN, Client Number, RetainSSN, Profile Reference, Authentication Status, Enable Caregiver Rating Emails, Enable Care Management, Enable Vendor Payments, and Enable Employer Reimbursements

This import is located in the Imports > Profile Menu

The screenshot displays the Acumen Powered by DCI web application interface. The top navigation bar includes links for HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, and SETTINGS. A left sidebar menu lists various sections: DASHBOARD, SETTINGS, PROFILES (highlighted), ENTRIES, AUTHORIZATIONS, ACCOUNTS, TRAINING, EW, CARE MANAGEMENT, DIAGNOSIS CODES, and CUSTOM FIELDS. The main content area shows the breadcrumb 'Import > Update Client Profile Element' and the title 'Import Details - Update Client Profile Element'. Below this, a box titled 'Import Details' contains the following information:

- Import Name: Update Client Profile Element
- Description: The purpose of this import is to allow the update of specific data elements on the Client profile. The data element names you provide must exactly match one of the following:
 - SSN
 - ClientNumber
 - RetainSSN
 - ProfileReference
 - AuthenticationStatus
 - EnableCaregiverRatingEmails
 - EnableCareManagement
 - EnableVendorPayments
 - EnableEmployerReimbursements

Reason Codes

Funding Source: Reason Code Required for Manual Entries

- Require Reason Code for Manual entries is a new field for adding or editing Funding Sources.
- If Yes is selected, the system will display the Reason Code dropdown when manual Hourly or Client Transportation entries are made after the fact via the Web Portal or Mobile Web.
- The default is set to No.
- Select Yes to enable this setting at the Funding Source level.
- This functionality will apply for all:
 - Employees entering late punches
 - Supervisor/Supersuser/Employer entering a punch on the employees behalf

The screenshot shows a web form for editing a Funding Source. The form includes the following fields:

- Email: e.g. test@gmail.com
- Sleep Shift Start: HH:MM PM (dropdown)
- End: HH:MM PM (dropdown)
- Provider Id: (text input)
- Profile Reference: (text input)
- How Many?: 0 (text input)
- Provider TIN: (text input)
- Provider NPI: (text input)
- Provider TPI: (text input)
- Provider EVV Effective Date: Select Date (MM/DD/YYYY) (calendar icon)
- FundSourEDI1: (text input)
- FundSourEDI2: (text input)
- FundSourEDI3: (text input)
- Business Unit Name: Acumen Fiscal Agent (text input)
- Status: Active (dropdown)
- Exclude From Auto Approval: No (dropdown)
- Require Reason Code For Manual Entries: Yes (selected) / No (radio buttons)

The 'Require Reason Code For Manual Entries' field is highlighted with an orange box and a checkmark, indicating it is set to 'Yes'. The form also includes 'Cancel' and 'Save' buttons at the bottom right.

Add or Edit Entry: Reason Code Required for Manual Entries

- With the Reason Code enabled at the Funding Source level, that Reasons dropdown is added to the Add New Entry screen on the Web Portal and the Mobile Web

To Add a Reason Code to an Entry

1. Select Plus to expand the Add Reason Code dropdown
2. Select an approved Reason Code from the list
3. Press Plus to add Reason Code to the Entry
4. If a Reason Code requires a note, the Add Note field will appear
5. Repeat steps 2 to 4 to add multiple Reason Codes

The screenshot shows the 'Add New Entry' form with the following fields:

- Entry Type: Punch
- Employee Name: Ann Perkins
- Account Type: Hourly
- Client: April Ludgate - CO21001
- Service Code: EBD
- Service Date: 10/19/2020
- Check In: 8:00 AM
- Check Out: 10:00 AM
- Pay Rate Name: Standard
- EVV Method: Client Portal Signoff
- Clock In EVV Location: Home
- Clock Out EVV Location: Home
- Check Out Date: 10/19/2020

The 'Reason' dropdown is expanded, showing 'No Cell Coverage - CO1235' selected. Below it is an 'Add Note' field with the text 'Add Note'. A table below the form shows 'Added Reason Codes' with columns for Name, Code, Note, and Actions.

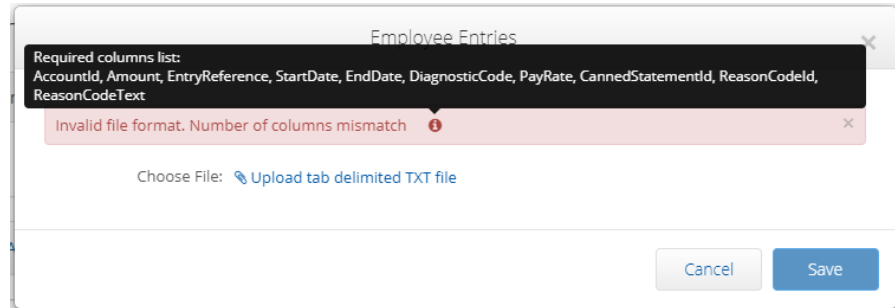
Name	Code	Note	Actions
No Cell Coverage	CO1235	Add Note	

Diagnostic Code: Diagnostic Code

Notes: Add Notes for Punch

Hourly and Client Transportation Imports

- One Reason Code can be added to imported Employee Hourly and Client Transportation entries.
- ReasonCodeID and ReasonCodeText columns are optional columns in the import file for Employee Entries
 - However, this field becomes required if the Reason Code is required at the funding source level
- Reason Code does not need to be added to EVV Fob Entries import as those are not considered manual because the FOB token verifies date/time and location



Reason Code Monthly Usage

- Monthly Usage Maximum Lower Bound added with a default of zero
 - Tooltip: "# of occurrences of usage of this reason for this Client which when reached will result in the end user seeing an alert when attempting to save changes to an existing punch"
- Monthly Usage Maximum Upper Bound added with a default of zero
 - Tooltip: "Maximum monthly allowed # occurrences of use of this reason code for this Client in a calendar month which when reached will result in the end user seeing an alert when attempting to save changes to an existing punch"

Add New Reason Code

Name: Reason Code Name

Code: Reason Code

Description: Add Description

Status: Active

Requires Free Text Note: Yes No

Monthly Usage Maximum Lower Bound: 0

Monthly Usage Maximum Upper Bound: 0

Maximum monthly allowed # occurrences of use of this reason code for this Client in a calendar month which when reached will result in the end user seeing an alert when attempting to save changes to an existing punch

Cancel Save

Reason Code Monthly Max Alert

Business Rule Details - Reason Code Monthly Max Alert

 Actions

Business Rule Details

Business Rule Name : Reason Code Monthly Max Alert

Description : The purpose of this rule is to check if a user is nearing or has exceeded the allowed number of uses of a particular reason code within the current month.

Enabled : No

Phase : Phase1

Parameter 1 :

Parameter 2 :

- The purpose of this rule is to alert a user if they have reached the threshold or the max for use of a reason code within a month
- Lower Bound Alert -> "The following Reason Codes usage is approaching the maximum allowed monthly usage limit. Reason Codes are: [reason code 1], [reason code 2], [etc]"
- Upper Bound Alert > "The following Reason Codes usage exceeds the maximum allowed monthly usage limit. Reason Codes are: [reason code 1], [reason code 2], [etc]"
- Since a user is able to select more than one Reason Code, the alert will be displayed in a table format that displays the reason code, times used and lower and upper bounds

Billing Batch Reason Code Report

Reports > Billing Reports > Billing Batch Reason Codes Report

Billing Batch Reason Codes Report

- This report will be to provide an easy way for a customer to retrieve all of the reason codes that are associated with entries in a target billing batch.

Columns:

- CFA Punch ID
- ESA Punch ID
- Billing Entry ID
- Reason Code ID
- Reason Code Name
- Reason Code Code
- Reason Code Description
- This report should pull entries that have reason codes linked
- If the entry has an Entry.Reason then only Reason Code ID and Name column will be populated and Name should be the text displayed in the Reason Code drop down when it was selected

Reason Code Details

- Description field added to Reason Codes in Punch Entry Details screen

The screenshot displays a web application interface with a navigation bar at the top containing the following tabs: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. A user profile for 'matthew.cava.' is visible in the top right corner.

The main content area is divided into two panels:

- EVV Details:** This panel contains the following information:
 - EVV Method: Client Portal Signoff
 - EVV: No
 - Clock In
 - Geolocation:
 - Clock Out
 - Geolocation:
 - Clock In EVV: Home
 - Location :
 - Clock In EVV: 5416 E Baseline Rd
 - Address: Mesa, AZ 85206
 - Clock Out EVV: Home
 - Location :
 - Clock Out EVV: 5416 E Baseline Rd
 - Address: Mesa, AZ 85206
 - Employee Fail: No
 - InHome Validation:
 - Supervisor: N/A
 - Approved Failed
 - InHome Validation:
 - Schedule: Comparison Pending
 - Comparison:
 - Schedule Entry Id:
- Reason Codes:** This panel shows details for a specific reason code:
 - Reason Code Name: Power Outage
 - Reason Code: CO9321
 - Free Text Note:
 - Description: Power outage prevented us from logging onA yellow checkmark icon is positioned to the right of the description field, indicating a successful update or confirmation.

Punch Entry Details: ScheduleEntryId

- The purpose of this data element will be to store the ScheduleEntryId that this punch was determined to be related to when the Schedule Comparison process is executed.

The screenshot displays the Acumen software interface. At the top, there is a navigation bar with the following tabs: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. A user profile icon for 'matthew.cava.' is visible in the top right corner. The main content area is divided into two panels: 'EVV Details' and 'Reason Codes'. The 'EVV Details' panel contains the following information:

- EVV Method: Client Portal Signoff
- EVV: No
- Clock In Geolocation:
- Clock Out Geolocation:
- Clock In EVV Home Location :
- Clock In EVV 5416 E Baseline Rd Address: Mesa, AZ 85206
- Clock Out EVV Home Location :
- Clock Out EVV 5416 E Baseline Rd Address: Mesa, AZ 85206
- Employee Fail No
- InHome Validation:
- Supervisor N/A
- Approved Failed
- InHome Validation:
- Schedule Comparison Pending
- Schedule Comparison:

The 'Reason Codes' panel contains the following information:

- Reason Code: Power Outage
- Reason Code Name: CO9321
- Free Text Note: Description: Power outage prevented us from logging on

At the bottom of the interface, there is a row of buttons: Ref Entries, Notes, Attachments, Events, Verifications, Map, Business Rules, Auto Approval, and History. A red checkmark icon is positioned next to the 'Schedule Entry Id' field in the EVV Details panel.

Texas Reports

EVV Reason Code Usage and Free Text Report

- Marked as a external 3rd party web service report
- The form wizard includes:
 - Client Name (required)
 - Year (required)
 - Month (required)
 - Payer name (optional) values include: AET, AGP, BCB, CFC, CHS, CKC, CMC, DRC, HHSC, LTC, MOL, SHP, TXC and UHC
 - Report Output Format (required) Excel and PDF options
- If the requester is an Employer or Case Worker then the Client Name drop down will only display clients that are linked to those accounts

EW Reason Code Usage and Free Text Report

Client Name: *

Year: *

Month: *

Payer Name:

Report Output Format: *

Cancel Submit

Regions

Client Profile: Regions Dropdown

- The Client Profile Regions free text field will be updated to be a dropdown field linked to Funding Sources
- Simply start typing the Region and then a list of Funding Source regions will populate
- Select the Region from the list to apply to the Client profile
- This field is optional

Note

- For those who use the DCI Care Management Module the following page also has the updates Regions dropdown field functionality:
 - Care Management > Client Summary > Client Summary Details Page > Edit Client Details

The screenshot shows the 'Add New Client' form with the 'Client Information' tab selected. The 'Region' field is highlighted with a yellow border and a dropdown menu is open, showing a list of regions. The 'South Region (CDASS Demo)' is selected and highlighted in blue. Other fields include 'Discharge Date', 'Suspended Date', 'Code', 'Guardian', 'Fee', 'Primary Diagnosis', 'Cost Share', and several 'Enable' checkboxes for Caregiver Rating, Care Management, Vendor Payment, and Employer Reimbursement.

Field	Value
Discharge Date:	Select Date (MM/DD/YYYY)
Suspended Date:	Select Date (MM/DD/YYYY)
Code:	Client Code
Region:	South Region (CDASS Demo)
Guardian:	Boise Kids (CPI Test - Dept of Health and Welf)
Fee:	HHSC (TX CLASS)
Primary Diagnosis:	Mariposa (Acumen V7 Features FR51 Test)
Cost Share:	Cost Share
Enable Caregiver Rating:	<input type="checkbox"/> Yes
Enable Care Management:	<input type="checkbox"/> Yes
Enable Vendor Payment:	<input type="checkbox"/> Yes
Enable Employer Reimbursement:	<input type="checkbox"/> Yes

Client Profile Import

The following fields have been added as optional to the Client Profile import as an optional field

- RegionID

Import > Client Profile

The screenshot shows a dialog box for importing client profiles. At the top, it says "Import > Client Profile". Below this, a black box lists the "Required columns list":
FirstName, LastName, FullName, Address, Address2, City, State, PostalCode, CountryCode, Phone, AltPhone, MobilePhone, Email, TimeZone, CostCenterId, DOB, Username, Password, ProfileReference, ClientNumber, MedicaidNumber, InsuranceNumber, InsurancePlan, InsuranceGroup, InsurancePayerId, ClientCode, RegionId, SSN, TemplateId, Fee, DiagnosisCode, CostShare, EnableCaregiverRatingEmails, ReceivedDate, RetainSSN, Pin, ProfileStatus
The "RegionId" field in this list is highlighted with a yellow box. Below the list, a red error message states: "Invalid file format. Number of columns mismatch". At the bottom of the dialog, there is a "Choose File:" section with a link to "Upload tab delimited TXT file", and "Cancel" and "Save" buttons.

Client Report: Regions

- Regions filter was added to the Client Report
- Funding Source filter was added to the Client Report

Acumen Powered by DCI

HOME PAYROLL BILLING SCHEDULING CARE MANAGEMENT AUTHORIZATION SETTINGS **REPORTS** IMPORT

Help matthew.cava...

Reports > Profile Reports > Clients Report

Clients Report

Type Client Name Client ID Type Cost Center

City Name Select State Select Status

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

Type Funding Source Name Type Region Name

Reset Search

Download To CSV Download To PDF

Showing 599 out of 599 records

Client ID	Client Code	Medicaid Nu...	Region	Status	Creation Date	Created By	Discharge
			BZ Region1 (B...	Active	09/23/2020	Huling Zhai	
			BZ Region3 (B...	Active	09/23/2020	Huling Zhai	
				Active	09/23/2020	Francisco Rogel	
		555668588		Active	09/22/2020	Trevor Clark	
		55566655		Active	09/22/2020	Trevor Clark	
		12355		Active	09/22/2020	Trevor Clark	
				Active	09/22/2020	Mason Menges	
		V23459		Active	09/18/2020	Matthew Cavallo	
		V23458		Active	09/18/2020	Matthew Cavallo	

No Account ID Imports

Employee Entries No Account ID Import

The purpose of this import is to provide an import that is based on information in a CRM and/or HRIS where those systems know unique identifiers for Clients and Employees but they do not know DCI Account IDs. This import should contain the following columns:

- EmployeeNumber
- ClientNumber
- ServiceCodeDesc
- Amount
- EntryReference
- StartDate
- EndDate
- DiagnosticCode
- CannedStatementId
- PayRate

A instance level setting must be enabled to access this import, contact your DCI Account Rep

Import > Employee Entries - No Account ID

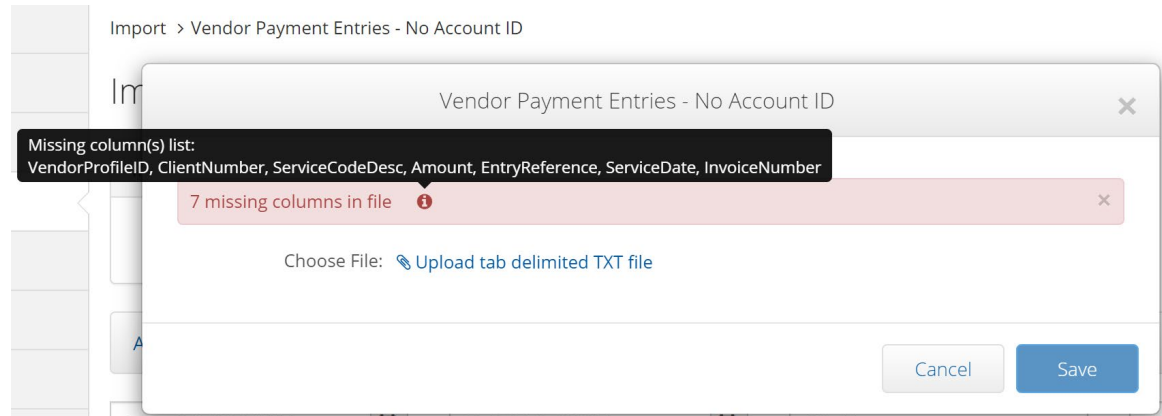
The screenshot shows a dialog box titled "Employee Entries - No Account ID" with a close button (X) in the top right corner. A black box displays the "Required columns list:" followed by the columns: EmployeeNumber, ClientNumber, ServiceCodeDesc, Amount, EntryReference, StartDate, EndDate, DiagnosticCode, CannedStatementId, PayRate, ReasonCodeId, ReasonCodeText. Below this, a red error message states "Invalid file format. Number of columns mismatch" with an information icon (i) and a close button (X). At the bottom of the dialog, there is a "Choose File:" label with a blue link icon and the text "Upload tab delimited TXT file". At the bottom right, there are "Cancel" and "Save" buttons.

Client Transportation Entries No Account ID Import

The purpose of this import is to provide an import that is based on information in a CRM and/or HRIS where those systems know unique identifiers for Clients and Employees but they do not know DCI Account IDs. This import should contain the following columns:

- EmployeeNumber
- ClientNumber
- ServiceCodeDesc
- Amount
- EntryReference
- StartOdometer
- EndOdometer
- ServiceDate

A instance level setting must be enabled to access this import, contact your DCI Account Rep

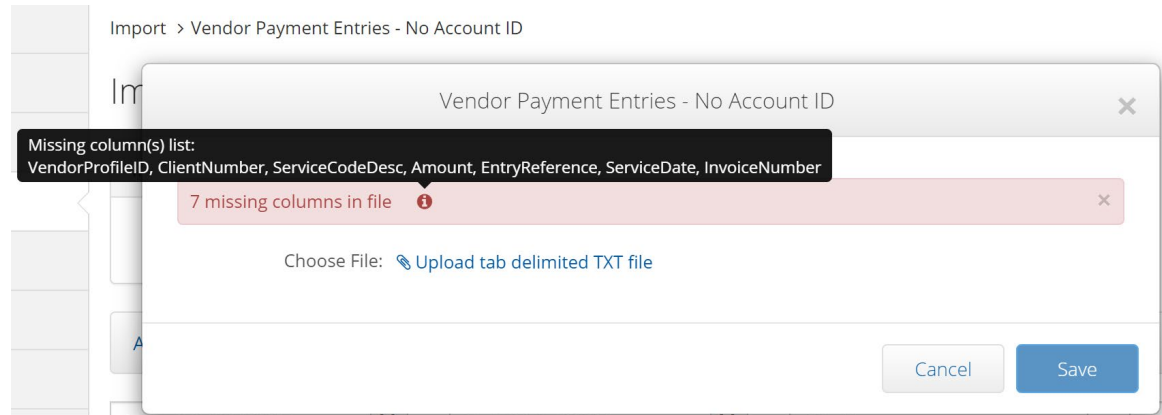


Vendor Payment Entries No Account ID Import

The purpose of this import is to provide an import that is based on information in a CRM and/or HRIS where those systems know unique identifiers for Clients and Employees but they do not know DCI Account IDs. This import should contain the following columns:

- VendorProfileID
- ClientNumber
- ServiceCodeDesc
- Amount
- EntryReference
- ServiceDate
- InvoiceNumber

A instance level setting must be enabled to access this import, contact your DCI Account Rep



Misc. Feature Requests

Superuser Punch Verification

If a Superuser creates a punch on behalf of another user, the Superuser can now verify that punch, as long as it is not on their own profile

The screenshot displays the DCI system interface. The top navigation bar includes 'HOME', 'PAYROLL', 'BILLING', 'SCHEDULING', 'CARE MANAGEMENT', 'AUTHORIZATION', 'SETTINGS', 'REPORTS', and 'IMPORT'. A notification icon with the number '4' and a user profile 'matthew.cava.' are visible. The left sidebar menu lists various system sections, with 'EMPLOYEES' highlighted. The main content area shows the breadcrumb 'Home > Employee > Ann Perkins > Andy Dwyer > EBD > 979146' and a title 'Punch Detail - Ann Perkins/ Andy Dwyer'. Below this, there are two columns of details: 'Punch Details' and 'Account Details/ Service Account'. The 'Punch Details' column includes fields for Entry Id (979146), Machine Details (72.208.141.34), Service Date (Oct 13, 2020), Check In (08:00 AM), Check Out (10:00 AM), Hour(s) (0:02:00), Amount (2.00), General Activity, Employee Time (MT (UTC-7)), Client/ Program (MT (UTC-7)), Payroll Modifier, Diagnostic Code, GL Code (CO - 070), Location Code, Authorization Entry Id (448047), Pay Rate Name (Standard), and Pay Rate (15.00). The 'Account Details/ Service Account' column includes fields for Account Id (5214), Account Type (Hourly), Client/ Program (MT (UTC-07)), Employee (Ann Perkins), Employee Time (MT (UTC-07)), Service Code (EBD), Client Signoff (TRUE), Funding Type (Dollars), Funding Source (Colorado CDASS), Cost Center (Colorado Cost Center), Unit Type (Hourly), and Status (Active). At the bottom of the punch details, there is a status field 'Status: Unverified' with 'Reject' and 'Verify' buttons, and a green checkmark icon. The 'Verify' button is highlighted with an orange border. The 'Created By' field shows 'Matthew Cavallo'.

Client Status: Suspended

Suspended status has been added to the Client Status dropdown

Use this status for a client who has temporarily left the program and intends to return

If you try to punch on a client with a suspended status, you will get the following error:

"You are attempting to enter a punch for a date of service that is beyond the clients suspend date. Please contact your supervisor."

To edit client status

- Open the client details
- Select
- the Client Information tab
- Select the Client Status dropdown



The screenshot shows the DCI (Direct Care Innovations) client management interface. The top navigation bar includes tabs for HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. A notification icon with a red '4' and a 'Help' link are visible on the right. The left sidebar contains a list of menu items: EMPLOYEES, RESIDENTIAL PROGRAMS, DAY PROGRAMS, CASE WORKERS, GROUP SERVICES, PARENTING PROGRAMS, GUARDIANS, VENDORS, COST CENTERS, PENDING ENTRIES (23945), PENDING VENDOR PAYMENT ENTRIES (579), and PENDING OTHER PAYMENTS (620). The main content area displays a form for client information. The 'Client Status' dropdown menu is open, showing options: Active, Deceased, Inactive, and Suspended. The 'Suspended' option is highlighted in blue and has a checkmark icon to its right. Other fields in the form include Insurance Payer No., Certification Template, Cost Center, Language, Received Date, Packet Mailed, Discharge Date, Suspended Date, Code, Region, Guardian, Fee, Primary Diagnosis, and Cost Share. At the bottom, there is a checkbox for 'Enable Caregiver Rating Emails' with 'Yes' selected.

Summary Report

- Caseworker field removed as a required field from Summary Report

Reports > Summary Report

Reports - Summary Report

 Ended Authorizations

Multiple Reimbursements

Add Reimbursement Pay Code

DCI users can now add additional reimbursement pay codes

This feature is an instance level and requires Superuser access, so contact your DCI rep today if you would like to learn more

Once enable, the action button appears on the Settings > Payroll > Pay Codes screen

To Create a new Reimbursement Pay Code

1. Select Actions
2. Select Add New Reimbursement Pay Code

The screenshot shows the DCI user interface for the 'Pay Codes' screen. The top navigation bar includes 'HOME', 'PAYROLL', 'BILLING', 'SCHEDULING', 'CARE MANAGEMENT', 'AUTHORIZATION', 'SETTINGS', 'REPORTS', and 'IMPORT'. The 'SETTINGS' menu is expanded, showing 'Payroll' > 'Pay Codes'. The left sidebar contains various menu items, with 'PAYROLL' highlighted. The main content area displays the 'Pay Codes' title, a search form with 'Type Name' and 'Type Code' fields, and an 'Add New Reimbursement Pay Code' button highlighted with a callout box. Below the search form is a table of existing pay codes.

Name	Code	Overtime Related Code	Reimbursement Code
Bonus	BON	No	No
Double Overtime Custom	2O	Yes	No
Double Overtime Default	2OT	Yes	No
Holiday OT Custom	HLOTC	Yes	No
Holiday OT Default	HLOTD	Yes	No
Holiday Worked Custom	HC	No	No

Complete Add Reimbursement Pay Code Form

1. Name: enter a name
2. Code: enter a unique code
3. Enter the description
4. Select Save and then Yes when prompted to save the new reimbursement code

Note

Reimbursements are the only Pay Code that can be added

The Reimbursement Code Y/N toggle is set to Yes and is not editable

Settings > Payroll > Pay Codes

Pa

Add New Reimbursement Pay Code

1 Name: Reimbursement D

2 Code: REIM-D

3 Description: Reimbursement D

Reimbursement Code: Yes No

Cancel Save 4

Na

Add Multiple Reimbursement Pay Codes to an Entry

The new reimbursement codes allow a user to submit multiple reimbursements per entry

Naming new reimbursement codes Reimbursement A, Reimbursement C, etc, give the end user an easy way to track multiple reimbursements

To Add Multiple Reimbursements

1. Add the dollar amount for the total amount of the multiple reimbursements
2. Add the dates when the reimbursements occurred
3. Select the appropriate new reimbursement pay code from the list
4. Select Save and then Yes when prompted to submit the reimbursements

The screenshot shows the 'Add New Reimbursement Entry' form. The fields are: Entry Type: Employer Reimbursement; Client: Jerry Gergich; Account Type: Hourly; Employee Name: Ann Perkins; Service Code: Bonus Test; Dollar Amount: 200; Date(s) of Service: 10/06/2020,10/07/2020. Below these fields is a table with columns: Number, Date, Amount, Pay Code, and Action. The table contains two rows: Row 1: Number 1, Date 10/06/2020, Amount 100, Pay Code Reimbursement, Action Reimbursement; Row 2: Number 2, Date 10/07/2020, Amount 100, Pay Code Reimbursement, Action Reimbursement. A dropdown menu is open for the second row's Pay Code, showing options: Reimbursement, Reimbursement-New, Reimbursement A, Reimbursement B, Reimbursement PayCode2, Mileage Reimbursement, and Reimbursement D. A 'Save' button is highlighted with a blue circle.

Number	Date	Amount	Pay Code	Action
1	10/06/2020	100	Reimbursement	Reimbursement
2	10/07/2020	100	Reimbursement	Reimbursement

Add Multiple Reimbursement Pay Codes to an Entry cont.

The confirmation screen for multiple reimbursements shows the dates that each reimbursement occurs

It also shows the total for both invoices

The screenshot shows a web application window titled "Add New Reimbursement Entry". The form contains several input fields: "Employee Name" (with "Jerry" entered), "Service Code", "Dollar Amount", and "Date(s) of Service". A confirmation alert is displayed in the foreground, asking: "Are you sure you want to add a new Reimbursement entry for Ann Perkins for \$200.00 for 02 Days to service Jerry Gergich - ?". The alert includes a date selector showing "Oct 2020" with a highlighted date range of "01" to "06". At the bottom of the alert are "No" and "Yes" buttons. The main form has "Cancel" and "Save" buttons at the bottom right. Under "Invoice Attachments", there is a link "Add Attachment(s)" and a file "DCI Logo.png" is listed.

Reimbursement Pay Code: Payroll Entries Pay Code Name

When processing an Employer Reimbursement entry in the Payroll module that the Pay Code Name displays the new Reimbursement Code names

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HOME PAYROLL BILLING SCHEDULING CARE MANAGEMENT AUTHORIZATION SETTINGS REPORTS IMPORT Help matthew.cava.

BATCHES
PUNCH ENTRIES
PAYROLL ENTRIES
PREVIOUSLY PAID ENTRIES
EMPLOYEES
RECONCILE

Payroll > Payroll Entries

Payroll Entries

10/01/2020 10/20/2020 Type Punch Id
Employee Number Type Cost Center Code Type Employee/Vendor Name
Pay Rate Payroll Ref Check Id Select Status

Reset Search

Export

Showing 30 out of 57 records

Id	Date of Service	Ref.	Employee/Vendor Name	Employee Number	Cost Center Code	Unit Type	Units	Pay Rate	Pay Code Name	Payroll Ref Check Id	Status
979036	10/09/2020	979026	Chrom	CO06	Infernum	Hourly	-20.00		Reimbursement		Approved
979035	10/08/2020	979025	Chrom	CO06	Infernum	Hourly	-20.00		Reimbursement B		Approved
979034	10/07/2020	979024	Chrom	CO06	Infernum	Hourly	-20.00		Reimbursement A		Approved
979033	10/06/2020	979023	Chrom	CO06	Infernum	Hourly	-20.00		Reimbursement-		Approved

Reimbursement Pay Code: Imports

AssignedPayCode has been added to the Reimbursement Entries import as an optional field

Import > Reimbursement Entries

The screenshot shows a dialog box titled "Reimbursement Entries" with a close button (X) in the top right corner. A black tooltip box is positioned over the "AssignedPayCode" column name in the missing column list, with a yellow border. Below the tooltip, a pink error message box states "5 missing columns in file" with an information icon (i) and a close button (X). The text "Choose File: Upload tab delimited TXT file" is centered below the error message. At the bottom right of the dialog, there are "Cancel" and "Save" buttons.

Reimbursement Entries

Missing column(s) list:
AccountId, Amount, EntryReference, ServiceDate, AssignedPayCode

5 missing columns in file

Choose File: [Upload tab delimited TXT file](#)

Cancel Save

Vendor Updates

Vendor Service Account: Account Reference

The Account Reference field was added to the Vendor Service Account to link the DCI Payroll Engine Employer Account ID to the Vendor information in the DCI Portal

This is an instance level setting that needs to be enabled

Once the instance level setting is enabled, the field becomes required

Contact your DCI representative to learn more

Add New Service Account ✕

Vendor Name: AZ Swim Lessons

Account Type: Vendor

Client: April Ludgate - CO21001 ✕

Service Code: Vendor

Funding Source: CDASS Demo

Cost Center: Colorado Cost Center - Colorado Cost Center ✕

Account Reference: 7118

Default: i ?

VSA Custom Field: ?

VenServAcctEDI1: ?

VenServAcctEDI2: ?

Status: Active

Cancel Save

Vendor Payment Entry

The Vendor Payment Entry screen has been updated with many new features:

1. **Account Reference:** when enabled, the account reference links the DCI Payroll Engine Employer ID
2. **Invoice Number:** DCI now allows for spaces and alpha numeric characters
 - a. Special characters are not allowed because they can affect payroll output files
3. **Vendor Payment Reference 1 – 5** were added

The screenshot shows a web form titled "Add New Vendor Payment Entry". The form contains the following fields and values:

- Client: April Ludgate - CO21001
- Service Code: Vendor
- Account Reference: 7118 (highlighted with a red circle '1' and an information tooltip that reads "Payroll Engine Employer Account ID")
- Dollar Amount: 200
- Invoice Number: Invoice 1 (highlighted with a red circle '2')
- Vendor Payment Reference 1: Enter Vendor Payment Reference 1 (highlighted with a red circle '3')
- Vendor Payment Reference 2: Enter Vendor Payment Reference 2

At the bottom right of the form are "Cancel" and "Save" buttons.

Vendor Payment Entry cont.

1. The 30 day restriction has been removed so vendor payments can go back to any date that is valid within the authorization
 - a. If you try to enter a date that is not within the authorization date, the system will display a warning that there is no active authorization for this date

reference 4.

Authorization Remaining Balance: 900.00
Authorization Daily Max: 1000.00
Authorization End Date: 12/31/2020

Date(s) of Service:

Date	Amount	Action
07/15/2020	100	
08/05/2020	100	

Notes: Add Notes

Cancel Save

Vendor Payment: Canned Statements

- Canned Statements can now be added to a Vendor Payment
- To add a Canned Statement to a Vendor Payment, the service code type must be hourly and Yes must be selected for the Allow Vendor Payments radio button
- Canned Statements will propagate from “Parent” to “Child” entries
- This functionality is currently only available for Hourly Service Codes that allow Vendor Payments
- Canned Statements will not display for a Vendor account type service code

The screenshot shows a web form titled "Add New Service Code". The form contains several sections:

- Reference Fields:** Includes a plus icon (+) and an information icon (i). Fields include "GL Code" (text input), "Description" (text area), and "Status" (dropdown menu set to "Active").
- Canned Statements:** This section is highlighted with an orange border. It includes a plus icon (+) and an information icon (i). It features an "Add Statement:" text input with "Cooking Lessons" entered and a plus icon (+). Below it is a list of "Added Statements:" containing "Swimming Lessons" and "Guitar Lessons", each with a minus icon (-) to its right.
- Default CPT Code:** Text input with "Default CPT Code".
- Default HCPCS Code:** Text input with "Default HCPCS Code".
- Certification Template:** Dropdown menu with "Select Certification Template".

At the bottom right of the form are "Cancel" and "Save" buttons.

Vendor Payment: Canned Statements cont.

- Once canned statements have been created, they are available to be selected when editing or creating other services codes
- Simply check or deselect the Canned Statements you would like to use or create new ones

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

- Reference Fields: +
- GL Code: ⓘ
- Description:
- Status: ▾
- Canned Statements: - ⓘ
 - Existing Canned Statement:
 - Swimming Lessons
 - Guitar Lessons
 - Cooking Lessons
 - New Canned Statement
- Default CPT Code:
- Default HCPCS Code:
- Certification Template: ▾

Buttons: Cancel, Save

Vendor Payment Entry Import

The following fields have been added as optional to the Vendor Payment Entries import

- CannedStatementID
- VendorPaymentReference1
- VendorPaymentReference2
- VendorPaymentReference3
- VendorPaymentReference4
- VendorPaymentReference5

Import > Vendor Payment Entries

The screenshot shows a dialog box titled "Vendor Payment Entries" with a close button (X) in the top right corner. A black tooltip box is overlaid on the dialog, containing the text: "Required columns list: AccountId, Amount, EntryReference, ServiceDate, InvoiceNumber, CannedStatementId, VendorPaymentReference1, VendorPaymentReference2, VendorPaymentReference3, VendorPaymentReference4, VendorPaymentReference5". Below the tooltip, a red error message box states: "Invalid file format. Number of columns mismatch" with an information icon (i) and a close button (X). Underneath the error message, there is a "Choose File:" label followed by a blue link icon and the text "Upload tab delimited TXT file". At the bottom right of the dialog, there are two buttons: "Cancel" and "Save".

Thank you!