



June 2021 Release Notes

Table of Contents

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 section.

- [Funding Sources](#)
- [Mobile App Offline Mode](#)
- [Dashboard Authorization Widget](#)
- [Employee Service Accounts](#)
- [Group Services](#)
- [Profiles](#)
- [Authorizations](#)
- [Business Rules](#)
- [Imports](#)
- [Additional Updates](#)

Funding Sources

Funding Sources: Approve Unverified EVV

- There is a new setting available on the Add/Edit Funding Source wizards called Approve Unverified EVV. This was an instance level setting that has been moved to the Funding Source level.
- When enabled for the specified EVV type, punches can be approved (manually or via auto approval) even if there is an unverified EVV of the specified type.
- The setting can be enabled for:
 - EVV Picture
 - EVV Signature
 - EVV Voice

The screenshot shows the 'Edit Funding Source' form with the following fields and values:

- Name: Mikaela Funding Source
- Type: Government
- Address: 123 ABC St
- Address Line 2: (empty)
- City: Somewhere
- OR: (dropdown arrow)
- Zip: 97301
- Country: USA
- Time Zone: PT (UTC-8)
- Cost Center: Mikaela Cost Center - MO-TEST
- Phone: (555) 555-5555
- Alternate Phone: xxx-xxx-xxxx

Below the form, there are three sections with expandable options:

- Authorization Automation Integration: (expanded)
- EVV: (expanded)
- Approve Unverified EVV: (expanded and highlighted with a blue box)

The 'Approve Unverified EVV' section contains three radio button options:

- Picture: Yes No
- Signature: Yes No
- Voice Recording: Yes No

Funding Sources: Mobile App Offline

- There is a new setting on the Add/Edit Funding Source wizards called Allow Offline Mobile App.
- When enabled, real-time punches can be made from the mobile app even if there is no internet connection or the connection is lost.
- See the next section for more information about Mobile App Offline Mode.

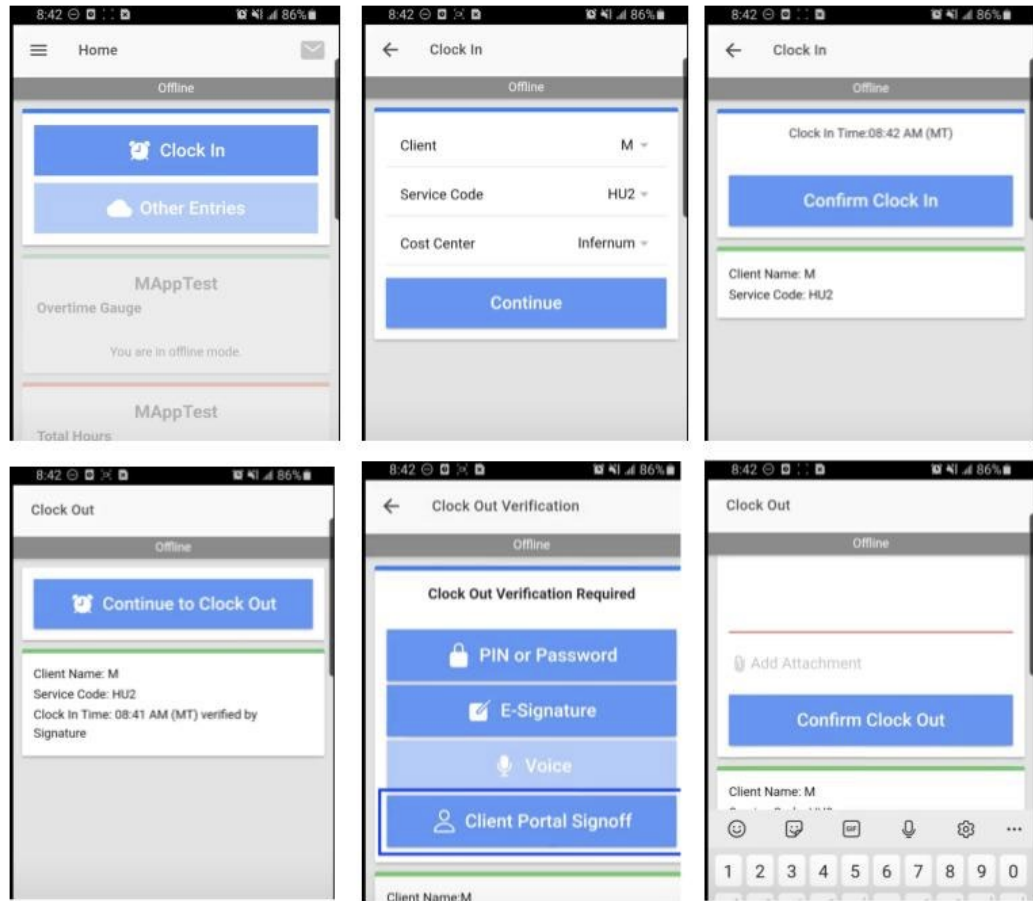
The screenshot shows a web form titled "Edit Funding Source" with a close button (X) in the top right corner. The form contains the following fields and options:

- Name: Mikaela Funding Source
- Type: Government (dropdown menu)
- Address: 123 ABC St
- Address Line 2: (empty)
- City: Somewhere (text input)
- OR: (dropdown menu)
- Zip: 97330
- Country: USA (dropdown menu)
- Time Zone: PT (UTC-8) (dropdown menu)
- Cost Center: Mikaela Cost Center - MO-TEST (dropdown menu)
- Phone: (555) 555-5555
- Alternate Phone: xxx-xxx-xxxx
- EDI: + (plus icon)
- EVV: + (plus icon)
- Allow Offline Mobile App: Yes No

Mobile App Offline Mode

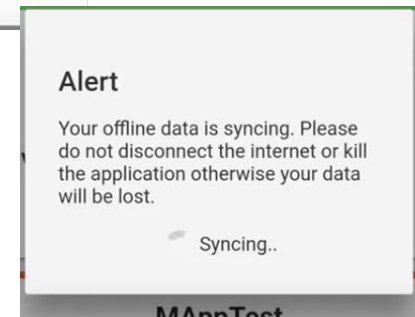
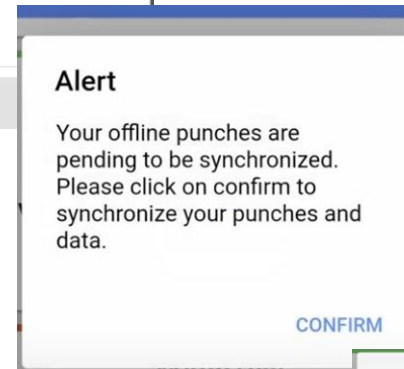
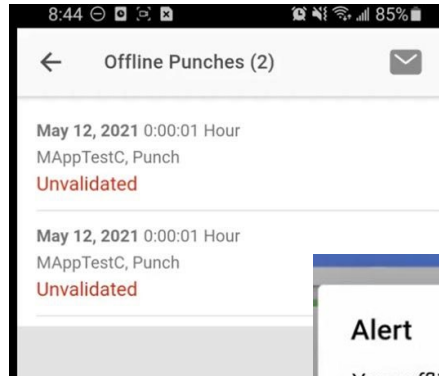
Mobile App Offline Mode

- There is a new feature that allows users to continue limited use of the Mobile App on a registered device even when the device is offline.
- The Mobile App will assess the internet connection and automatically switch to offline mode in the event that no connection is found or connection is lost.
- When in Offline Mode, users are limited to logging in and making real-time punches. Client Transportation is not available in Offline mode.



Mobile App Offline Mode

- Offline punches are stored in the Mobile App until internet connection is restored. The user can only be offline a specified number of days in a row and/or make a specified number of offline punches in a row before they need to reconnect to the internet.
- The user will be prompted to sync offline punches when internet connection is restored. Once the punches are synced, they will be visible in the Entries table.
- Using Mobile App Offline Mode requires several instance level setting changes. Please contact your DCI representative if you are interested in using this feature.



Dashboard Authorization Widget

Dashboard Authorization Widget: New Columns

- There are now Monthly Max, Weekly Max, and Daily Max columns on the Authorization Widget on the dashboard.

Authorizations

Biggs Darklighter - 124 ✕

Search

Reset

Click link to see Monthly Budget Summary

	Remaining Balance	Pre Authorizations Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
	455.00	0.00	455.00	35.00	7.00	7.00
	970.00	107.03	862.97	1000.00	1000.00	1000.00

Authorization Widget: Monthly/Weekly Summation

- There is a new feature on the Authorization Widget called Monthly/Weekly Summation. When enabled, the Monthly Max and Weekly Max columns on unit-funded authorizations will be hyperlinks to a pop-up with the following information:
 - Monthly or Weekly Max
 - Monthly or Weekly Used
 - Monthly or Weekly Remaining
 - Billing Unit
 - Billing Multiplier



Authorization Monthly Max

May 2021

Monthly Max: 35.00
Monthly Used: 2.08
Monthly Remaining: 32.92
Billing Unit: Hourly
Billing Multiplier: Hourly



Authorization Weekly Max

← 05/23/2021 To 05/29/2021

Weekly Max: 7.00
Weekly Used: 2.08
Weekly Remaining: 4.92
Billing Unit: Hourly
Billing Multiplier: Hourly

Authorization Widget: Monthly/Weekly Summation

- Users are able to navigate to previous months/weeks on the pop-up.
- The Monthly/Weekly Summation is only visible if the instance level setting is enabled. Please contact your DCI representative if you would like to use this feature..

The screenshot displays a software interface with a search bar at the top containing 'Biggs Darklighter - 124' and buttons for 'Search' and 'Reset'. Below the search bar is a table with columns for 'Balance' and 'Remaining Balance'. A pop-up window titled 'Authorization Weekly Max' is overlaid on the table. The pop-up window contains a date range selector '05/02/2021 To 05/08/2021' with left and right navigation arrows, and the following data:

Weekly Max:	7.00
Weekly Used:	0.00
Weekly Remaining:	7.00
Billing Unit:	Hourly
Billing Multiplier:	Hourly

The background table has the following visible data:

Balance	Remaining Balance
	452.92
	970.00

Authorization Widget: Guardian Profiles

- The Authorization Widget with the additional columns listed in the previous slides is also now visible to Guardian Profiles.

The screenshot shows the Acumen Guardian Profiles dashboard. The top navigation bar includes the Acumen logo (Powered by DCI), a HOME link, and a Help icon with the user name mikaela.guar.. The left sidebar contains DASHBOARD and CLIENTS. The main content area is titled 'Authorizations' and features a search bar with the text 'Biggs Darklighter - 124', a Search button, and a Reset button. Below the search bar, it indicates 'Authorization for Client: Biggs Darklighter' with an information icon. A table displays authorization details for two services: Hourly Units and Hourly Dollar.

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorizations Holds	Current Availab Balance
Hourly Units	01/01/2021	05/25/2022	455.00	452.92	0.00	452.92
Hourly Dollar	09/15/2018	09/15/2022	1000.00	970.00	107.03	862.97

Profiles

Client & Guardian Profiles: Pay Rate Name

- Client and Guardian Profiles now have a Pay Rate Name column and search filter on the Entries Requiring Sign Off page.
- If the punch does not have a Pay Rate Name, then the column will be left blank.
- To make room for this new column, the Type column has been removed.

Acumen Powered by DCI | HOME | 19 | Help | Site Map | biggs.darkli... | English

Home / Entries Requiring Sign Off

Entries Requiring Sign Off

From (MM/DD/YYYY) | To (MM/DD/YYYY) | Type Service Code

Type Employee | Select Unit | **Type Payrate Name**

Reset | Search

Select All

Export

Showing 1 out of 1 record

Id	Service Date	Employee	Service Code	Start Time	End Time	EW Locations	Units	Pay Rate Name	Status	EVV	Action
<input type="checkbox"/> 1089086	Mar 30, 2021	Bubba Watson	Hourly Dollar	08:16 AM	09:00 AM	Clock In: Home Clock Out: Home	0.73	Standard	Pending	No	S R

Client Profiles: Client Accounts

- Client Profiles now have the ability to view their own Accounts.
- The Accounts function is located between the Entries and Schedules functions on the Home Screen.
- Clicking the Accounts function will display all of the user's accounts. The user is able to filter the list of accounts, but will not be able to view the Account Details Pages.

Acumen Powered by DCI

HOME

Help Site Map biggs.darkli... English

DASHBOARD

ENTRIES REQUIRING SIGN OFF

ENTRIES

ACCOUNTS

SCHEDULES

VENDORS

Home / Accounts

Accounts

Select Account Type

Type Employee/Program/Vendor Name

Type Service Code

Reset Search

Export

Showing 5 out of 5 records

Account Type	Employee/Program/Vendor Name	Service Code
Client Service	Mikaela Group Service	GRP
Employee Service	Bubba Watson	Hourly Dollar
Employee Service	Bubba Watson	Hourly Units
Employee Service	Minnie Mouse	Hourly Units

Client & Case Worker Profiles: High Priority Message Banner

- Client and CaseWorker Profiles now see a red banner on the dashboard if there are any unread High Priority messages.

The screenshot shows a web dashboard for 'Biggs Darklighter'. At the top, there is a navigation bar with the DCI logo, a 'HOME' link, and a notification bell icon with the number '8'. To the right of the bell are links for 'Help', 'Site Map', and a user profile for 'biggs.darkli...'. A language dropdown menu is set to 'English'. On the left side, there is a sidebar menu with options: 'DASHBOARD', 'ENTRIES REQUIRING SIGN OFF', 'ENTRIES', 'ACCOUNTS', and 'SCHEDULES'. The main content area shows the breadcrumb 'Home / Dashboard' and a red banner with the text 'You have 1 high priority message(s) in your inbox'. Below the banner is a search bar containing 'Biggs Darklighter' with 'Search' and 'Reset' buttons. The main data section is titled 'Biggs Darklighter' with a date range '05/30/2021 - 06/05/2021'. It contains a table for 'Total Hours Per Week' with columns for days of the week and a 'Weekly Total' column. The table lists hours for 'Bubba Watson' and a 'Total' row.

Total Hours Per Week								
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
Employees	05/30/2021	05/31/2021	06/01/2021	06/02/2021	06/03/2021	06/04/2021	06/05/2021	Weekly Total
Bubba Watson	2.00	2.00	2.00	0.00	0.00	0.00	0.00	6.00
Total	2.00	2.00	2.00	0.00	0.00	0.00	0.00	6.00

Below the table, there is a section for 'Authorizations'.

Group Services Profiles: Require Multiple Attendees

- There is a new instance level setting called Group Service Require Multiple Attendees.
- Requiring more than one attendee for Group Services is currently an editable field on Group Service Profiles. When the new setting is enabled, all Group Service Profiles will automatically have this Require Multiple Attendees field set to Yes and it will not be editable.
- If the instance level setting is not enabled, users will continue to set the field manually per each Group Service Profile.
- Please contact your DCI representative if you would like the instance level setting enabled.

The screenshot shows a web form titled "Add New Group Service" with a close button (X) in the top right corner. The form contains several input fields and radio button options:

- Alternative Phone: xxx-xxx-xxxx
- Email: e.g. test@gmail.com
- Cost Center: Select Cost Center (dropdown menu)
- Profile Reference: Profile Reference
- GrpServED11: GrpServED11 (with a question mark icon)
- CN4: CN4 (with a question mark icon)
- Status: Active (dropdown menu)
- EVV Required: Yes No
- Enable Geofencing: Yes No
- Requires Multiple Client Per Punch: Yes No** (This field is highlighted with a blue rectangular box)
- Minimum # of Attendees: Minimum # of attendees (with an information icon)

At the bottom right of the form, there are two buttons: "Cancel" and "Next".

Employee Profiles: Employee Service Accounts for Pending Employees


- There is a new feature that allows users with the appropriate role and/or permission to create Employee Service Accounts for employees in Pending status. Employee Profiles created through self-registration remain in Pending status until a user with the appropriate role/permission changes the status. Employee Profiles can also be manually changed to Pending status by a user with the appropriate role/permission.
- The employee will not be able to make punches against the service account until the profile is in Active status.
- This feature can be used when creating service accounts via the UI or import.
- Please note that this feature requires an instance level setting change. Please contact your DCI representative if you are interested in using this feature.

The screenshot displays an employee profile page with an 'Actions' menu open. The 'Actions' menu is located in the top right corner and contains the following options: New Note, New Attachment, View Roles, New Service Account (highlighted with a blue border), Edit Employee, Edit Custom Field Values, Manage Roles, Manage Permissions, Add Certification, Block Mobile App Usage, Block Portal Usage, New EVV Location, Add New FOB, and Register with Training System. The employee profile details are listed on the left side of the page, including: Other Details, Average Caregiver Rating: 0, Domestic Worker: No, Domestic Worker 7 Day Exemption: No, Domestic Worker Preferred Day of Rest: Sunday, Employee Number: 1w12, Weekly Hours Available: 40.00, Holiday Schedule: Default H, Cost Center: MaxRise C, Preferred Language: English, Hire Date: Mar 19, 20, Custom Reports List: None, and Employment Status: Pending (circled in blue).

Employee Service Accounts

Employee Service Accounts: Day of Week Restriction

- There is a new setting that allows companies to restrict punches to only certain days of the week.
- Employee Service Accounts configuration will include checkboxes to select which days of the week punches should be blocked. If punches are allowed on all days for this particular Employee Service Account, then no checkboxes would be selected.
- When enabled, the system will block punches at clock-in or upon attempted creation of historical punches for days specified on the Employee Service Accounts.
- Please note that this feature requires an instance level setting change. Please contact your DCI representative if you are interested in using this feature.

Day of Week Restrictions:  By selecting a day of the week the system will block punches on those days.

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

This client is not allowed to receive this service on this day of the week

Cancel

Save

Employee Service Accounts: Holiday Restriction

- There is a new setting that allows companies to block punches on holidays.
- Employee Service Accounts configuration will include the ability to enable Holiday Restriction, along with the ability to link the Employee Service Account to a Holiday Schedule. If punches are allowed on holidays for this particular Employee Service Account, then Holiday Restriction would not be enabled.
- When enabled, the system will block punches at clock-in or upon attempted creation of historical punches for dates on the Holiday Schedule that is linked to the Employee Service Account.
- Please note that this feature requires an instance level setting change. Please contact your DCI representative if you are interested in using this feature.

Enable Holiday Restrictions:

Holiday Schedule:

This client is not allowed to receive this service on a holiday

Cancel

Save

Employee Service Accounts: Pay Rate Effective Date

- The Pay Rate Effective Date field on the Add New Service Account wizards is now an editable field.
- This field used to be automatically populated with the date the service account was created and was not editable.
- It is still a required field.

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

- Employee Name: Bubba Watson - 119
- Account Type: Hourly
- Client: Type Client Name
- Relationship Type: Select Relationship Type
- Service Code: Select Service Code
- Funding Source: Select Funding Source
- Funding Type: Select Funding Type
- Cost Center: [Empty]
- Employee Number: [Empty]
- Pay Rate Name: [Empty]
- Pay Rate: [Empty]
- Effective Date: 05/25/2021
- Daily Pay Max: 0

A calendar widget is displayed for the 'Effective Date' field, showing the month of May 2021. The date 05/25/2021 is highlighted in blue. A blue arrow points from the highlighted date to the 'Effective Date' input field. An information icon (i) is visible to the right of the calendar.

May 2021						
Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Authorizations

Authorizations: Authorization Reference ID

- Authorization ID Reference has been added as a filter on both the Approved Authorizations and Pending Authorizations pages.

APPROVED AUTHORIZATIONS

Authorization / Approved Authorizations



Approved Authorizations

PENDING AUTHORIZATIONS (15)

FUNDING ACCOUNTS

PENDING FEES AND ADJUSTMENTS

CLIENT FEES AND ADJUSTMENTS

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

Type Client Name Type Service Code Initial Balance

Type Cost Center Select Status Type Authorization ID Reference

Reset Search

APPROVED AUTHORIZATIONS

Authorization / Pending Authorizations



Pending Authorizations

PENDING AUTHORIZATIONS (16)

FUNDING ACCOUNTS

PENDING FEES AND ADJUSTMENTS

CLIENT FEES AND ADJUSTMENTS

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

Type Client Name Type Service Code Initial Balance

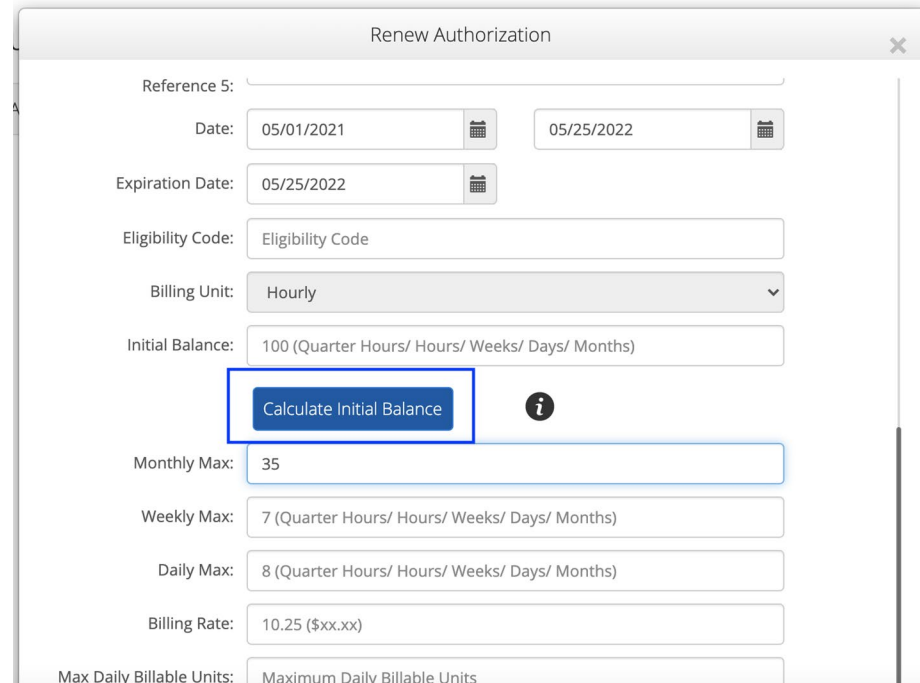
Type Cost Center Name Type Authorization ID Reference

Actions

Reset Search

Authorizations: Calculate Initial Balance

- There is a new feature that allows users with the appropriate role and/or permission to calculate the initial balance when creating or renewing authorizations.
- When the Calculate Initial Balance button is clicked, the system will automatically populate the initial balance based on the values set in the Start Date, End Date, and Monthly Max fields. The initial balance field will still be editable even after clicking the Calculate Initial Balance button in case any changes need to be made.
- Calculating the Initial Balance has no effect on authorization imports or the remaining balance of existing authorizations.
- This feature requires an instance level setting change. Please contact your DCI representative if you would like it enabled.



The screenshot displays a 'Renew Authorization' form with the following fields and values:

- Reference 5: [Empty]
- Date: 05/01/2021 (Start Date) and 05/25/2022 (End Date)
- Expiration Date: 05/25/2022
- Eligibility Code: Eligibility Code
- Billing Unit: Hourly
- Initial Balance: 100 (Quarter Hours/ Hours/ Weeks/ Days/ Months)
- Monthly Max: 35
- Weekly Max: 7 (Quarter Hours/ Hours/ Weeks/ Days/ Months)
- Daily Max: 8 (Quarter Hours/ Hours/ Weeks/ Days/ Months)
- Billing Rate: 10.25 (\$xx.xx)
- Max Daily Billable Units: Maximum Daily Billable Units

The 'Calculate Initial Balance' button is highlighted with a blue border, and an information icon (i) is visible next to it.

Business Rules

Business Rule: Client Duplicate/Overlapping Punch

- The Client Duplicate/Overlapping Punch business rule validation has been moved from Phase 3 to Phase 2.
- This means that the check runs after the punch is created but prior to being approved.

Business Rule Details - Duplicate/Overlapping Client Punch

 Actions

Business Rule Details

Business Rule Name : Duplicate/Overlapping Client Punch

Description : This punch cannot be approved as the client already has a duplicate or overlapping punch in the system for this date and time

Enabled : No

Phase : Phase2

Parameter 1 :

Parameter 2 :

Business Rule: Max Hours Per Year Per Employee Per Client Per Service Code

- There is a new business rule called Max Hours Per Year Per Employee Per Client Per Service Code.
- This business rule validates that an employee has not exceeded the maximum allowed hours for a client per year under a specific service code
- This business rule will be validated during Phase 2 validation.

Business Rule Details - Max Hours Per Year Per Employee Per Client Per Service Code

 Actions

Business Rule Details

Business Rule Name : Max Hours Per Year Per Employee Per Client Per Service Code

Description : The purpose of this business rule is to validate that an employee has not exceeded the maximum allowed hours for a client per year under a specific service code

Enabled : No

Phase : Phase2

Parameter 1 :

Parameter 2 :

Edit Business Rule

Business Rule Name: Max Hours Per Year Per Employee Per Client Per Service Code

Enable:

Parameter 1: Mode (Integer 1 or 2)

Parameter 2: Max Hours (Decimal)

Cancel Save

Imports

Imports: Employee Service Account Day of Week Restrictions

- There is now an import for Day of Week Restrictions.
- This import allows users with the appropriate role or permission to enable or disable day of week restrictions in bulk.
- Please visit the [Help Center](#) to obtain the most updated Import File Formats Document.

The screenshot displays a web application interface. At the top, a navigation bar includes the DCI logo and menu items: HOME, PAYROLL, BILLING, SCHEDULING, CARE MANAGEMENT, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. The 'IMPORT' menu item is highlighted. Below the navigation bar, a sidebar on the left lists various system components: DASHBOARD, SETTINGS, PROFILES, ENTRIES, AUTHORIZATIONS, ACCOUNTS, TRAINING, EVV, CARE MANAGEMENT, DIAGNOSIS CODES, CUSTOM FIELDS, and NOTES. The main content area is titled 'Import / Employee Service Account Day of Week Restrictions' and 'Import Details - Employee Service Account Day of Week Restrictions'. A box labeled 'Import Details' shows 'Import Name: Employee Service Account Day of Week Restrictions'. Below this, a dropdown menu is open, listing several account types, with 'EMPLOYEE SERVICE ACCOUNT DAY OF WEEK RESTRICTIONS' selected. To the right of the dropdown, there are input fields for 'To (MM/DD/YYYY)', 'File Name', and 'Select Typ', along with a 'Res' button.

Imports: Employee Service Account Holiday Restrictions

- There is now an import for Holiday Restrictions.
- This import allows users with the appropriate role or permission to enable or disable holiday restrictions in bulk.
- Please visit the [Help Center](#) to obtain the most updated Import File Formats Document.

The screenshot displays the 'Import Details - Employee Service Account Holiday Restrictions' page in the Acumen software. The navigation menu on the left includes: SETTINGS, PROFILES, ENTRIES, AUTHORIZATIONS, ACCOUNTS, TRAINING, EVV, CARE MANAGEMENT, DIAGNOSIS CODES, CUSTOM FIELDS, and NOTES. The main content area shows the 'Import Details' section with the following fields:

- Import Name: Employee Service Account Holiday Restrictions
- To (MM/DD/YYYY): [Calendar icon]
- File Name: [Text input]
- Select Type: [Dropdown menu]
- Active: [Dropdown menu]
- Res: [Button]
- Sho: [Button]

At the bottom, a table displays the import results:

File Name	File Size	Added By
Employee_Service_Account_Holiday_Restriction_Import_Result.txt	0.09 KB	Keith Jones

Imports: Refresh Billing Rate

- There is a new task available on the Actions menu of the Import Module Dashboard called Refresh Billing Rate.
- When clicking Refresh Billing Rate, the system will:
 - Pull a list of Rate Change Authorization Entries imported by the current user.
 - Using the list pulled above, will search the system for approved and batched funding account entries impacted.
 - Update the rate on the funding account entries.
- This action functions the same as the Refresh Billing Rate button in the Billing module.

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. The 'IMPORT' tab is currently selected. In the top right corner, there is a 'Help' icon and the user name 'mikaela.oven..'. On the left side, there is a vertical sidebar menu with the following items: DASHBOARD, SETTINGS, PROFILES, ENTRIES, AUTHORIZATIONS, ACCOUNTS, TRAINING, EVV, CARE MANAGEMENT, DIAGNOSIS CODES, CUSTOM FIELDS, and NOTES. The 'DASHBOARD' item is highlighted. The main content area shows 'Import / Dashboard' and 'Dashboard'. On the right side of the dashboard, there is an 'Actions' button. A dropdown menu is open from this button, listing the following actions: Approve Imported Authorization, Approve Imported Employee Entries, Run Screen Scrape Process, Approve Imported Authorization Balance Adjustments, Approve Imported Client Fees, Approve Imported Vendor Payment Entries, Approve Imported Reimbursement Entries, Approve Imported Accrued Time Adjustment Entries, and Refresh Billing Rate. The 'Refresh Billing Rate' option is highlighted with a blue border.

Additional Updates

Additional Updates

- This release includes additional updates to enhance user experience. Some of these updates include:
 - There is a new Employment Status of Inactive on the Add/Edit Employee wizards. This new status functions the same as the status of Suspended and prevents the employee from logging in.
 - SSN is now a conditionally optional field for Employee Type of Contractor. If Allow SSN Retrieval is not enabled, then Contractor SSN is optional. If Allow SSN Retrieval is enabled, then it is a required field for Contractors. As part of this change, the Employee Type field on the Add/Edit Employee Wizard has been moved from the second tab to the first tab just above the SSN field.
 - Decimal values are now allowed on Starting and Ending Odometer fields for Mileage and Client Transportation entries.

Thank you!