

Employee - Enter or Edit a Punch with a Reason Code in the Web Portal

Description: In this topic, the user will learn how to enter or edit a punch with a reason code and reason code text note. The organization may require a reason code and a reason code text note when entering or editing a punch in the web portal.

Role Required: Employee (base user)

Permission Required: N/A

Enter a Punch with a Reason Code in the Web Portal

1. Log in to personal profile in the DCI web portal
2. Click the blue **Add Entry** button on the dashboard
3. Complete the **Add New Entry** form wizard
 - a. Entry Type: Punch defaults
 - b. Employee Name: Auto-populates the name of the employee logged in
 - c. Account Type: Available options depend upon the authorizations
 - d. Client: Type and select the client name from list
 - e. Service Code: The service code(s) authorized for the client. Select the one that is most appropriate for the service rendered.
 - f. Service Date: The date the service took place. Please ensure that it is within the acceptable date range of the organization.
 - g. Remaining Balance: This is specific to the client and appears after the name is selected. Shows how many hours or units are remaining on the authorization. Some organizations do not display Remaining Balance.
 - h. Check In/Check Out: Enter the clock in/clock out times. Both fields are required. Clicking in the field displays a time drop-down in half hour increments. Specific time can be entered directly into the field.
 - i. EVV Method: For web portal time punches, this option will be **Portal Signoff**. The only exception is if FOB is enabled for the organization
 - j. Clock in EVV Location: Where the service was performed. There may be one or more options available depending on the client. This field will not be visible if EVV locations have not been defined for the client.
 - k. Clock out EVV Location: See above. This should remain the same as the Clock in location unless the service ended in a different location. There may be one or more options available depending on the client. This field will not be visible if EVV locations have not been defined for the client.
 - l. Check Out Date: This field is tied to the date of service and cannot be edited
 - m. **Add Reason Codes:** The organization may require a reason code when entering a punch, explaining why a non-EVV-compliant method of time entry has been added. Select a reason from the **Add Reason Codes** drop-down. **Please note:** Multiple reason codes may be selected simultaneously.
 - n. **Add Reason Code Note:** Some Reason Codes require an additional field called Add Reason Code Note to be completed. Enter a free form note to support the chosen reason code(s). **Please note:** The added reason code note will be saved with all selected reason codes that require a free text note.
 - o. Diagnosis Code (optional): Enter ICD-10 code
 - p. Notes (optional): Enter notes per organizational requirements
 - q. Attachment (optional): Click the blue Add Attachment hyperlink to add an attachment
4. Click **Save** and **Yes** to confirm

Edit a Punch in the Web Portal with a Reason Code

1. Log in to personal profile in the DCI web portal
2. Click **Home** on the main menu
3. Click **Entries** on the submenu
4. Search for the entry by using the search filters and click **Search**
 - a. Please note: Employees may only edit entries in Pending status, except residential and day program entries which cannot be edited by the employee. See the punch entries status section of the article Status - Quick Reference for details.
5. Click on the entry in the table
6. Click **Actions**
7. Click **Edit Entry** in the drop-down menu
8. Edit fields as needed in the Edit Entry form wizard
 - a. **Add Reason Codes:** The organization may require a reason code when entering a punch, explaining why a non-EVV-compliant method of time entry has been added. Select a reason from the **Add Reason Codes** drop-down that best describes why an edit is needed. **Please note:** Multiple reason codes may be selected simultaneously.
 - b. **Add Reason Code Note:** Some Reason Codes require an additional field called Add Reason Code Note to be completed. Enter a free form note to support the chosen reason code(s). **Please note:** The added reason code note will be saved with all selected reason codes that require a free text note.
9. Click **Save** and **Yes** to confirm

Related articles

- [Group Service - Supervisor Guide](#)
- [What is the "Needs Review" column on my employees' pending entries?](#)
- [Enter a Punch - Web Portal](#)
- [Managing Entries - Guide](#)
- [November 2023 Release Notes](#)