



# Historical Entries with Reason Codes

# Reason Code Basics

- Reason Codes are required for some programs and services
- If you see an option to select a reason, it's required for you
- This is the reason you are entering your time in the DCI Web Portal instead of an EVV Compliant method
- The DCI Web Portal should only be used to enter missed punches or for Live-In Exempt Employees
  - Discuss with your FMS for more info on Live-In Exemptions

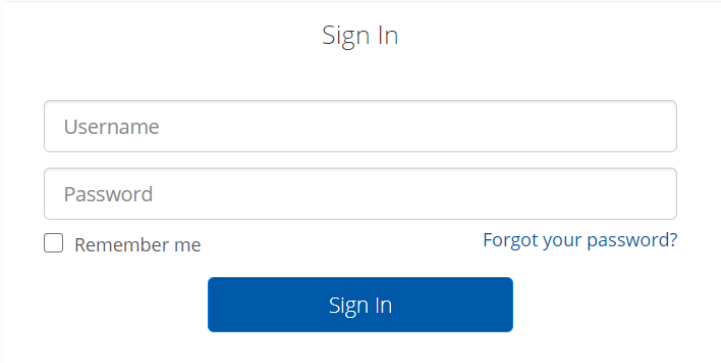
Reason: 



# The DCI Web Portal

1. Open an Internet Browser on a computer or mobile device
2. Navigate to the DCI Web Portal
3. Enter Employee Username/Password
4. Use Forgot Password link if needed
5. Contact Customer Service for help

[outreach.dcisoftware.com](https://outreach.dcisoftware.com)



Sign In

Username

Password

Remember me [Forgot your password?](#)

Sign In

The screenshot shows a white rectangular box representing a sign-in form. At the top center is the text 'Sign In'. Below it are two input fields: 'Username' and 'Password'. Under the 'Password' field, there is a checkbox labeled 'Remember me' and a blue link 'Forgot your password?'. At the bottom center of the form is a blue button with the text 'Sign In'.



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# DCI Web Portal

On a Laptop or Desktop Computer

# Add New Entry (Computer/Laptop)

## Once logged in

1. Select Add New Entry

Home > Dashboard

Help spongebob

1 → Add Entry

SPONGEBOB ← 11/01/2020 to 11/07/2020 →


Overtime Gauge	11/01/2020 to 11/07/2020
No entry in current week	

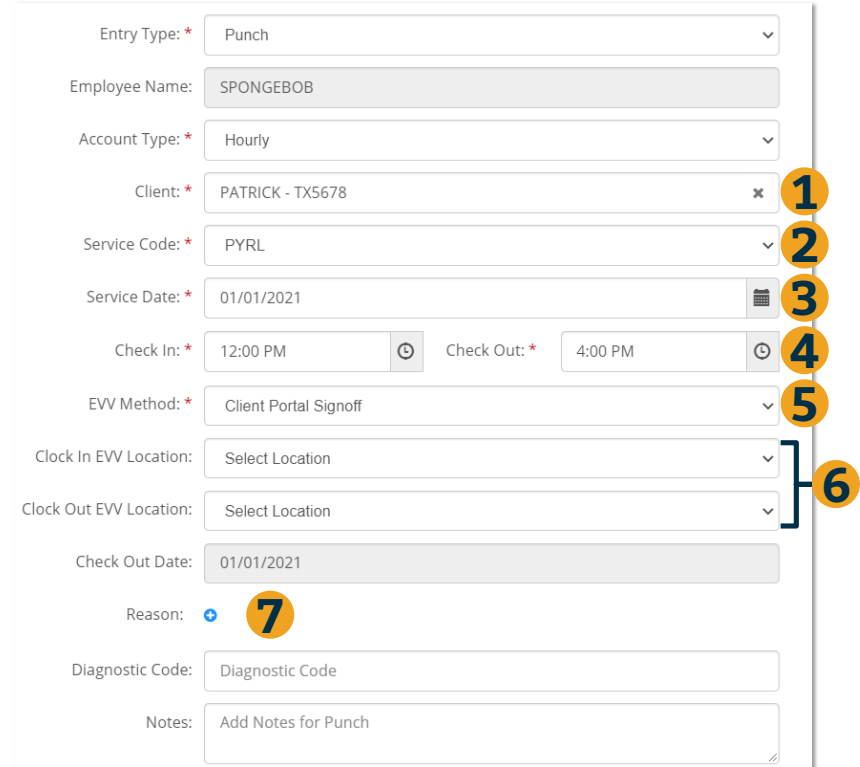
Total Hours	11/01/2020 to 11/07/2020
Approved By:	7.52
Pending Hours:	0.00
Unverified Hours:	0.00
<b>Total Hours:</b>	<b>7.52</b>

Expiring Certifications		
Certification Name	Certification Expiration Date	Link to Certification Course




# Complete New Entry

1. Enter Client Name & Select
2. Select Service Code
3. Select Service Date
4. Enter Start & End Time
5. Select Client Portal Signoff
6. Select Location if necessary
7. Select  to choose reason code




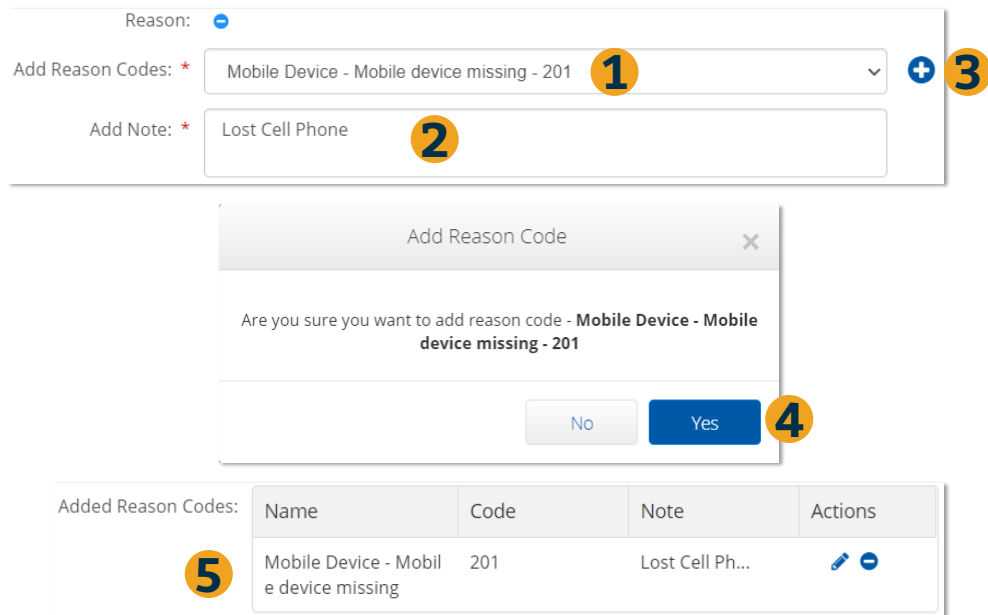
The screenshot shows a form for creating a new entry. The fields are as follows:


- Entry Type: \* Punch
- Employee Name: SPONGEBOB
- Account Type: \* Hourly
- Client: \* PATRICK - TX5678 (marked with 1)
- Service Code: \* PYRL (marked with 2)
- Service Date: \* 01/01/2021 (marked with 3)
- Check In: \* 12:00 PM (marked with 4)
- Check Out: \* 4:00 PM (marked with 4)
- EVV Method: \* Client Portal Signoff (marked with 5)
- Clock In EVV Location: Select Location (marked with 6)
- Clock Out EVV Location: Select Location (marked with 6)
- Check Out Date: 01/01/2021
- Reason:  (marked with 7)
- Diagnostic Code: Diagnostic Code
- Notes: Add Notes for Punch





# Add Reason Code


1. Select Reason code from list
2. Enter Note to explain
3. Select  to add reason code
4. Select Yes to add code
5. Reason code should be displayed below w/ note






Reason: 

Add Reason Codes: \*   

Add Note: \*

Add Reason Code 

Are you sure you want to add reason code - **Mobile Device - Mobile device missing - 201**

Added Reason Codes:	Name	Code	Note	Actions
	Mobile Device - Mobile device missing	201	Lost Cell Ph...	 



# Add Notes and Submit

## After Reason Code is added

1. Notes are Optional
2. Attachment are Optional
3. Select Save
4. Select Yes to Submit

The screenshot shows a web form with the following elements:

- Diagnostic Code:** A text input field containing "Diagnostic Code".
- Notes:** A text area containing "Add Notes for Punch", with a yellow circle containing the number "1" next to it.
- Attachment:** A "Choose File" button, with a yellow circle containing the number "2" next to it.
- Buttons:** "Cancel" and "Save" buttons at the bottom right, with a yellow circle containing the number "3" next to the "Save" button.

Below the form is an "Alert" dialog box with the following text:

Alert

Are you sure you want to add a new punch for **04:00 hour(s)** for **PATRICK - TX5678** for **Jan 01, 2021**?

Buttons: "No" and "Yes", with a yellow circle containing the number "4" next to the "Yes" button.





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# Mobile Web Portal

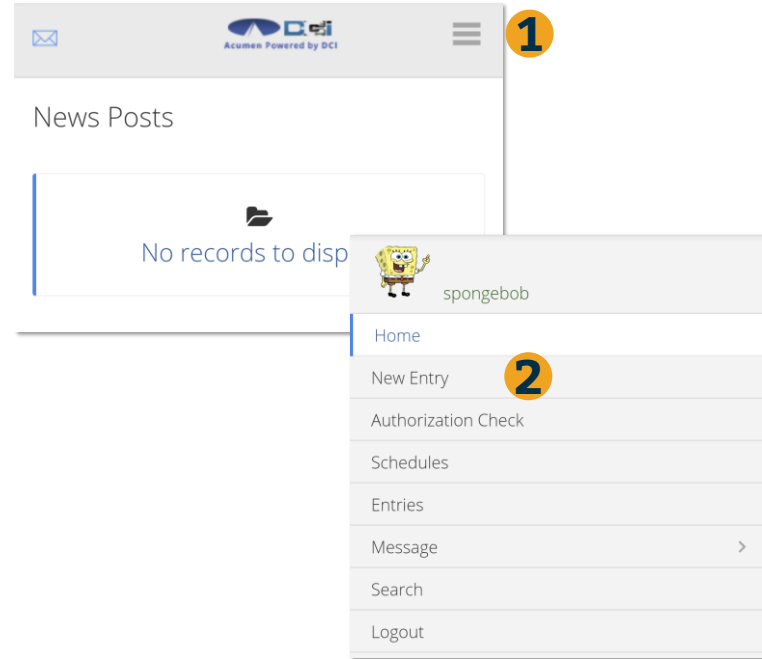
On a Smartphone or Tablet

# Add New Entry (Mobile Device)

Once logged in

1. Select the Menu in the top right corner
2. Select New Entry

Complete the Add New Entry Wizard



# Add New Entry Wizard

1. First 2 boxes are preset
2. Enter Client Name
3. Select Service Code
4. Select Service Date
5. Enter Start & End Time
6. Select Client Portal Signoff
7. Select Location if necessary

The screenshot shows a form titled "Add New Entry" with the following fields and callouts:

- 1:** A bracket on the right side of the first two dropdown menus, "Punch" and "Hourly".
- 2:** A text input field containing "PATRICK - TX5678" with a clear (X) button on the right.
- 3:** A dropdown menu with "PYRL" selected.
- 4:** A date input field containing "01/01/2021" with a calendar icon on the right.
- 5:** Two time input fields: "6:00 AM" and "10:00 AM", each with a clock icon on the right.
- 6:** A dropdown menu with "Client Portal Signoff" selected.
- 7:** A bracket on the right side of the last two dropdown menus, "Select Clock In EW Location" and "Select Clock Out EW Location".



# Add New Entry Wizard (Cont)

1. Select **+** to choose Reason Code
2. Select Reason Code from dropdown list
3. Enter Note to explain
4. Select **+** to add Reason Code
5. Reason Code will be added

The screenshot illustrates the 'Add New Entry Wizard' interface. At the top, there is a date field showing '01/01/2021' with a calendar icon. Below this, the 'Reason:' label is followed by a dropdown menu. The dropdown menu is open, showing a list of options: 'Mobile Device - Mobile device missing -' (highlighted with a yellow circle '2') and 'Lost Cell Phone' (highlighted with a yellow circle '3'). A blue plus sign icon (highlighted with a yellow circle '4') is located to the right of the dropdown menu. Below the dropdown menu, there is a text input field containing the text 'Lost Cell Phone' (highlighted with a yellow circle '3'). To the right of this field is another blue plus sign icon (highlighted with a yellow circle '4'). Below the main form, there is a smaller window showing the details of the selected reason code. It includes a dropdown menu labeled 'Select Reason' with a blue plus sign icon (highlighted with a yellow circle '4'). Below this, the details are listed: 'Name : Mobile Device - Mobile device missing' (highlighted with a yellow circle '5'), 'Code : 201', 'Note : Lost Cell Phone', and 'Action : [edit icon] [minus icon]'.



# Save & Submit

1. Enter Notes if necessary
2. Select Save
3. Select Yes to confirm
4. Punch will be submitted

The screenshot shows a form for entering punch data. It includes a 'Diagnosis Code' field, an 'Add Notes for Punch' field with a yellow '1' callout, a 'Choose File' button, a 'Cancel' button, and a blue 'Save' button with a yellow '2' callout. Below the form is an 'Alert' dialog box with a close button (X). The alert text asks: 'Are you sure you want to add a new punch for 04:00 hour(s) for PATRICK - TX5678 for Jan 01, 2021?'. At the bottom of the alert are 'No' and 'Yes' buttons, with a yellow '3' callout on the 'Yes' button.

The screenshot shows a punch summary card for 'Punch 1641' on 'Jan 01, 2021'. The card lists the employee as 'SPONGEBOB', the time as '06:00 AM - 10:00 AM', the duration as 'Hours: 0:04:00', and the amount as 'Amount: 4.00'. The status is 'Pending' in red text, and the punch type is 'Hourly'. The employee's name 'PATRICK' and code 'PYRL' are listed at the bottom. A red 'Reject' button is located at the bottom right of the card, with a yellow '4' callout.



# Where to go for help?

- **Utilize our DCI Training Materials for more help**
  - This will give you a full list of Training Materials for DCI
- **Contact your Customer Service for more help**



NC Phone: (877) 901-5827

WI Phone: (877) 901-5826



[acumenfiscalagent.zendesk.com](https://acumenfiscalagent.zendesk.com)



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# Thank you!

Visit the **Help Center** to learn more at:  
[acumenfiscalagent.zendesk.com](https://acumenfiscalagent.zendesk.com)