GUARDIAN USER GUIDE

Chances are, if you're viewing this guide, you are the guardian of an individual who receives support from a Fiscal Intermediary or Service Provider agency. The agency uses DCI (Direct Care Innovations) to track time and attendance for payroll and billing purposes. In this guide, you will take a tour of your guardian profile and learn how to perform all necessary tasks. If you have any questions, please reach out to your service coordinator.

Profile Access

There are three methods in which you can access your guardian profile:

- Web Portal - Use a web browser on a computer to navigate to the url provided to you by your agency
- Mobile Web - Use a web browser on a mobile device to navigate to the url provided to you by your agency
- Mobile App - Use the DCI App on a mobile device to login. Your agency will provide a unique system ID upon first use of the app.

Key Tasks

You might be wondering why you need to use DCI in the first place. The goal of DCI is to provide access to the information you need in the most efficient way possible. Here's a quick snapshot of what you'll find in your profile:

- Dashboard
  - Receive updates from your agency
  - Review status of authorizations including remaining balance
- Entries
  - View entries for individuals under your guardianship
  - Provide sign off on entries that need it
  - Provide ratings of your employee per punch (If your agency uses Caregiver Ratings)
- Scheduling
  - View schedules for all individuals under your guardianship
  - Request services for all individuals under your guardianship
- Messaging
  - Contact your service coordinator and employees using the secure messaging module

Let's take a tour of your profile now.

Access Your Profile

Profile Set Up

Your profile will be created by administrative personnel at your agency. You will be provided your username and temporary password. Before you log in the first time, you will need to confirm profile registration. To do so:

1. Find the email sent to you by support@dcisoftware.com. It will be titled "DCI - Confirm Registration".
2. Click the blue "Activate Your Profile" button in your email.
3. The DCI portal will open in a new browser window. enter the username and temporary password provided to you.
4. You will receive confirmation that the profile registration has been confirmed. Click the button to take you back to the login screen.
5. Enter your username and temporary password again.
6. The first time you do this, you will be required to update your security details.
   a. Select your security question and enter your answer. Please note that the answer is case sensitive. Click Next.
   b. Enter a new password. Hover over the tool tip icon (black circle with an i) to view password criteria. Click Change Password.
7. You will be taken back to the login screen (We promise this is the last time you will be taken to the login screen! Upon subsequent logins, you will only have to login once). Enter your username and new password and click Sign In.
8. Ta da! You're in!

You can reset your security details at any time by clicking your username in the top right corner of the portal, then click Settings.

Logging in via Web Portal or Mobile Web

Your username and password can be used to log in from a web browser on a computer or mobile device. Simply navigate to the url provided by your agency and login with your username and password.

Logging in via Mobile App

To use the mobile app, download the "DCI Mobile EVV" app from the AppleStore or GooglePlay Store. The first time you launch the app, you will be asked:

- "Allow 'DCI' to access your location while you are using the app" - This allows the system to confirm that services are provided where they are supposed to be provided. Please click Allow in order to use the app.
- System Identifier - This is a number provided to you by your agency. You will only need to enter it the first time you launch the app. Please enter the number then tap Next.
- Enter your username and password and click Login.
- Voila! You've logged in to the mobile app.

Dashboard

When you first log in to your profile via web portal or mobile app, you will be taken to your Dashboard. Your dashboard includes:

- News Posts - Your agency will post announcements as needed in this section. Click any news post to see more details.
- Authorizations Widget (Web Portal only) - The authorizations widget is a way to view all active authorizations for individuals under your care. To search:
  - Enter the individual's name in the Type Client Name field and select it when it appears.
  - Click Search.
  - All current authorizations will display.
  - To search for a different individual, click the Reset button and repeat the above steps.

NOTE: When logging in via mobile web, the landing page will be the Client Listing Page. The dashboard is not present in mobile web.

<div align="center">

Entries

</div>

The most important task you will be complete in your DCI portal is reviewing and signing off (when needed) on entries. Entries that already have EVV will be listed on the Entries table and will not require your sign off. For full details on EVV, please view the EVV Workflow for Clients and Guardians. To do so:

Portal:

1. Log in to your profile from web portal on a computer.
2. Click Clients on the side bar.
3. Click the individual that you wish to view entries for. This will take you to the Client Details Page.
4. Scroll down to view the Entries table.
5. You can search for specific entries by using the filters above the table. Simply enter your search criteria and click the blue Search button.
6. Click any blue entry ID to open the Entry Details Page.
   a. Caregiver Rating can be provided by clicking, Actions, then "Provide Caregiver Rating"
   b. Select the number of stars you wish to give
   c. Enter any comments
   d. Click Submit
7. To provide sign off on entries that need it, select the checkbox in the entry row(s), then click the green Sign Off button.
8. If any entry is incorrect, you can reject by selecting the checkbox and clicking the red Reject button.

Mobile Web:

1. Log in to your profile from web browser on a mobile device.
2. Click the individual that you wish to view entries for. This will take you to the Client Details Page.
3. To view all entries, select Entries.

a. Select any entry to open the Entry Details Page.
   i. Caregiver Rating can be provided by clicking, Actions, then "Provide Caregiver Rating"
   ii. Select the number of stars you wish to give
   iii. Enter any comments
   iv. Click Submit
4. To provide sign off on entries that need it:
   a. Select Entries Requiring Sign Off
   b. Select the checkbox in the entry row(s)
   c. Select the blue EVV button.
   d. If any entry is incorrect, you can reject by selecting the checkbox and selecting the red Reject button.

Mobile App:

1. Log in to your profile from the mobile app.
2. Select the menu icon in the top left corner
3. Select Clients
4. Select the individual that you wish to view entries for. This will take you to the Client Details Page.
5. To view all entries, select Entries.
   a. Select any entry to open the Entry Details Page.

NOTE: Sign off and caregiver ratings cannot be completed from the mobile app at this time. This feature will be coming soon.

Scheduling

The Scheduling Module allows for coordinators to build a schedule for individual clients that take into consideration employee availability, authorization limitations, and guardian/client requests. As a guardian, you can view published schedules and submit requests for services on particular days/times.

View Published Schedules

Portal:

1. Log in to your guardian profile.
2. Click "Clients" on the sidebar.
3. Select the client from the table.
4. Click the Schedule tab.
   1. The schedule module displays the current week's schedule listed by employee. Any employee with an active service account linked to the client will appear in the list. If the client attends a Day or Group Services Program, these programs will also be listed.

2. Each published shift will appear in blue on the schedule including start and end time, total hours, and the service provided. Click an individual entry to see more details.
5. To see a detailed view of the current day's scheduled shifts click "Today."
6. To view a different week, use the arrows or the calendar icon.
7. Click the printer icon to print the schedule.

Mobile App:

1. Log in to your profile via app.
2. Click the menu icon in the top left corner
3. Click Clients
4. Select the client from the table.
5. Click Schedules
6. Use the arrows to navigate to the desired week. To view just the current date, click "Today" at the bottom

Mobile Web:

1. Log in to your profile via mobile web.
2. Select the client from the table.
3. Click Schedules
4. Use the arrows to navigate to the desired week. To view just the current date, click "Today" at the top.

Request Services

Portal:

1. Log in to your profile.
2. Click "Clients" on the sidebar.
3. Select the client from the table.
4. Click the Schedule tab.
5. On the Scheduling Module, click actions.
6. Click "New Request"
7. Complete the request form. Select the date, start time, end time, service, and employee you would prefer to work.
   a. If the employee is unavailable, your coordinator might schedule a different employee.
   b. Add any particular notes for the request, if needed.
8. The request will appear on the schedule as pending and has been sent to your coordinator for review. You will receive a notification when this review is complete.
   a. If the request is approved, the shift will appear blue on the schedule.
   b. If it is rejected, it will no longer appear and your coordinator will provide you details as to why it was rejected.
   c. If you would like to cancel your request, please contact your coordinator.

Mobile App:

1. Log in to your profile via app.
2. Click the menu icon in the top left corner
3. Click Clients
4. Select the client from the table.
5. Click "Add New Client Request"
6. Complete the request form. Select the date, start time, end time, service, and employee you would prefer to work.
    a. If the employee is unavailable, your coordinator might schedule a different employee.
    b. Add any particular notes for the request, if needed.
7. The request will appear on the schedule as pending and has been sent to your coordinator for review. You will receive a notification when this review is complete.
    a. If the request is approved, the shift will appear blue on the schedule.
    b. If it is rejected, it will no longer appear and your coordinator will provide you details as to why it was rejected.
    c. If you would like to cancel your request, please contact your coordinator.

Mobile Web:

1. Log in to your profile via mobile web.
2. Select the client from the table.
3. Click "Add New Client Request"
4. Complete the request form. Select the date, start time, end time, service, and employee you would prefer to work.
    a. If the employee is unavailable, your coordinator might schedule a different employee.
    b. Add any particular notes for the request, if needed.
5. The request will appear on the schedule as pending and has been sent to your coordinator for review. You will receive a notification when this review is complete.
    a. If the request is approved, the shift will appear blue on the schedule.
    b. If it is rejected, it will no longer appear and your coordinator will provide you details as to why it was rejected.
    c. If you would like to cancel your request, please contact your coordinator.

Messaging

The Messaging Module allows for users to communicate with the right people about client services and any other necessary information. The module is a secure messaging system and limits communication with only users who should have interaction with your individual. As a guardian, you can:

- Send messages to:
    - Users with Supervisor or Employer Role for your client
    - Employees with an active service account linked to your client

- ○ DCI Support
- ● Receive messages from:
    - ○ Users with Supervisor or Employer Role for your client
    - ○ Employees with an active service account linked to your client
    - ○ DCI Support
    - ○ DCI Superusers
    - ○ Users with Client Admin Permission

For complete details on messaging module functionality, please review the Messaging Module videos in the Help Center.