EES – Self-Enrollment Training for Employers with Employees and Vendors (Quick Reference Guide)

Welcome to Acumen! In this guide, you will learn how to complete your **NJ DDD Vendor Only** enrollment using Acumen's new Electronic Enrollment System (EES). Before getting started, here are a few important terms to know when using EES:

1. **Client**: When using both EES and DCI, the term Client refers to the Individual who is receiving services. In the context of the New Jersey Division of Developmental Disabilities (DDD), this person may also be referred to as an Individual or Participant, depending on the documentation or system being used.

2. **Employer**: This is the person who is managing the Client's Enrollment

   *Note***:** The Employer and Client can be the same person

4. **Agent**: An Acumen employee who assists the enrollee through the enrollment process

5. **Employment**: Links the Employee, Client, and Employer

6. **Add Vendor Agreement**: The Individual or Employer enters the information about the services the vendor will provide into EES. Information includes the vendor(s) name, the service the vendor will be providing and the Expected Start Date.

Initial Registration:

- For Clients receiving Vendor and Employee services
- Clients may be their own Employer if they do not have one designated and **<u>must</u>** complete the Employer sections of the enrollment with their information

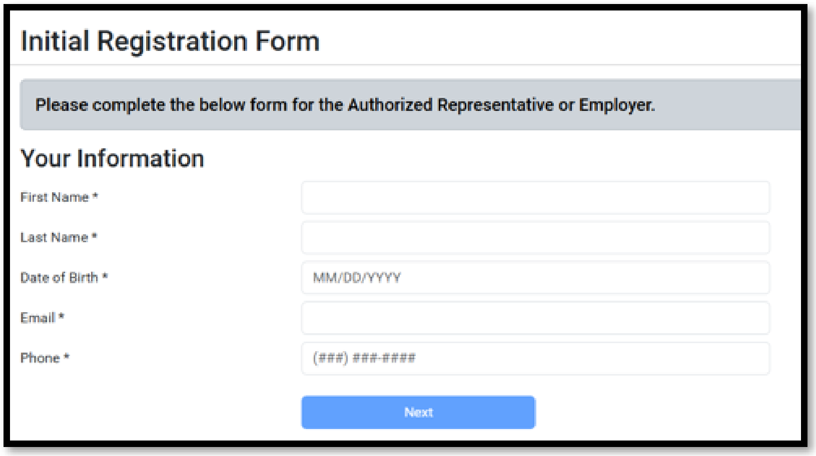
To complete the **Initial Registration:**

1. Navigate to the **NJ Programs Electronic Enrollment page:** https://www.acumenfiscalagent.com/nj/ees/

2. Click the **Go to Electronic Enrollment** button

3. Click **Next** on the following screen

4. Complete the **Initial Registration Form** (Required fields are marked with an asterisk (*)



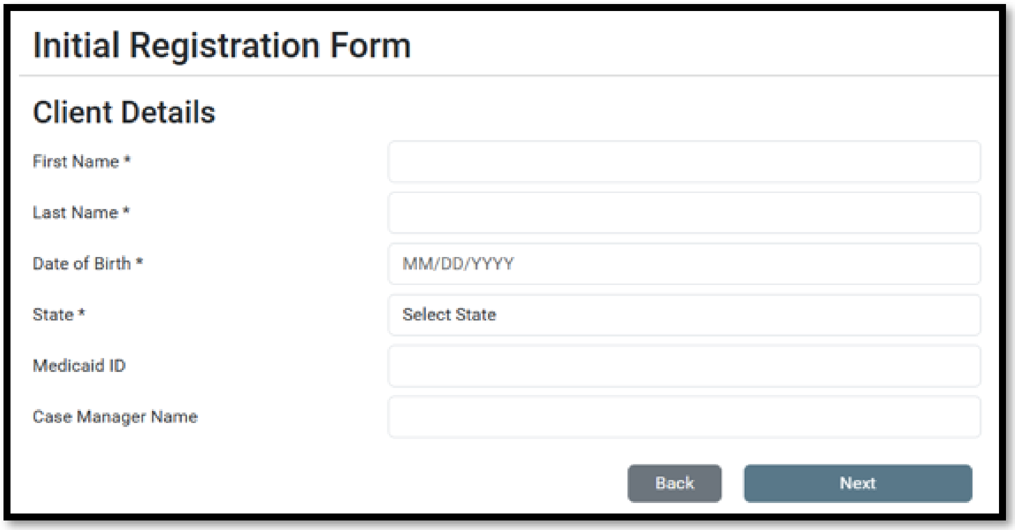
5. Answer the question **Are you the person receiving services?**

- If the person receiving services is completing the registration, select **Yes** (the Client is also the Employer)
- If the person completing the registration represents the Client, select **No** (the Client is *NOT* the Employer)
- Then press **Next**

6. Complete the **Client Details**

Notes:

- Medicaid ID is Optional
- Case Manager Name is Not Applicable


Initial Registration Form

Client Details

First Name *	
Last Name *	
Date of Birth *	MM/DD/YYYY
State *	Select State
Medicaid ID	
Case Manager Name	

Back Next

7. **Create Your Login Credentials**:

- **Username** (required): Create a username to log into the EES portal
  - Must be at least 6 characters
  - Cannot be more than 50 characters
  - Must be unique
  - Characters must be alpha-numeric and the only special character allowed is the period (**.**)
  - We recommend using the **firstname.lastname** format

    Tip: You can click on the "i" to view the username requirements. The requirements will be marked with a red "x", and once it meets the criteria, the "x" will turn into a green checkmark.

- **Password** (required): Create a password to log into the EES portal

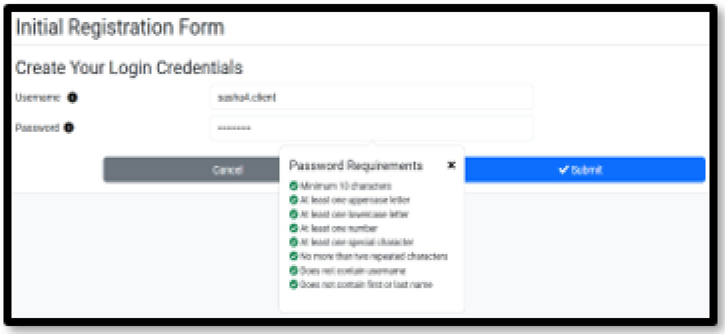
  o Must contain 1 uppercase letter, lowercase letter, number, and special character

  o No more than two repeated characters in a row

  o Username and password cannot contain three consecutive characters of your first or last name

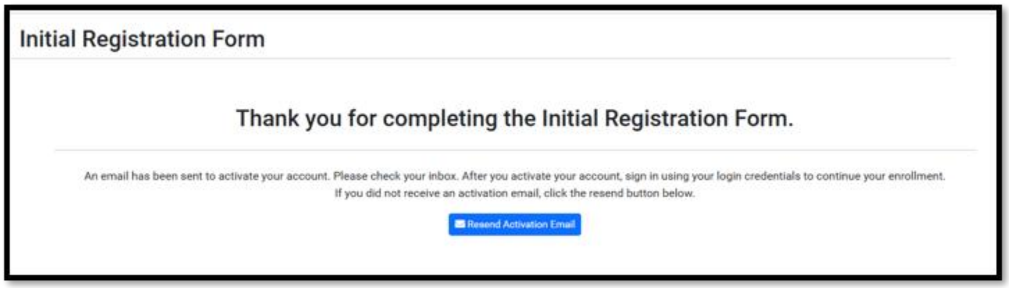
  o Password cannot contain your username

    Tip: You can click on the "i" to view the password requirements. The requirements will be marked with a red "x", and once it meets the criteria, the "x" will turn into a green checkmark.



8. Click **Submit** to complete the Initial Registration Form

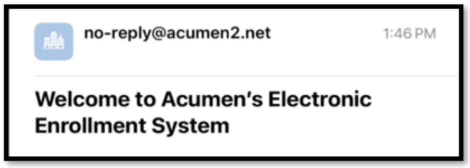
9. A confirmation message populates. You will receive an email to confirm your account. See **Activate Authorized Representative / Employer Profile** section to continue.



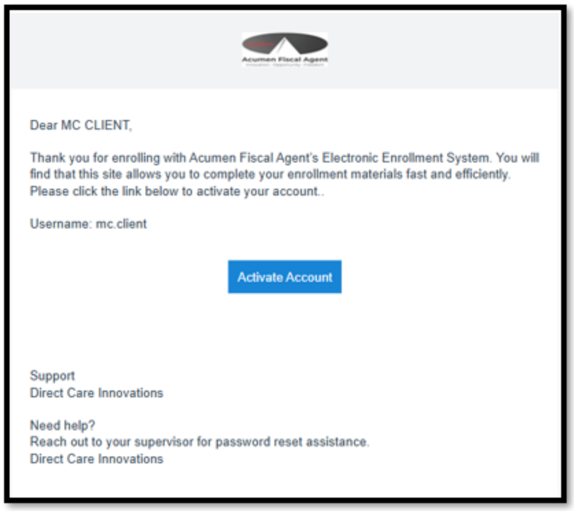
Activate Employer Profile

1. Upon completing Initial Registration, an email is sent to you for account activation. (Check the email you provided during the Initial Registration).

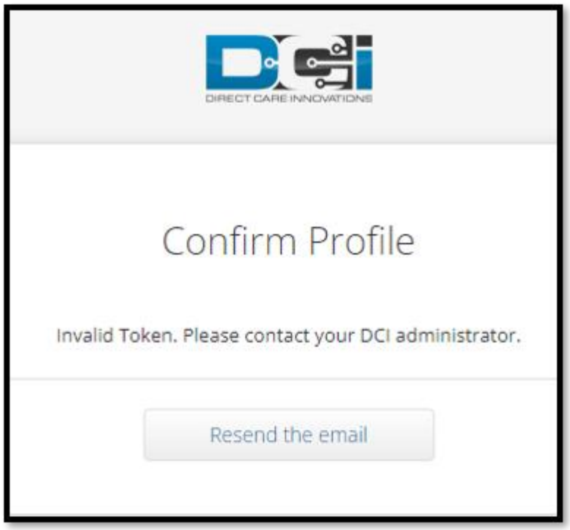
   - **Title**: Welcome to Acumen's Electronic Enrollment System
   - **Sender**: no-reply@acumen2.net
   - Check the spam or junk folder if necessary



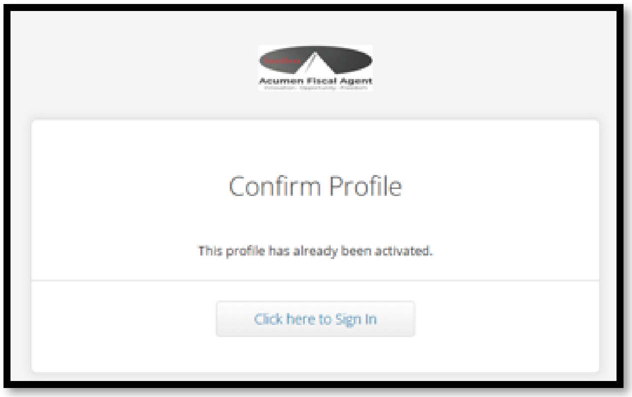
2. Click the **Activate Account** button in the email (Link is active for a specific amount of time; typically, 24 hours)



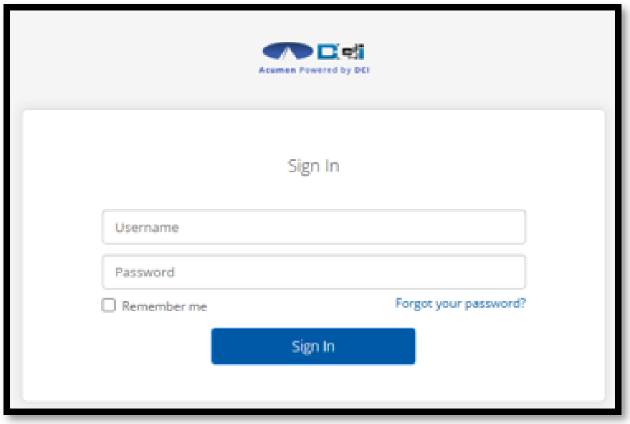
- *Note:* If after clicking the Activate Account button, **<u>the link is inactive</u>**, an alert stating Invalid Token - Please contact your DCI administrator appears
- Click the **Resend the email** button and return to **step 2**



3. The **Activate Account** button opens a web page that states Confirm Profile: This Profile has already been activated
4. Click the **Click here to Sign In** button



5. You will be directed to the **DCI Web Portal** login screen
6. Enter the **username** and **password** created in the Initial Registration form
7. Click **Sign In** to begin the registration process

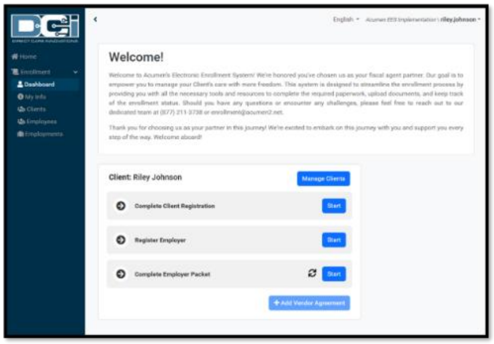


8. You are directed to the **Enrollment Dashboard**. See **Complete Client Registration** section for next steps.

Complete Client Registration

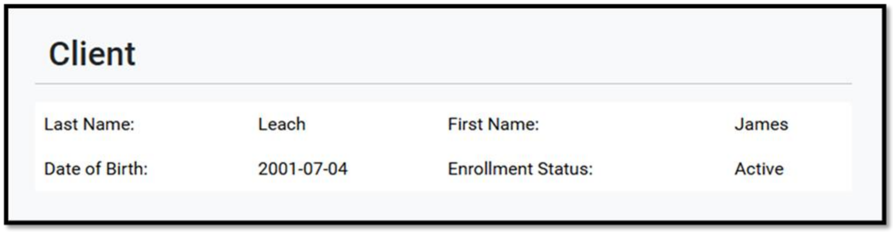
To complete Client Registration:

1. On the Enrollment Dashboard, click the **Start** button to Complete Client Registration



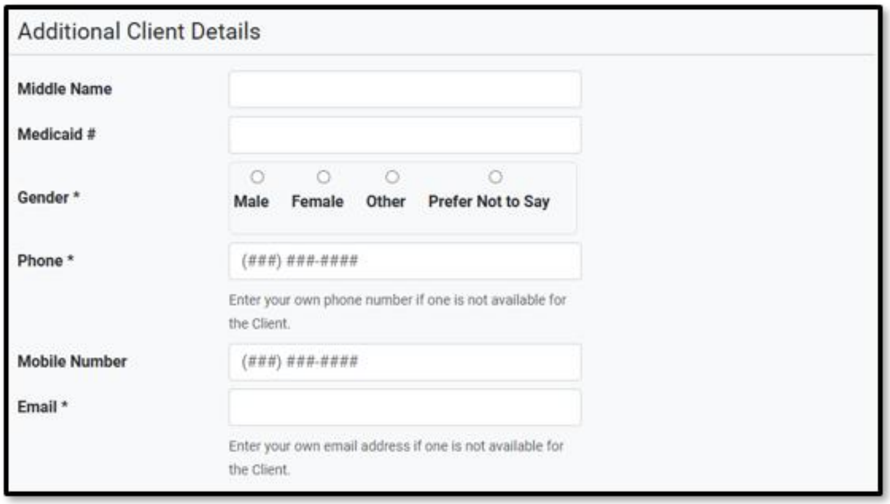
2. Complete **Additional Client Details**:

- Required fields are marked with an asterisk (*)



Client

Last Name:	Leach	First Name:	James
Date of Birth:	2001-07-04	Enrollment Status:	Active



Additional Client Details

Middle Name

Medicaid #

Gender * Male Female Other Prefer Not to Say

Phone * (###) ###-####

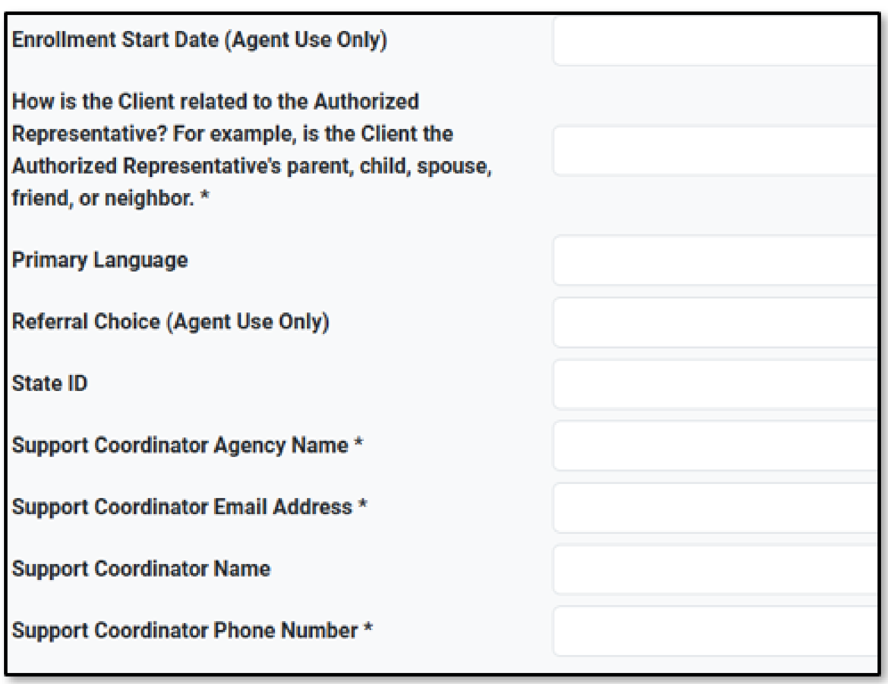
Enter your own phone number if one is not available for the Client.

Mobile Number (###) ###-####

Email *

Enter your own email address if one is not available for the Client.

- **Important!** If **Support Coordinator Agency Name, Email, or Phone Number** is pre-populated and incorrect, please update to the correct information



Enrollment Start Date (Agent Use Only)

How is the Client related to the Authorized Representative? For example, is the Client the Authorized Representative's parent, child, spouse, friend, or neighbor. *

Primary Language

Referral Choice (Agent Use Only)

State ID

Support Coordinator Agency Name *

Support Coordinator Email Address *

Support Coordinator Name

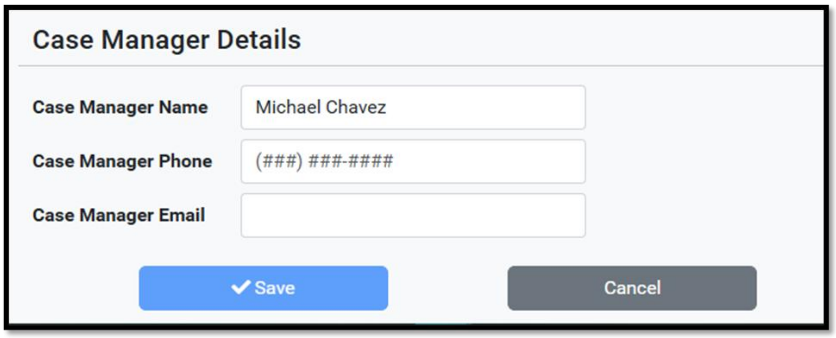
Support Coordinator Phone Number *

3. Complete the **Physical Address**

   - Required fields are marked with an asterisk (*)

4. **Case Manager Details** (Not Applicable)

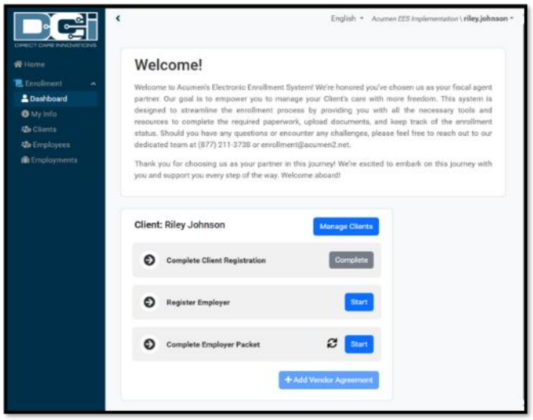
   - Leave blank



5. Click **Save** to complete the Client Registration process

   Tip: To save the information you have entered, ensure all required fields have been completed. Otherwise, the **Save** button will not be enabled.

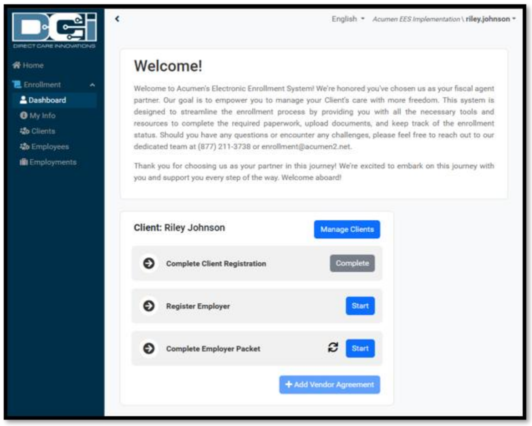
6. On the Enrollment Dashboard, Complete Client Registration is now marked **Complete**. See **Register Employer** section for next steps.



Register Employer

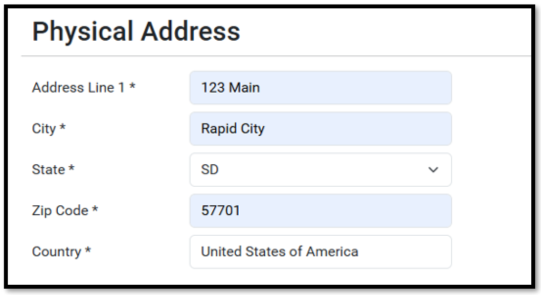
To register the Employer:

1. On the Enrollment Dashboard, click the **Start** button to Employer



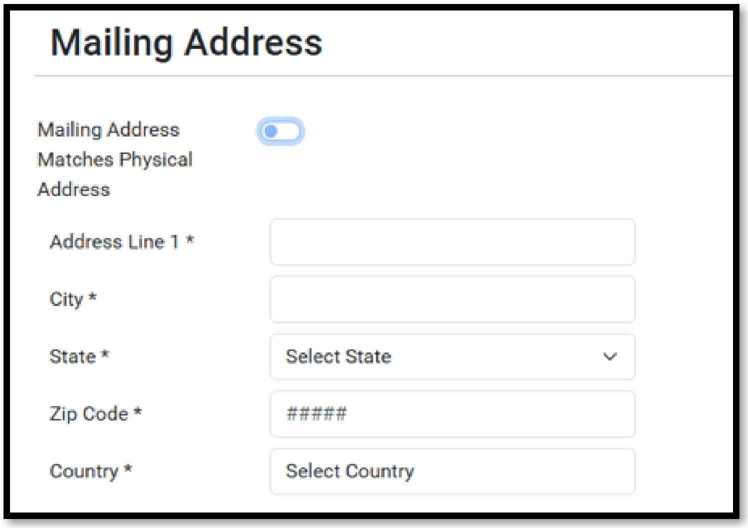
2. Complete **Additional Employer Details** section:
   - Required fields are marked with an asterisk (*)

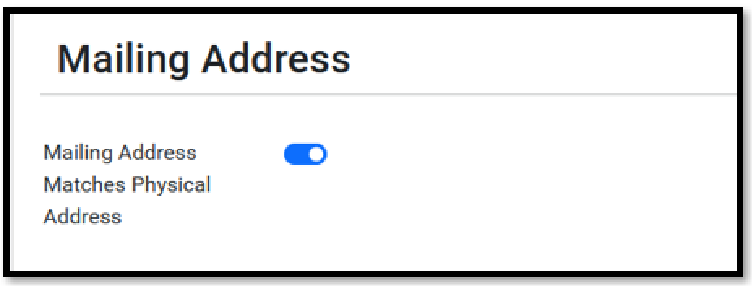
3. Complete **Physical Address**
   - Required fields are marked with an asterisk (*)



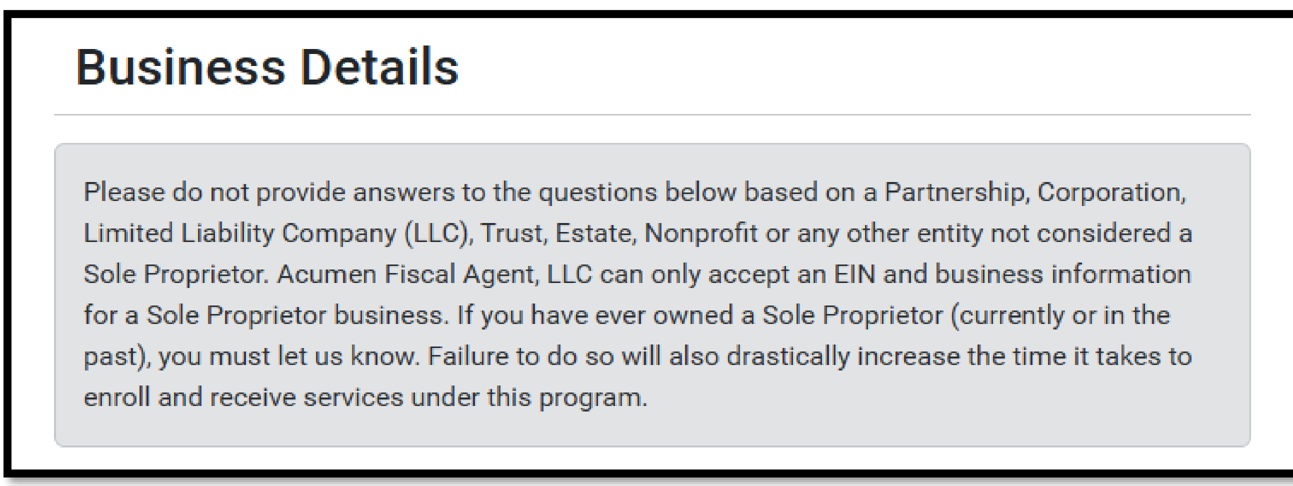
4. Mailing Address

- Defaults to **OFF**, indicating the mailing address does not match the physical address
- Add the mailing address
- Toggle to **ON** position if the mailing address is the same as the physical address



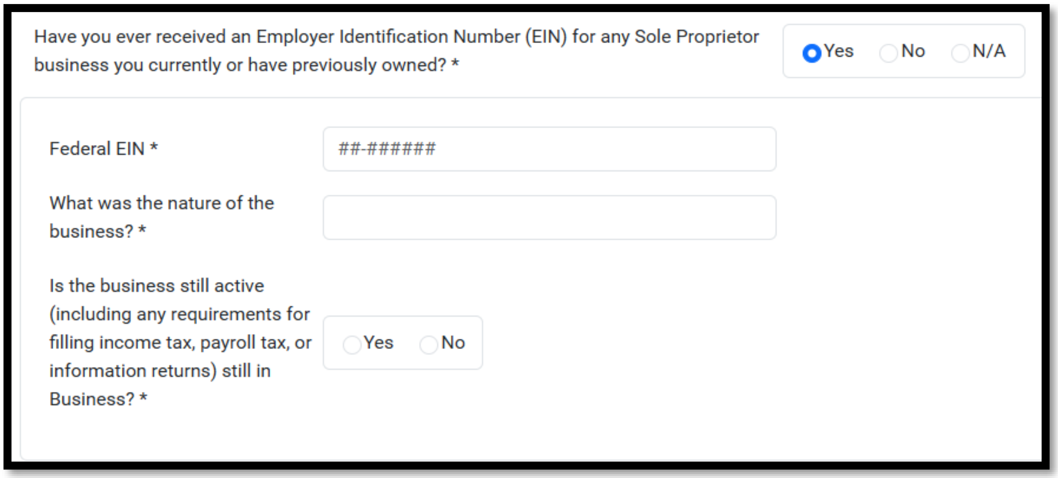


5. Complete **Business Details** section



- For the first question, during transition the employer should already have an **EIN**

  Tip: If you do not know your EIN, you can access it from the PPL website or by calling PPL directly at 844-842-5891



Have you ever received an Employer Identification Number (EIN) for any Sole Proprietor business you currently or have previously owned? * Yes No N/A

Federal EIN * ##-######

What was the nature of the business? *

Is the business still active (including any requirements for filling income tax, payroll tax, or information returns) still in Business? * Yes No

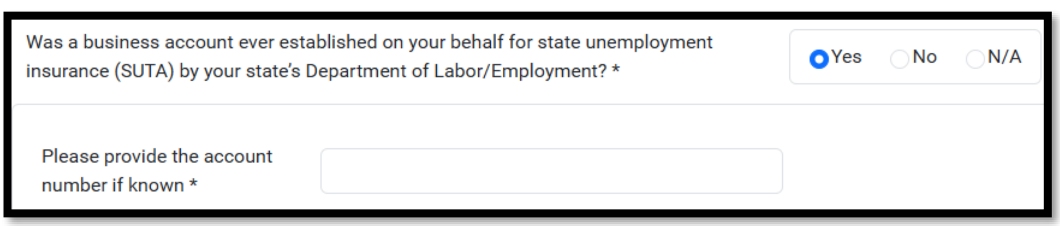
- For the second question, during transition the F/EA should be **PPL**

Have you ever previously been enrolled with another Fiscal/Employer Agent (F/EA), sometimes known as a Financial Management Service Agency? * Yes No N/A

Please provide the name of the F/EA *

Please provide the dates of when you were with the F/EA * Start Date MM/DD/YYYY End Date MM/DD/YYYY

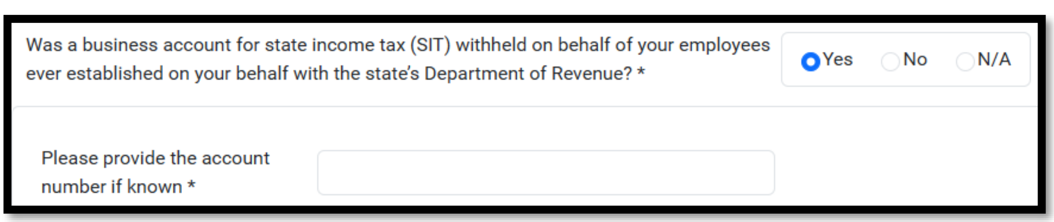
- For the next question, (SUTA), select the appropriate answer, **YES** or **NO**



Was a business account ever established on your behalf for state unemployment insurance (SUTA) by your state's Department of Labor/Employment? * Yes No N/A

Please provide the account number if known *

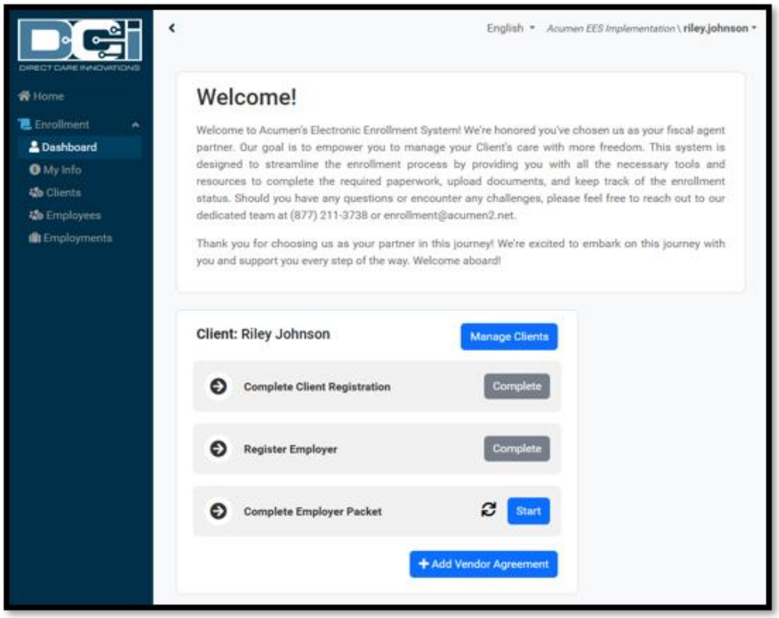
- For the next question, (SIT), select the appropriate answer, **YES** or **NO**



Was a business account for state income tax (SIT) withheld on behalf of your employees ever established on your behalf with the state's Department of Revenue? * Yes No N/A

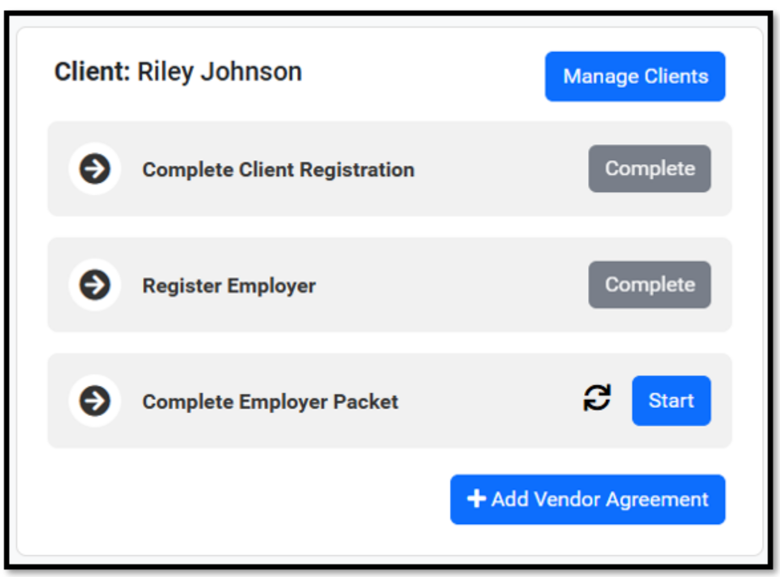
Please provide the account number if known *

6. Click **Save** to complete the Register Employer process
7. EES directs you back to the Enrollment Dashboard. Register Employer is now marked as Complete. See **Complete the Employer Packet** for next steps.

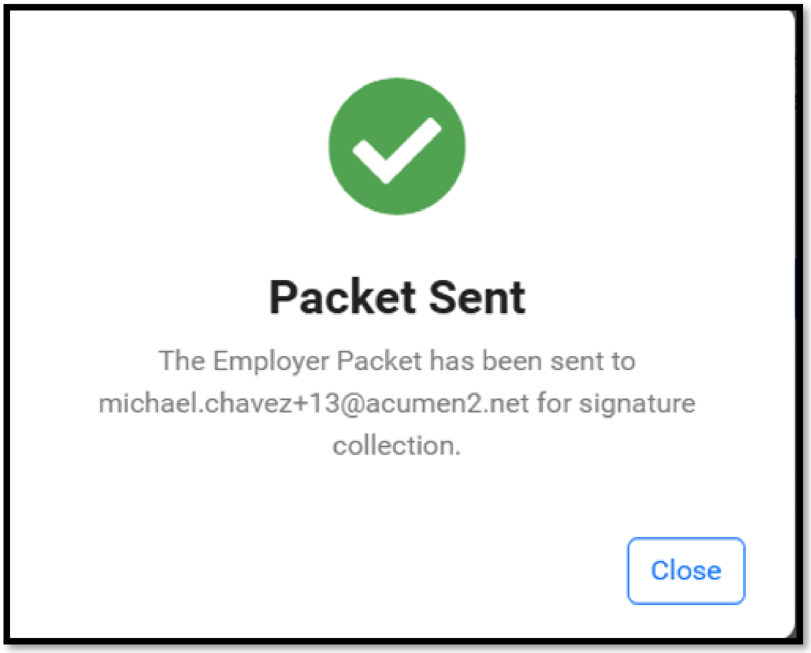


Complete the Employer Packet

1. On the Enrollment Dashboard, click the **Start** button to Complete Employer Packet

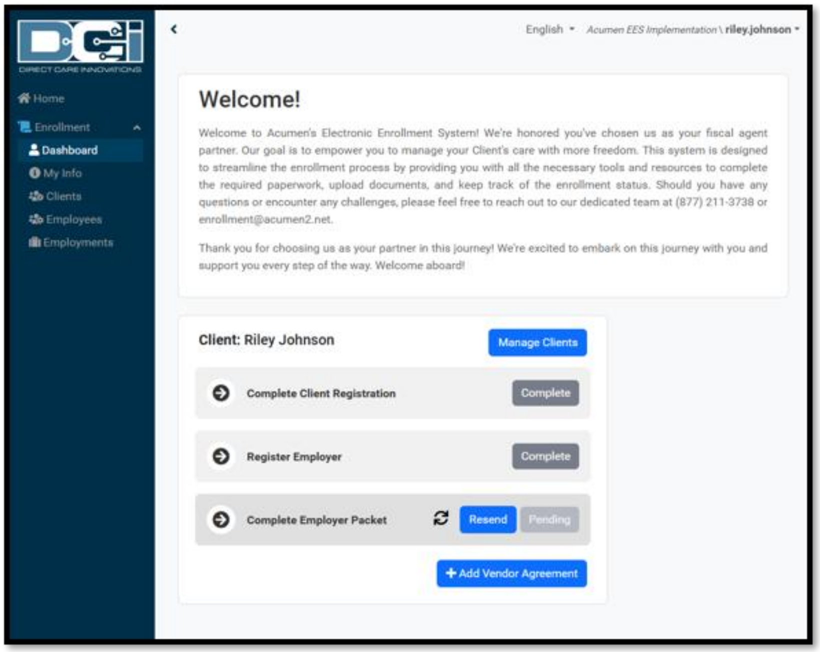


- The pop-up message The Employer Packet has been sent to [**Employer's email address**] for signature collection displays
- Click **Close**

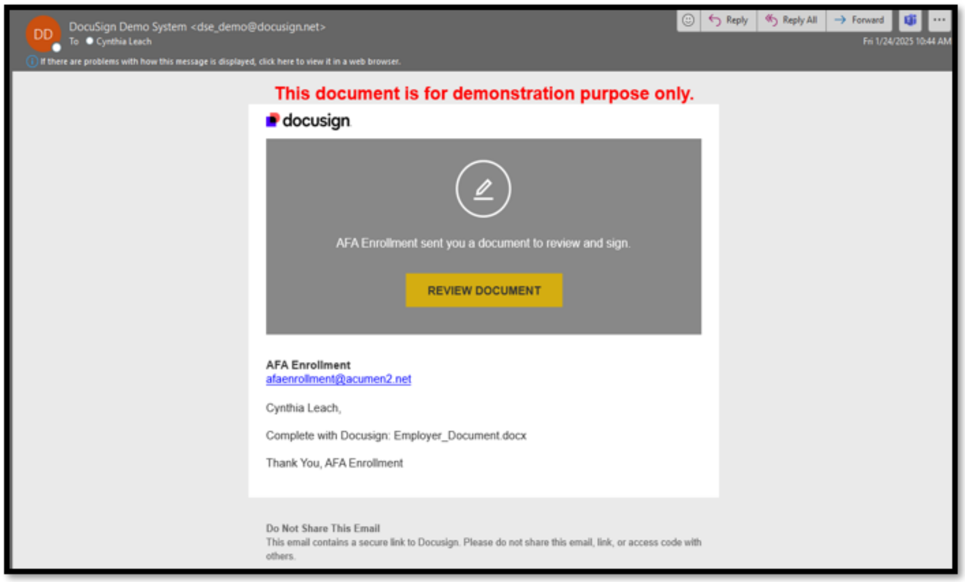


- EES will direct you back to the Enrollment Dashboard

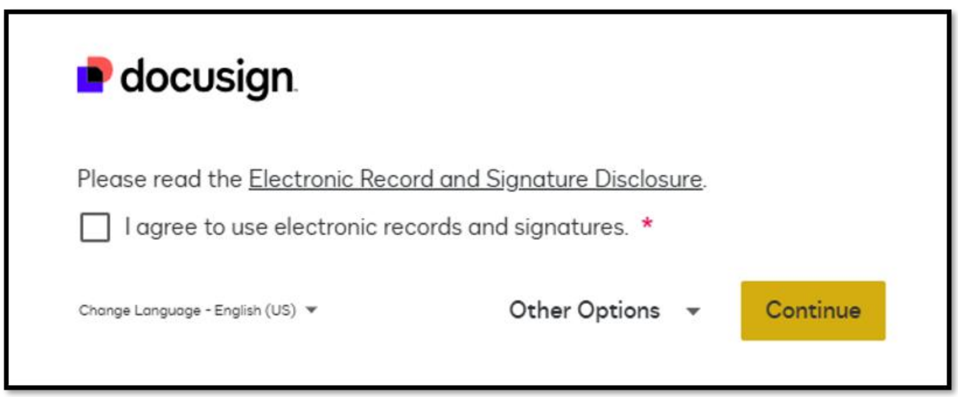
2. On the Enrollment Dashboard, Complete Employer Packet now displays **Pending**



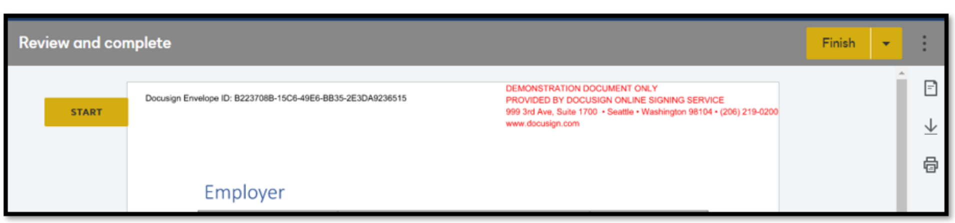
3. Check your email to find the packet to sign
   - The packet will come from a DocuSign sender. (dse_na2@docusign.net)
   - Check junk or spam folders if needed
4. Click the yellow **Review Document** button in the email to complete the forms



5. Click the **Electronic Record and Signature Disclosure** link to view the disclosure
6. Check the **box** to agree to using electronic records and signatures
7. Click the yellow **Continue** button



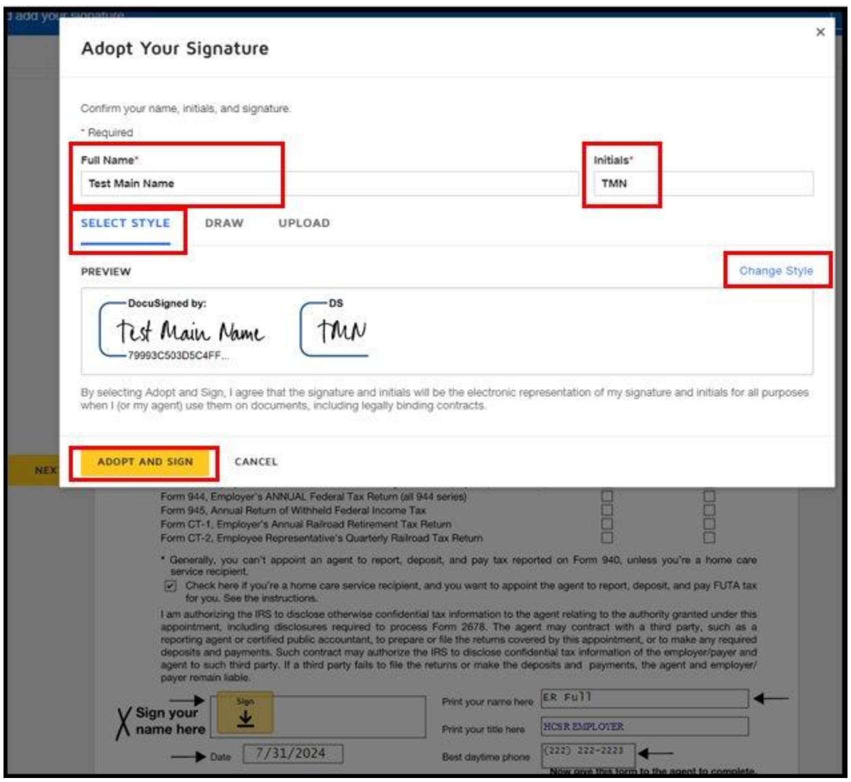
8. Click the yellow **Start** button



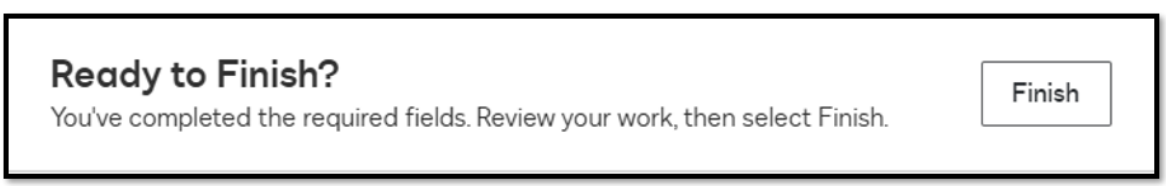
- Use the **tab** key on the keyboard to move through each line
- Review documents for accuracy!

9. For required signature and date, click the **Sign** button to sign and date the form(s)
10. Click the yellow **Next** button or scroll down to proceed to the next form

- You can change the style of your electronic signature by selecting **Change Style**
- You can also **Draw** your signature or **Upload** it
- After you have selected your signature, press **Adopt and Sign**

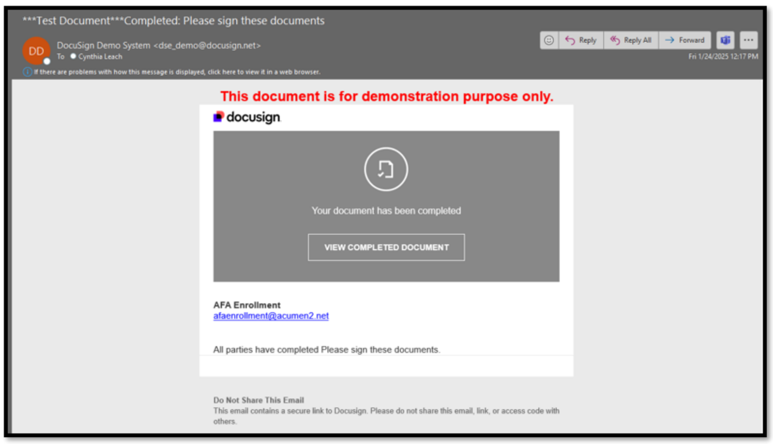


11. Click the **Finish** button at the bottom of the last document



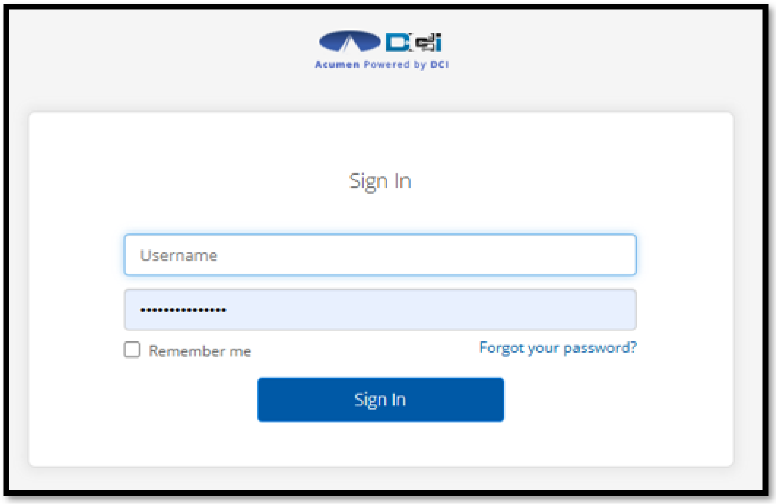
12. Click the yellow **Continue** button to proceed

- The Employer receives a confirmation email with a link to view the completed document

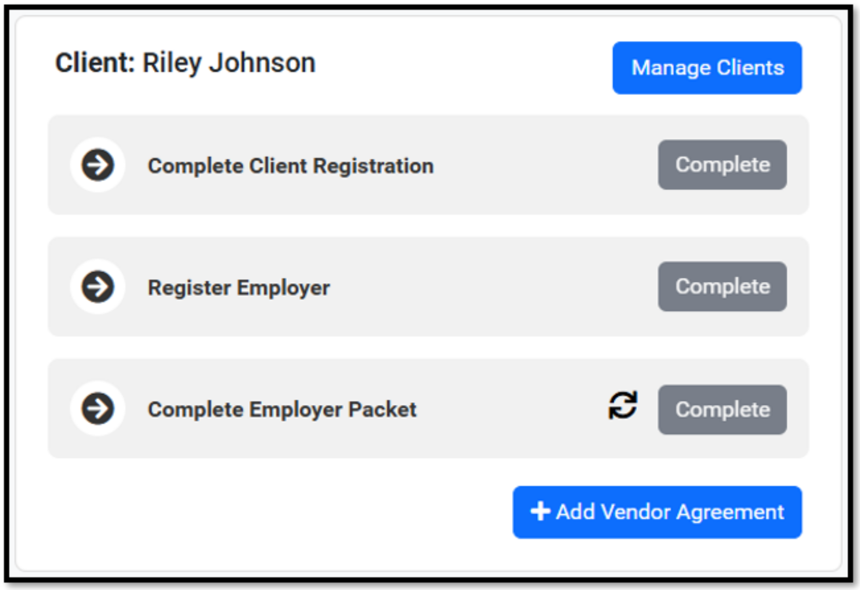


13. Once you have signed the DocuSign packet, return to EES to finish your enrollment

    - To log back into EES later, navigate to: **https://acumen.dcisoftware.com/**
    - Enter the **username** and **password** created in the Initial Registration form
    - Click **Sign In**



14. The Enrollment Dashboard displays and Complete Employer Packet is marked as **Complete**



Important!

Before the Employer starts registering the Employee, this is what you will need from the Employee(s) to complete the registration:

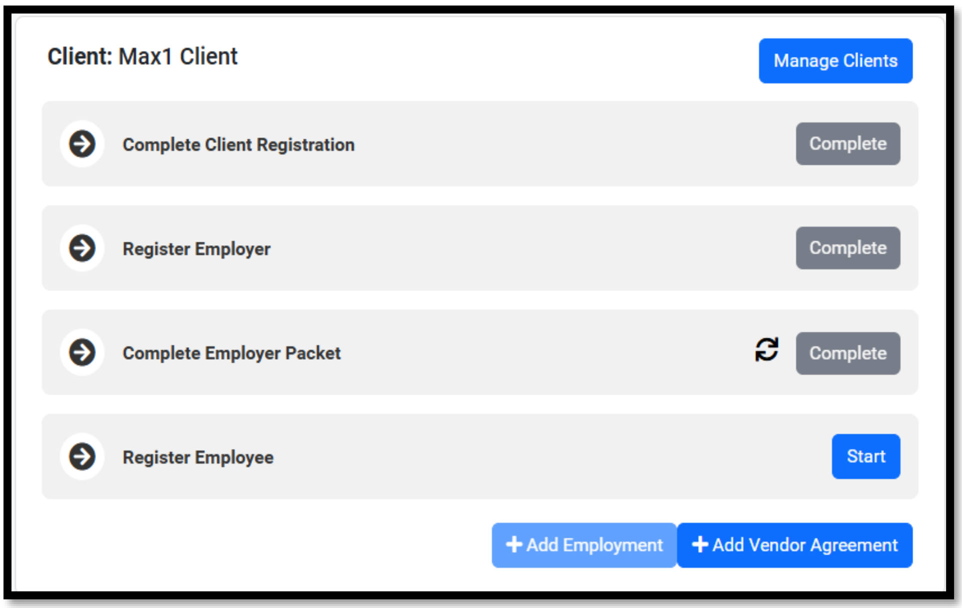
- Employee's full legal name (including any other names used or alias)
- Date of birth
- Social Security Number
- State where they reside
- Physical and mailing address
- The relationship to the employer and employee
- Payment preference, if they request Direct Deposit:
    - Bank's name
    - Account number
    - Routing number
    - Checking or Savings?
    - Flat dollar amount or percentage they would like to deposit into the account
    - Is the account under their name, if not the name on the account
    - Secondary account (optional)

- I9 documents for review and verification (a copy of the documents selected would need to be uploaded to the I9 form)
    - One item from List A (e.g. Citizenship, Birth Certificate, US Passport, etc.)
    - ***OR***
    - One item from List B and one from List C (e.g. Driver's License, Social Security Card, etc.)
    - Driver's License if the Employee provides transportation to the Client

Register Employee

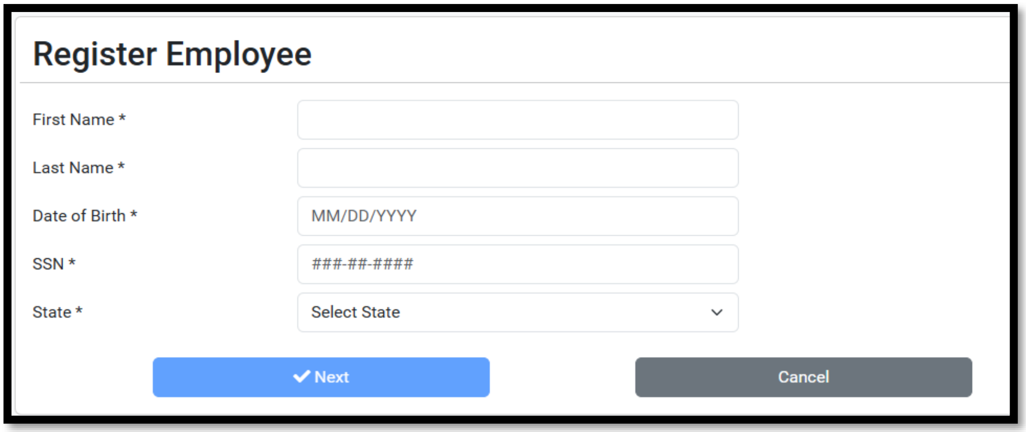
To register the Employee:

1. On the Enrollment Dashboard, click the **Start** button to Employee



2. Complete **Register Employee**:
    - First Name
    - Last Name
    - Date of Birth
    - Social Security Number
    - State
    - Required fields are marked with an asterisk (*)

    Tip: when you press Next, it will search for existing Employees with the same name



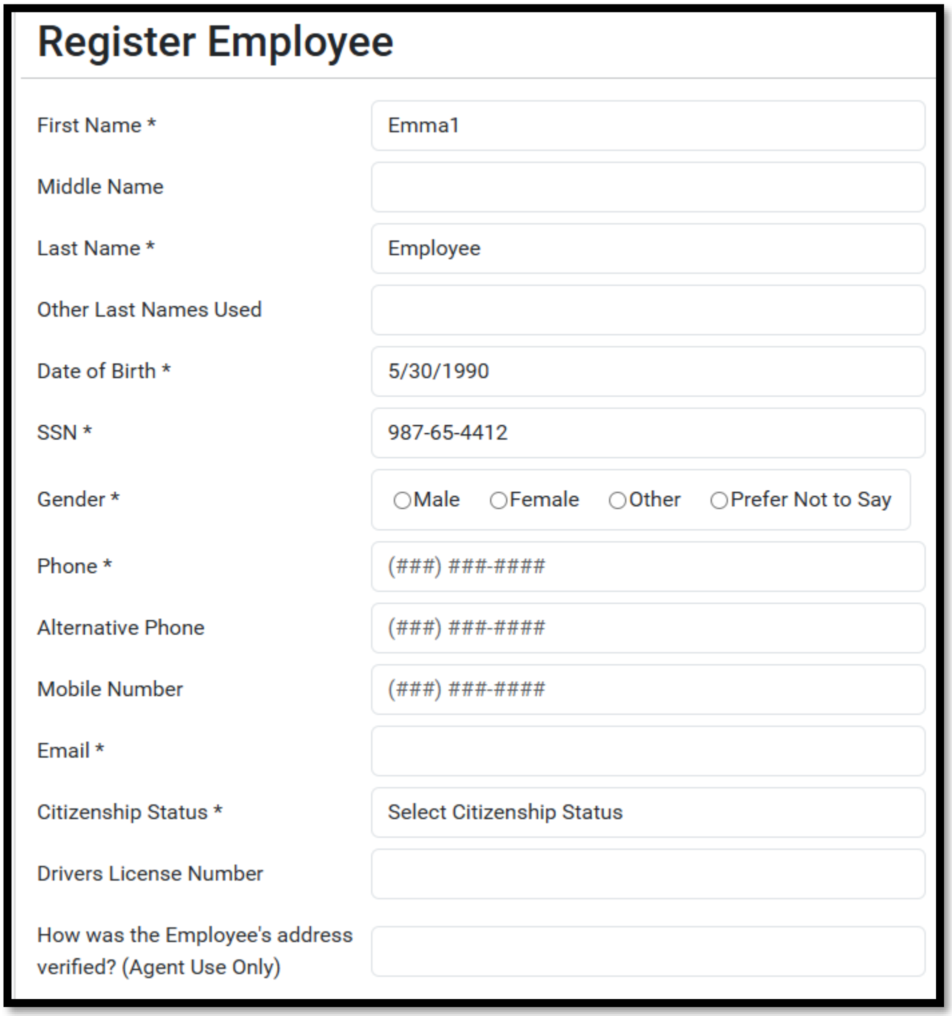
Register Employee

First Name *
Last Name *
Date of Birth * MM/DD/YYYY
SSN * ###-##-####
State * Select State

Next
Cancel

3. Continue completing **Register Employee**:

    - Required fields are marked with an asterisk (*)

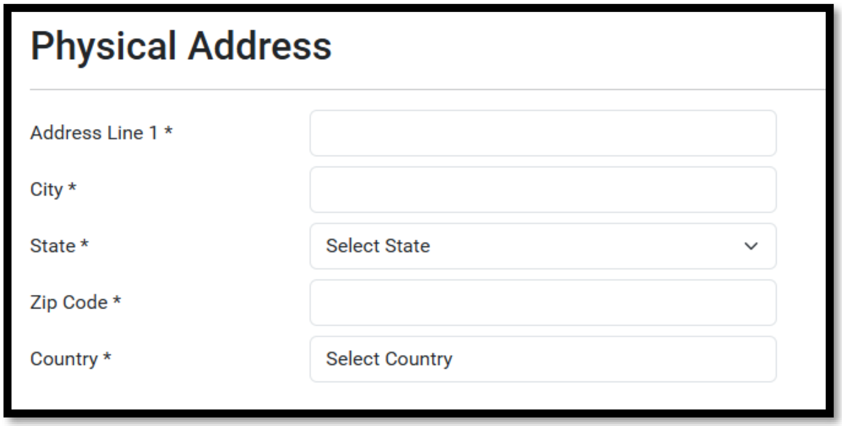


Register Employee

First Name * Emma1
Middle Name
Last Name * Employee
Other Last Names Used
Date of Birth * 5/30/1990
SSN * 987-65-4412
Gender * Male Female Other Prefer Not to Say
Phone * (###) ###-####
Alternative Phone (###) ###-####
Mobile Number (###) ###-####
Email *
Citizenship Status * Select Citizenship Status
Drivers License Number
How was the Employee's address verified? (Agent Use Only)

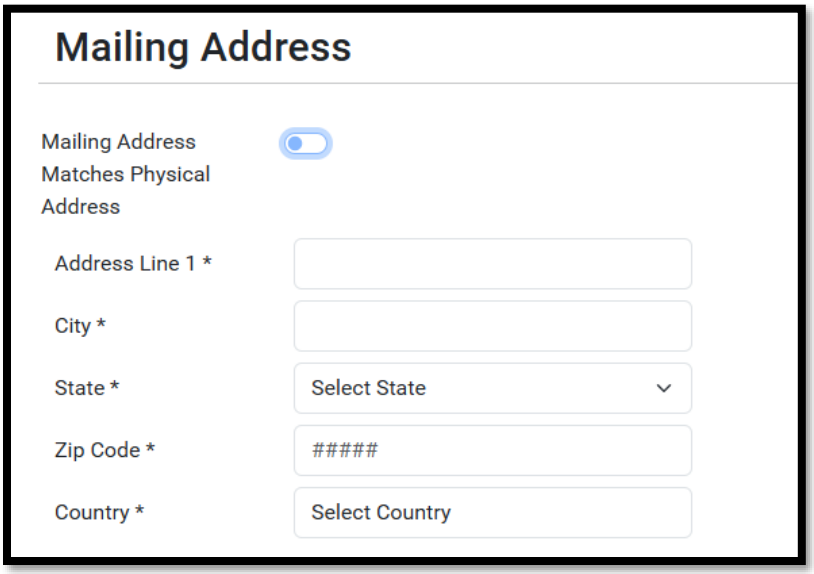
4. Complete **Physical Address:**

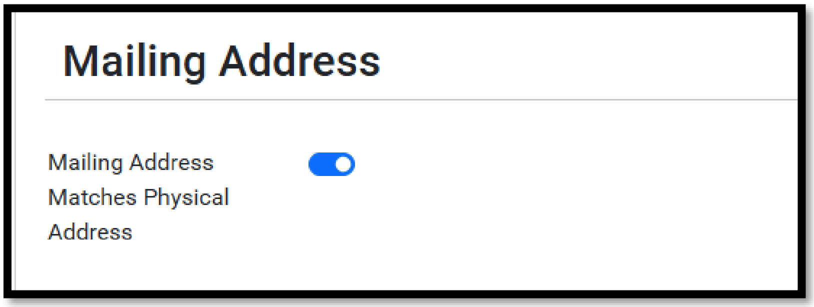
- Required fields are marked with an asterisk (*)



5. **Mailing Address:**

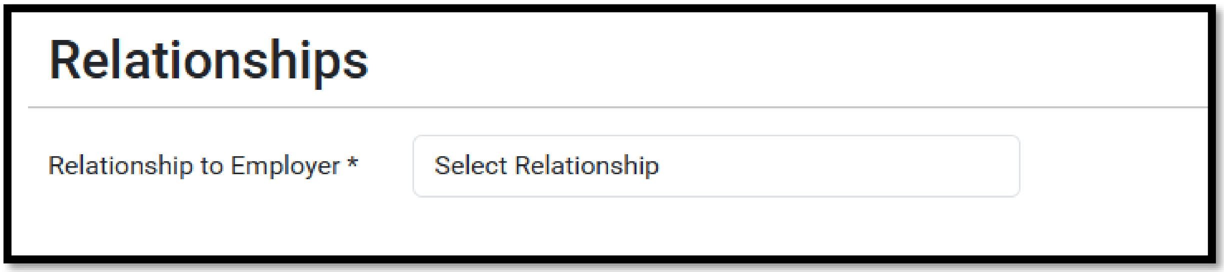
- Defaults to **OFF**, indicating the mailing address does not match the physical address.
- Add the mailing address
- Toggle to **ON** position if the mailing address is the same as the physical address

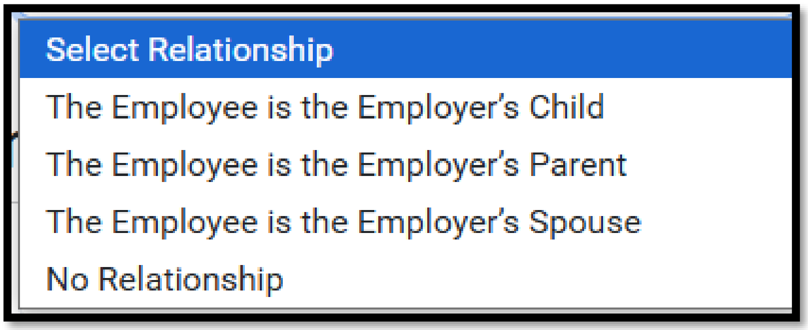




6. Complete **Relationships:**

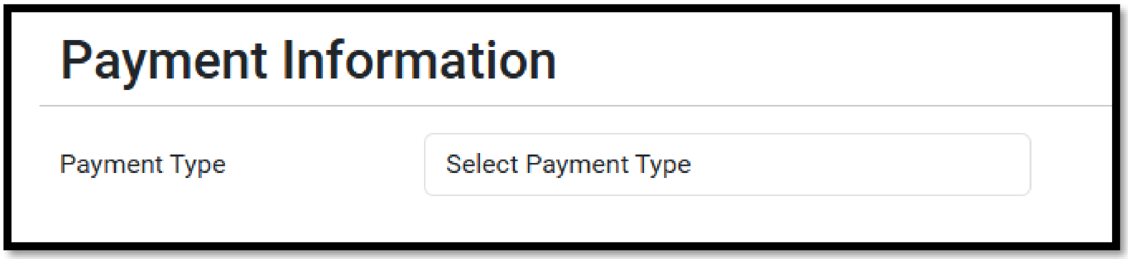
   - Employee's relationship to the Employer

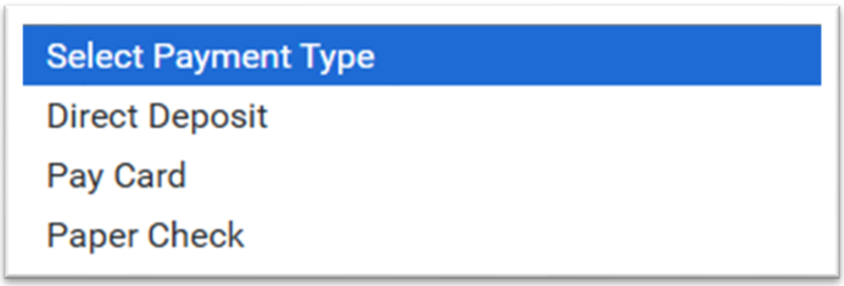




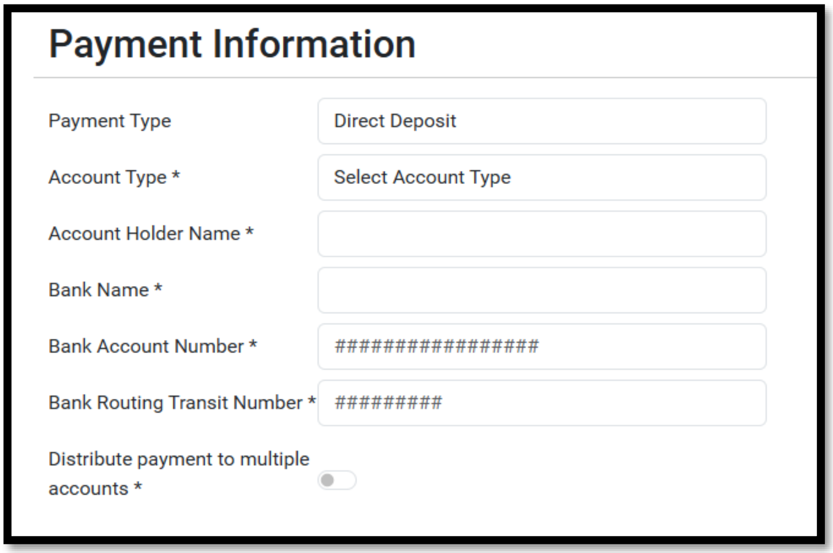
7. Complete **Payment Information:**

   - Paper Check (No further information needed)
   - Payment Card (No further information needed)

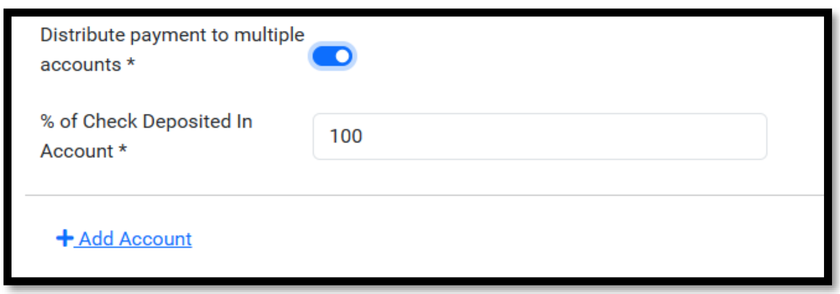


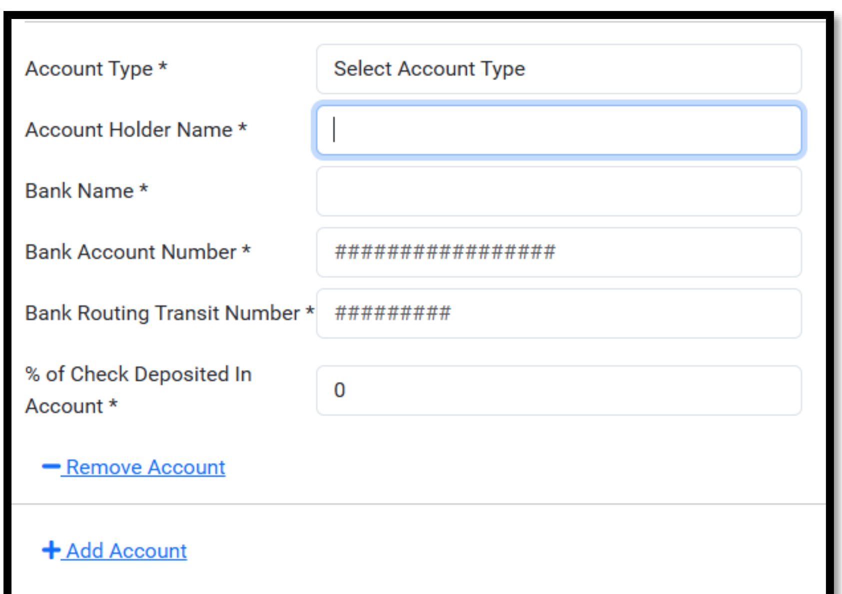


- Direct Deposit
  - Required fields are marked with an asterisk (*)



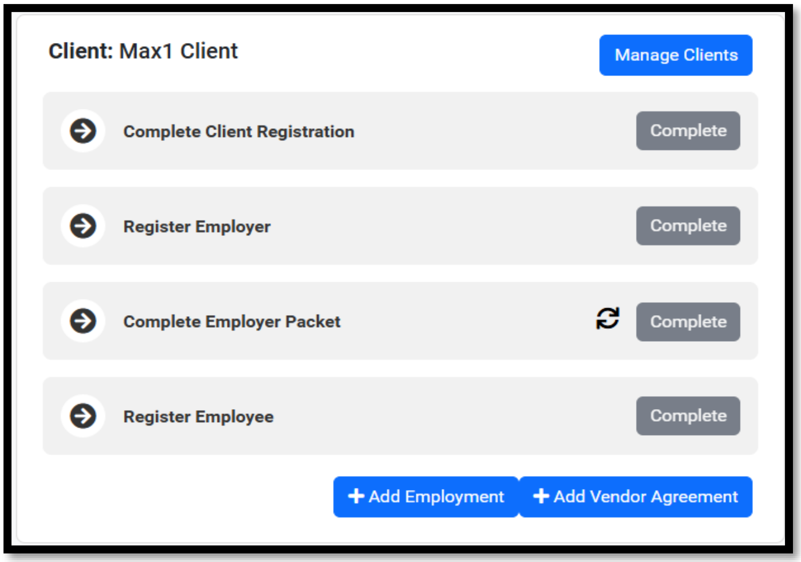
  - You can optionally distribute payment to multiple accounts





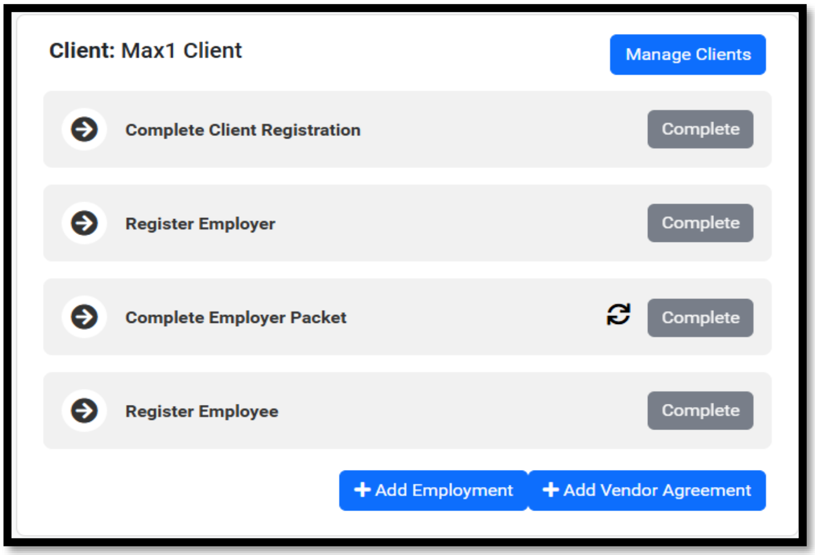
- A **Voided Check** or **Bank Letter** (showing the account and routing numbers) is required

8. The Enrollment Dashboard displays and **Register Employee** is marked as **Complete.** See **+Add Employment** section for next steps.

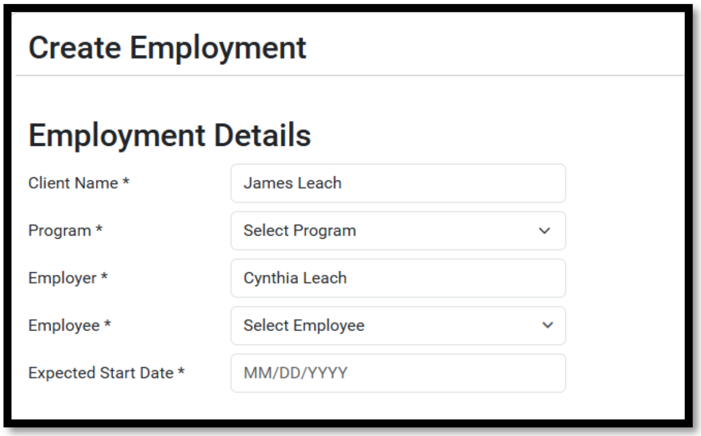


+Add Employment

1. Once you are back in EES, on the Enrollment Dashboard, click the **+Add Employment** button

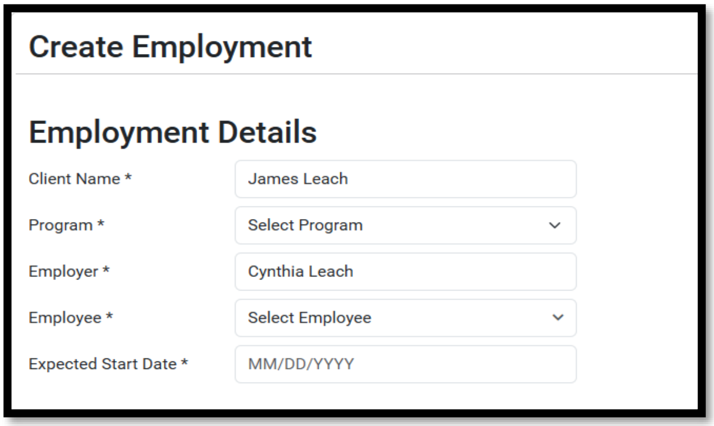


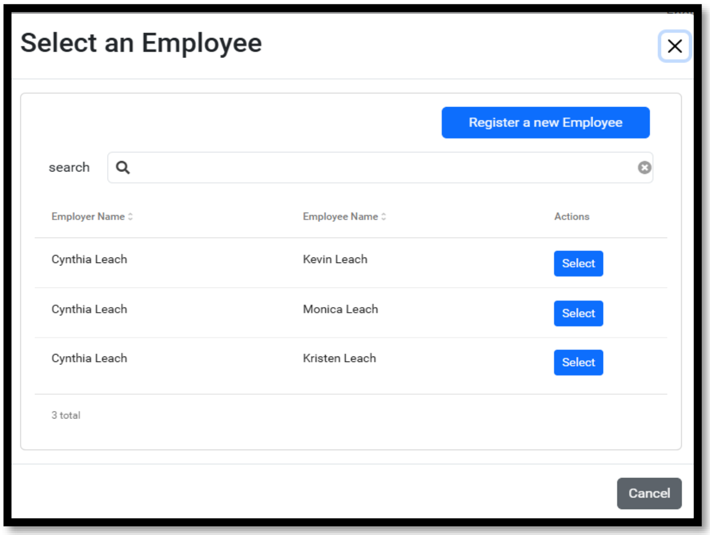
2. Complete **Employment Details** section:
   - Required fields are marked with an asterisk (*)
   - Some fields are pre-populated



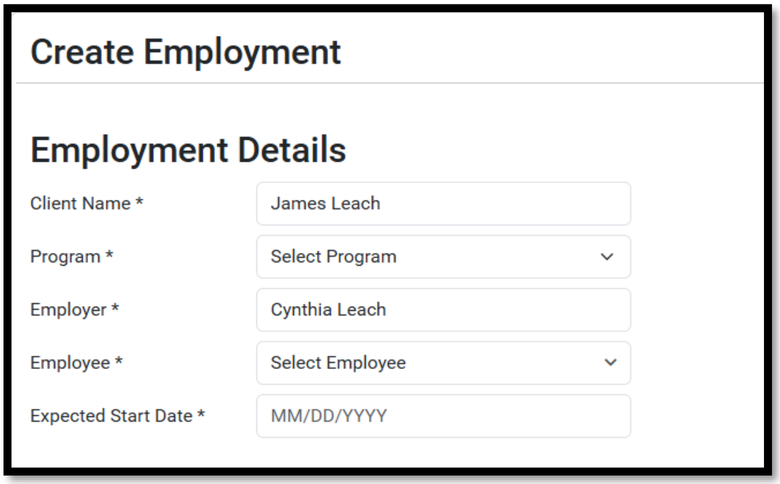
- When you click on the box for the **Employee**, a pop-up appears where you can select the Employee(s) you have already registered for the Client

  Tip: You will also have the option to **Register a new Employee.** You can also use the search bar if you have multiple Employees.





3. Select the **Expected Start Date** (if you are unsure of this information, contact your Support Coordinator for further guidance)



Create Employment

Employment Details

Client Name * James Leach

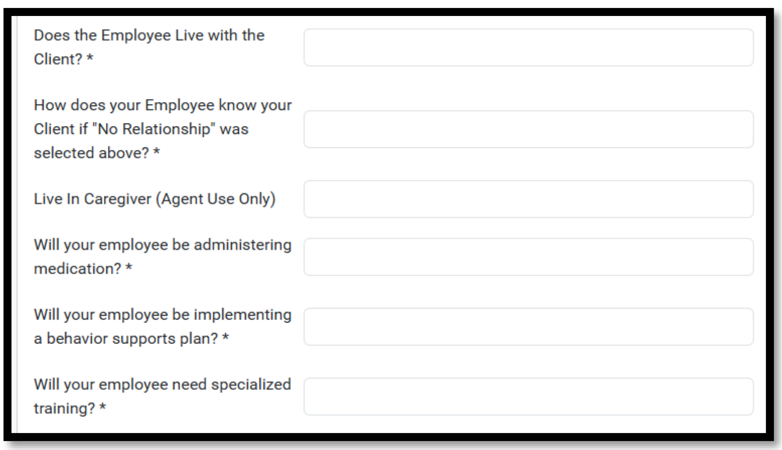
Program * Select Program

Employer * Cynthia Leach

Employee * Select Employee

Expected Start Date * MM/DD/YYYY

4. Complete all required fields



Does the Employee Live with the Client? *

How does your Employee know your Client if "No Relationship" was selected above? *

Live In Caregiver (Agent Use Only)

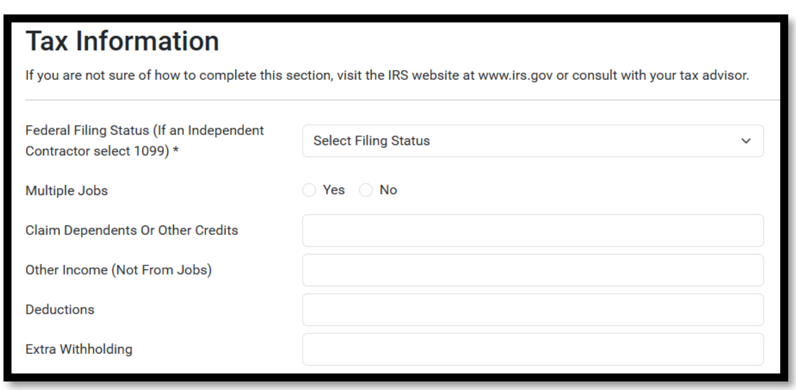
Will your employee be administering medication? *

Will your employee be implementing a behavior supports plan? *

Will your employee need specialized training? *

5. Complete the **Tax Information** section:

Tip: If you are not sure of how to complete this section, visit the IRS website at **www.irs.gov** or consult with your tax advisor



Tax Information

If you are not sure of how to complete this section, visit the IRS website at www.irs.gov or consult with your tax advisor.

Federal Filing Status (If an Independent Contractor select 1099) * Select Filing Status

Multiple Jobs Yes No

Claim Dependents Or Other Credits

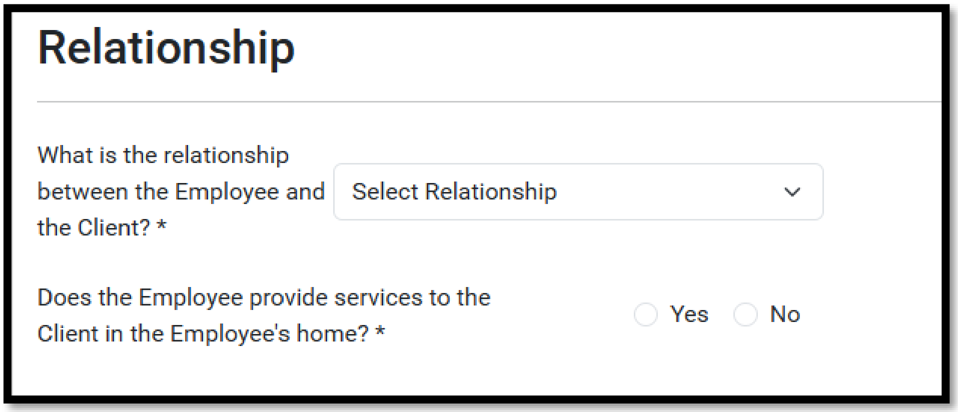
Other Income (Not From Jobs)

Deductions

Extra Withholding

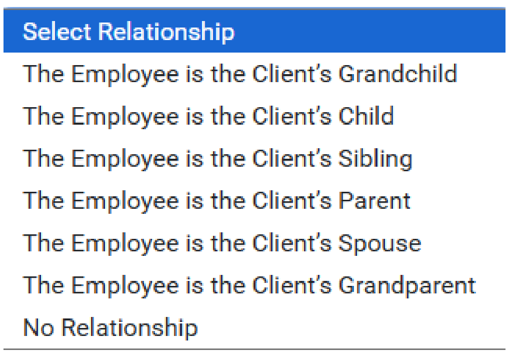
6. Complete the **Relationship** section:

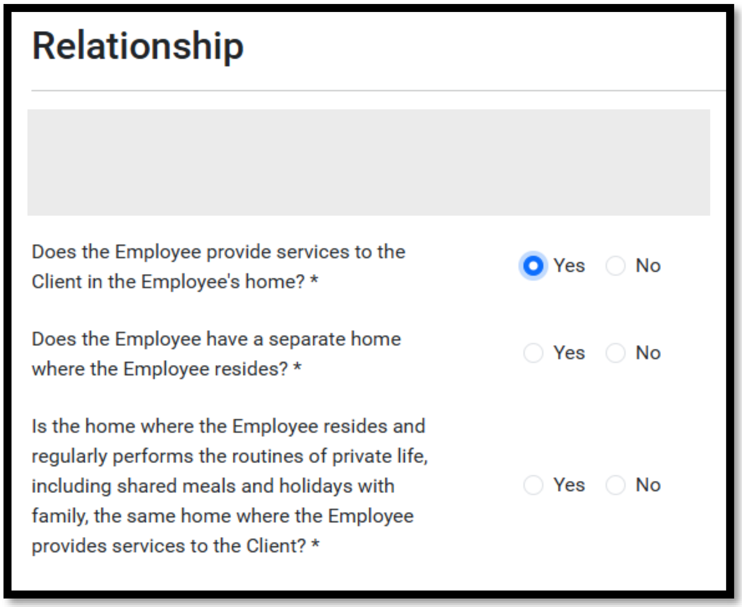
    - This is the relationship between the Client and the Employee
    - Required fields are marked with an asterisk (*)


Relationship

What is the relationship between the Employee and the Client? * Select Relationship

Does the Employee provide services to the Client in the Employee's home? * Yes No


Select Relationship
The Employee is the Client’s Grandchild
The Employee is the Client’s Child
The Employee is the Client’s Sibling
The Employee is the Client’s Parent
The Employee is the Client’s Spouse
The Employee is the Client’s Grandparent
No Relationship


Relationship

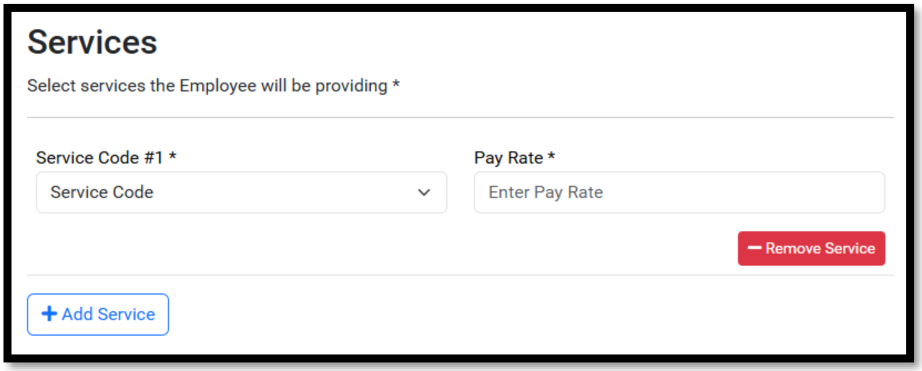
Does the Employee provide services to the Client in the Employee's home? * Yes No

Does the Employee have a separate home where the Employee resides? * Yes No

Is the home where the Employee resides and regularly performs the routines of private life, including shared meals and holidays with family, the same home where the Employee provides services to the Client? * Yes No

7. Complete the **Services** section:

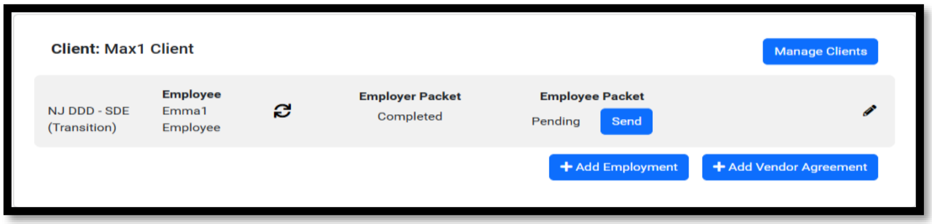
- Required fields are marked with an asterisk (*)



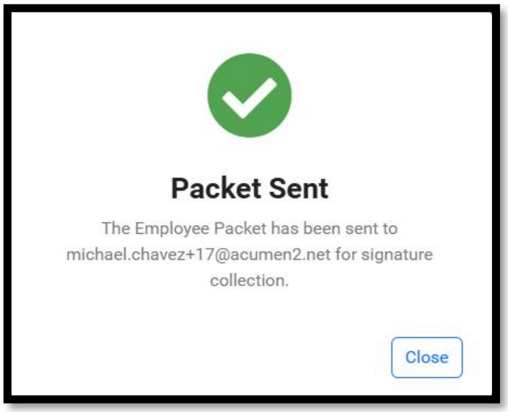
8. Click **Save** to complete the process

Send the Employee Packet

1. On the Enrollment Dashboard, click the **Send** button to send the Employee Packet

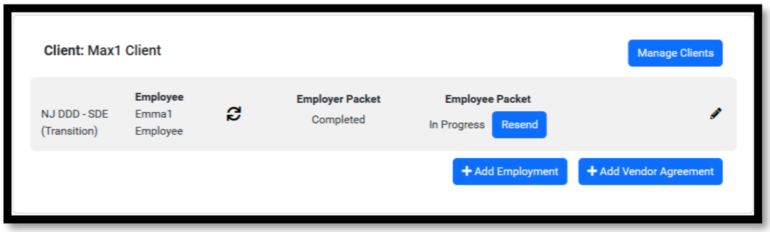


- The pop-up message The Employee Packet has been sent to [**Employee's email address**] for signature collection displays
- Click **Close**

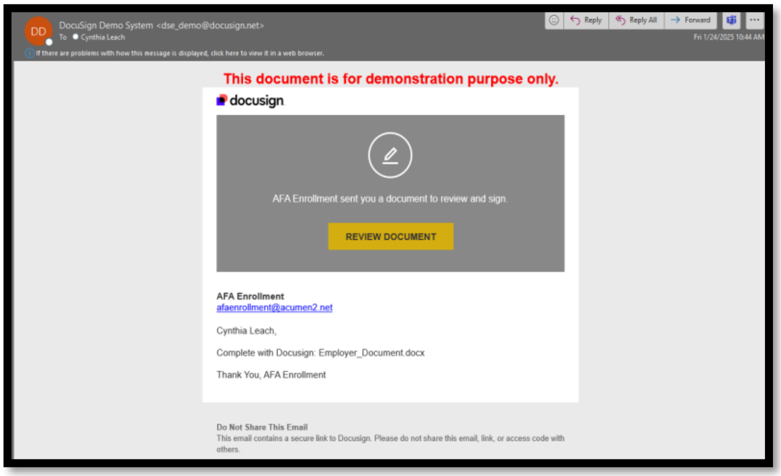


- EES will direct you back to the Enrollment Dashboard

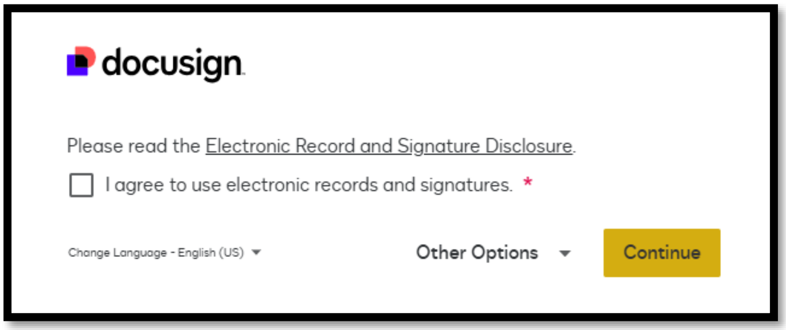
2. On the Enrollment Dashboard, Employee Packet now displays **In Progress**



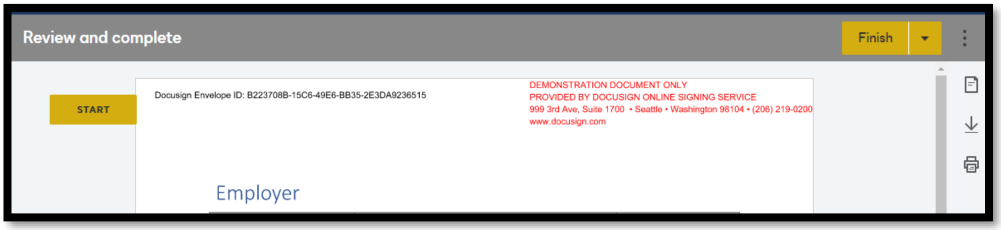
3. Check your email to find the packet to sign
   - The packet will come from a DocuSign sender
   - Check junk or spam folders if needed
4. Click the yellow **Review Document** button in the email to complete the forms



5. Click the **Electronic Record and Signature Disclosure** link to view the disclosure
6. Check the **box** to agree to using electronic records and signatures
7. Click the yellow **Continue** button



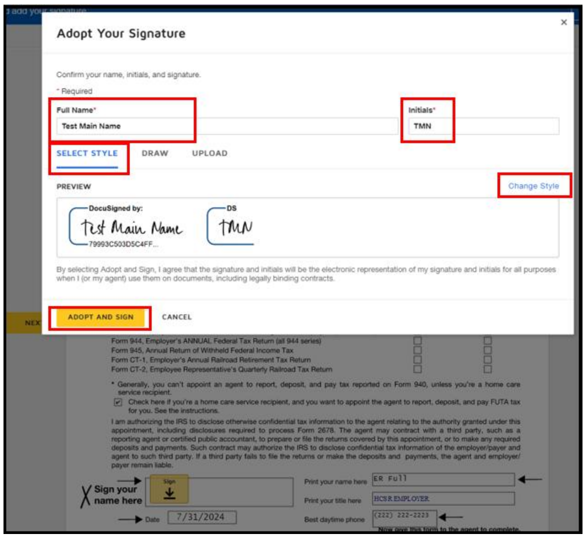
8. Click the yellow **Start** button



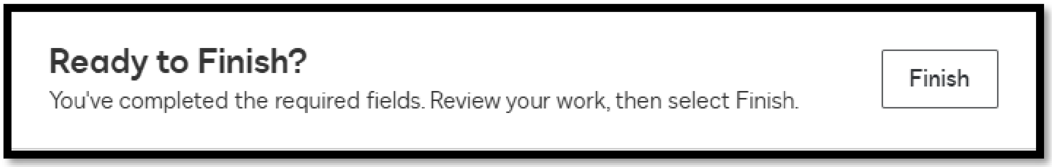
- Use the **tab** key on the keyboard to move through each line
- Review documents for accuracy!
- Signature and date are required at the bottom of a page, click the **Sign** button to sign and date the form(s)
- The Employer will need to review and attach the **I9 Documents** provided by the Employee to verify citizenship

9. Click the yellow **Next** button or scroll down to proceed to the next form

- You can change the style of your electronic signature by selecting **Change Style**
- You can also **Draw** your signature or **Upload** it
- After you have selected your signature, press **Adopt and Sign**

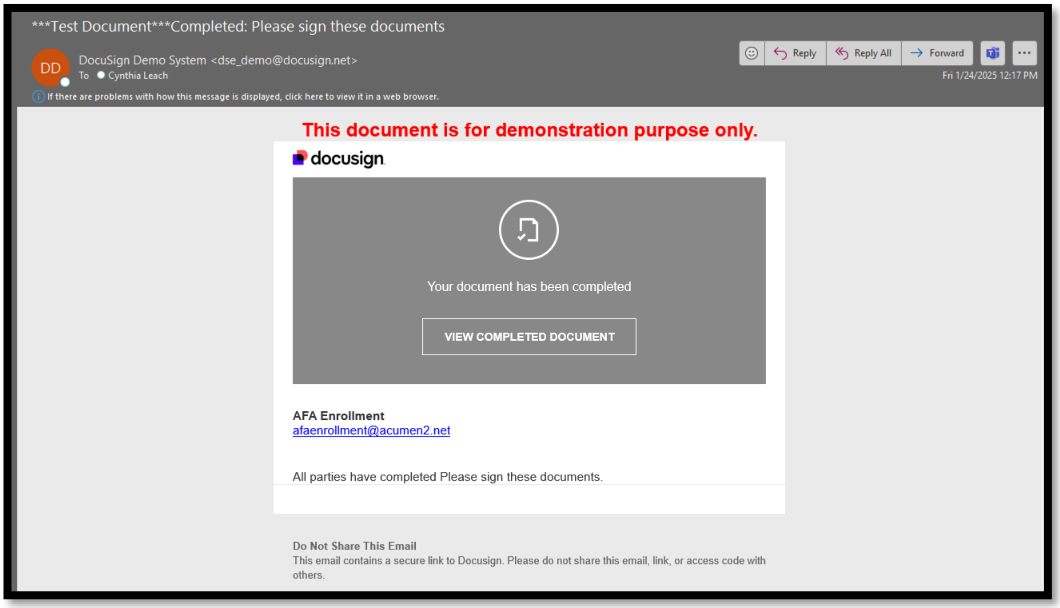


10. Click the **Finish** button at the bottom of the last document



11. Click the yellow **Continue** button to proceed

- The Employer receives a confirmation email with a link to view the completed document



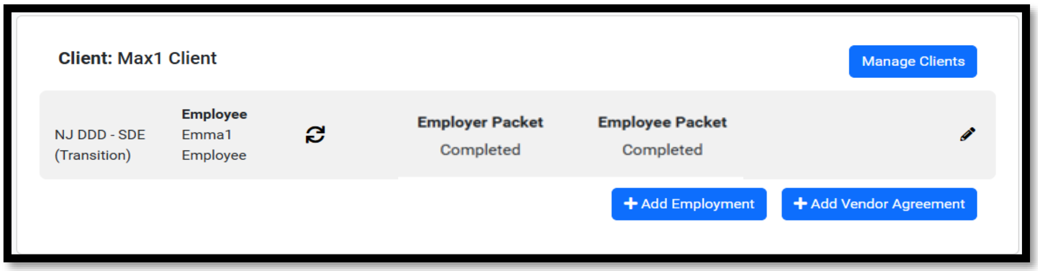
12. Once you have signed the DocuSign packet, return to EES

- To log back into EES later, navigate to: **https://acumen.dcisoftware.com/**

- Enter the **username** and **password** created in the Initial Registration form
- Click **Sign In**

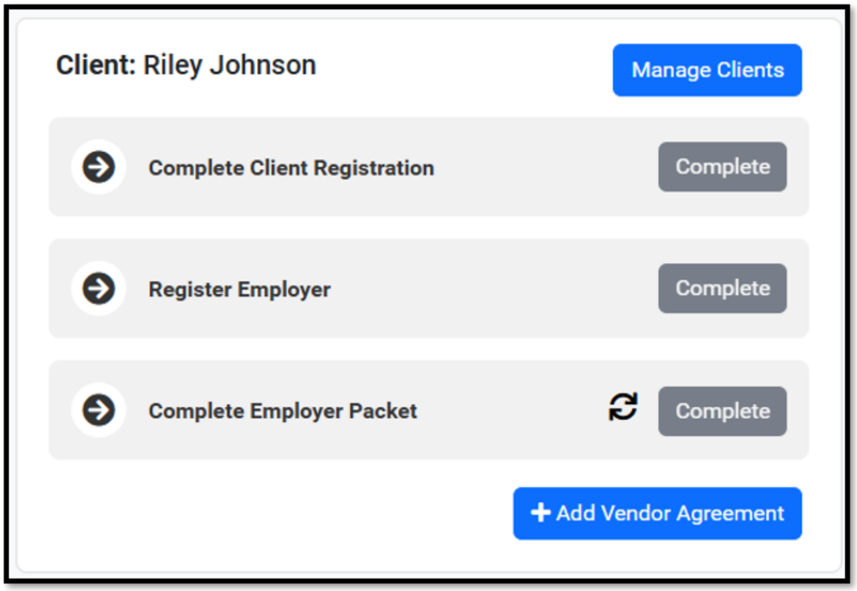
13. Now the Employee will receive an email to find the packet to sign
    - The packet will come from a DocuSign sender
    - They should check junk or spam folders if needed
    - The Employee will follow the same directions as the Employer to **review** and **sign** the Employee Packet (follow steps 4-11)

14. The Enrollment Dashboard displays and Employee Packet is marked as **Completed**
    - If the Employee Packet shows **In Progress**, you can press the circle arrows to refresh the page



Add Vendor Agreement

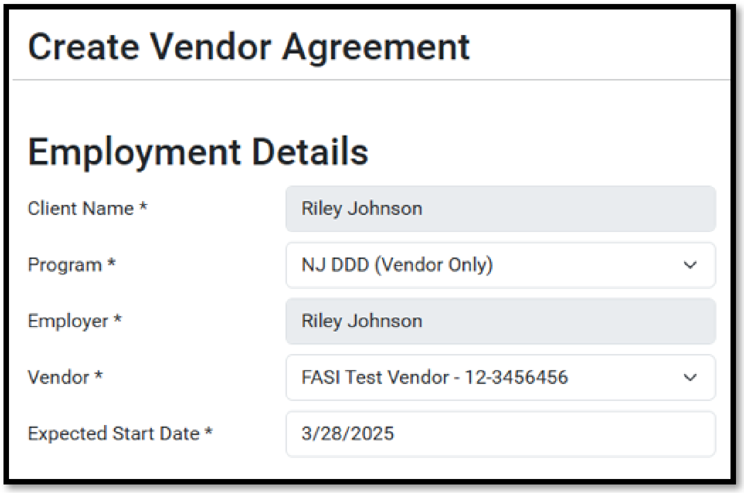
1. Once you are back in EES, on the Enrollment Dashboard, click the **+Add Vendor Agreement** button



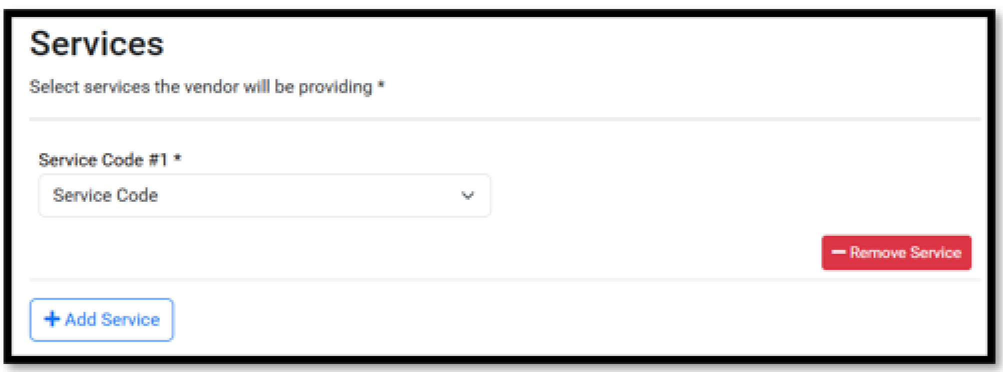
2. Complete **Create Vendor Agreement** section:

- Required fields are marked with an asterisk (*)
- **Vendor**: If the vendor is not listed, select **Other Vendor not listed**

3. Enter the Expected Start Date (if you are unsure of the expected start date, please reach out to your Support Coordinator)



4. Complete the **Services** section:
   - Click the drop-down to select the services the vendor will be providing



5. Click **Save** to complete the process

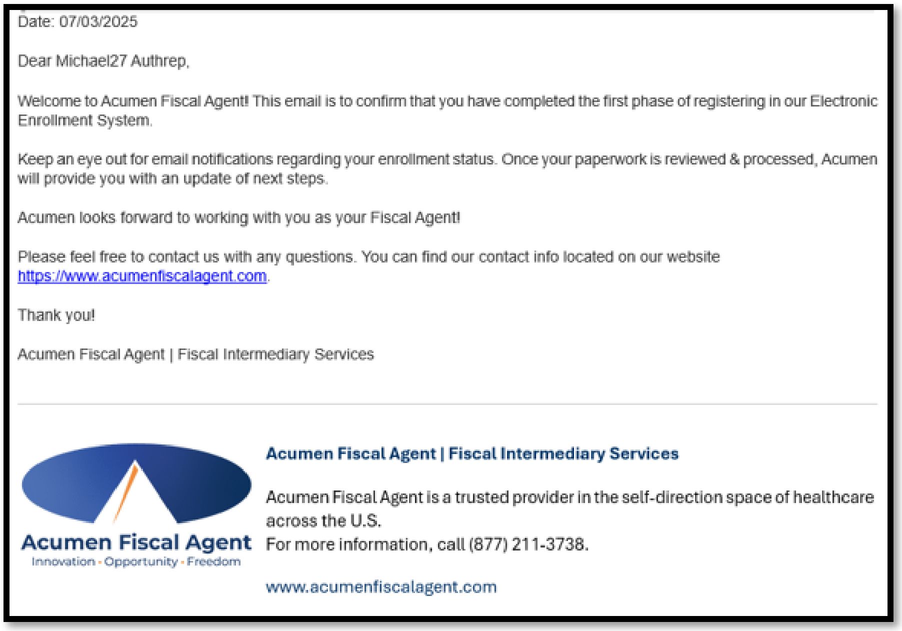
Enrollment Completed

Enrollment Completed means <u>**your portion**</u> of the enrollment is completed and ready for review by an Agent

- The Enrollment Dashboard displays the Employer Packet marked **Completed**

Next Steps:

1. You will receive an email confirming that the first phase of registering in EES has been completed



Date: 07/03/2025

Dear Michael27 Authrep,

Welcome to Acumen Fiscal Agent! This email is to confirm that you have completed the first phase of registering in our Electronic Enrollment System.

Keep an eye out for email notifications regarding your enrollment status. Once your paperwork is reviewed & processed, Acumen will provide you with an update of next steps.

Acumen looks forward to working with you as your Fiscal Agent!

Please feel free to contact us with any questions. You can find our contact info located on our website https://www.acumenfiscalagent.com.

Thank you!

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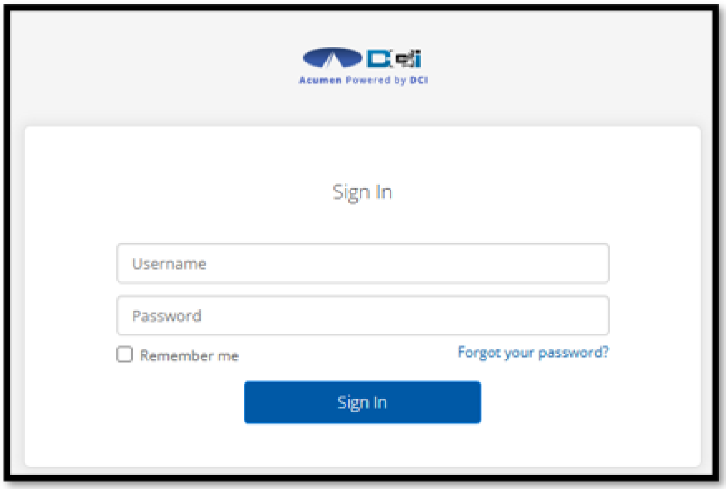
Acumen Fiscal Agent is a trusted provider in the self-direction space of healthcare across the U.S.
For more information, call (877) 211-3738.

www.acumenfiscalagent.com

2. An Agent will contact you with the next steps after they have reviewed the information received

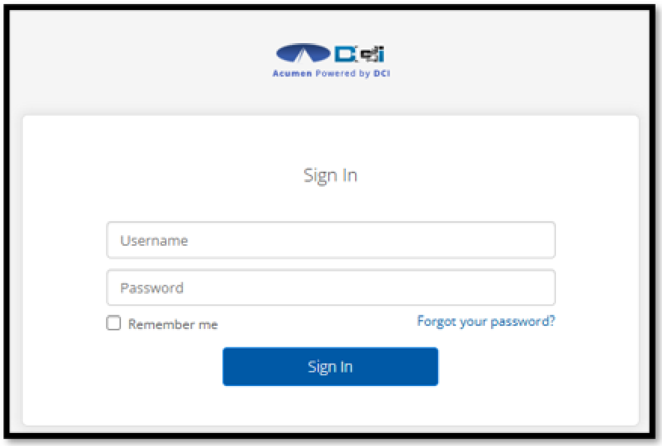
Logging into EES after Enrollment Completed

1. To log back into EES later, navigate to: https://acumen.dcisoftware.com/
2. Enter the **username** and **password** created in the Initial Registration Form
3. Click **Sign In**
4. Optionally, click **Forgot your password** to reset your password (see **Reset Password**)

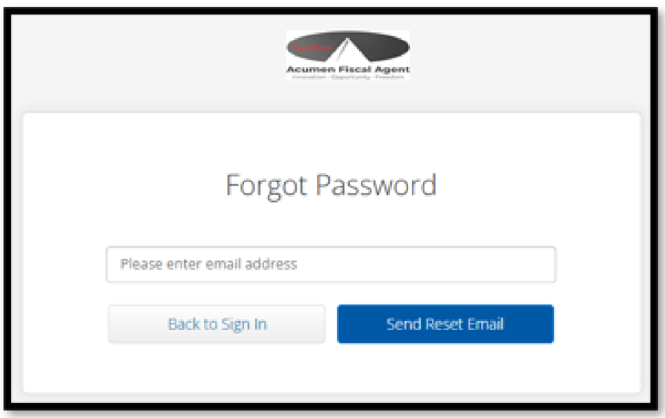


Reset Password

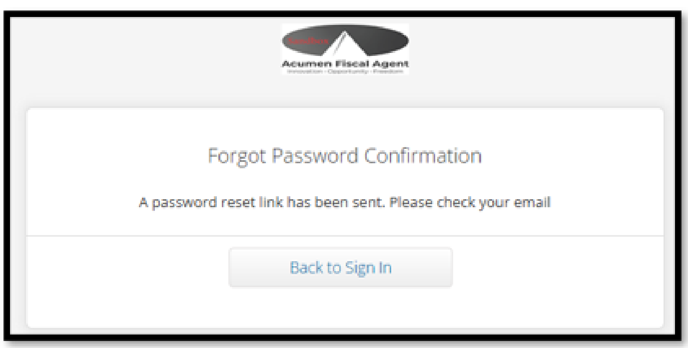
1. Navigate to: https://acumen.dcisoftware.com/
2. Click the **Forgot your password** link to begin the process of resetting your password



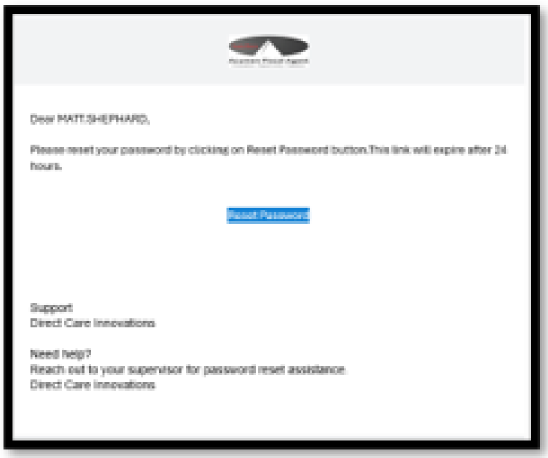
3. In the **Forgot Password** screen, enter the email used during the Initial Registration
4. Click the **Send Reset Email** button



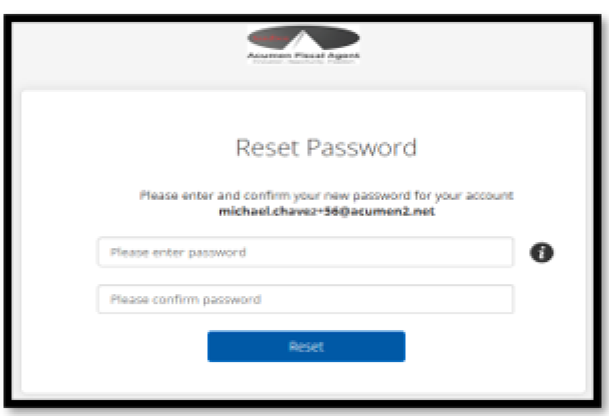
5. The **Forgot Password Confirmation** screen displays:
   - A password reset link has been sent. Please check your email



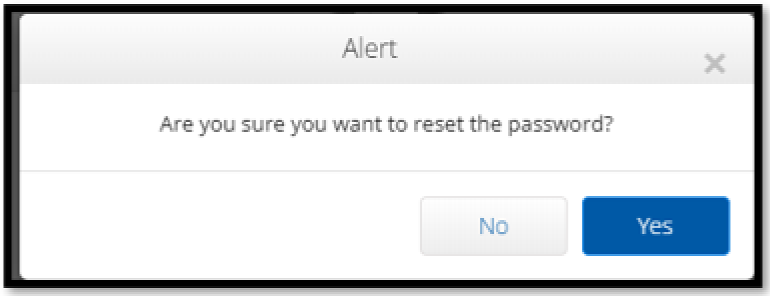
6. Click the **Back to Sign in** button
7. Check your email to find the Reset Password email
    - **Title**: Reset Password
    - **Sender**: no-reply@acumen2.net
    - Check the spam or junk folder if necessary
8. Click the **Reset Password** button within the email. You will be directed to the Reset Password screen



9. On the Reset Password screen, enter your **<u>new</u>** password in the Please enter password field
    - Password Criteria:
        - Must contain 1 uppercase letter, lowercase letter, number, and special character (e.g. !?%)
        - No more than two repeated characters in a row
        - Password cannot contain three consecutive characters of the first or last name
        - Password cannot contain three consecutive characters of the username
10. Re-enter the new password in the Please confirm password field
11. Click **Reset**



12. An alert displays “Are you sure you want to reset the password?”
13. Click the **Yes** button



14. EES will direct you to the DCI login screen. Enter the **username** and **<u>new</u> password**
15. Click **Sign In**