

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 **must** 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



- Click **Next** on the following screen

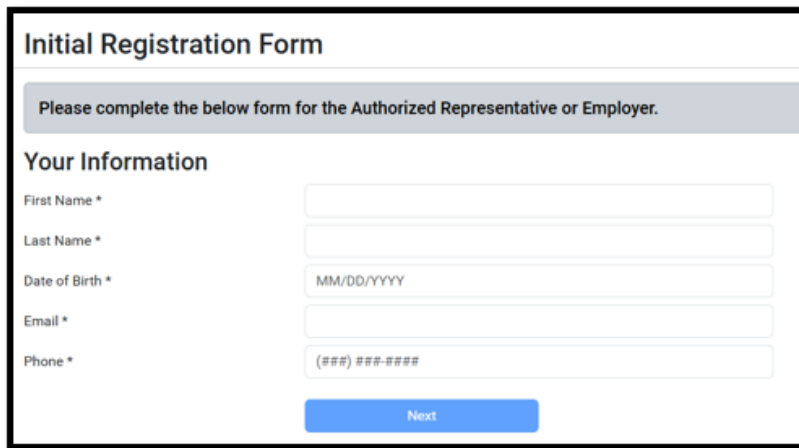


Welcome to Acumen's Electronic Enrollment System!

Click Next to begin creating your account with your information as the Employer or Authorized Representative. In a future step, we will ask if you are also the Client or if you wish to enroll another individual as the Client.

Next

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



Initial Registration Form

Please complete the below form for the Authorized Representative or Employer.

Your Information

First Name *

Last Name *

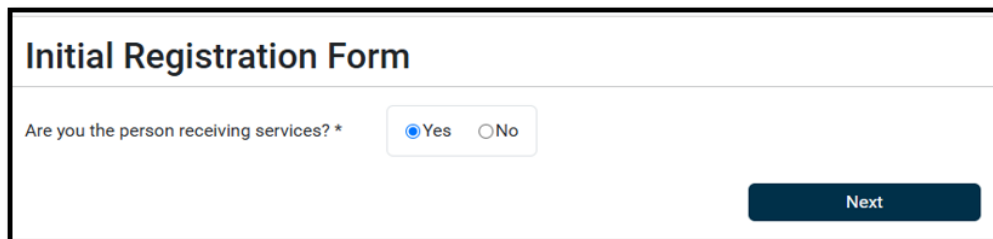
Date of Birth *

Email *

Phone *

Next

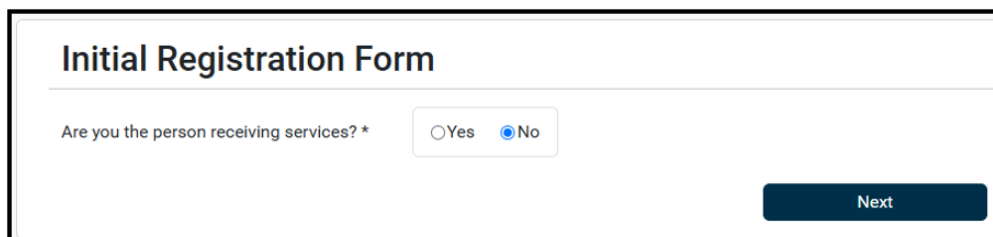
- Answer the question **Are you the person receiving services?**
 - If the person receiving services is completing the registration, select **Yes** (the Client is also the Employer)
 - If the person completing the registration represents the Client, select **No** (the Client is *NOT* the Employer)
 -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



Initial Registration Form

Are you the person receiving services? * ☒ Yes ☐ No

Next



Initial Registration Form

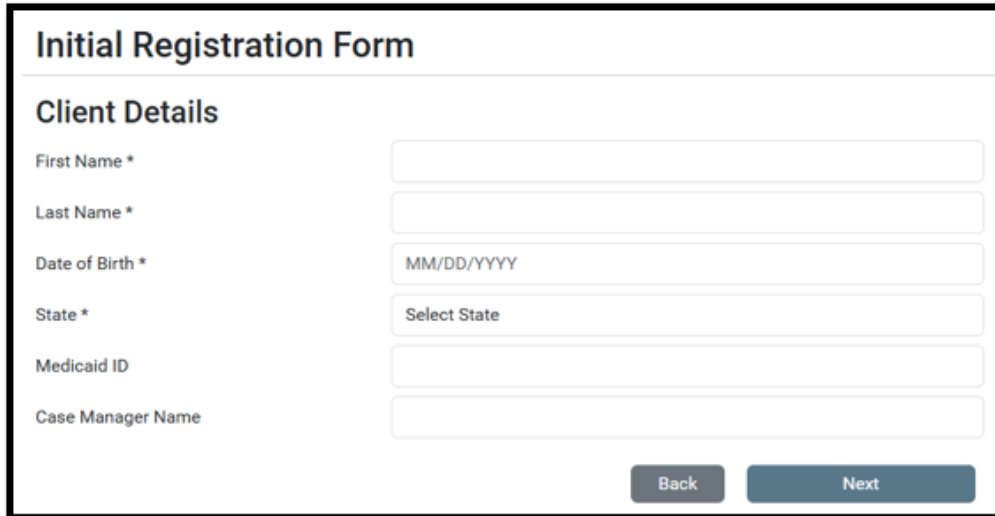
Are you the person receiving services? * ☐ Yes ☒ No

Next

- Complete the **Client Details**

Notes:

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



The image shows a screenshot of the 'Initial Registration Form'. The form is titled 'Initial Registration Form' and has a section for 'Client Details'. The fields are: First Name *, Last Name *, Date of Birth * (with a placeholder MM/DD/YYYY), State * (with a dropdown menu labeled 'Select State'), Medicaid ID, and Case Manager Name. At the bottom right of the form are two buttons: 'Back' and 'Next'.

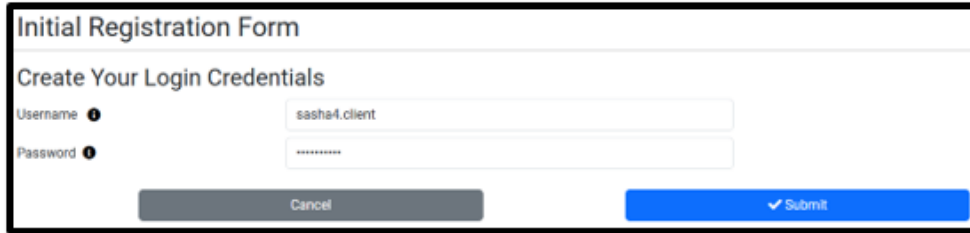
7. Create Your Login Credentials:

- **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

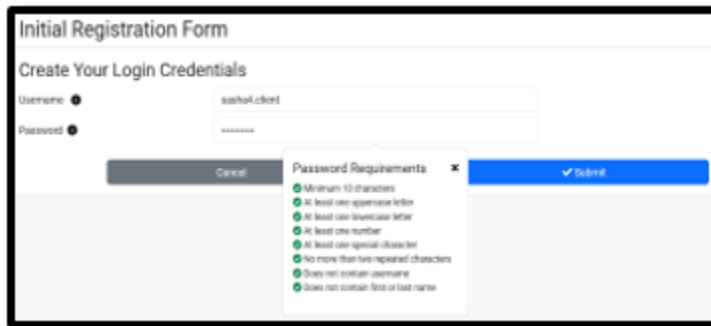
Tip: You can click on the "i" to view the username requirements. The requirements will be marked with a red "x", and once it meets the criteria, the "x" will turn into a green checkmark.

- **Password** (required): Create a password to log into the EES portal
 - Must contain 1 uppercase letter, lowercase letter, number, and special character
 - No more than two repeated characters in a row
 - Username and password cannot contain three consecutive characters of your first or last name
 - 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.

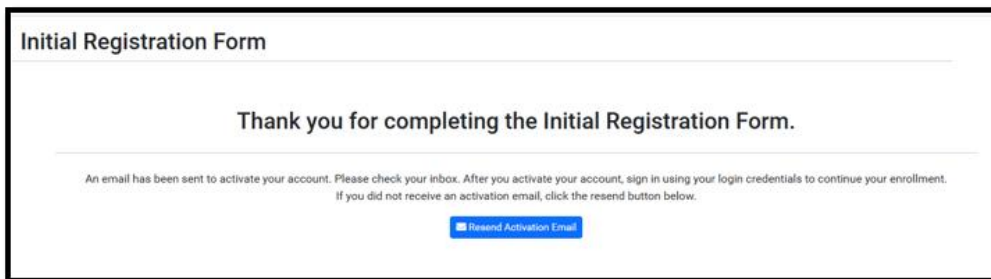


The screenshot shows the 'Initial Registration Form' with the sub-header 'Create Your Login Credentials'. It features two input fields: 'Username' with the value 'sasha4.client' and 'Password' with masked characters. Below the fields are two buttons: a grey 'Cancel' button and a blue 'Submit' button with a checkmark icon.



This screenshot shows the same registration form, but with a 'Password Requirements' pop-up window open. The requirements list includes: Minimum 10 characters, At least one uppercase letter, At least one lowercase letter, At least one number, At least one special character, No more than two repeated characters, Does not contain username, and Does not contain first or last name. The 'Submit' button is highlighted in blue.

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.



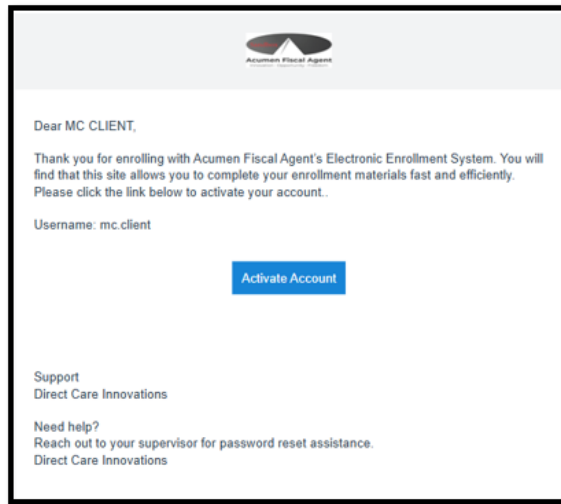
The screenshot displays a confirmation message: 'Thank you for completing the Initial Registration Form.' Below this, it states: 'An email has been sent to activate your account. Please check your inbox. After you activate your account, sign in using your login credentials to continue your enrollment. If you did not receive an activation email, click the resend button below.' A blue button labeled 'Resend Activation Email' is positioned at the bottom.

Activate Employer Profile

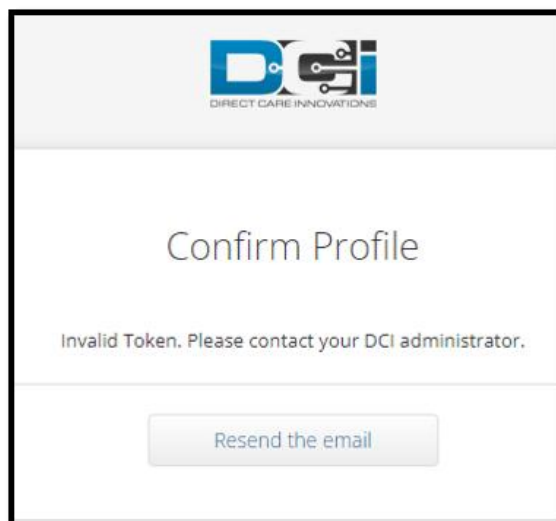
1. Upon completing Initial Registration, an email is sent to you for account activation. (Check the email you provided during the Initial Registration).
 - **Title:** Welcome to Acumen's Electronic Enrollment System
 - **Sender:** no-reply@acumen2.net
 - Check the spam or junk folder if necessary



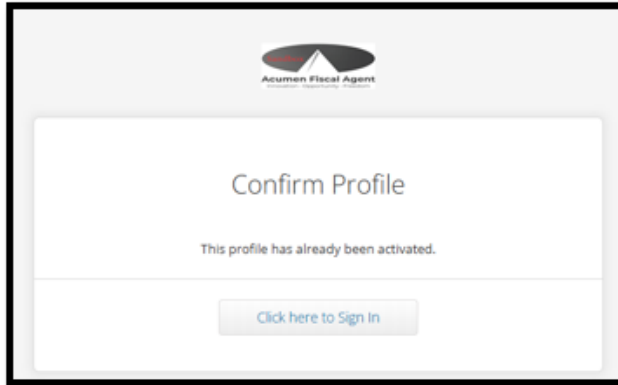
2. Click the **Activate Account** button in the email (Link is active for a specific amount of time; typically, 24 hours)



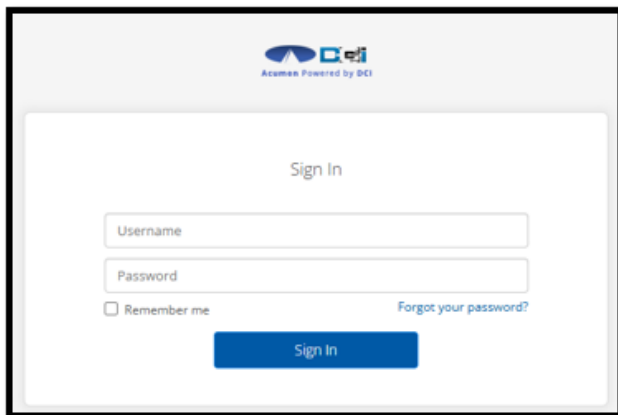
- *Note:* If after clicking the Activate Account button, **the link is inactive**, an alert stating Invalid Token - Please contact your DCI administrator appears
- Click the **Resend the email** button and return to **step 2**



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

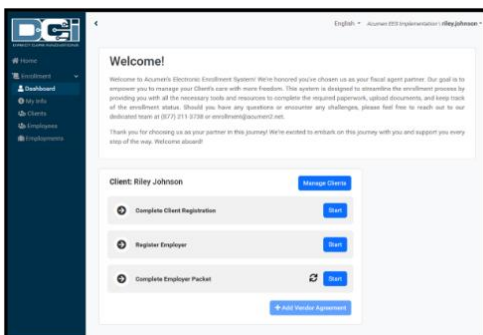


8. You are directed to the **Enrollment Dashboard**. See **Complete Client Registration** section for next steps.

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	<input type="text"/>
Medicaid #	<input type="text"/>
Gender *	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other <input type="radio"/> Prefer Not to Say
Phone *	<input type="text" value="(###) ###-####"/> <small>Enter your own phone number if one is not available for the Client.</small>
Mobile Number	<input type="text" value="(###) ###-####"/>
Email *	<input type="text"/> <small>Enter your own email address if one is not available for the Client.</small>

- **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)	<input type="text"/>
How is the Client related to the Authorized Representative? For example, is the Client the Authorized Representative's parent, child, spouse, friend, or neighbor. *	<input type="text"/>
Primary Language	<input type="text"/>
Referral Choice (Agent Use Only)	<input type="text"/>
State ID	<input type="text"/>
Support Coordinator Agency Name *	<input type="text"/>
Support Coordinator Email Address *	<input type="text"/>
Support Coordinator Name	<input type="text"/>
Support Coordinator Phone Number *	<input type="text"/>

3. Complete the **Physical Address**

- Required fields are marked with an asterisk (*)



Physical Address

Address Line 1 * 1776 Freedom Lane

City * Rapid City

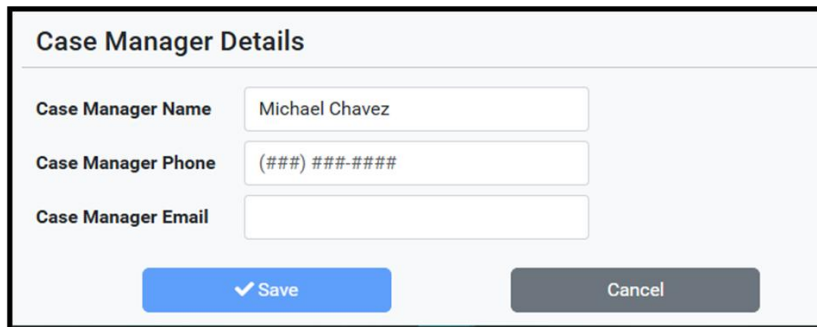
State * SD

Zip Code * 57701

Country * United States of America

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

- Leave blank



Case Manager Details

Case Manager Name Michael Chavez

Case Manager Phone (###) ###-####

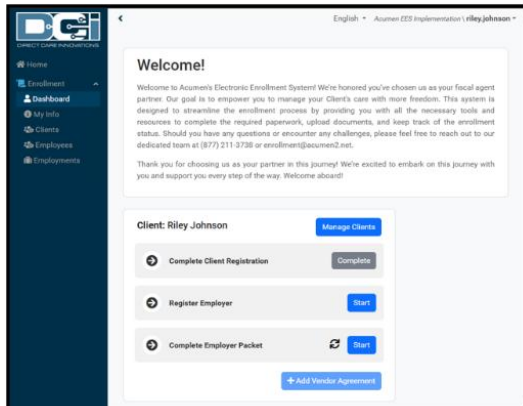
Case Manager Email

✓ Save Cancel

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.



Welcome!

Welcome to Acumen's Electronic Enrollment System! We're honored you've chosen us as your fiscal agent partner. Our goal is to empower you to manage your Client's care with more freedom. This system is designed to streamline the enrollment process by providing you with all the necessary tools and resources to complete the required paperwork, upload documents, and keep track of the enrollment status. Should you have any questions or encounter any challenges, please feel free to reach out to our dedicated team at (877) 211-3788 or enrollment@acumen2.net.

Thank you for choosing us as your partner in this journey! We're excited to embark on this journey with you and support you every step of the way. Welcome aboard!

Client: Riley Johnson Manage Client

Complete Client Registration Complete

Register Employer Start

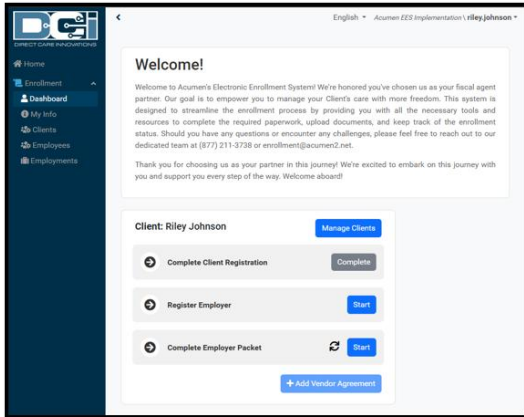
Complete Employer Packet Start

+ Add Vendor Agreement

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 (*)

Register Employer			
Last Name:	Leach	First Name:	Cynthia
Date of Birth:	1990-03-10	Employer Status:	Pending

Additional Employer Details	
Middle Name	<input type="text"/>
Gender *	<input type="radio"/> Male <input checked="" type="radio"/> Female <input type="radio"/> Other <input type="radio"/> Prefer Not to Say
SSN *	<input type="text" value="987-65-4332"/>
Phone *	<input type="text" value="(555) 555-5555"/>
Mobile Number	<input type="text" value="(###) ###-####"/>
Preferred Communication Method	<input type="radio"/> Text <input type="radio"/> Email <input type="radio"/> Phone

3. Complete **Physical Address**

- Required fields are marked with an asterisk (*)

Physical Address	
Address Line 1 *	<input type="text" value="123 Main"/>
City *	<input type="text" value="Rapid City"/>
State *	<input type="text" value="SD"/>
Zip Code *	<input type="text" value="57701"/>
Country *	<input type="text" value="United States of America"/>

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

Mailing Address

Mailing Address Matches Physical Address ☐

Address Line 1 *

City *

State *

Zip Code *

Country *

Mailing Address

Mailing Address Matches Physical Address ☒

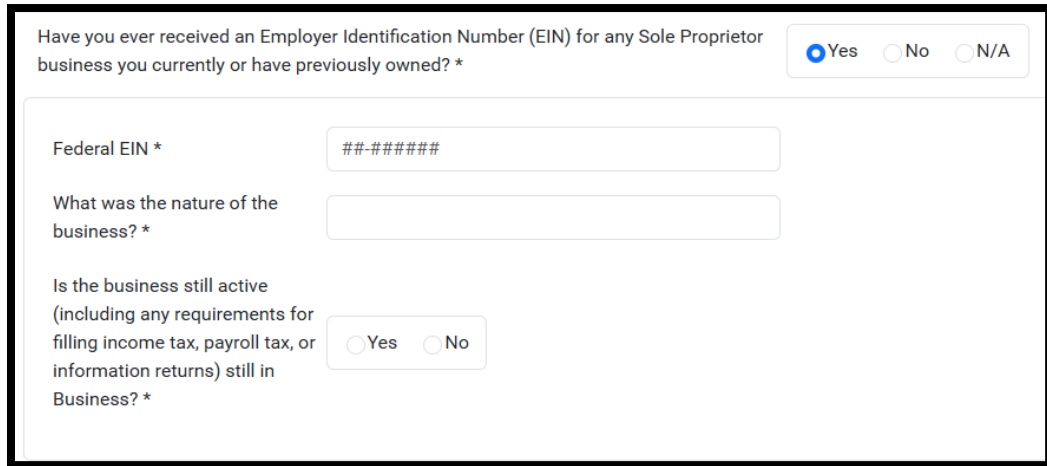
5. Complete **Business Details** section

Business Details

Please do not provide answers to the questions below based on a Partnership, Corporation, Limited Liability Company (LLC), Trust, Estate, Nonprofit or any other entity not considered a Sole Proprietor. Acumen Fiscal Agent, LLC can only accept an EIN and business information for a Sole Proprietor business. If you have ever owned a Sole Proprietor (currently or in the past), you must let us know. Failure to do so will also drastically increase the time it takes to enroll and receive services under this program.

- 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? *

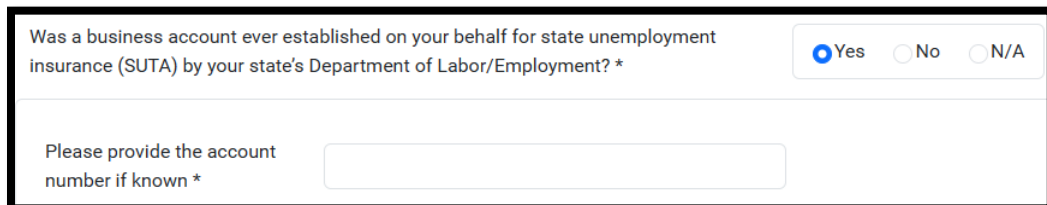
☒ Yes ☐ No ☐ N/A

Please provide the name of the F/EA *

Start Date End Date

Please provide the dates of when you were with the F/EA *

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

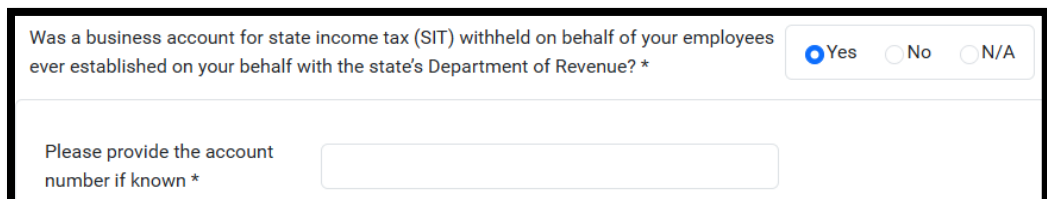


Was a business account ever established on your behalf for state unemployment insurance (SUTA) by your state's Department of Labor/Employment? *

☒ Yes ☐ No ☐ N/A

Please provide the account number if known *

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

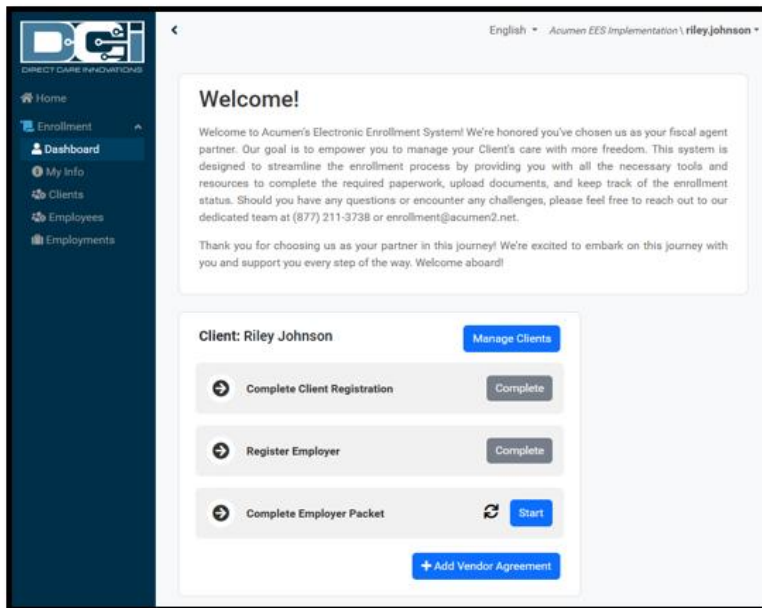


Was a business account for state income tax (SIT) withheld on behalf of your employees ever established on your behalf with the state's Department of Revenue? *

☒ Yes ☐ No ☐ N/A

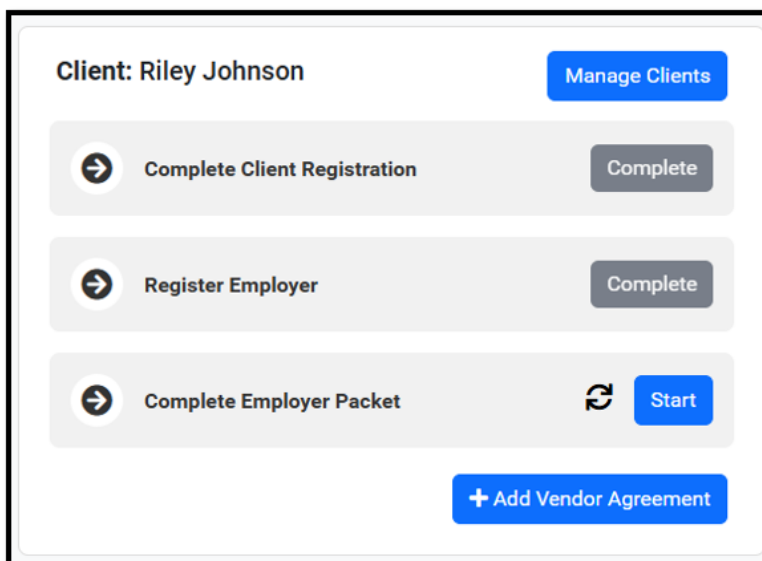
Please provide the account number if known *

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.

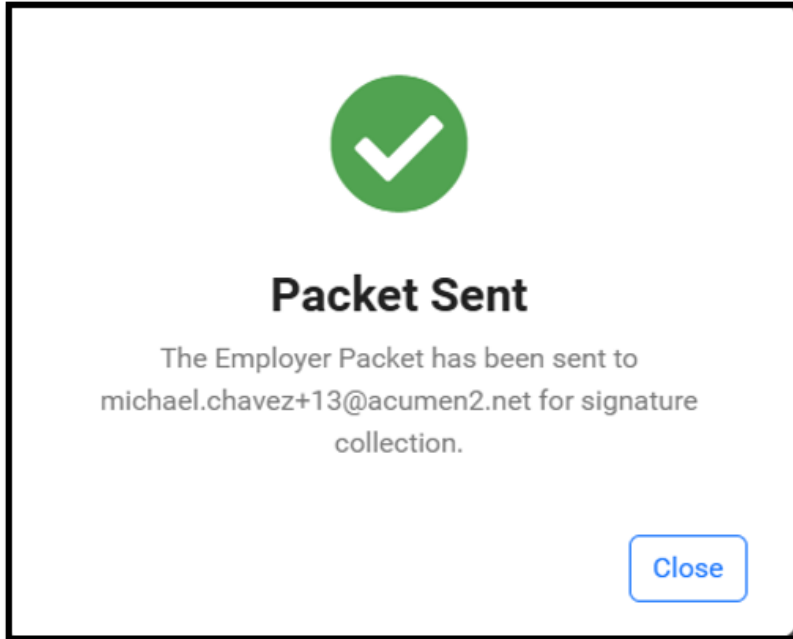


Complete the Employer Packet

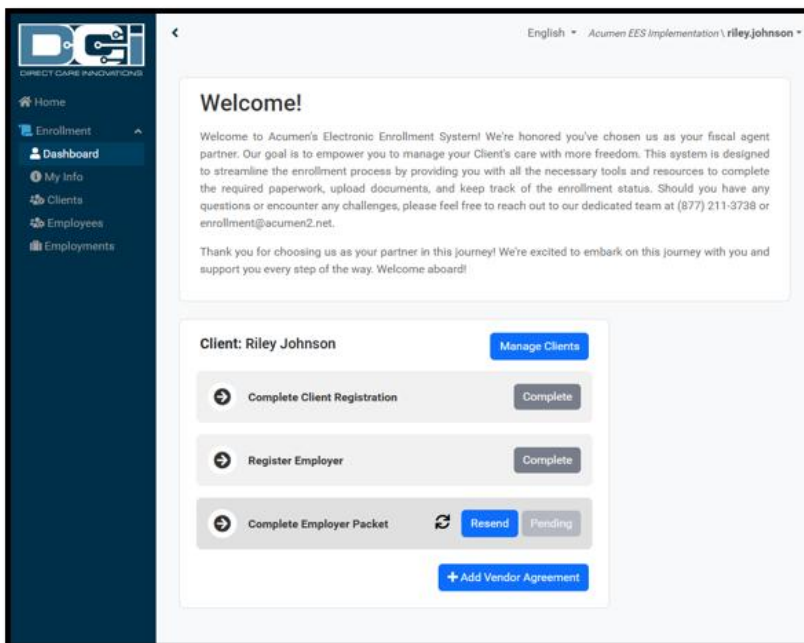
1. On the Enrollment Dashboard, click the **Start** button to Complete Employer Packet



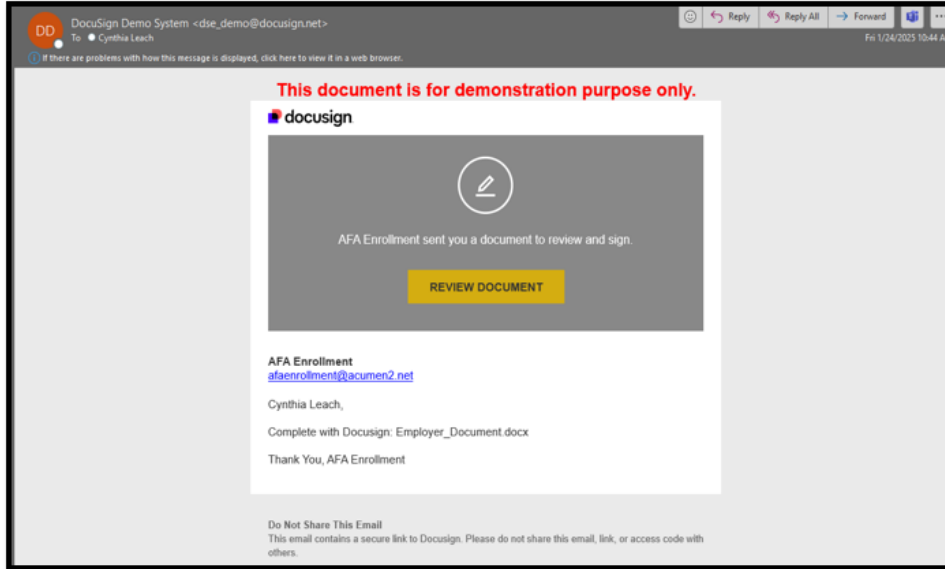
- The pop-up message The Employer Packet has been sent to [**Employer's email address**] for signature collection displays
- Click **Close**



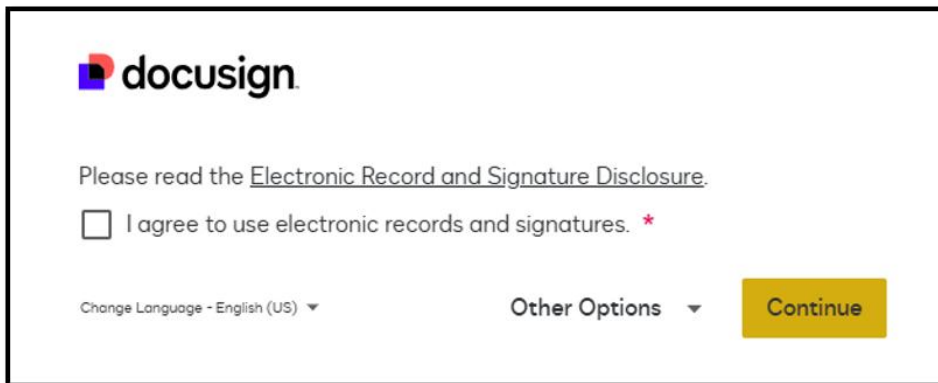
- EES will direct you back to the Enrollment Dashboard
2. On the Enrollment Dashboard, Complete Employer Packet now displays **Pending**



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

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



My signature below confirms my understanding and agreement to abide by the terms and conditions as stated above.

Name of Participant: Amy Jo Smith

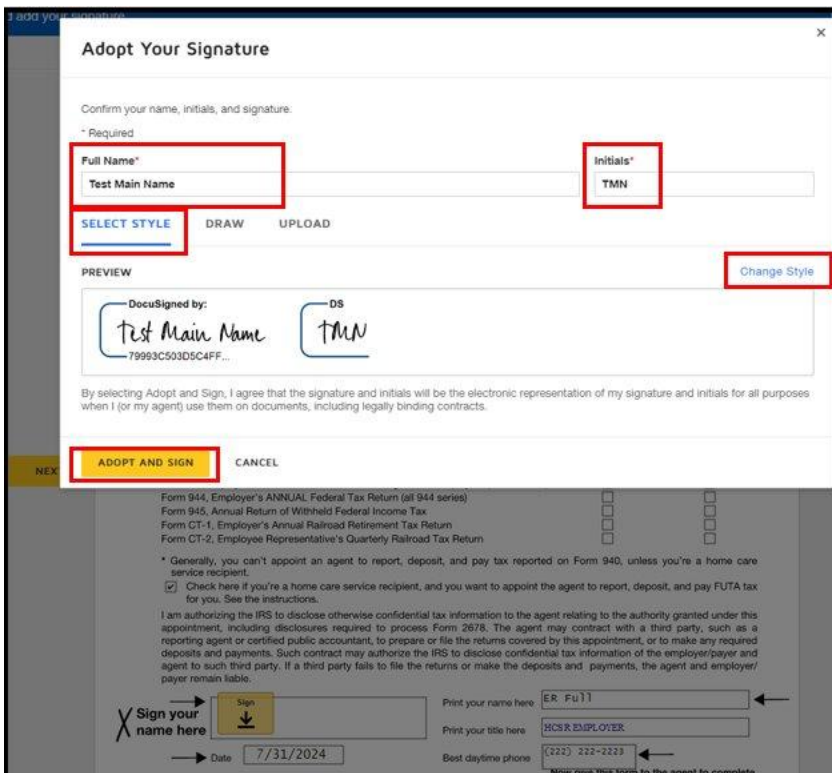
Name of Employer/ Representative (if applicable): Charles Lee Burns

Phone: (222) 222-2222 Email Address: reynaldaa+01@acumen2.net

Participant or Employer/ Representative Signature: [Signature] Date: 10/31/2024

NEXT

- 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**



Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* Test Main Name Initials* TMN

SELECT STYLE DRAW UPLOAD

PREVIEW

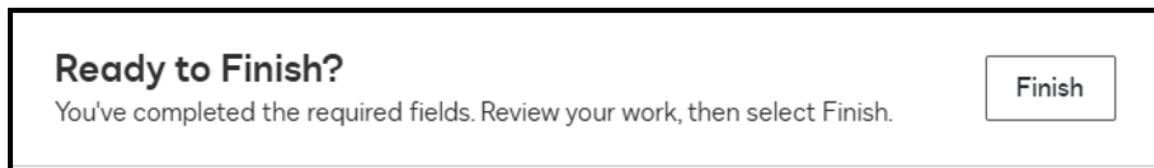
DocuSigned by: Test Main Name 79993C503D5C4FF... DS TMN

Change Style

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts.

ADOPT AND SIGN CANCEL

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

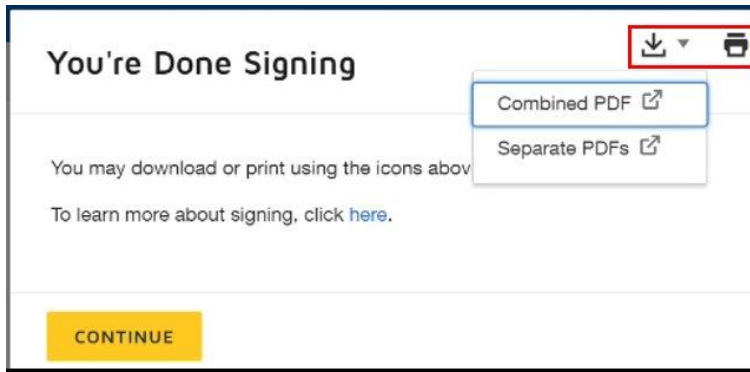


Ready to Finish?

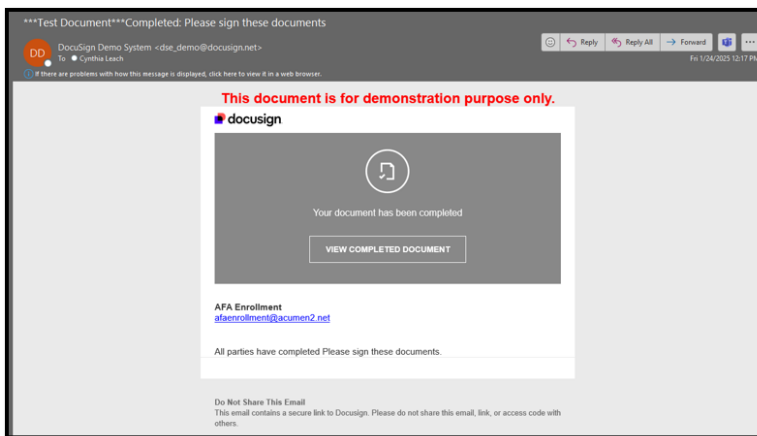
You've completed the required fields. Review your work, then select Finish.

Finish

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

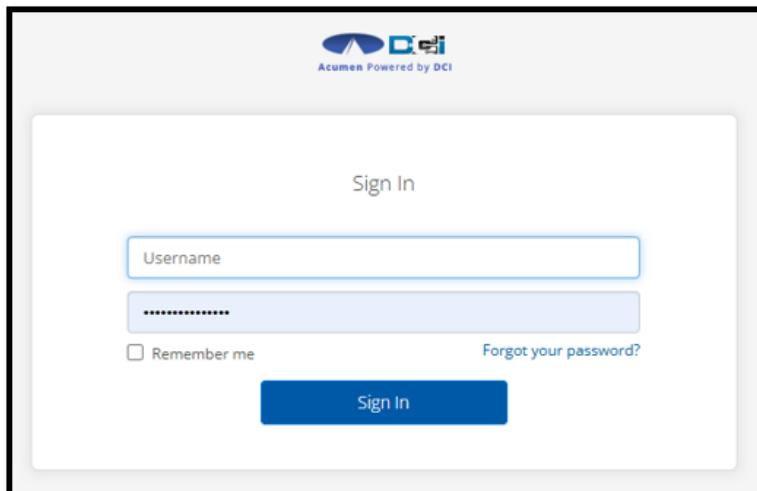


- The Employer receives a confirmation email with a link to view the completed document

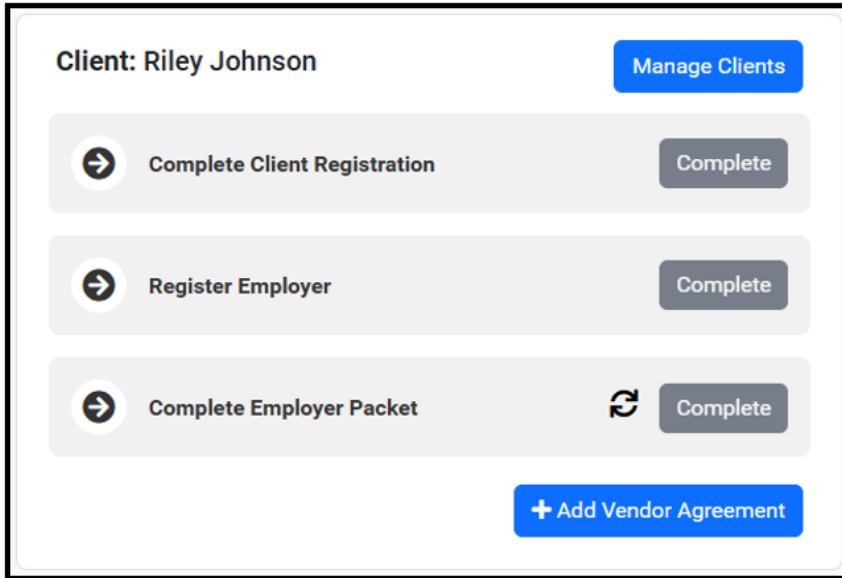


13. Once you have signed the DocuSign packet, return to EES to finish your enrollment

- 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**



Client: Riley Johnson [Manage Clients](#)

- ➔ Complete Client Registration [Complete](#)
- ➔ Register Employer [Complete](#)
- ➔ Complete Employer Packet [Complete](#)

[+ Add Vendor Agreement](#)

Important!

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

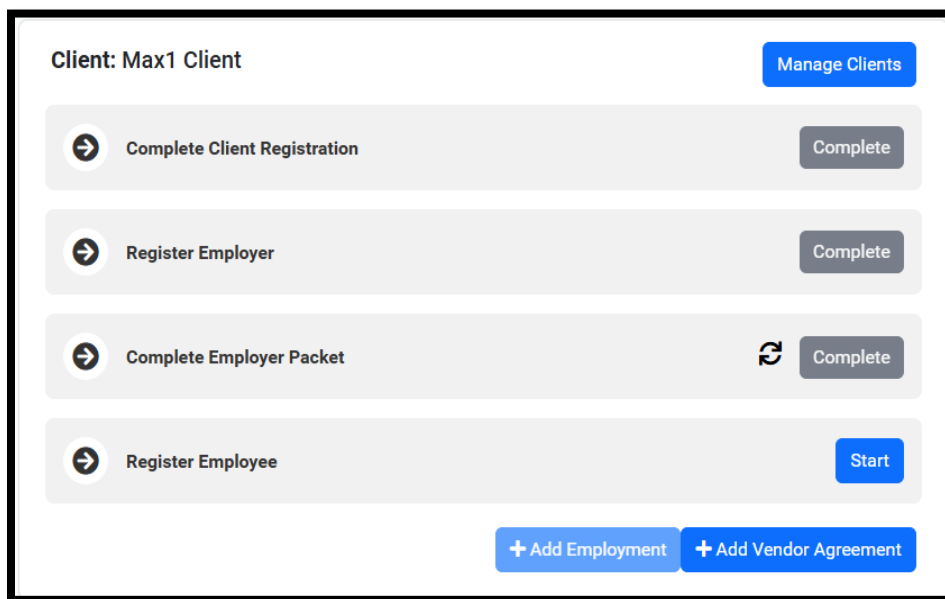
- Employee's full legal name (including any other names used or alias)
- Date of birth
- Social Security Number
- State where they reside
- Physical and mailing address
- The relationship to the employer and employee
- Payment preference, if they request Direct Deposit:
 - Bank's name
 - Account number
 - 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



The screenshot shows the 'Enrollment Dashboard' for 'Client: Max1 Client'. At the top right is a 'Manage Clients' button. Below this are four task cards, each with a right arrow icon and a 'Complete' button: 'Complete Client Registration', 'Register Employer', 'Complete Employer Packet', and 'Register Employee'. The 'Register Employee' card has a blue 'Start' button instead of a 'Complete' button. At the bottom are two blue buttons: '+ Add Employment' and '+ Add Vendor Agreement'.

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 *	<input type="text"/>
Last Name *	<input type="text"/>
Date of Birth *	<input type="text" value="MM/DD/YYYY"/>
SSN *	<input type="text" value="###-##-####"/>
State *	<input type="text" value="Select State"/>

3. Continue completing **Register Employee**:

- Required fields are marked with an asterisk (*)

Register Employee

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

4. Complete **Physical Address**:

- Required fields are marked with an asterisk (*)

Physical Address

Address Line 1 *

City *

State *

Select State ▼

Zip Code *

Country *

Select Country

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

Mailing Address

Mailing Address
Matches Physical
Address

☐

Address Line 1 *

City *

State *

Select State ▼

Zip Code *

#####

Country *

Select Country

Mailing Address

Mailing Address
Matches Physical
Address

☒

6. Complete **Relationships**:

- Employee's relationship to the Employer

Relationships

Relationship to Employer *

Select Relationship

Select Relationship

The Employee is the Employer's Child

The Employee is the Employer's Parent

The Employee is the Employer's Spouse

No Relationship

7. Complete **Payment Information**:

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

Payment Information

Payment Type

Select Payment Type

Select Payment Type

Direct Deposit

Pay Card

Paper Check

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

Payment Information

Payment Type	Direct Deposit
Account Type *	Select Account Type
Account Holder Name *	
Bank Name *	
Bank Account Number *	#####
Bank Routing Transit Number *	#####
Distribute payment to multiple accounts *	<input type="checkbox"/>

- You can optionally distribute payment to multiple accounts

Distribute payment to multiple accounts *	<input checked="" type="checkbox"/>
% of Check Deposited In Account *	100

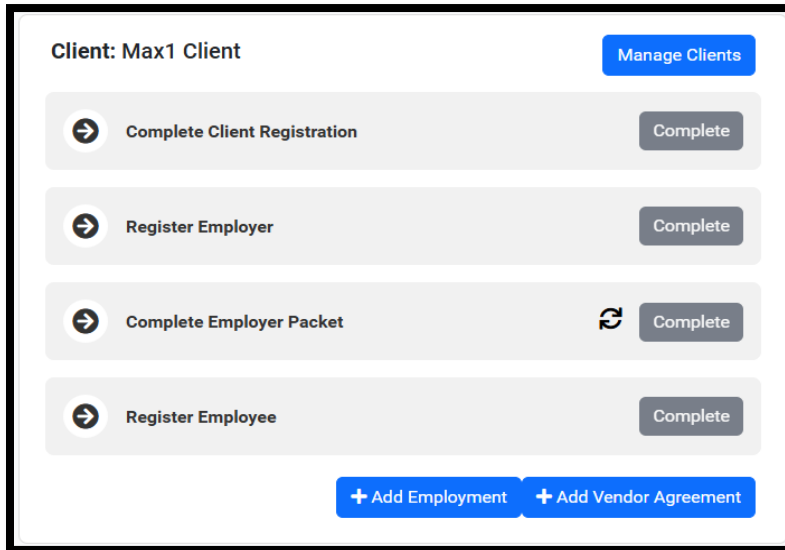
[+ Add Account](#)

Account Type *	Select Account Type
Account Holder Name *	
Bank Name *	
Bank Account Number *	#####
Bank Routing Transit Number *	#####
% of Check Deposited In Account *	0

[- Remove Account](#)

[+ Add Account](#)

- 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.



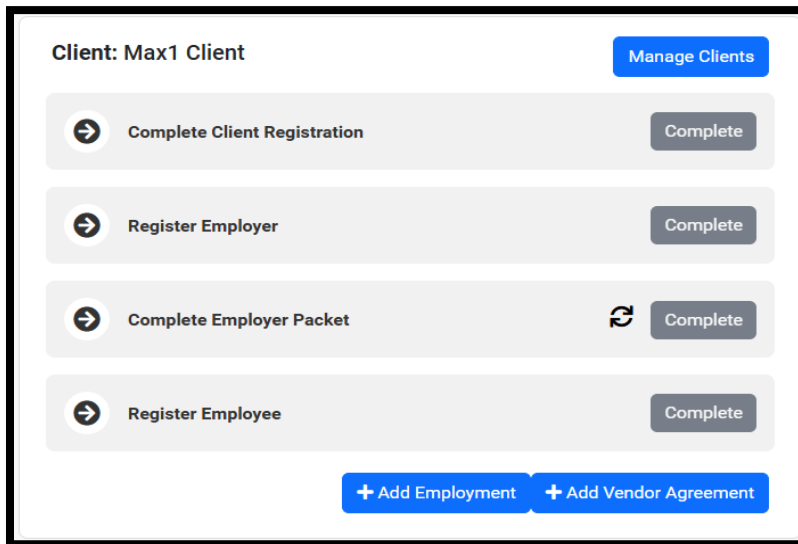
Client: Max1 Client [Manage Clients](#)

- Complete Client Registration [Complete](#)
- Register Employer [Complete](#)
- Complete Employer Packet [Complete](#)
- Register Employee [Complete](#)

[+ Add Employment](#) [+ Add Vendor Agreement](#)

+Add Employment

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



Client: Max1 Client [Manage Clients](#)

- Complete Client Registration [Complete](#)
- Register Employer [Complete](#)
- Complete Employer Packet [Complete](#)
- Register Employee [Complete](#)

[+ Add Employment](#) [+ Add Vendor Agreement](#)

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

Create Employment

Employment Details

Client Name *

Program *

Employer *

Employee *

Expected Start Date *

- 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.

Create Employment

Employment Details

Client Name *

Program *

Employer *

Employee *

Expected Start Date *

Select an Employee

[Register a new Employee](#)

Employer Name ▾	Employee Name ▾	Actions
Cynthia Leach	Kevin Leach	<input type="button" value="Select"/>
Cynthia Leach	Monica Leach	<input type="button" value="Select"/>
Cynthia Leach	Kristen Leach	<input type="button" value="Select"/>

3 total

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 *	<input type="text" value="James Leach"/>
Program *	<input type="text" value="Select Program"/> ▼
Employer *	<input type="text" value="Cynthia Leach"/>
Employee *	<input type="text" value="Select Employee"/> ▼
Expected Start Date *	<input type="text" value="MM/DD/YYYY"/>

4. Complete all required fields

Does the Employee Live with the Client? *	<input type="text"/>
How does your Employee know your Client if "No Relationship" was selected above? *	<input type="text"/>
Live In Caregiver (Agent Use Only)	<input type="text"/>
Will your employee be administering medication? *	<input type="text"/>
Will your employee be implementing a behavior supports plan? *	<input type="text"/>
Will your employee need specialized training? *	<input type="text"/>

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) *	<input type="text" value="Select Filing Status"/> ▼
Multiple Jobs	<input type="radio"/> Yes <input type="radio"/> No
Claim Dependents Or Other Credits	<input type="text"/>
Other Income (Not From Jobs)	<input type="text"/>
Deductions	<input type="text"/>
Extra Withholding	<input type="text"/>

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? *

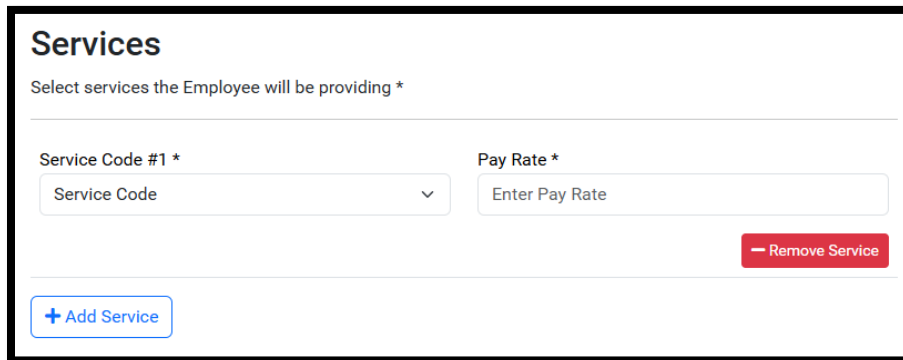
☐ Yes ☐ No

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 (*)



Services
Select services the Employee will be providing *

Service Code #1 * Pay Rate *

Service Code Enter Pay Rate

+ Add Service - Remove Service

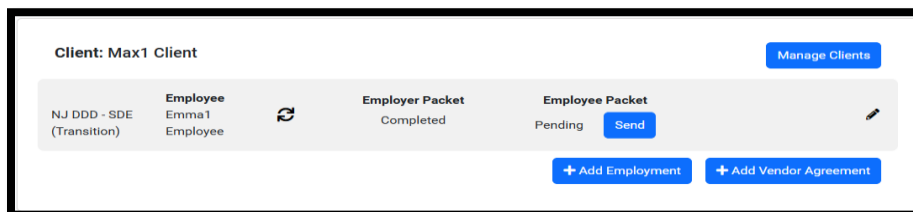
8. Click **Save** to complete the process



Save Cancel

Send the Employee Packet

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

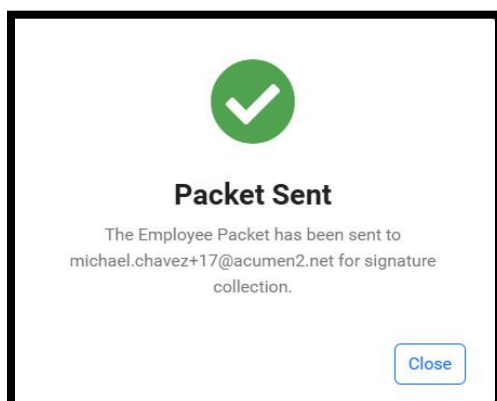



Client: Max1 Client Manage Clients

NJ DDD - SDE (Transition)	Employee Emma1 Employee	↻	Employer Packet Completed	Employee Packet Pending Send	✎
---------------------------	-------------------------	---	---------------------------	-----------------------------------	---

+ Add Employment + Add Vendor Agreement

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



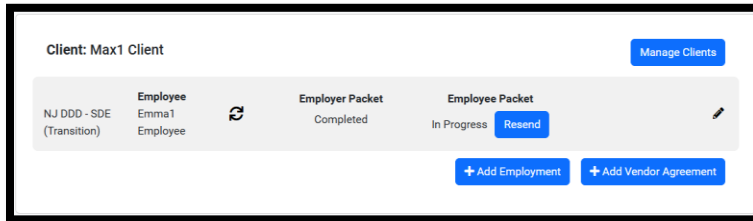


Packet Sent

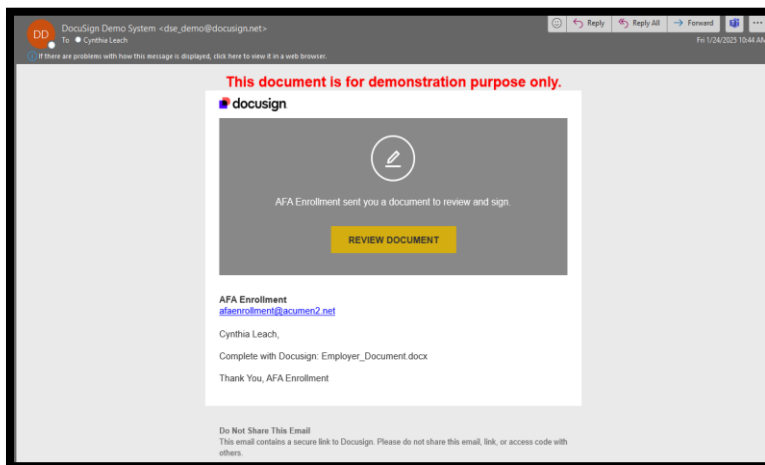
The Employee Packet has been sent to michael.chavez+17@acumen2.net for signature collection.

Close

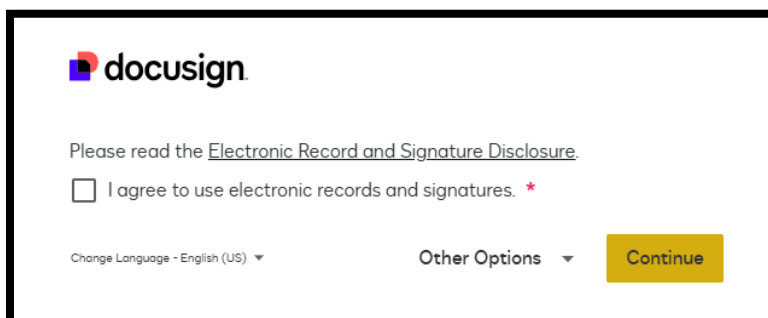
- EES will direct you back to the Enrollment Dashboard
2. On the Enrollment Dashboard, Employee Packet now displays **In Progress**



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

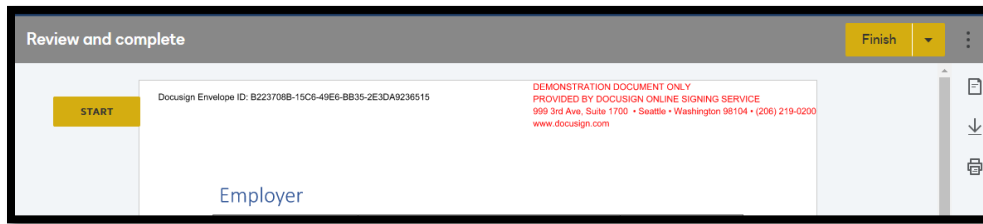


5. Click the **Electronic Record and Signature Disclosure** link to view the disclosure
6. Check the **box** to agree to using electronic records and signatures
7. Click the yellow **Continue** button



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

8. Click the yellow **Start** button

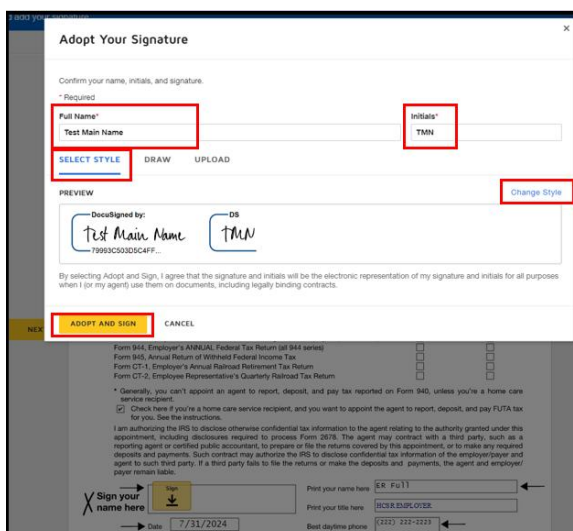


- Use the **tab** key on the keyboard to move through each line
- Review documents for accuracy!
- Signature and date are required at the bottom of a page, click the **Sign** button to sign and date the form(s)
- The Employer will need to review and attach the **19 Documents** provided by the Employee to verify citizenship

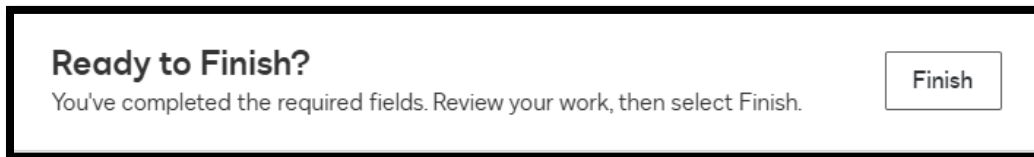
9. Click the yellow **Next** button or scroll down to proceed to the next form



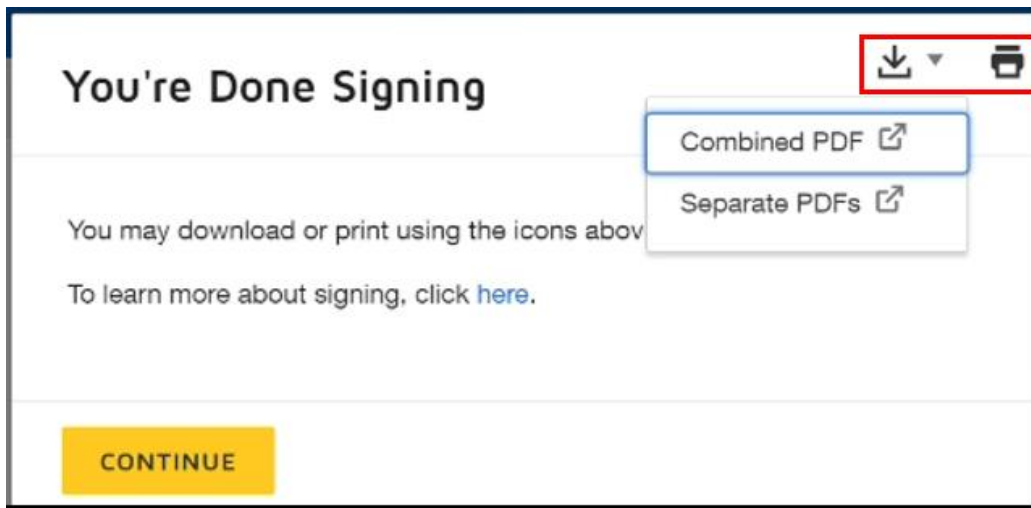
- You can change the style of your electronic signature by selecting **Change Style**
- You can also **Draw** your signature or **Upload** it
- After you have selected your signature, press **Adopt and Sign**



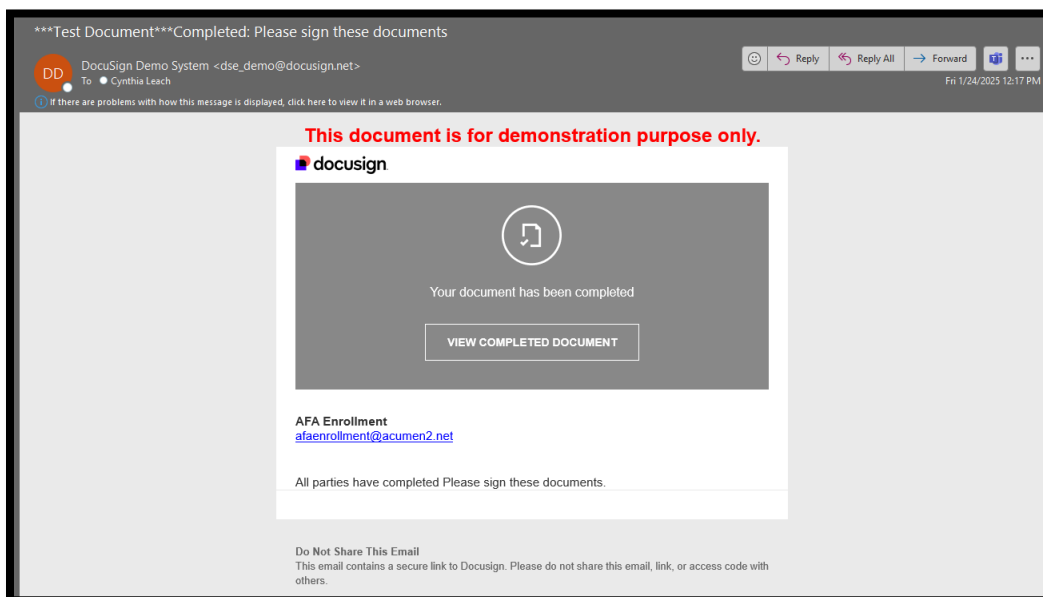
10. Click the **Finish** button at the bottom of the last document



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/>

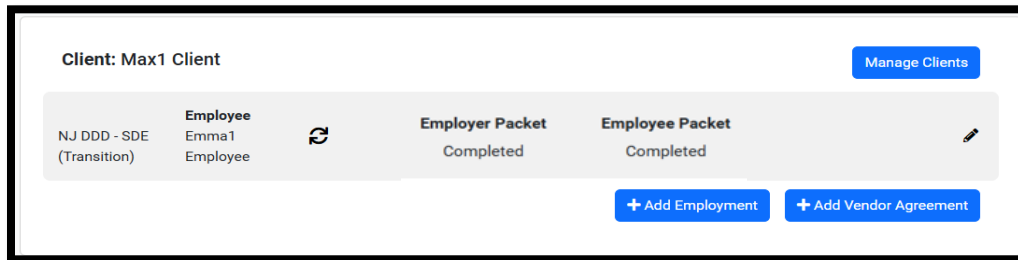
- Enter the **username** and **password** created in the Initial Registration form
- Click **Sign In**

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**

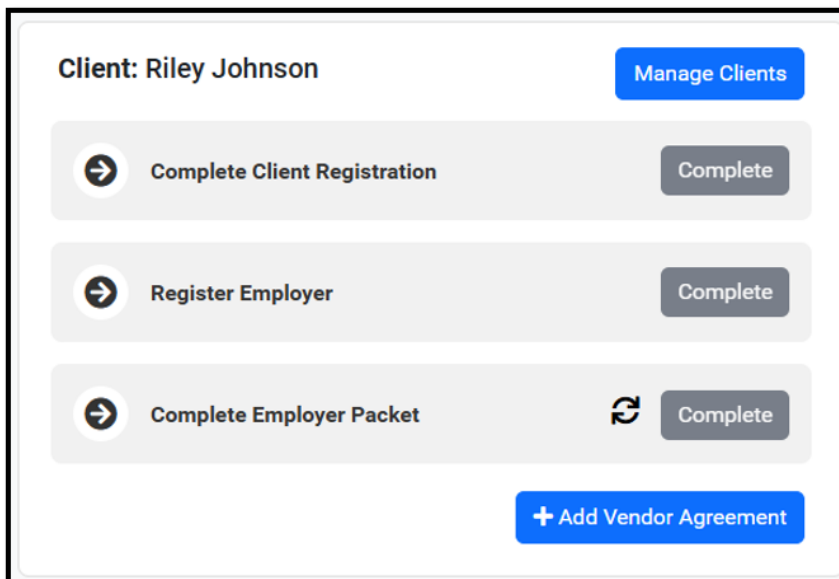
- If the Employee Packet shows **In Progress**, you can press the circle arrows to refresh the page



The screenshot shows the 'Client: Max1 Client' dashboard. At the top right is a 'Manage Clients' button. Below this is a table with two columns: 'Employer Packet' and 'Employee Packet'. The 'Employer Packet' is marked 'Completed' and has a refresh icon. The 'Employee Packet' is also marked 'Completed' and has an edit icon. Below the table are two buttons: '+ Add Employment' and '+ Add Vendor Agreement'.

Add Vendor Agreement

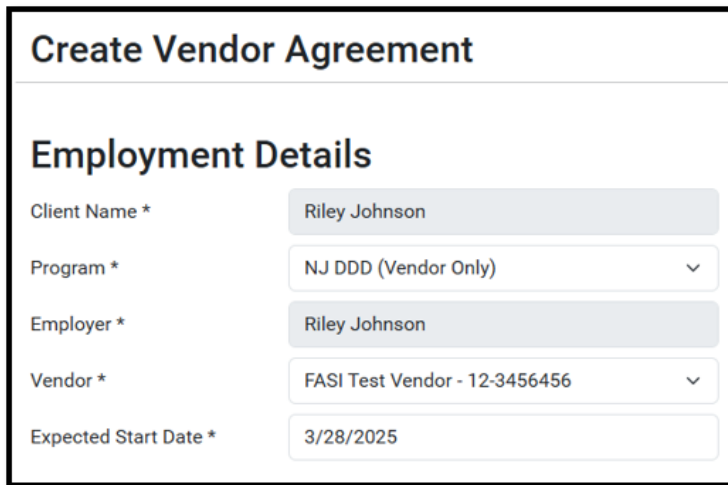
1. Once you are back in EES, on the Enrollment Dashboard, click the **+Add Vendor Agreement** button



The screenshot shows the 'Client: Riley Johnson' dashboard. At the top right is a 'Manage Clients' button. Below this are three rows, each with a circular arrow icon, a text label, and a 'Complete' button. The labels are 'Complete Client Registration', 'Register Employer', and 'Complete Employer Packet'. The 'Complete Employer Packet' row also has a refresh icon. At the bottom right is a blue button labeled '+ Add Vendor Agreement'.

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)

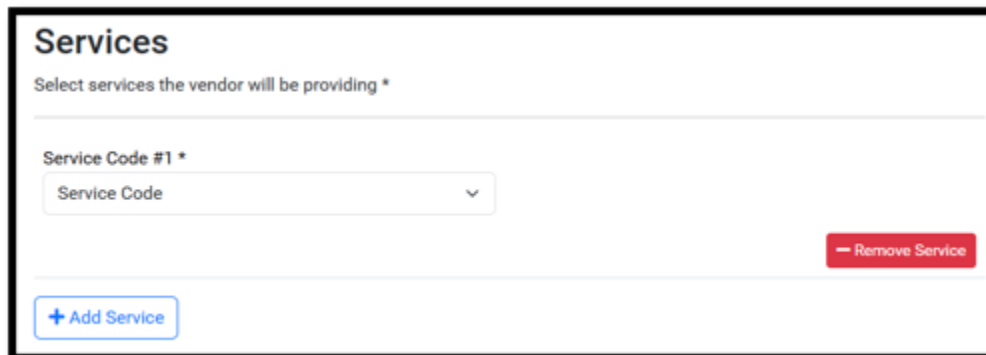


Create Vendor Agreement

Employment Details

Client Name *	Riley Johnson
Program *	NJ DDD (Vendor Only) ▼
Employer *	Riley Johnson
Vendor *	FASI Test Vendor - 12-3456456 ▼
Expected Start Date *	3/28/2025

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



Services

Select services the vendor will be providing *

Service Code #1 *	Service Code ▼	- Remove Service

+ Add Service

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



Save Cancel

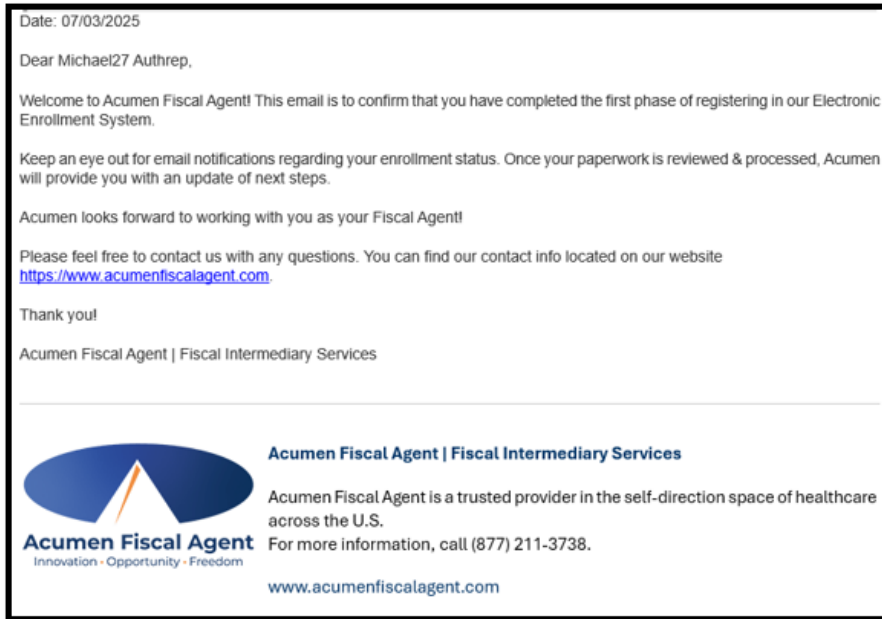
Enrollment Completed

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

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

Next Steps:

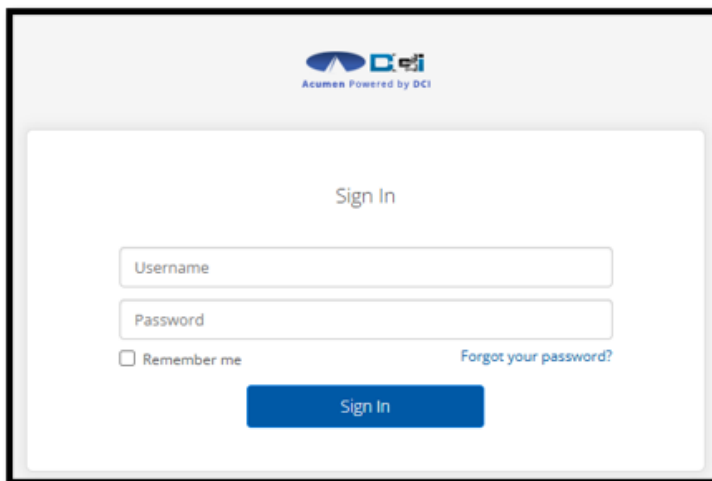
1. You will receive an email confirming that the first phase of registering in EES has been completed



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

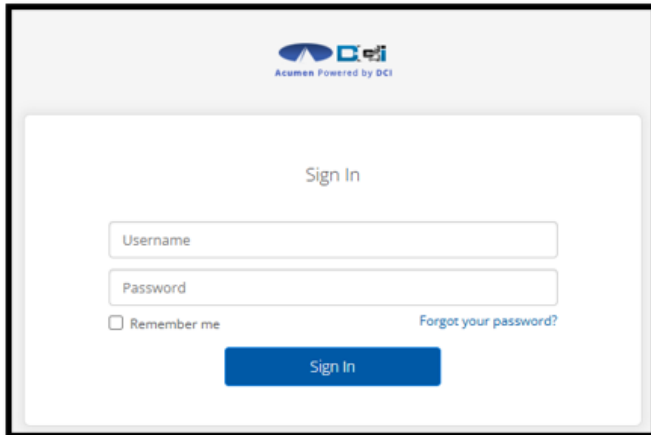
Logging into EES after Enrollment Completed

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**)



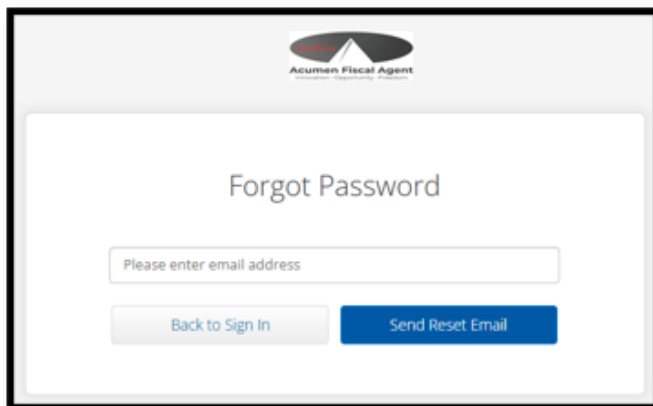
Reset Password

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



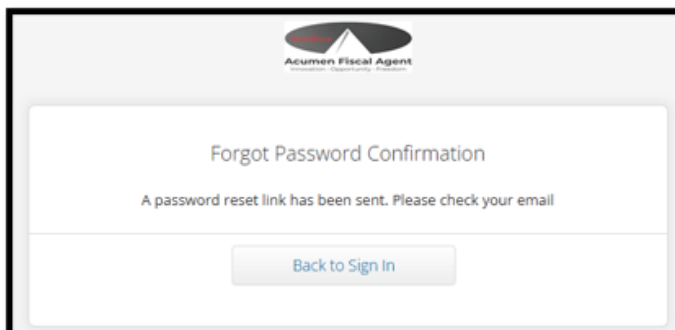
The image shows the 'Sign In' screen of the Acumen Fiscal Agent portal. At the top, there is a logo for 'Acumen Powered by DCI'. Below the logo, the text 'Sign In' is centered. There are two input fields: 'Username' and 'Password'. Below the 'Password' field, there is a checkbox labeled 'Remember me' and a link labeled 'Forgot your password?'. At the bottom, there is a blue button labeled 'Sign In'.

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



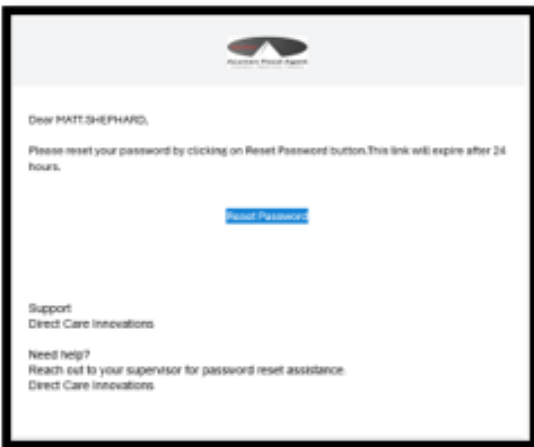
The image shows the 'Forgot Password' screen of the Acumen Fiscal Agent portal. At the top, there is a logo for 'Acumen Fiscal Agent'. Below the logo, the text 'Forgot Password' is centered. There is a text input field with the placeholder text 'Please enter email address'. Below the input field, there are two buttons: 'Back to Sign In' and 'Send Reset Email'.

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

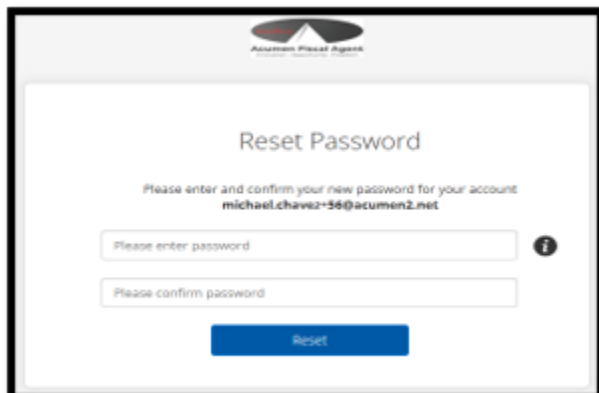


The image shows the 'Forgot Password Confirmation' screen of the Acumen Fiscal Agent portal. At the top, there is a logo for 'Acumen Fiscal Agent'. Below the logo, the text 'Forgot Password Confirmation' is centered. Below this text, there is a message: 'A password reset link has been sent. Please check your email'. At the bottom, there is a button labeled 'Back to Sign In'.

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

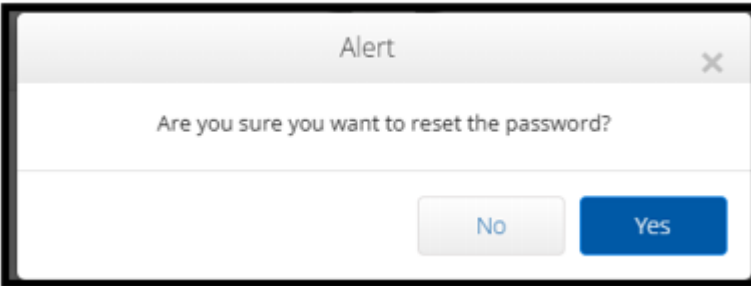


9. On the Reset Password screen, enter your **new** password in the Please enter password field
 - Password Criteria:
 - Must contain 1 uppercase letter, lowercase letter, number, and special character (e.g. !?%)
 - No more than two repeated characters in a row
 - Password cannot contain three consecutive 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**



The screenshot shows a web form titled "Reset Password". Below the title is a message asking the user to enter and confirm their new password for the account "michael.chavez-56@acumen2.net". There are two input fields: "Please enter password" and "Please confirm password". A blue "Reset" button is at the bottom. A small information icon is next to the first input field.

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 **new password**
15. Click **Sign In**

