

EES-Electronic Enrollment System: NJ Self-Enrollment Guide (Vendor Only Program)

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 & Client can be the same person
 - ✓ For Individuals receiving vendor only services, a formal Employer of Record is NOT required
 - ✓ **Authorized Representatives completing the vendor only enrollment will be referred to as Employers in EES, however, do not need an EIN (Employer Identification Number)**
4. **Agent:** An Acumen employee who assists the enrollee through the enrollment process
5. **Add Vendor Agreement:** The Individual or Authorized Representative 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 only services, an employer is **NOT** required
- **Authorized Representatives** completing the enrollment will be referred to as **Employers** in EES
- Clients may be their own Authorized Representative if they do not have one designated and **must** complete the Employer sections of the enrollment with their information

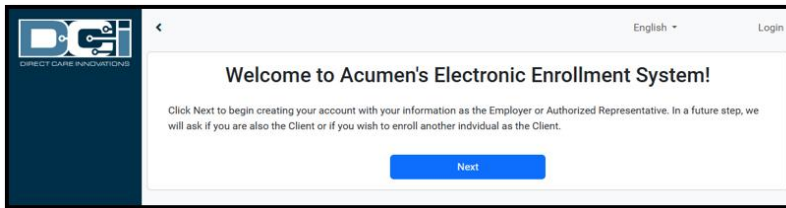
To complete the **Initial Registration**:

1. Navigate to the **NJ Programs Electronic Enrollment** page: <https://www.acumenfiscalagent.com/nj/ees/>
2. Click the **Go to Electronic Enrollment** button



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- Click **Next** on the following screen

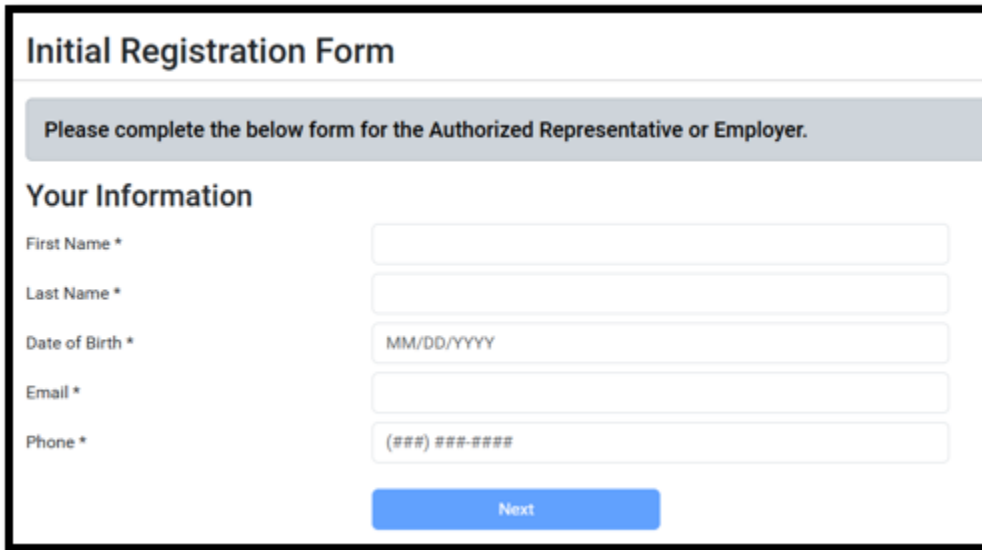


Welcome to Acumen's Electronic Enrollment System!

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 *

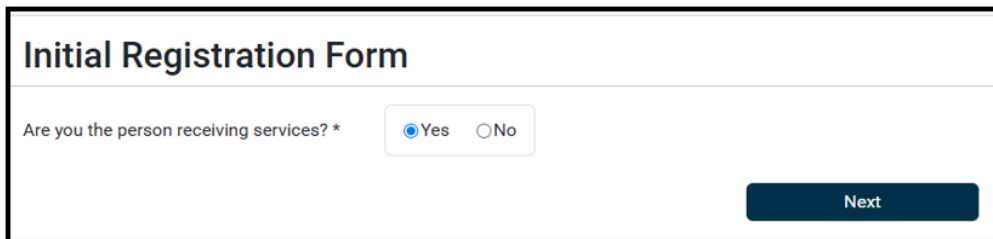
Date of Birth *

Email *

Phone *

Next

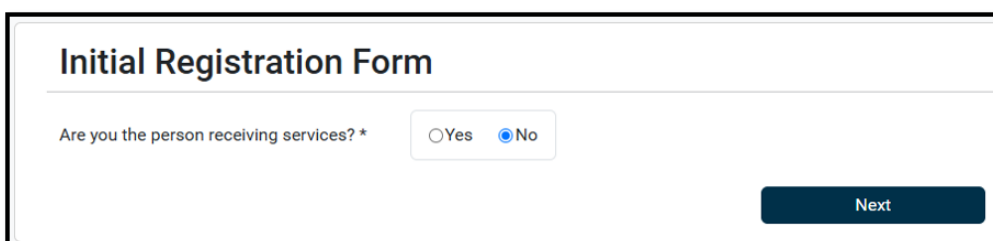
- Answer the question **Are you the person receiving services?**
 - If the person receiving services is completing the registration, select **Yes** (the Client is also the Auth. Rep.)
 - If the person completing the registration represents the Client, select **No** (the Client is *NOT* the Auth. Rep.)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



Initial Registration Form

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

Next



Initial Registration Form

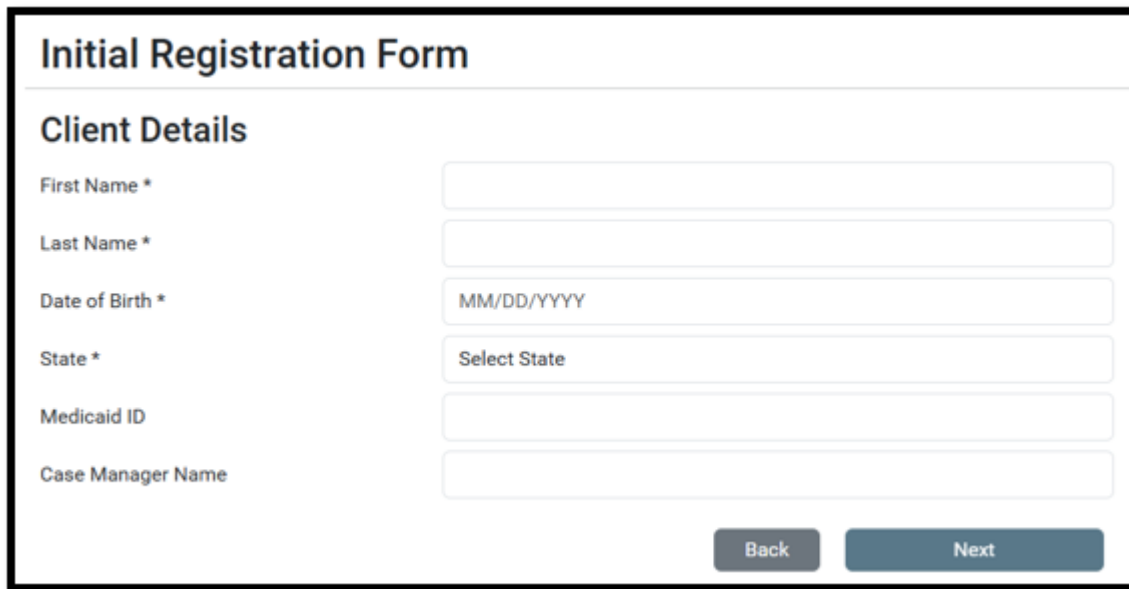
Are you the person receiving services? * ☐ Yes ☒ No

Next

6. 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' with the 'Client Details' section highlighted. The form contains the following fields:

- First Name ***: Text input field
- Last Name ***: Text input field
- Date of Birth ***: Text input field with placeholder 'MM/DD/YYYY'
- State ***: Dropdown menu with 'Select State' text
- Medicaid ID**: Text input field
- Case Manager Name**: Text input field

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

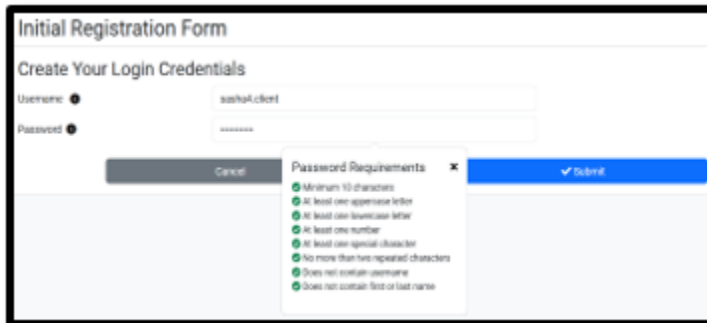
Notes:

- You can click on the "i" next to the username and password to see the requirement

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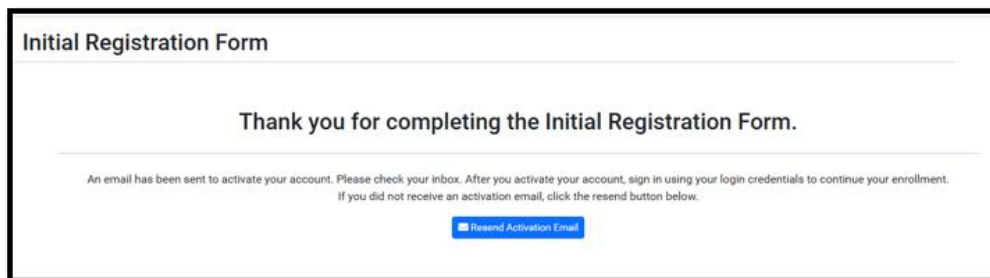


The screenshot shows the 'Initial Registration Form' with the heading 'Create Your Login Credentials'. It features two input fields: 'Username' with the value 'sasha4.client' and 'Password' with masked characters. Below the fields are two buttons: a grey 'Cancel' button and a blue 'Submit' button with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



This screenshot shows the same registration form as the previous one, but with a 'Password Requirements' pop-up window displayed over the 'Submit' button. The pop-up lists several requirements, each preceded by a green checkmark icon: 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.

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 shows the 'Initial Registration Form' with a confirmation message: 'Thank you for completing the Initial Registration Form.' Below this message, 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.' At the bottom, there is a blue button labeled 'Resend Activation Email' with an envelope icon.

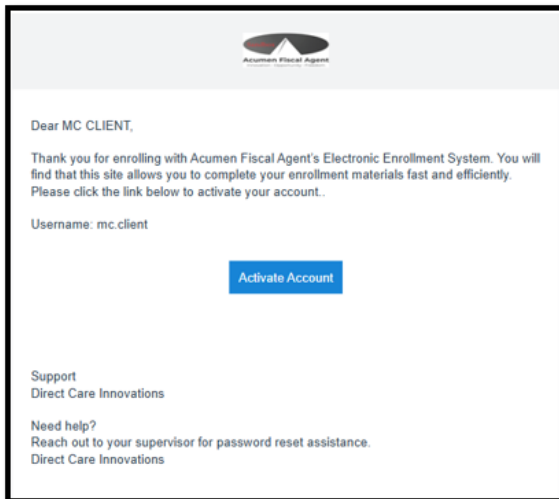
Activate Authorized Representative / Employer Profile

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

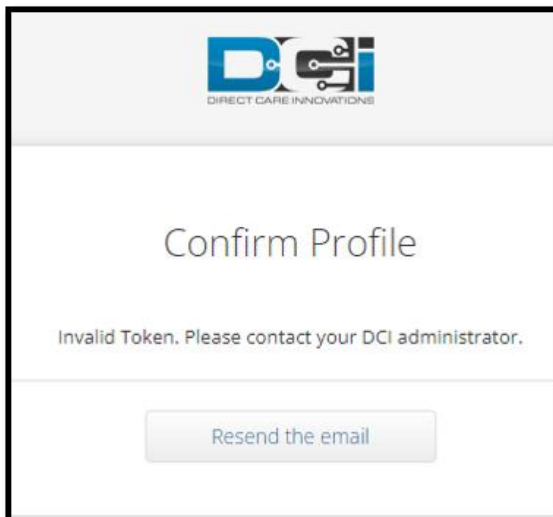


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- Click the blue **Activate Account** button in the email (Link is active for a specific amount of time; typically 24 hours)

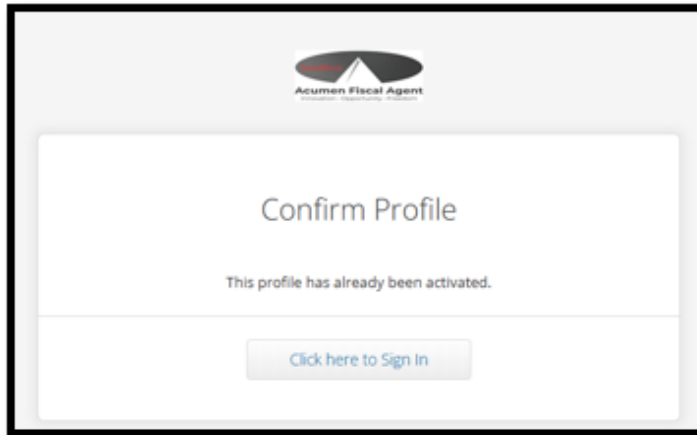


- Note: If after clicking the Activate Account button, **the link is inactive**, an alert stating Invalid Token - Please contact your DCI administrator appears
- Click the **Resend the email** button and return to **step 2**

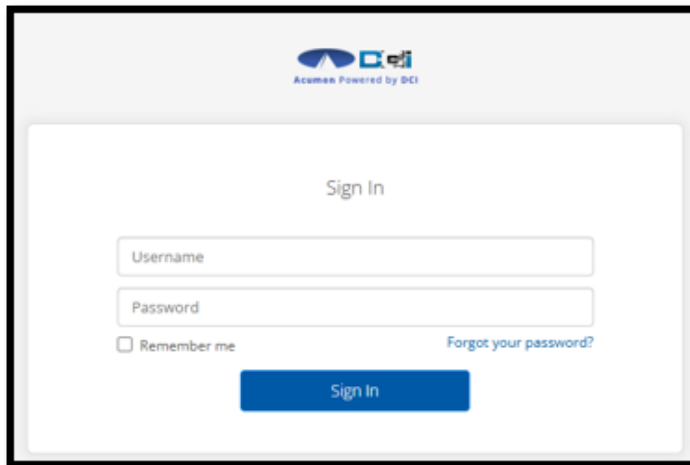


- The **Activate Account** button opens a web page that states Confirm Profile: This Profile has already been activated
- Click the **Click here to Sign In** button

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5. You will be redirected 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

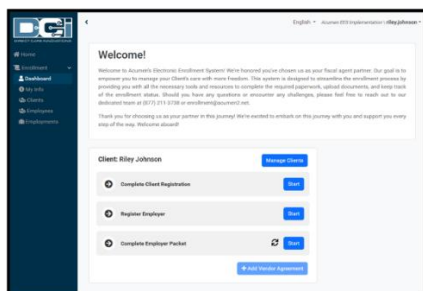


8. You are directed to the **Enrollment Dashboard**. See **Complete Client Registration** section for next steps

Complete Client Registration

To complete Client Registration:

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



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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 (*)

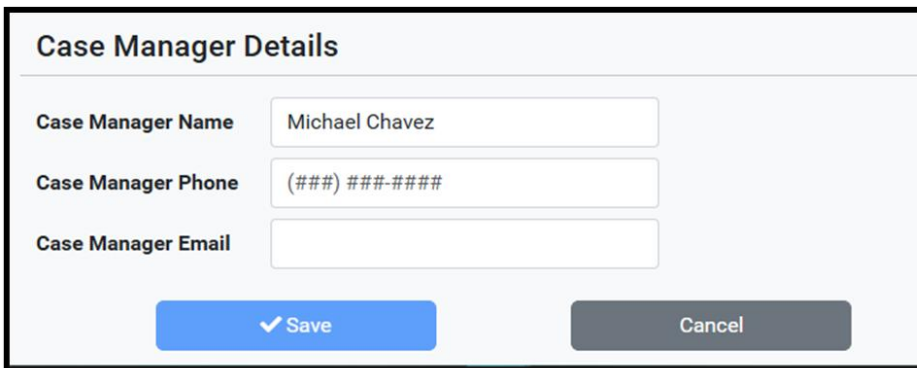


Physical Address

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

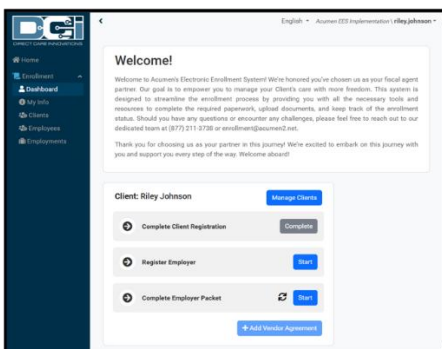
Case Manager Name	Michael Chavez
Case Manager Phone	(###) ###-####
Case Manager Email	

[✓ 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 Authorized Representative / Employer** section for next steps.



English • Acumen EES Implementation | Riley Johnson

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) 511-5728 or enrollment@acumen2.com.

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](#)

- 1 Complete Client Registration [Complete](#)
- 2 Register Employer [Start](#)
- 3 Complete Employer Packet [Start](#)

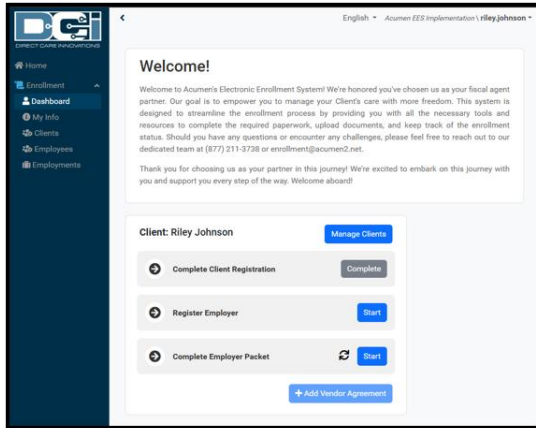
[Add Vendor Agreement](#)

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Register Authorized Representative / Employer

To register the Authorized Representative:

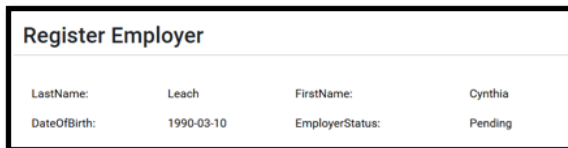
1. On the Enrollment Dashboard, click the **Start** button to Register Auth. Rep. / Employer



The screenshot shows the EES Enrollment Dashboard for Riley Johnson. The dashboard includes a sidebar with navigation links: Home, Enrollment, Dashboard, My Info, Clients, Employees, and Employments. The main content area has a 'Welcome!' message and a progress bar with three steps: 'Complete Client Registration' (marked 'Complete'), 'Register Employer' (marked 'Start'), and 'Complete Employer Packet' (marked 'Start'). There is also a 'Add Vendor Agreement' button.

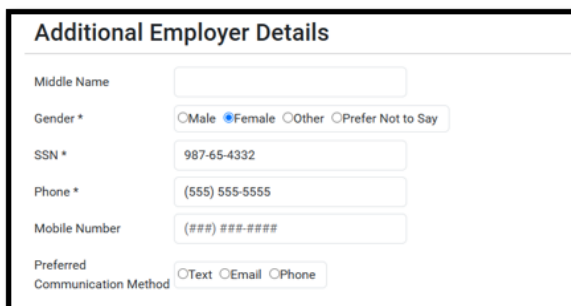
2. Complete **Additional Auth. Rep. / Employer Details** section:

- Required fields are marked with an asterisk (*)



The 'Register Employer' form contains the following fields:

LastName:	Leach	FirstName:	Cynthia
DateOfBirth:	1990-03-10	EmployerStatus:	Pending

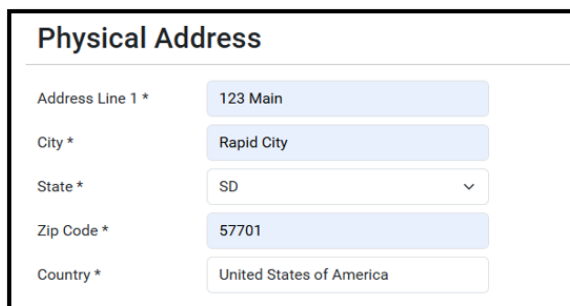


The 'Additional Employer Details' form contains the following fields:

- Middle Name: [Text Field]
- Gender *: ☐ Male ☒ Female ☐ Other ☐ Prefer Not to Say
- SSN *: 987-65-4332
- Phone *: (555) 555-5555
- Mobile Number: (##) ###-####
- Preferred Communication Method: ☐ Text ☐ Email ☐ Phone

3. Complete **Physical Address**

- Required fields are marked with an asterisk (*)

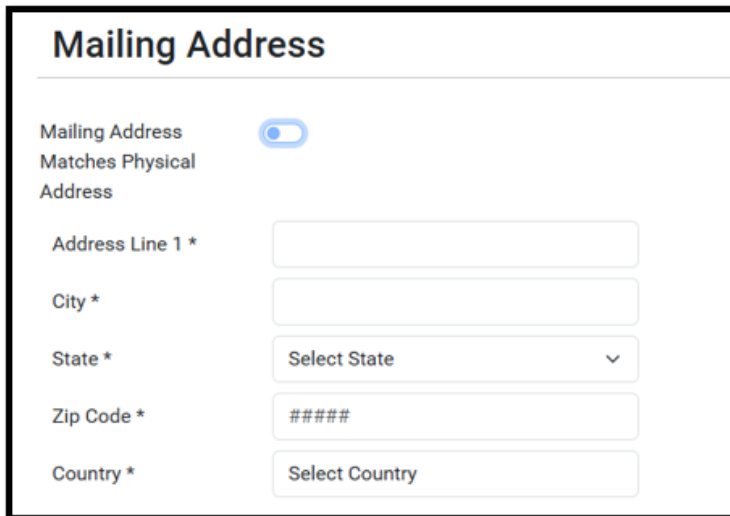


The 'Physical Address' form contains the following fields:

- Address Line 1 *: 123 Main
- City *: Rapid City
- State *: SD
- Zip Code *: 57701
- Country *: United States of America

4. Mailing Address

- Defaults to **OFF**, indicating the mailing address does not match the physical address.
 - i. 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 ☐

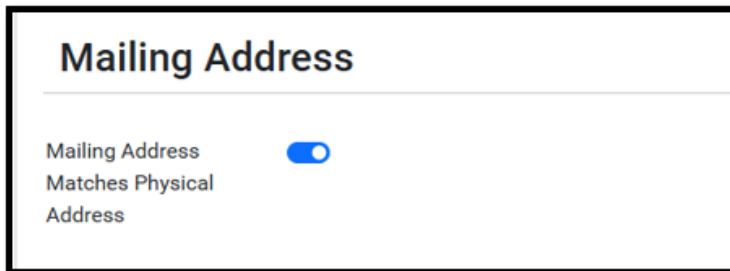
Address Line 1 *

City *

State *

Zip Code *

Country *

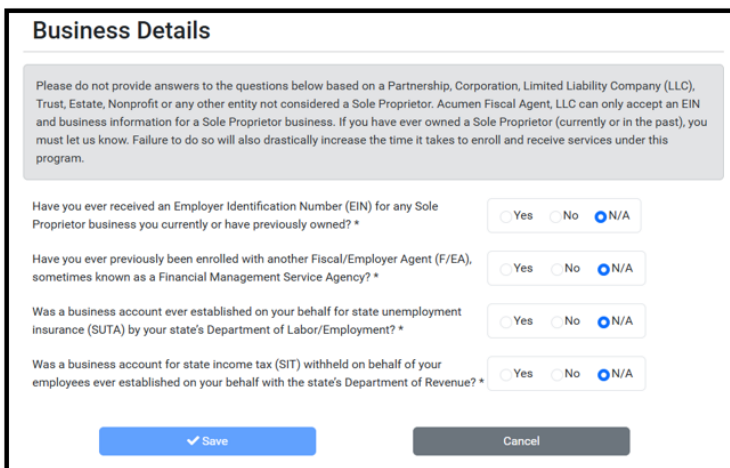


Mailing Address

Mailing Address Matches Physical Address ☒

5. Complete **Business Details** section

- Answer all four questions as **N/A** (Not Applicable)



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.

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

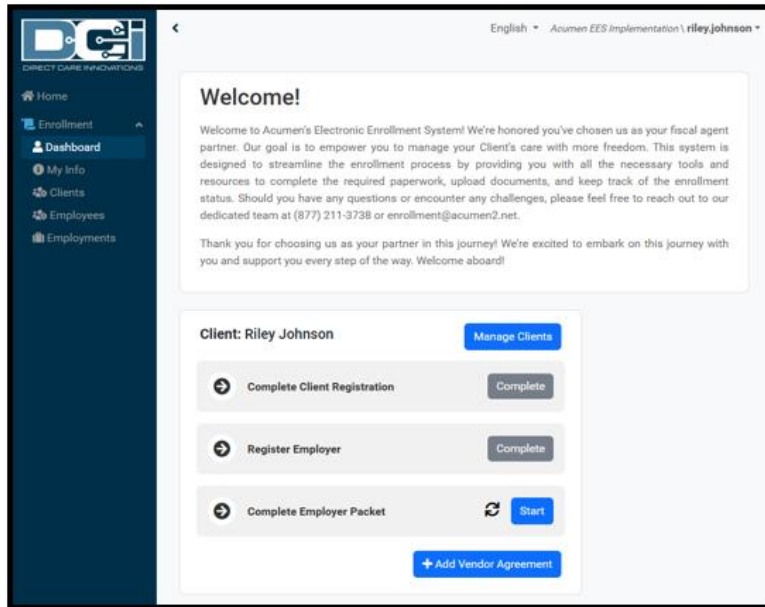
Have you ever previously been enrolled with another Fiscal/Employer Agent (F/EA), sometimes known as a Financial Management Service Agency? * ☐ Yes ☐ No ☒ N/A

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

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

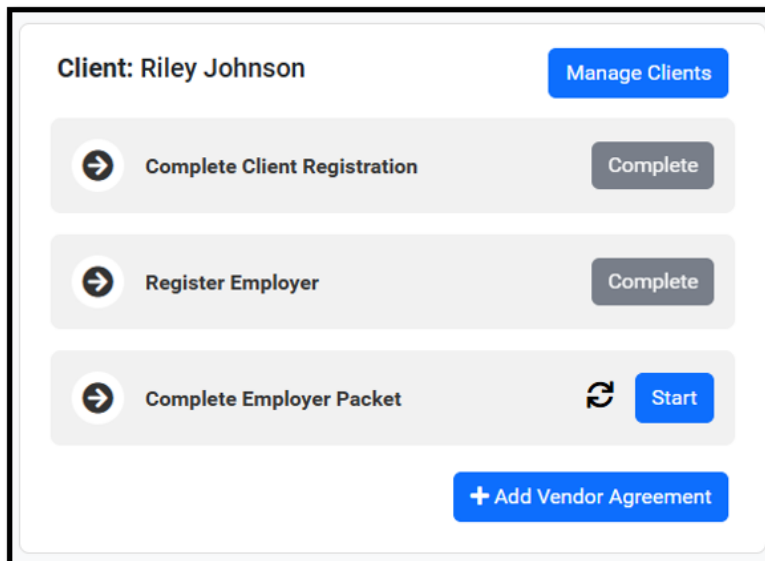
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6. Click **Save** to complete the Register Employer process
7. EES directs you back to the Enrollment Dashboard. Register Employer is now marked as **Complete**. See **Complete the Authorized Representative / Employer Packet** for next steps.



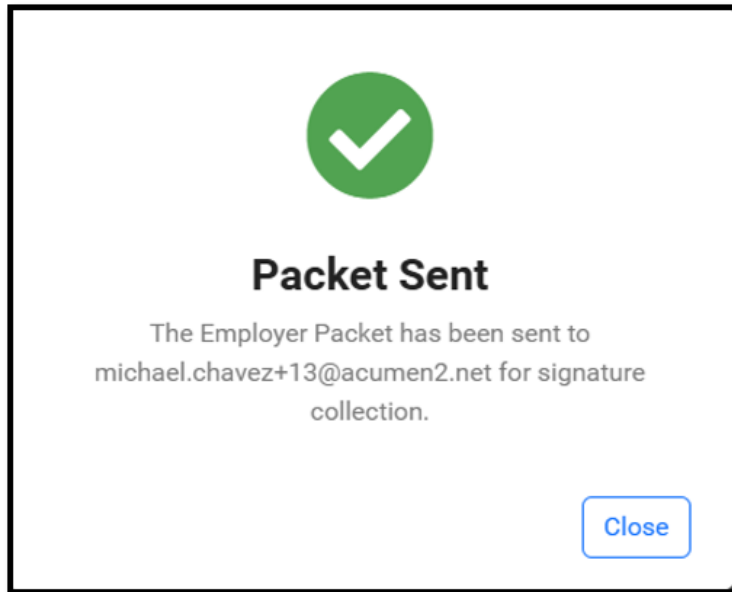
Complete the Authorized Representative/Employer Packet

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



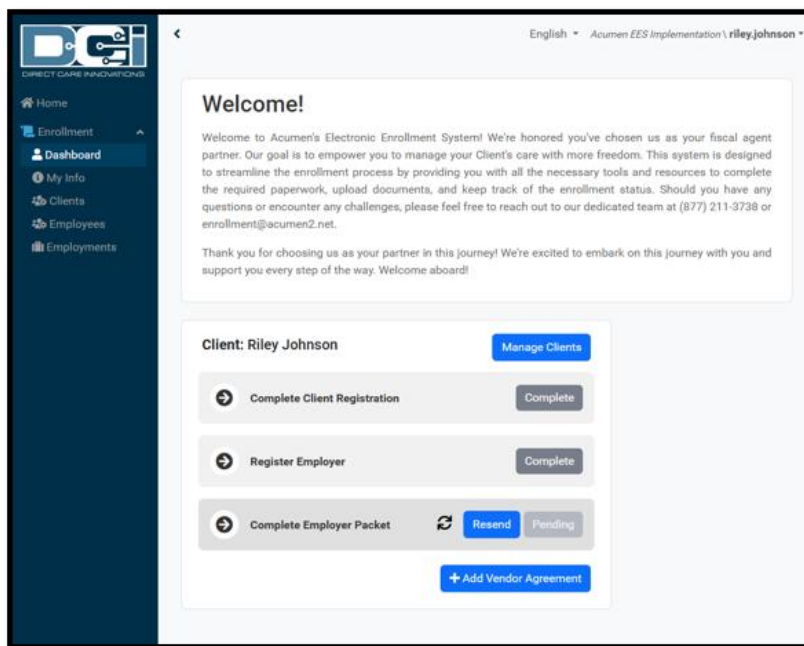
- The pop-up message The Employer Packet has been sent to [Auth. Rep./ employers email address] for signature collection displays
- Click **Close**

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- EES will direct you back to the Enrollment Dashboard

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

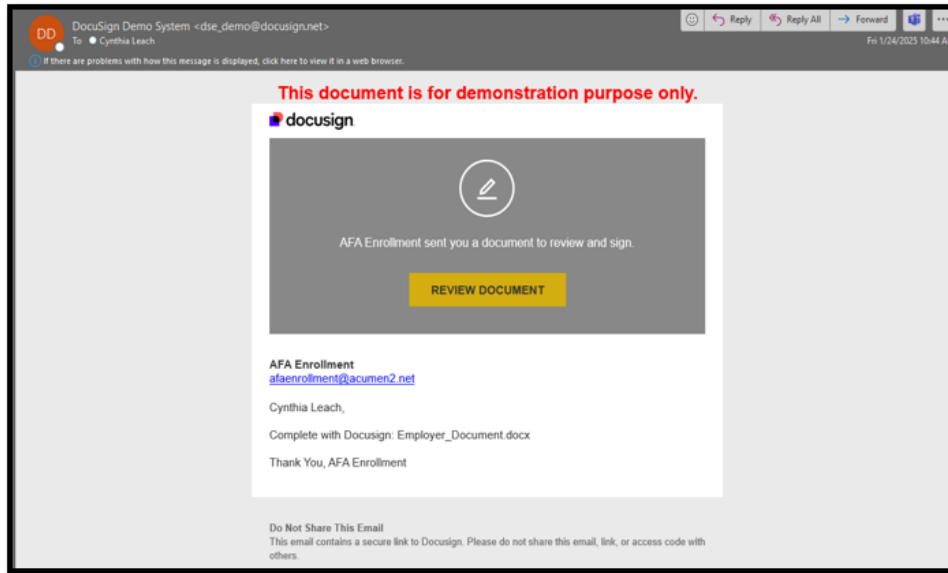


3. Check your email to find the packet to sign

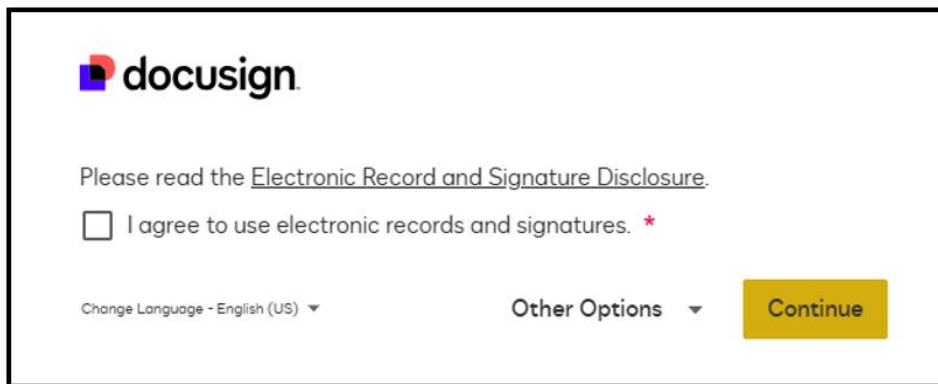
- The packet will come from a DocuSign sender. (dse_na2@docuSign.net)
- Check junk or spam folders if needed.

4. Click the yellow **Review Document** button in the email to complete the forms

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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

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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

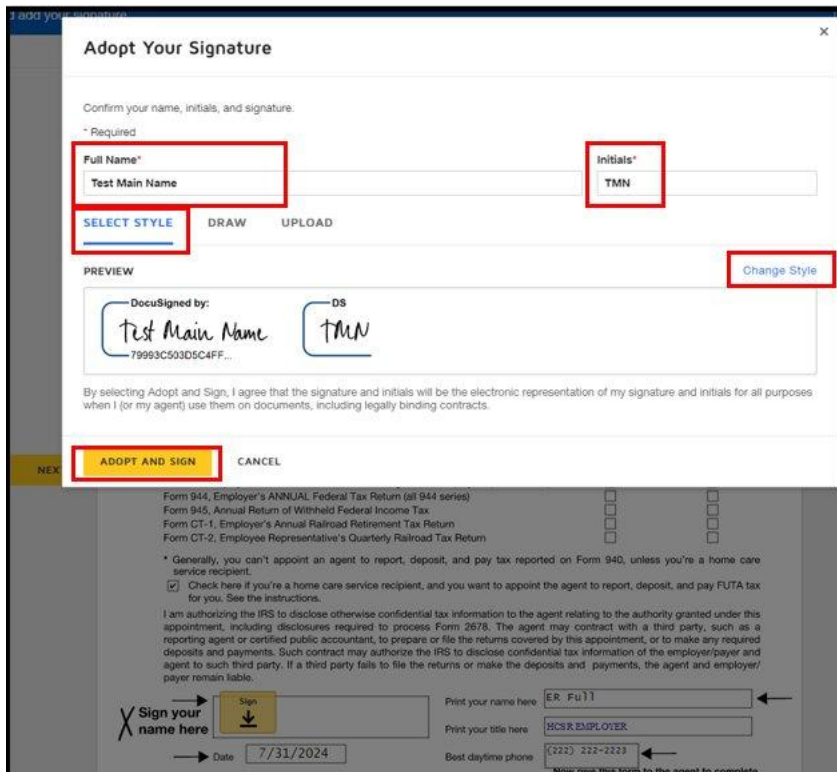
10/31/2024

Participant or Employer/ Representative Signature Date

NEXT

11. After pressing the **Sing** button, a window will appear to select the style of your electronic signature

- 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

Change Style

DocuSigned by: Test Main Name TMN

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

Form 944, Employer's ANNUAL Federal Tax Return (all 944 series)
Form 945, Annual Return of Withheld Federal Income Tax
Form CT-1, Employer's Annual Railroad Retirement Tax Return
Form CT-2, Employee Representative's Quarterly Railroad Tax Return

* Generally, you can't appoint an agent to report, deposit, and pay tax reported on Form 940, unless you're a home care service recipient.

☒ Check here if you're a home care service recipient, and you want to appoint the agent to report, deposit, and pay FUTA tax for you. See the instructions.

I am authorizing the IRS to disclose otherwise confidential tax information to the agent relating to the authority granted under this appointment, including disclosures required to process Form 2678. The agent may contract with a third party, such as a reporting agent or certified public accountant, to prepare or file the returns covered by this appointment, or to make any required deposits and payments. Such contract may authorize the IRS to disclose confidential tax information of the employer/payer and agent to such third party. If a third party fails to file the returns or make the deposits and payments, the agent and employer/payer remain liable.

Sign your name here

Print your name here ER FUJ

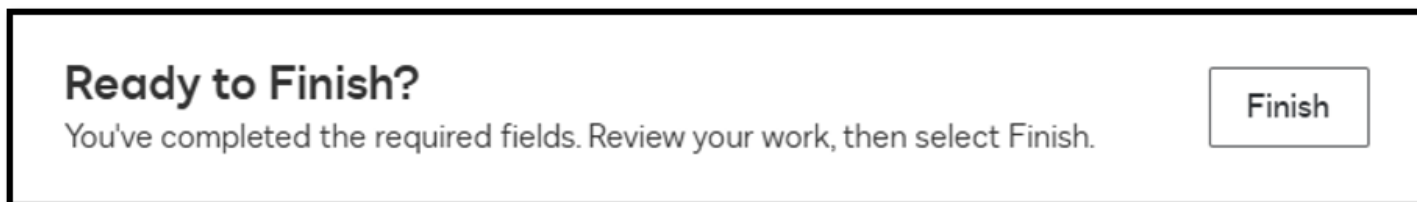
Print your title here HCSR EMPLOYER

Best daytime phone (222) 222-2223

Date 7/31/2024

Now give this form to the agent to complete.

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



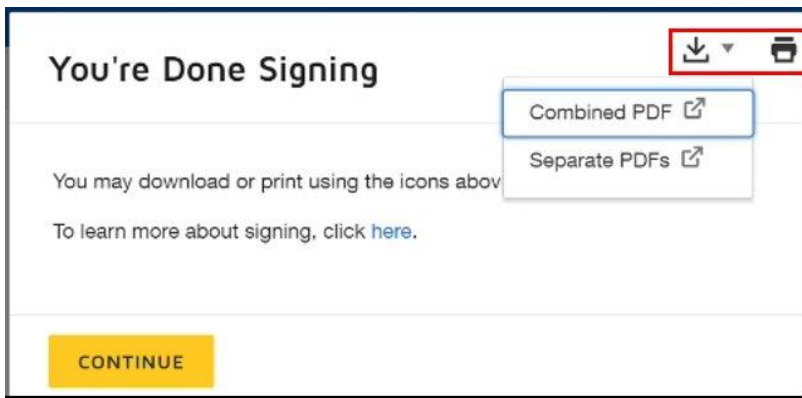
Ready to Finish?

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

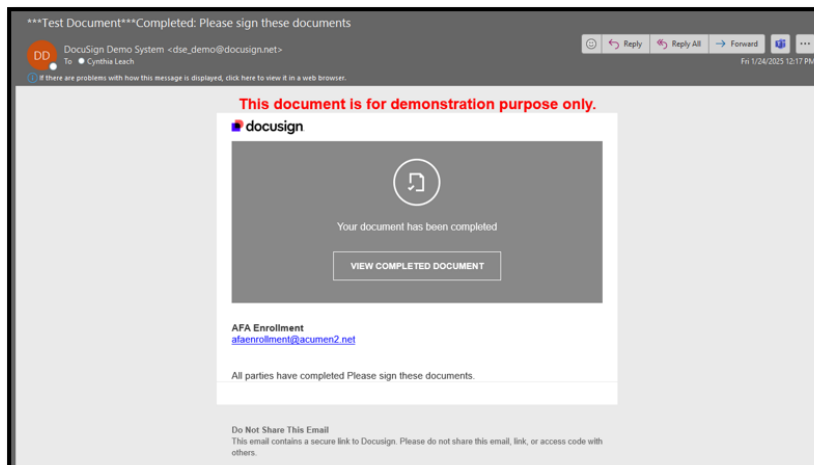
Finish

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

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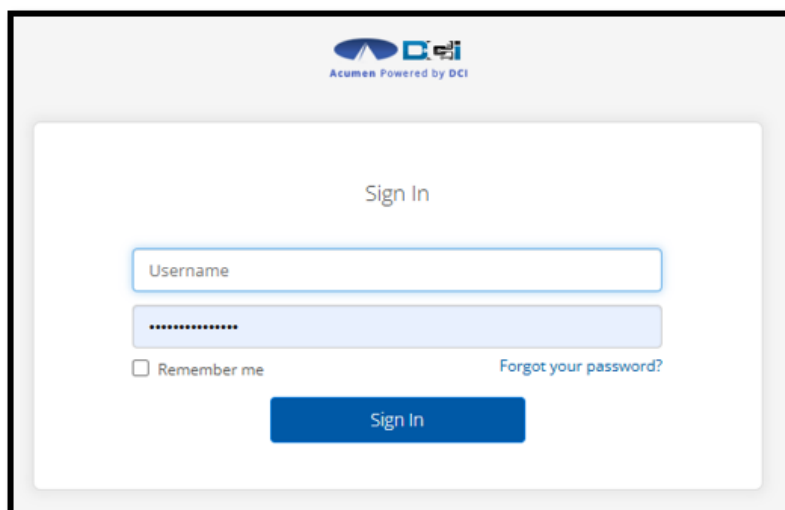


- The Auth. Rep. / Employer receives a confirmation email with a link to view the completed document

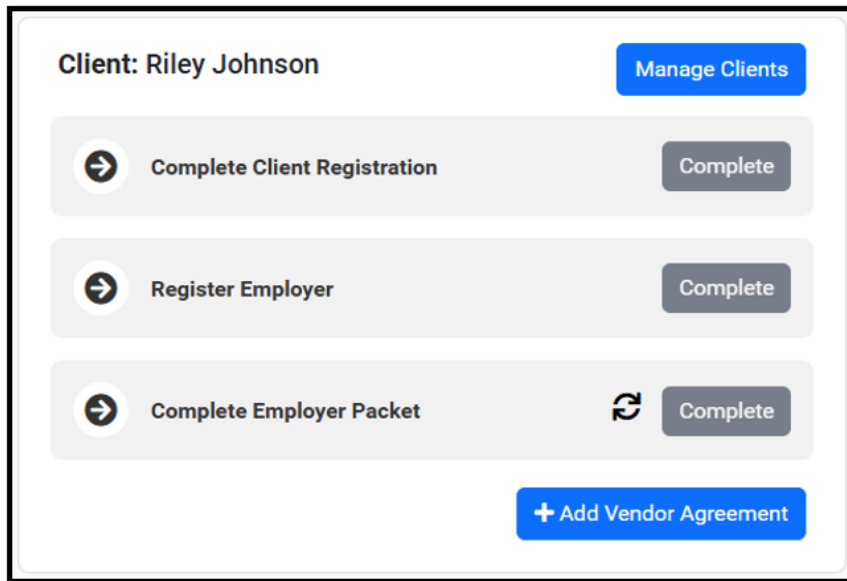


14. Once you have signed the DocuSign packet, return to EES to finish your enrollment

- 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**



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



Client: Riley Johnson [Manage Clients](#)

→ Complete Client Registration [Complete](#)

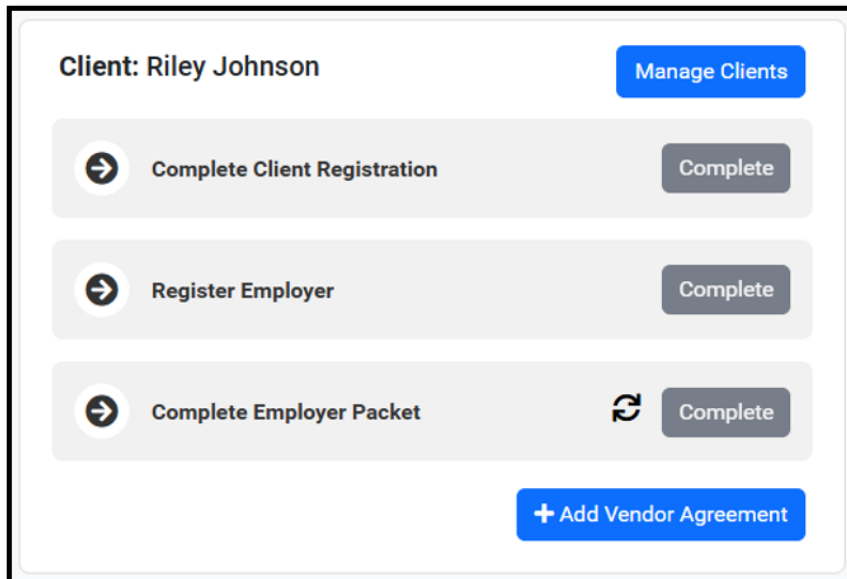
→ Register Employer [Complete](#)

→ Complete Employer Packet [Complete](#)

[+ Add Vendor Agreement](#)

Add Vendor Agreement

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



Client: Riley Johnson [Manage Clients](#)

→ Complete Client Registration [Complete](#)

→ Register Employer [Complete](#)

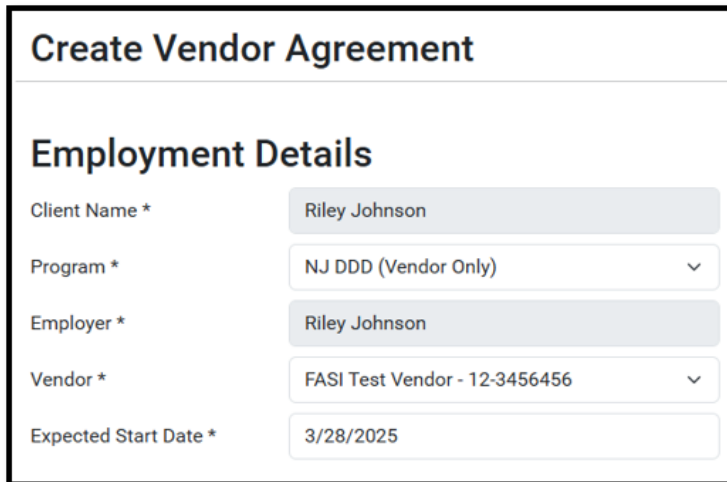
→ Complete Employer Packet [Complete](#)

[+ Add Vendor Agreement](#)

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

- Required fields are marked with an asterisk (*)
- **Vendor:** If the vendor list only shows **Other** OR 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)

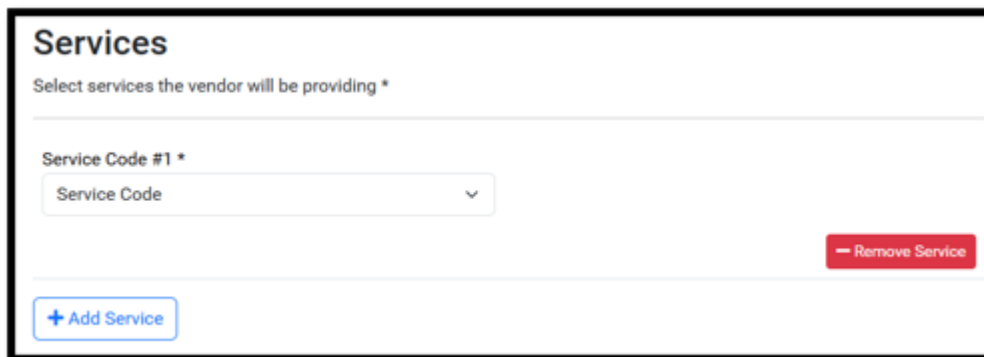


Create Vendor Agreement

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

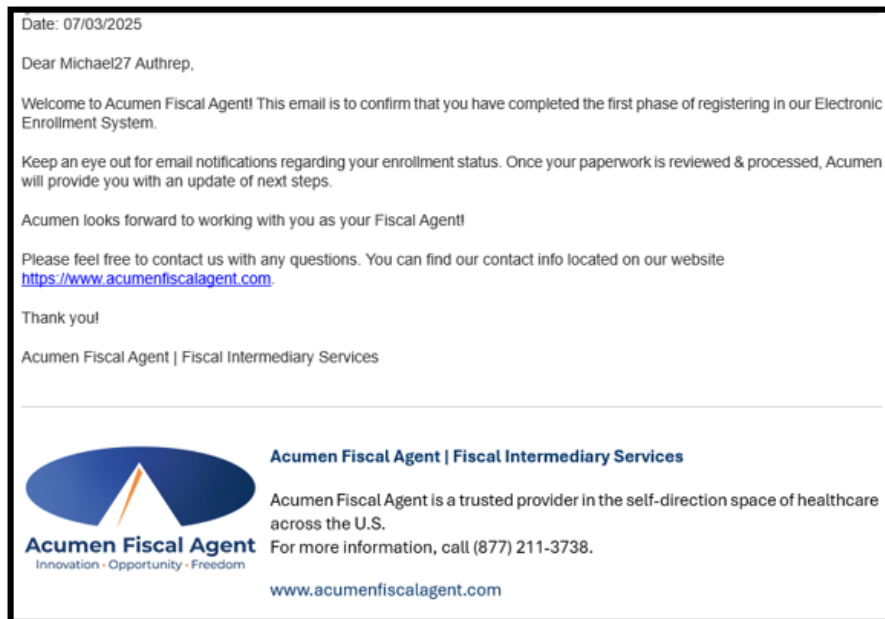
Enrollment Completed means **your portion** of the enrollment is completed and ready for review by an Agent.

- 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

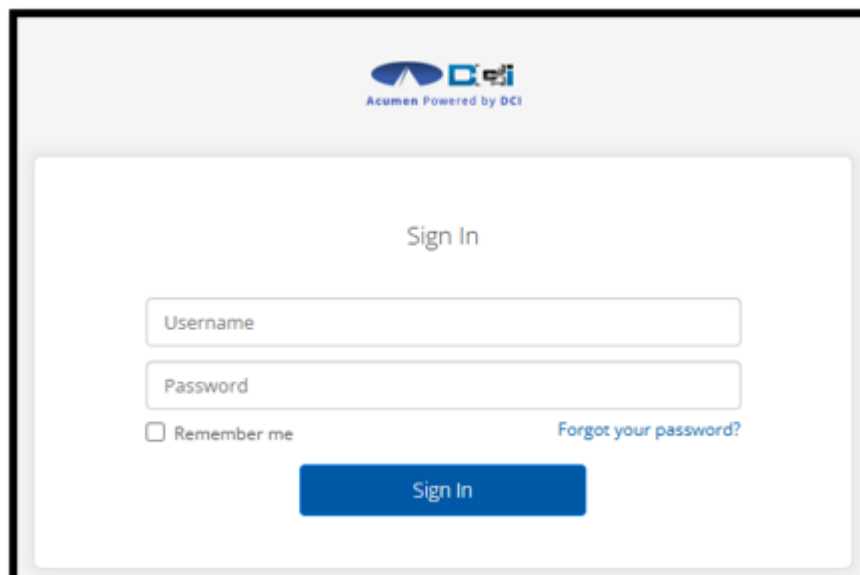
EES-Electronic Enrollment System: NJ Self-Enrollment Guide (Vendor Only Program)



2. An Agent will contact you if any further information is needed 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**)



Acumen Powered by DCI

Sign In

Username

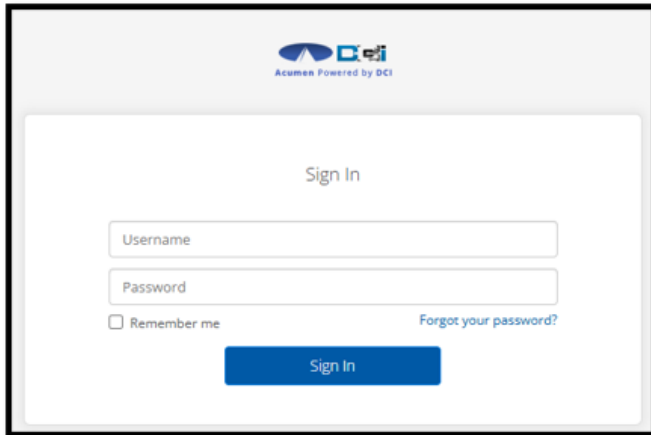
Password

☐ Remember me [Forgot your password?](#)

Sign In

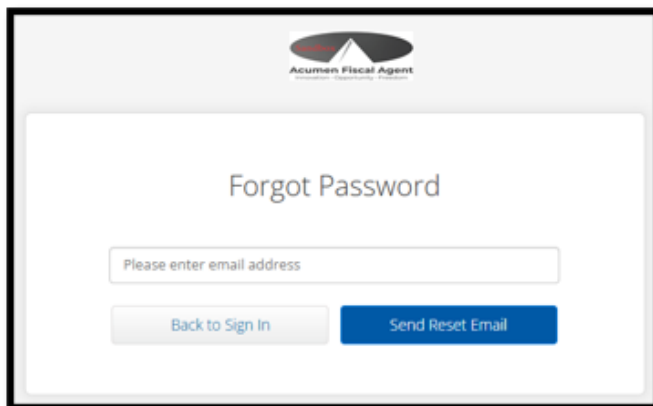
Reset Password

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



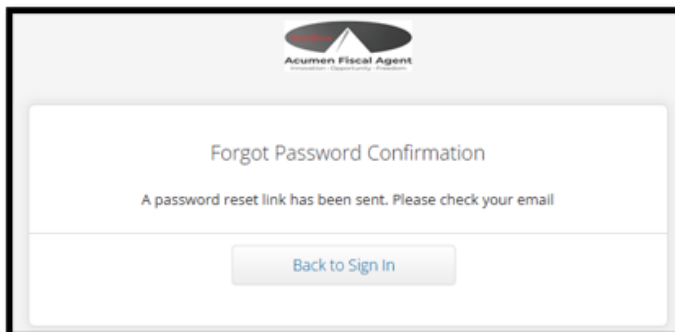
The image shows the 'Sign In' screen of the Acumen Fiscal Agent system. At the top, there is a logo for 'Acumen Powered by DCI'. Below the logo, the text 'Sign In' is centered. There are two input fields: 'Username' and 'Password'. Below the 'Password' field, there is a checkbox labeled 'Remember me'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



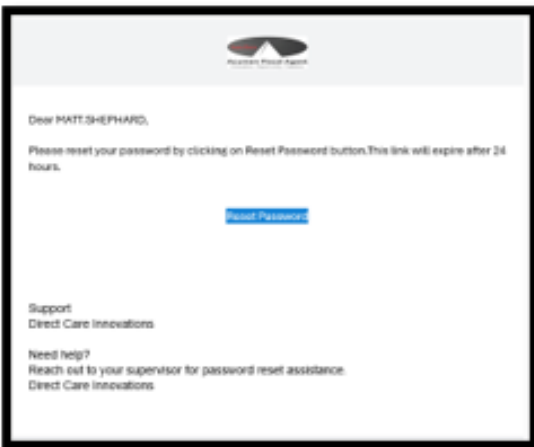
The image shows the 'Forgot Password' screen of the Acumen Fiscal Agent system. At the top, there is a logo for 'Acumen Fiscal Agent'. Below the logo, the text 'Forgot Password' is centered. There is a text input field with the placeholder text 'Please enter email address'. Below the input field, there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

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

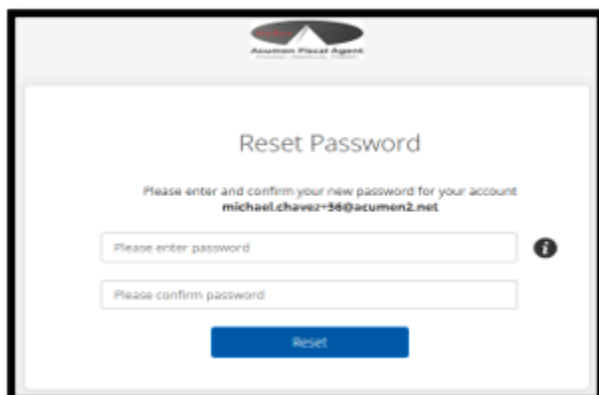


The image shows the 'Forgot Password Confirmation' screen of the Acumen Fiscal Agent system. At the top, there is a logo for 'Acumen Fiscal Agent'. Below the logo, the text 'Forgot Password Confirmation' is centered. Below this text, there is a message: 'A password reset link has been sent. Please check 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

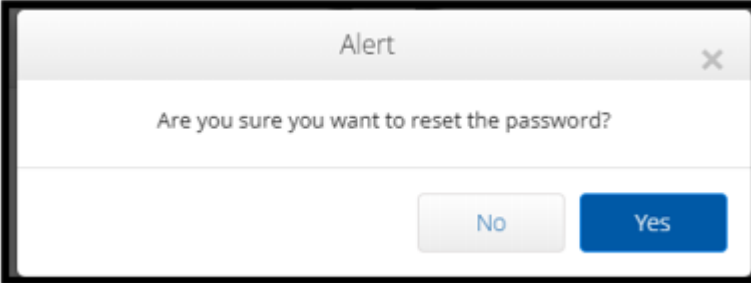


9. On the Reset Password screen, enter your **new** password in the Please enter password field
 - Password Criteria:
 - Must contain 1 uppercase letter, lowercase letter, number, and special character (e.g. !?%)
 - No more than two repeated characters in a row
 - Password cannot contain three consecutive 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" with the Acumen Fiscal Agent logo at the top. Below the title, it says "Please enter and confirm your new password for your 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 (i) is next to the first password 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**

