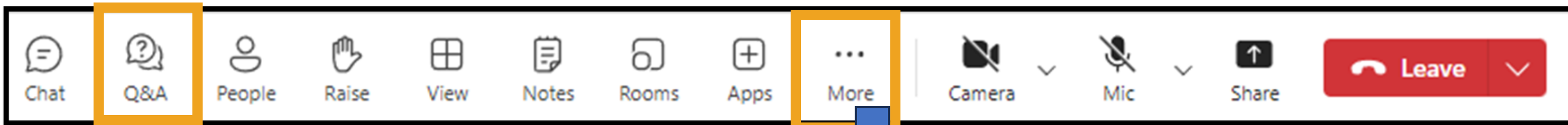
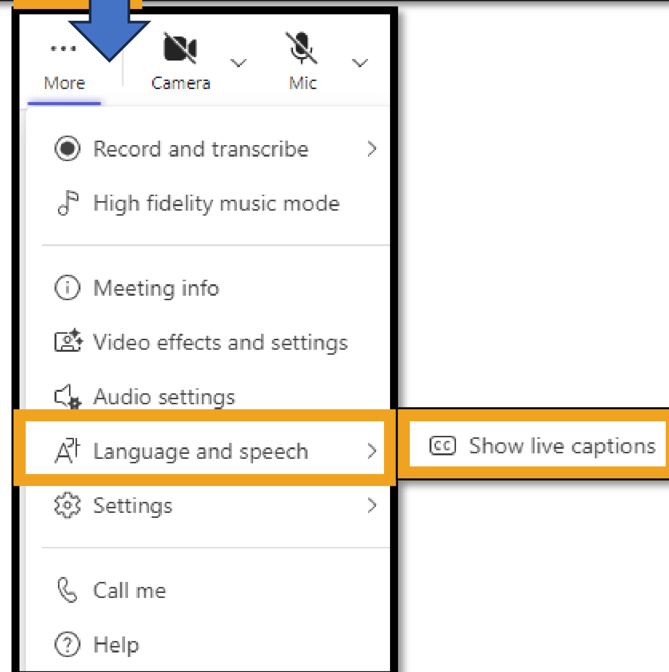
EES – Electronic Enrollment System

Self-Enrollment Training for Employers with Employees & Vendors

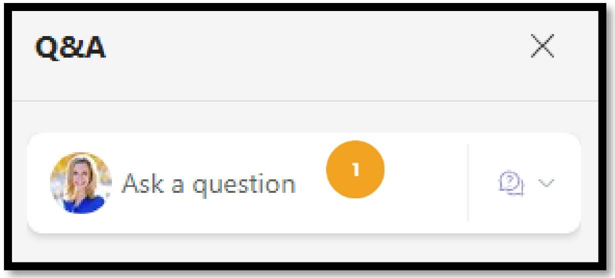
Using Microsoft Teams

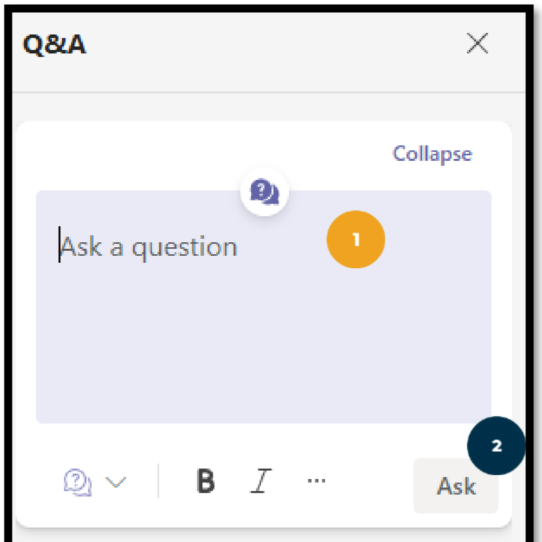




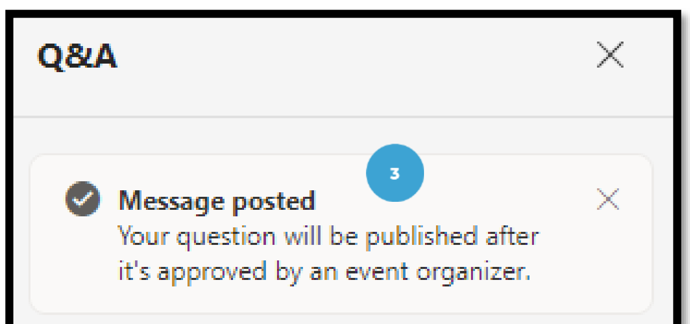
- Ensure both the Camera & Mic are disabled (as pictured above with a line through them)
- Today we will not be using the Chat (disabled) or Raise hand features.
- Click the **Q&A** button to type & send your question during the meeting.
- To enable closed captioning:
  - ✓ Click the **More** button (three dots)
  - ✓ Select **Language and speech**
  - ✓ Click **Show live captions**
  - ✓ OR press **ALT+Shift+C** on your keyboard.

Using the Q&A button

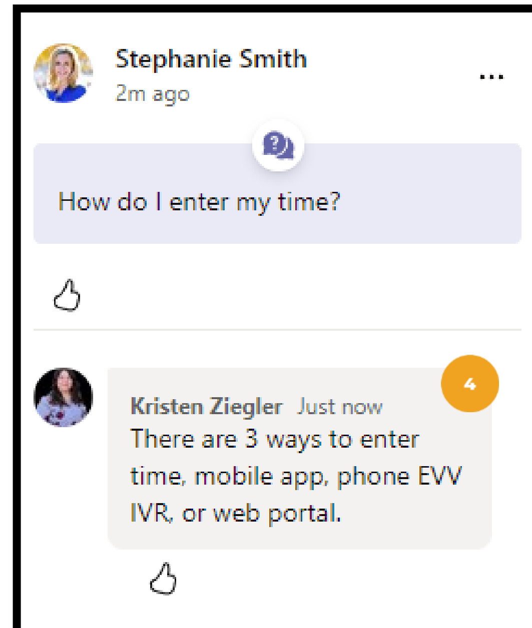




1. After clicking the Q&A button, **type your question** in the Ask a question field.
   - <u>Please do not include any confidential information</u> or the question cannot be published & answered.
2. Click the Ask button
3. Message posted displays



4. Moderators review, approve & post your question.



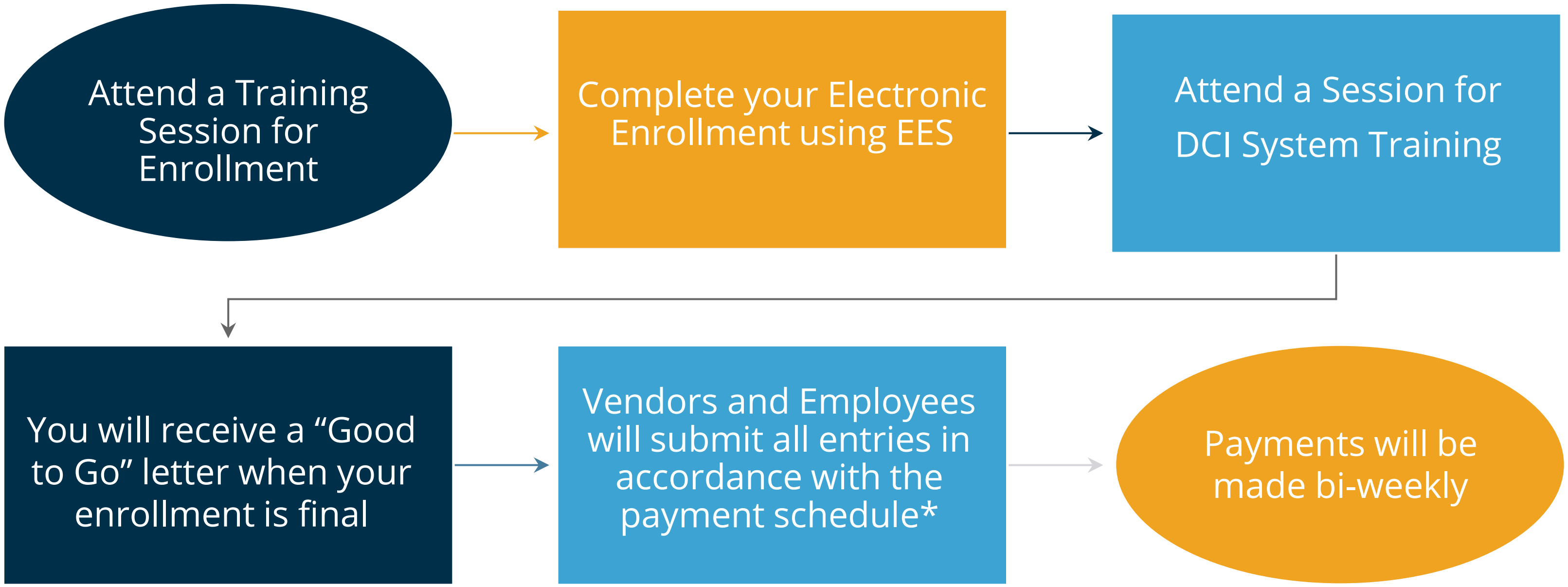
Welcome to Acumen!

As you may know, the Division of Developmental Disabilities (**DDD**) Vendor Fiscal/Employer Agent Model is transitioning Fiscal Intermediary (**FI**) services from Public Partnerships, LLC (**PPL**) to Acumen Fiscal Agent (**Acumen**), this transition started in *early June*. Acumen will help manage both Community Vendor Services and Self-Directed Employee (**SDE**) Services in this model.

Transition enrollments with Acumen will happen at staggered intervals over the summer of 2025, with groups of participants called **cohorts** assigned to enroll within a specific window of time. Using this approach will help ensure a smooth and organized transition for everyone.

In this training, We will review the specific details to our training sessions for the **New Jersey DDD program**. We will also review the process flow, so you have a good comprehension of what comes next.

Overview of NJ DDD Enrollment Process



Note: *Submit and approve all time entries and vendor/reimbursement requests by 9pm EST of the due date, **even if it falls on a weekend or holiday.** Those received *after* 9pm EST of due date will be processed in the following payment period.

Training Sessions

Enrollment

In **Enrollment training**, you'll learn how to create an account in Acumen's electronic enrollment system, complete all required enrollment information, and electronically sign enrollment packets. These sessions will include a live demonstration, and you'll have the chance to ask questions along the way. By the end of these trainings, you'll feel confident navigating the system and completing the enrollment process smoothly.

DCI System

In **DCI System training**, you'll learn how to navigate the DCI system using both the web and mobile versions to complete the essential tasks required for your role. These sessions will include a live demonstration, and you'll have the opportunity to ask questions in real time. By the end of these trainings, you'll be comfortable using DCI to manage your responsibilities efficiently.

NJ DDD VF/EA Services

1. **Self-Directed Employee**: A person hired to provide services and supports to the clients under the Vendor Fiscal/ Employer Agent Self-Direction model under the Division of Developmental Disabilities. An **SDE** will be managed by the Employer who holds the EIN for services to be rendered under. SDEs provide the below services:
   - Community Based Supports
   - Individual Supports-Hourly
   - Interpreter Services
   - Respite
   - Supports Brokerage
   - Transportation - Self-Directed Employee

2. **Vendor/Vendor ONLY services are provided by a third-party provider**. A **client (CLT)** will receive services from a third-party provider (i.e., gym membership, music lessons, etc.) and will not have an employee. A **vendor** is the third-party organization who has agreed to be hired to provide service(s) to the client and be paid by the Fiscal Intermediary. Vendors provide the below services:
   - Assistive Technology
   - Environmental Modification
   - Goods and Services
   - Natural Supports Training
   - Transportation – Single Passenger
   - Vehicle Modification

Prepare for Enrollment

Here is a list of items you will need for your enrollment. Please review the list and be sure to have this information readily available when completing your enrollment documents:

Client Information:

- First Name
- Last Name
- Date of Birth
- Social Security Number
- Physical Address
- Email
- Phone Number
- Cell Phone (optional)
- Support Coordinator Name
- Support Coordinator Email
- Support Coordinator Phone

Employer Information:

- First Name
- Last Name
- Date of Birth
- Social Security Number
- Gender
- Physical Address (No P.O. Box)
- Mailing Address (if different)
- Email
- Relationship to the Individual receiving services
- EIN

Prepare for Enrollment

Here is a list of items you will need for your enrollment. Please review the list and be sure to have this information readily available when completing your enrollment documents:

Employee Information:

- Full name (and any other names/aliases used)
- Date of birth
- Social Security Number
- Physical and Mailing address
- Contact info (email and phone)
- Citizenship status and relationship to the employer
- Driver's license number (if transporting the individual)
- Payment preference (check, direct deposit, or Paycard)
- If using direct deposit: bank name, routing/account numbers, and account type

Prepare for Enrollment

Here is a list of items you will need for your enrollment. Please review the list and be sure to have this information readily available when completing your enrollment documents:

Employment Information:

- Employment details including:
  - services provided
  - hourly wage
  - expected start date
- Whether the employee lives with the client or will administer medication or behavior support
- Number of clients served and any required specialized training
- Race/ethnicity, veteran status, disability status

Vendor(s) Agreement:

- Vendor(s) Name
- Service vendor(s) will be providing

Table of Contents

Overview & Getting Started

Acumen Fiscal Agent
Innovation · Opportunity · Freedom
DIRECT CARE INNOVATIONS
Acumen powered by DCI

What is EES?

The **Electronic Enrollment System (EES)** is a software solution designed to streamline the enrollment process by providing Clients and Employers the tools and resources to self-enroll, complete required paperwork, and track enrollment status.

Benefits:

- Provides an improved user experience
- Streamlined enrollment process
- Reduces redundant data inputs
- Minimizes the risk of inaccurate information

EES Terms

1. **Client**: The individual receiving services

2. **Employer**: An individual who is allowed to represent a Client, manage the Client's care, and manage the Client's enrollment. **Note**: The Employer & Client can be the same person.

3. **Employee**: An individual providing care to the Client

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 and the service the vendor will be providing.

EES Roles

The Electronic Enrollment System (EES) is designed to facilitate the self-enrollment process for the following roles:

- ✓ **Employer** is the Client (the same person)
- ✓ **Employer** (not the Client)

Support

Acumen agents and enrollment specialists may assist in completing the self-enrollment process. Their responsibilities include:

- ✓ Facilitate Enrollments
- ✓ Entering any additional Client and/or Employer information
- ✓ Entering budget information (authorization)
- ✓ Verifying documentation is completed accurately
- ✓ Granting a Good to Go/Welcome letter to the Employer and Client

Initial Registration

Employer & Client are the same person

Follow these steps if the Client is receiving and managing their services.

Initial Registration (Employer = Client)

1. Navigate to the **NJ Programs Electronic Enrollment** page:

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

1

https://www.acumenfiscalagent.com/nj/ees/

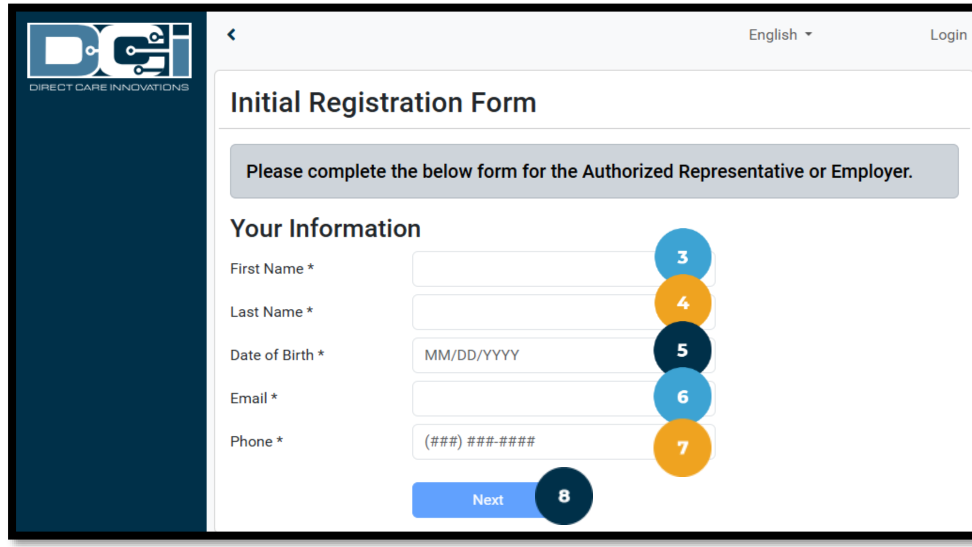
Initial Registration (Employer = Client)

Complete the Initial Registration Form:

3. First Name (**required**)
4. Last Name (**required**)
5. Date of Birth (**required**):
    - Enter the date in **MM/DD/YYYY** format

    OR

    - Click in the field to select a date from the calendar
6. Email (**required**)
7. Phone (**required**)
8. Click **Next**



EES will look for the Client based on the information we received on your Authorization. Please be sure to enter the Client's data exactly as it is on your Authorization.

Initial Registration (Employer = Client)

Are you the person receiving services?

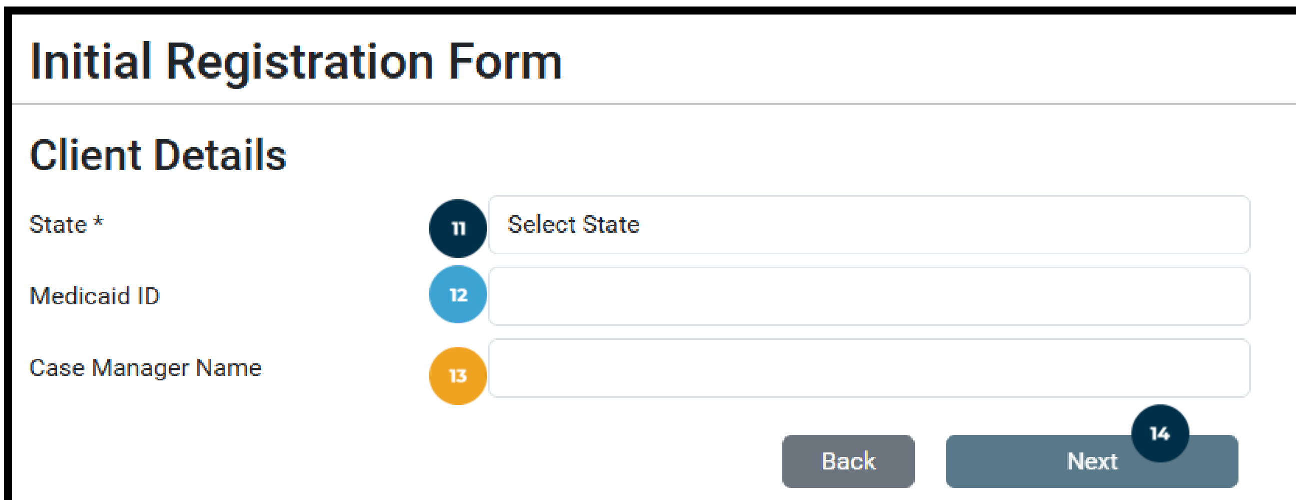
9. Click **Yes**
10. Click **Next** to continue

✓ Assigned both the Client & Employer roles

Initial Registration (Employer = Client)

Complete the Client Details:

11. State: Select State (**required**)
12. Medicaid ID: Enter Medicaid ID (optional)
13. Case Manager Name: (**Leave Blank**)
14. Click **Next**

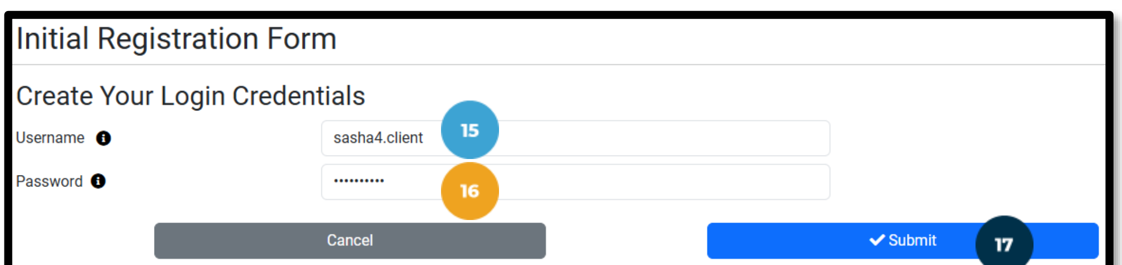


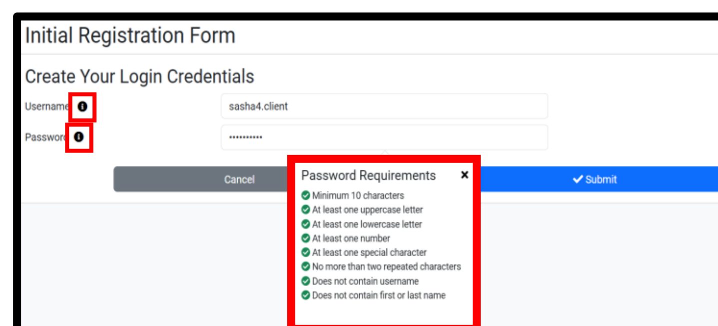
Initial Registration (Employer = Client)

Create login credentials:

15. 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 is the period "."
16. Password (**required**): Create a password to log into the EES portal.
    - ✓ Must contain 10 characters (1 uppercase and lowercase letter, number, and special character)
    - ✓ No more than two repeated characters in a row
    - ✓ Does not contain three consecutive characters of the first or last name
    - ✓ Does not contain three consecutive characters of username
17. Click **Submit**

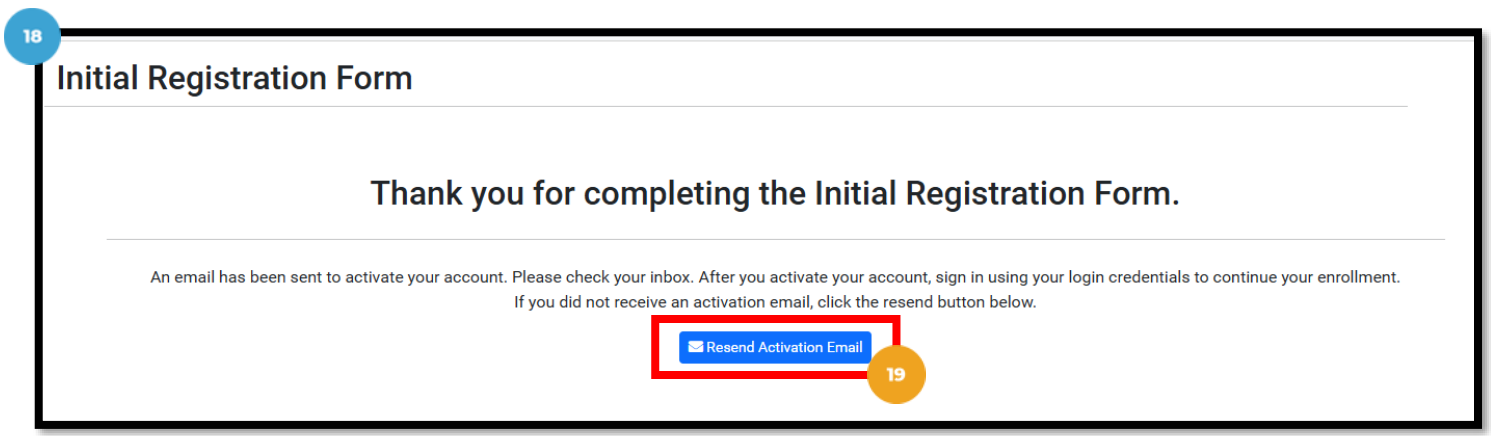
Tip: Click the information button to verify username and password requirements are met.





Initial Registration (Employer = Client)

18. The confirmation message populates. An email will be sent to the email address entered. See Activate Profile to continue.
19. Optionally, click the **Resend Activation Email** button if you did not receive an activation email.



Employer is NOT the Client

Complete this process if the client and employer are two different people

Initial Registration (Employer is NOT the Client)

1. Navigate to the **NJ Programs Electronic Enrollment** page:
2. Click the **Go to Electronic Enrollment** button

1

https://www.acumenfiscalagent.com/nj/ees/

Initial Registration (Employer is NOT the Client)

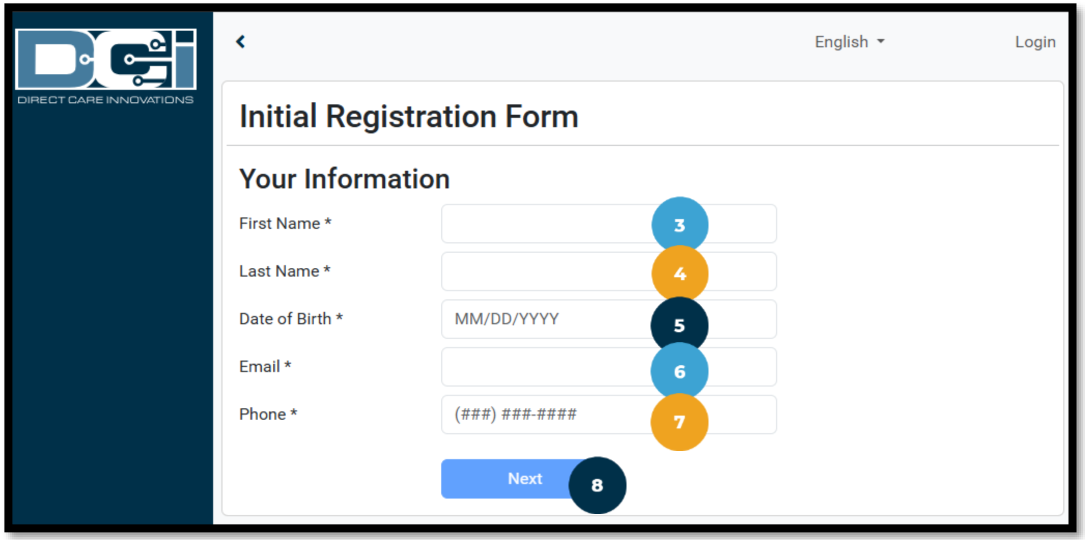
Complete the Initial Registration Form:

Enter the **Employer's** information here, **NOT** the Client's information:

3. First Name (**required**)
4. Last Name (**required**)
5. Date of Birth (**required**):
   - Enter the date in **MM/DD/YYYY** format

   OR

   - Click in the field to select a date from the calendar
6. Email (**required**)
7. Phone (**required**)
8. Click **Next**

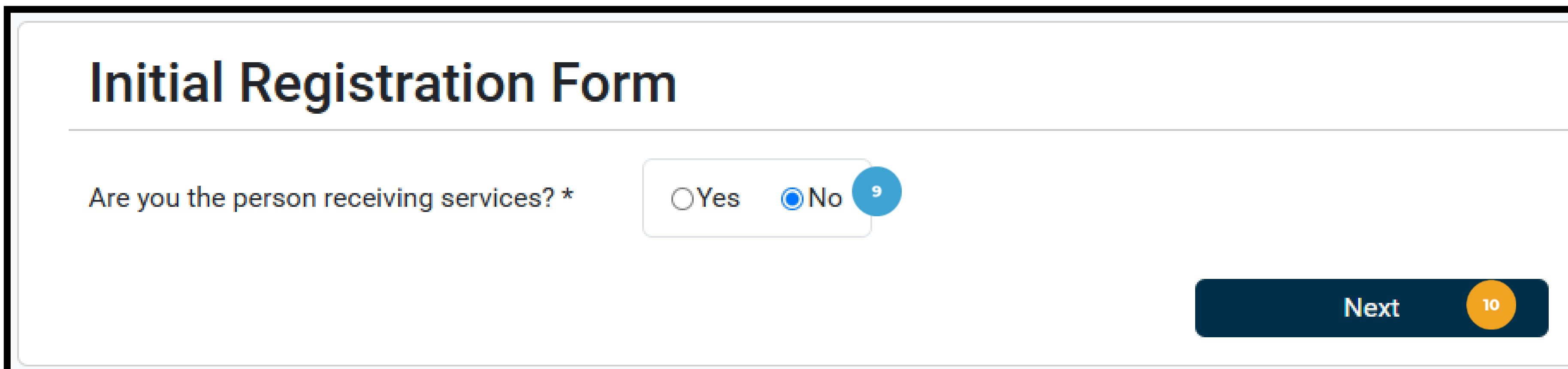


EES will look for the Client based on the information we received on your Authorization. Please be sure to enter the Client's data exactly as it is on your Authorization.

Initial Registration (Employer is NOT the Client)

Are you the person receiving services?

9. Click **No**
10. Click **Next** to continue

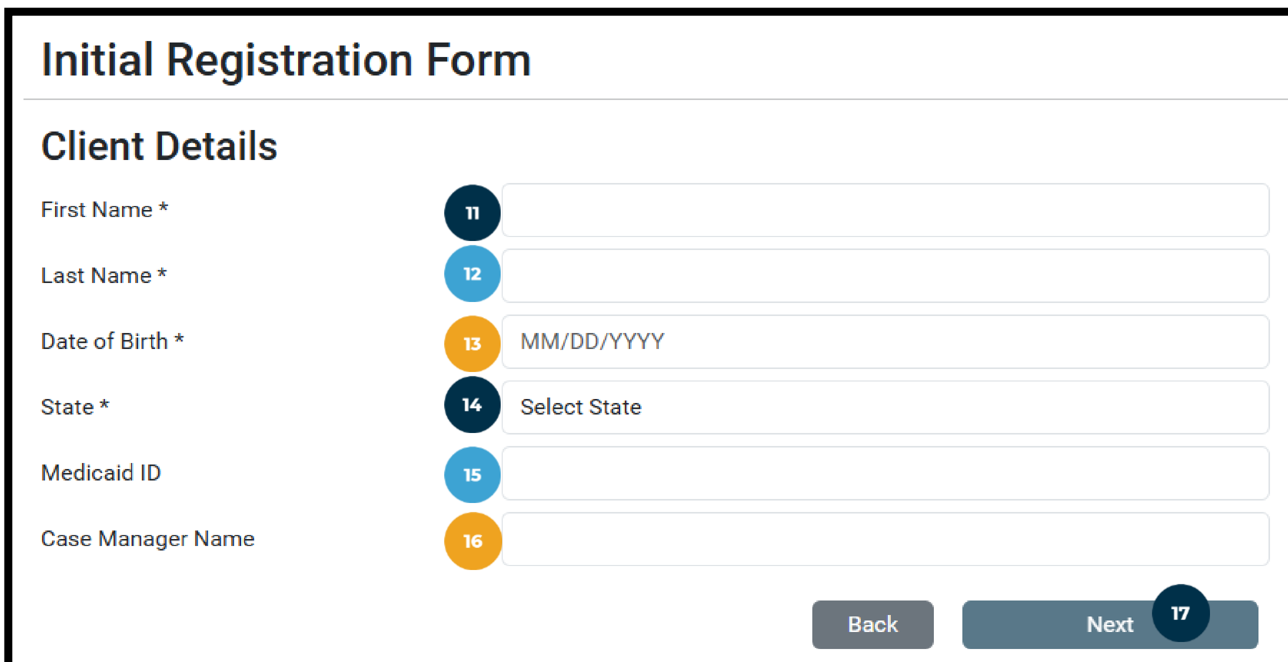


Initial Registration (Employer is NOT the Client)

Proceed to complete the Client Details:

11. First Name (**required**)
12. Last Name (**required**)
13. Date of Birth (**required**)
14. State (**required**)
15. Medicaid ID (optional)
16. Case Manager Name (Leave Blank)
17. Click **Next**

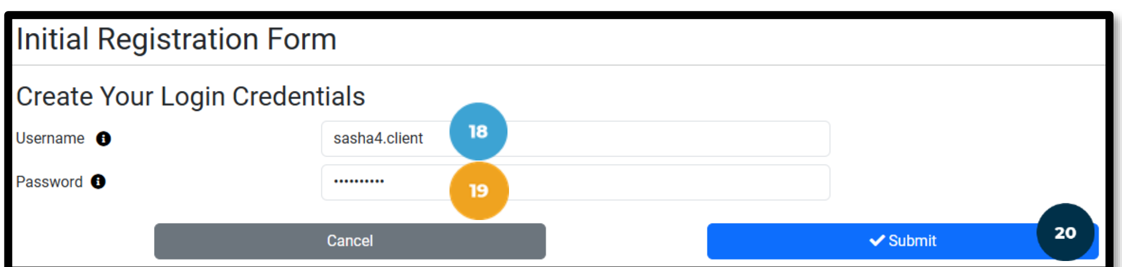
EES will look for the Client based on the information we received on your Authorization. Please be sure to enter the Client's data exactly as it is on your Authorization.



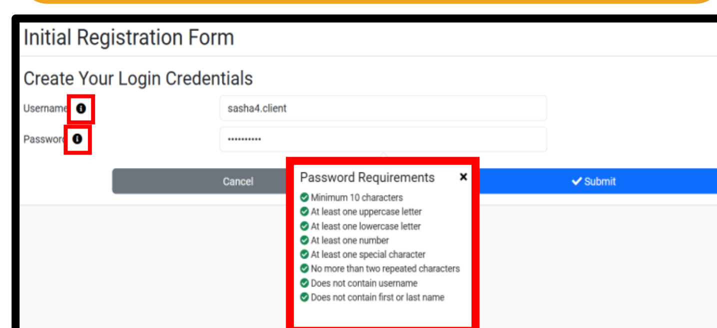
Initial Registration (Employer is NOT the Client)

Create login credentials:

18. 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 is the period “.”
19. Password (**required**): Create a password to log into the EES portal.
    - ✓ Must contain 10 characters (1 uppercase and lowercase letter, number, and special character)
    - ✓ No more than two repeated characters in a row
    - ✓ Does not contain three consecutive characters of the first or last name
    - ✓ Does not contain three consecutive characters of username
20. Click **Submit**

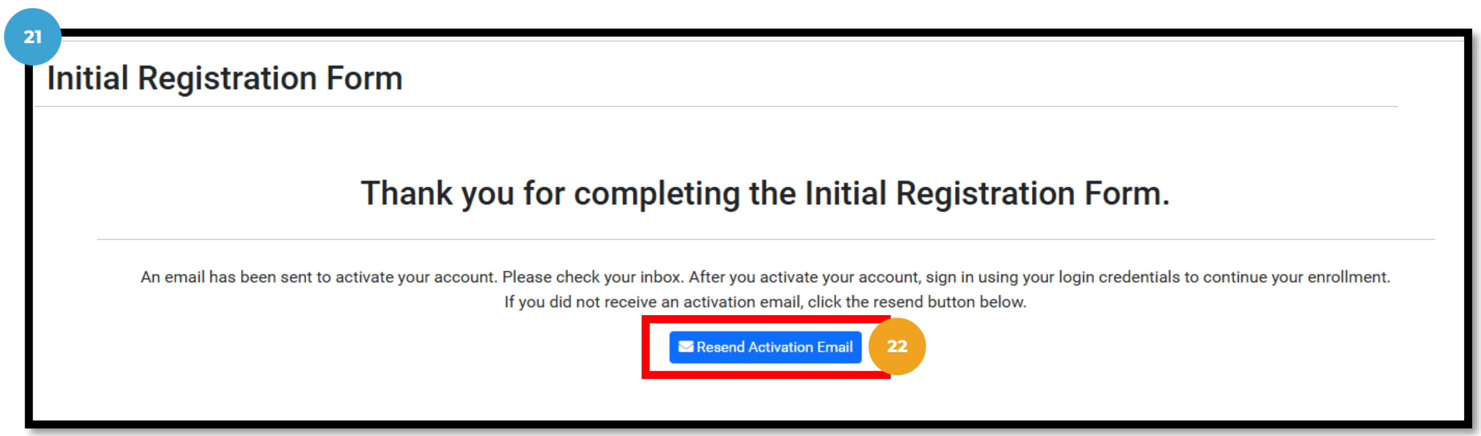


Tip: Click the information button to verify username and password requirements are met.



Initial Registration (Employer is NOT the Client)

21. The confirmation message populates. An email is sent to the email address entered. See **Activate Profile** section to continue.
22. Optionally, click the **Resend Activation Email** button if you did not receive an activation email.

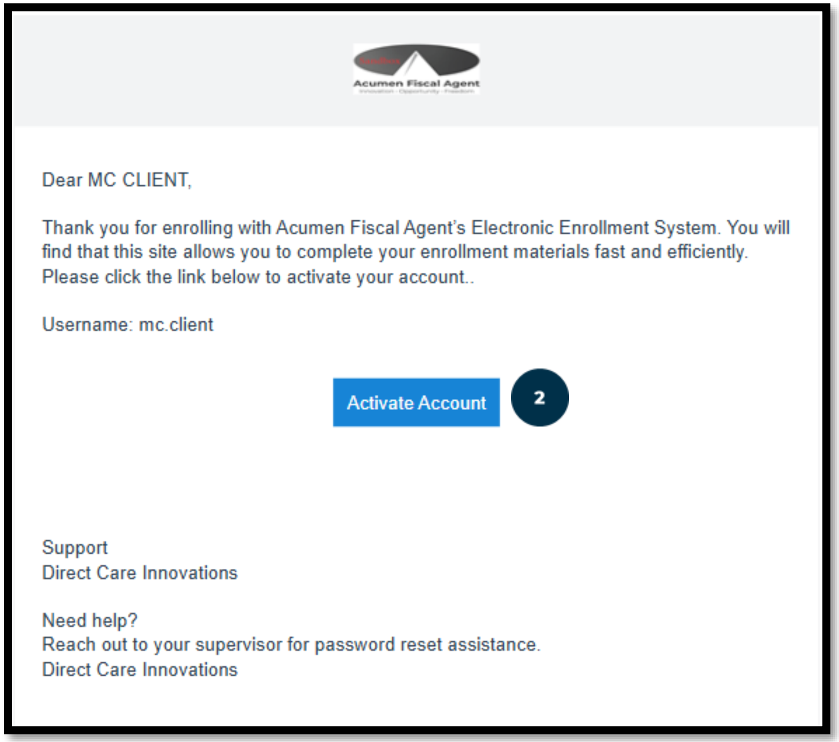


Instructions for logging into EES using a tablet or mobile device

Employer completes this process by using a **tablet** or **mobile** device.

Activate Profile –DCI Mobile Full Site

1. Upon completing Initial Registration, an email is sent to the Employer for account activation.
   - ✓ **Title:** Welcome to Acumen's Electronic Enrollment System
   - ✓ **Sender:** no-reply@acumen2.net
   - ✓ Check the spam folder if necessary
2. Click the blue **Activate Account** button in the email
   - ❖ Only active for a specific amount of time (typically 24 hours)

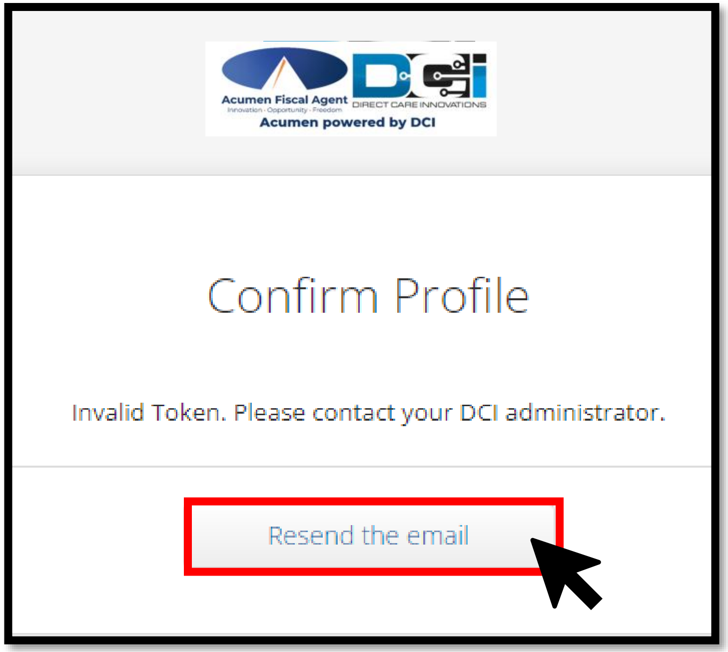


Activate Profile

Note:

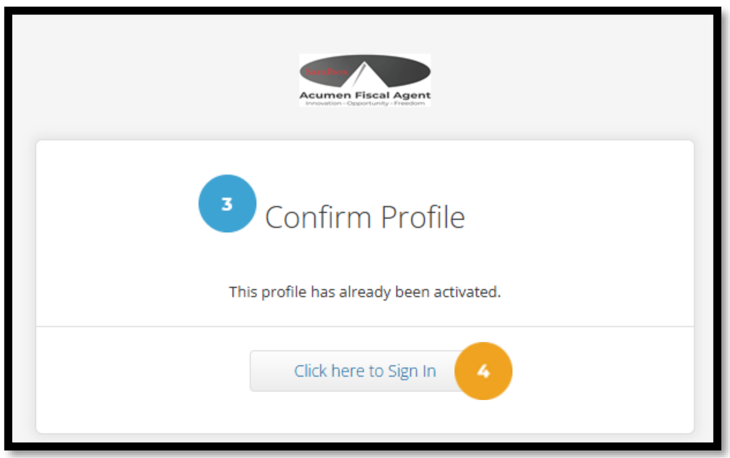
- If you clicked on the activate profile link after 24 hours of receiving it, you may receive an error message saying “Invalid Token - Please contact your DCI administrator”

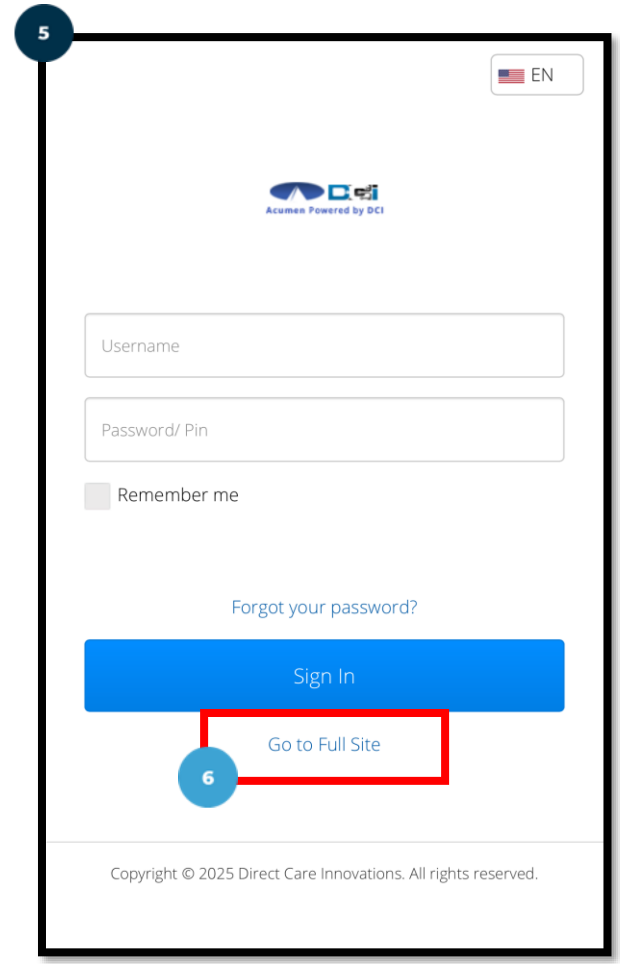
- Simply click the **Resend the email** button below and check your email for a new link to activate your profile (see step 2).



Activate Profile –DCI Mobile Full Site

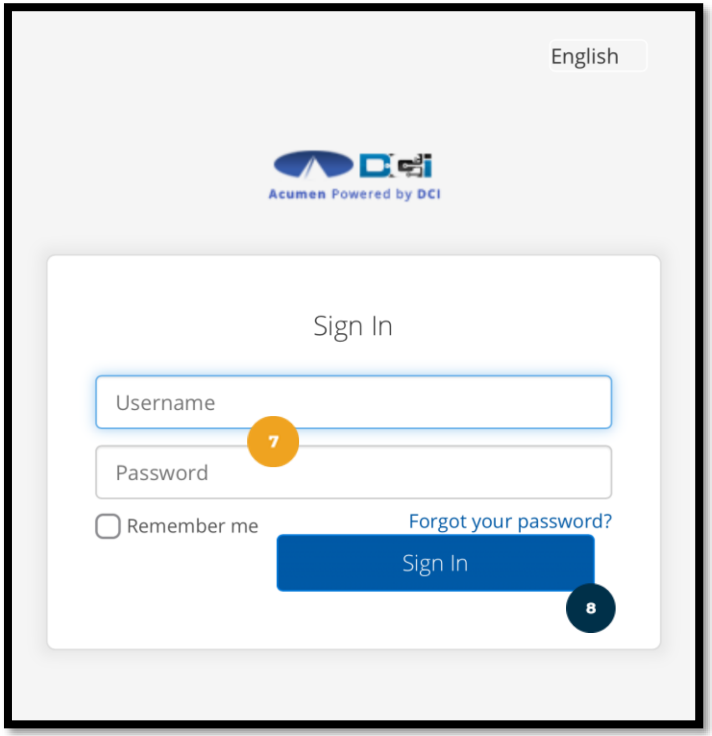
3. The Activate Account button opens a web page that states **Confirm Profile: This Profile has already been activated**
4. Tap the **Click here to Sign In** button
5. You will be redirected to the **DCI Mobile Web** login screen.
6. ***Important!** Tap **Go to Full Site** to access the **DCI Mobile Full Site.**





Activate Profile –DCI Mobile Full Site

7. Enter the **username** and **password** created in the Initial Registration form
8. Click **Sign In** to begin the registration process



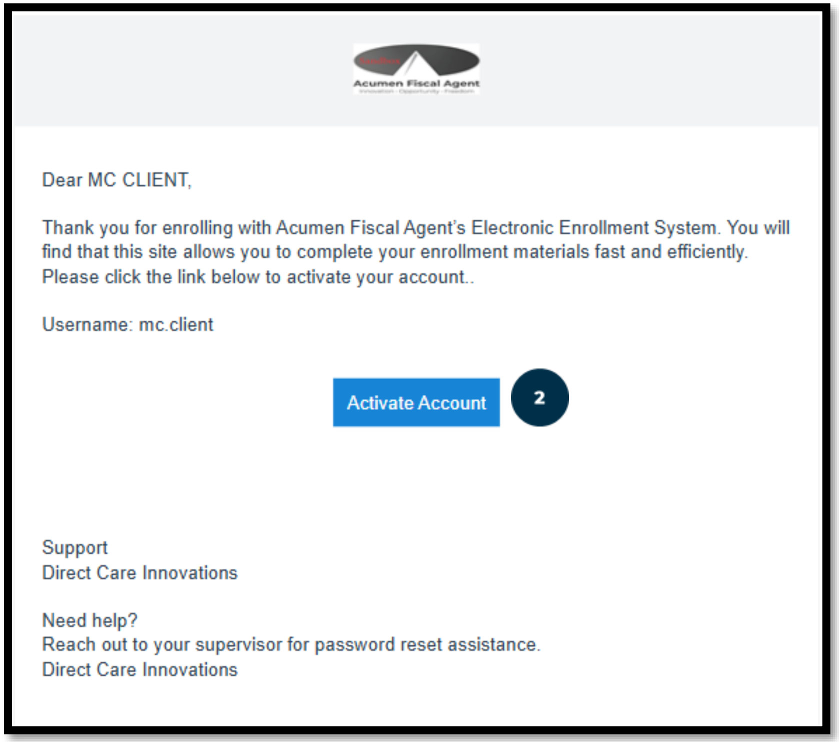
Instructions for logging into EES using a desktop or laptop computer

*Employer completes this process by using a **desktop** or **laptop** computer.

Important! If using a tablet or mobile device, see Log into EES via DCI Mobile Full Site section.

Activate Profile

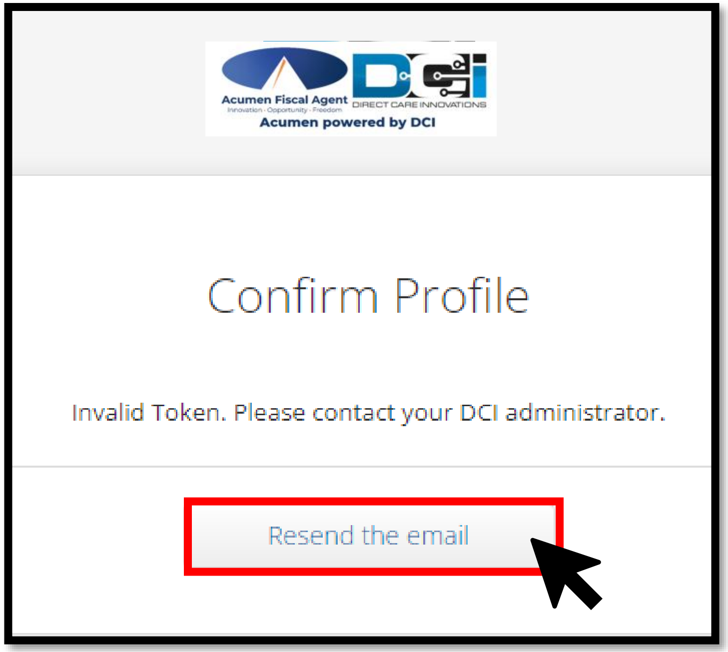
1. Upon completing Initial Registration, an email is sent to the Employer for account activation.
   - ✓ **Title:** Welcome to Acumen's Electronic Enrollment System
   - ✓ **Sender:** no-reply@acumen2.net
   - ✓ Check the spam folder if necessary
2. Click the blue **Activate Account** button in the email
   - ❖ Only active for a specific amount of time (typically 24 hours)



Activate Profile

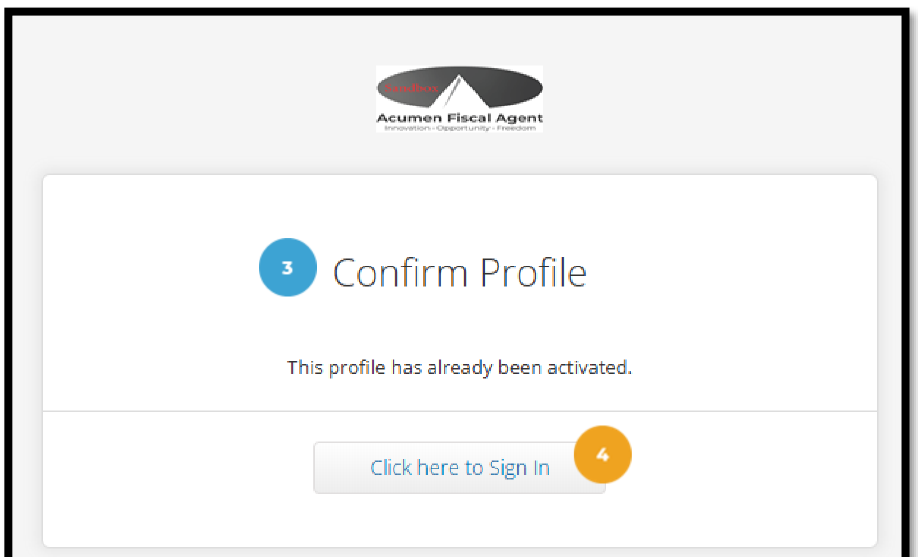
Note:

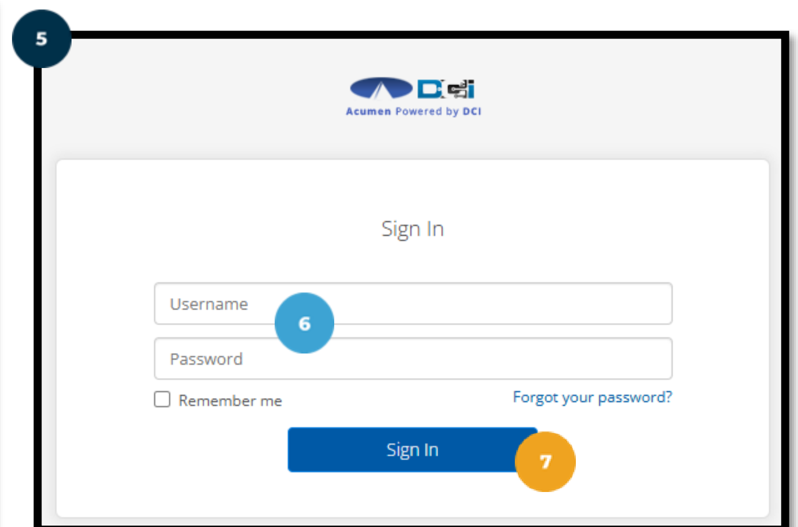
- If you clicked on the activate profile link after 24 hours of receiving it, you may receive an error message saying “Invalid Token - Please contact your DCI administrator”
- Simply click the **Resend the email** button below and check your email for a new link to activate your profile (see step 2).



Activate Profile

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. The Enrollee is 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



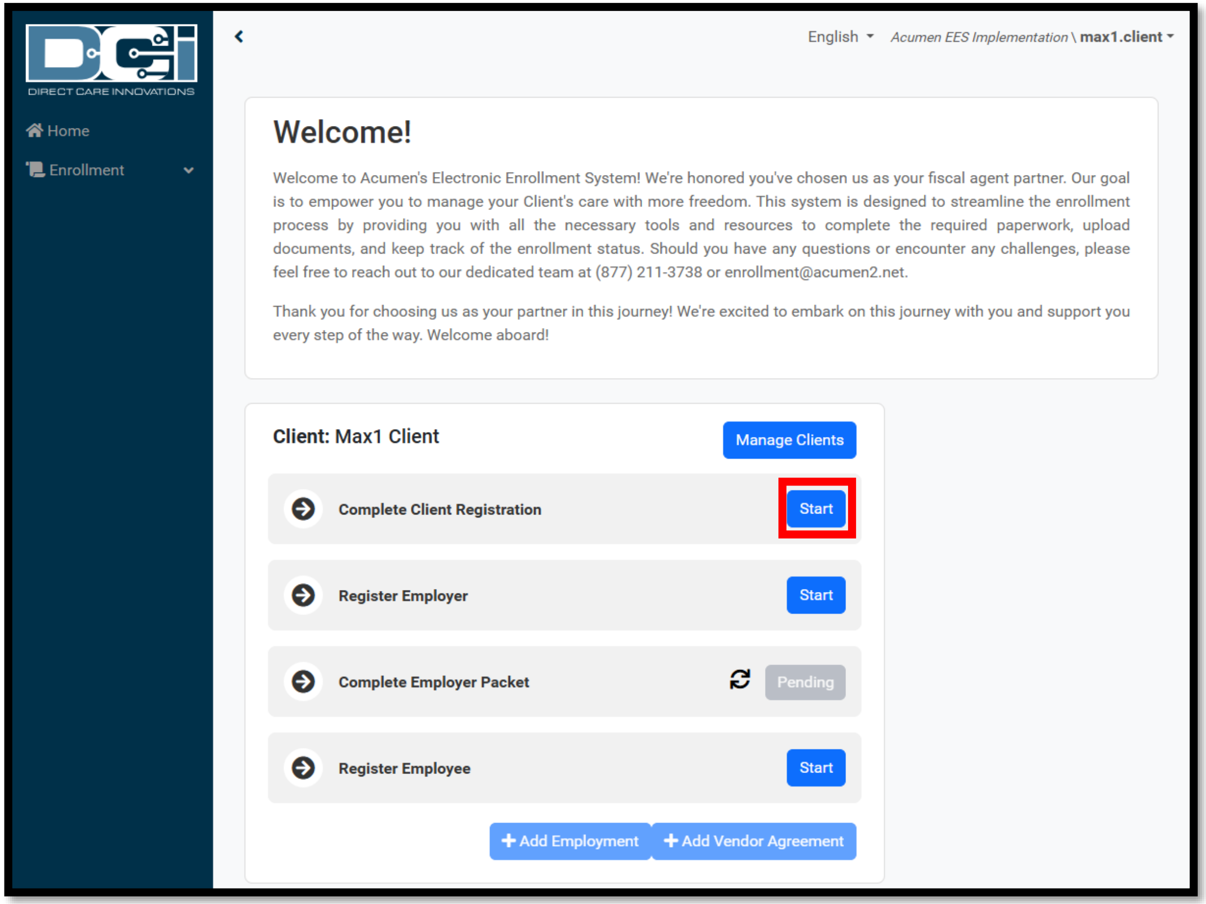


Complete Client Registration

Employer completes this process

Complete Client Registration

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



Complete Client Registration

Client information auto-populates at the top of the page with the information provided during the initial registration

Complete Additional Client Details:

1. Middle Name (optional)
2. Medicaid # (optional)
3. Gender (**required**): Select one
    - Male
    - Female
    - Other
    - Prefer Not to Say
4. Phone (**required**):
5. Mobile Number (optional):
6. Email (**required**):

Client

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

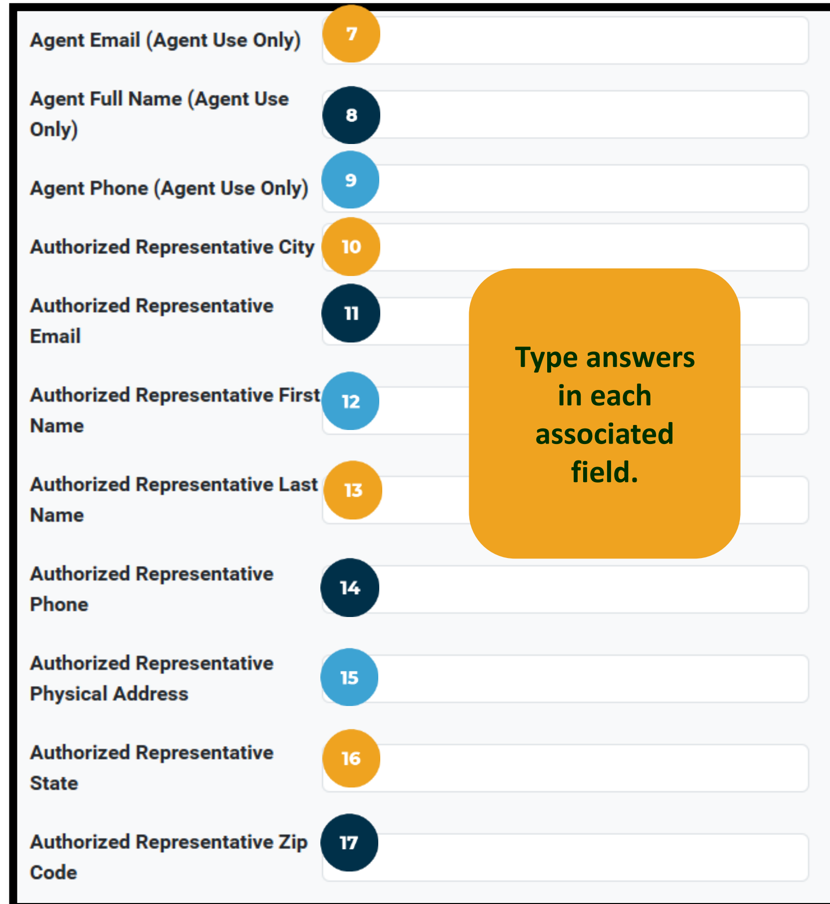
Additional Client Details

Middle Name	1	
Medicaid #	2	
Gender *	3	Male Female Other Prefer Not to Say
Phone *	4	(###) ###-#### Enter your own phone number if one is not available for the Client.
Mobile Number	5	(###) ###-####
Email *	6	Enter your own email address if one is not available for the Client.

Complete Client Registration

Complete Additional Client Details:

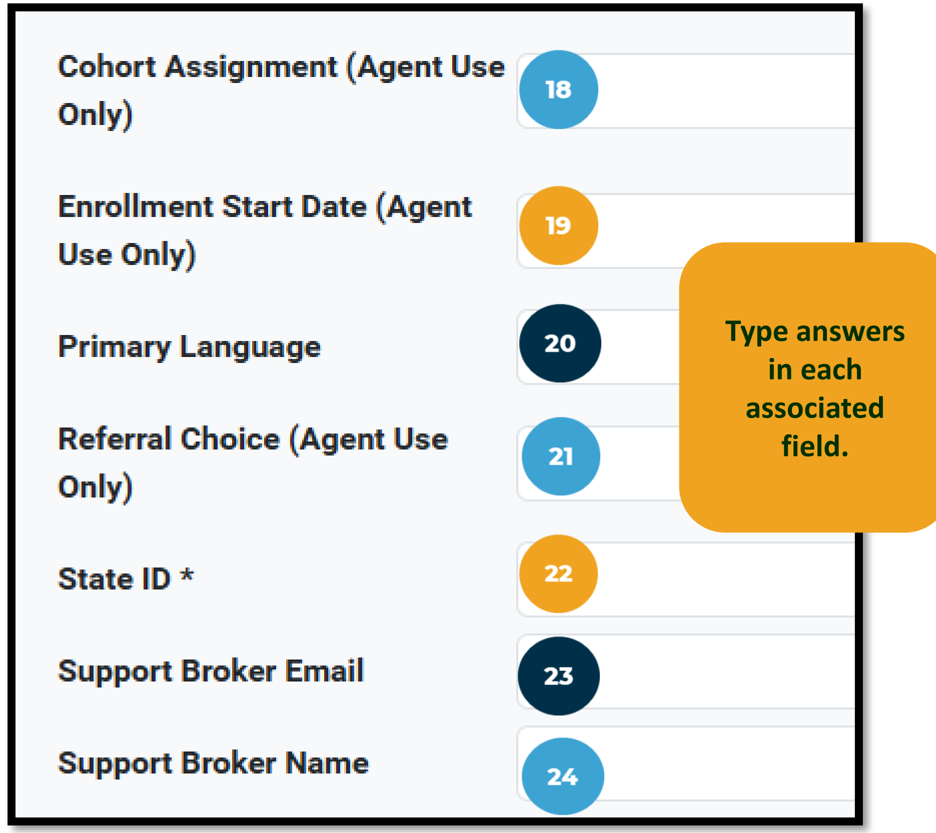
7. Agent Email (Agent Use Only)
8. Agent Full Name (Agent Use Only)
9. Agent Phone (Agent use only)
10. Authorized Rep. City (optional)
11. Authorized Rep. Email (optional)
12. Authorized Rep. First name (optional)
13. Authorized Rep. Last name (optional)
14. Authorized Rep. Phone (optional)
15. Authorized Rep. Physical Address (optional)
16. Authorized Rep. State (optional)
17. Authorized Rep. Zip Code (optional):



Complete Client Registration

Complete Additional Client Details:

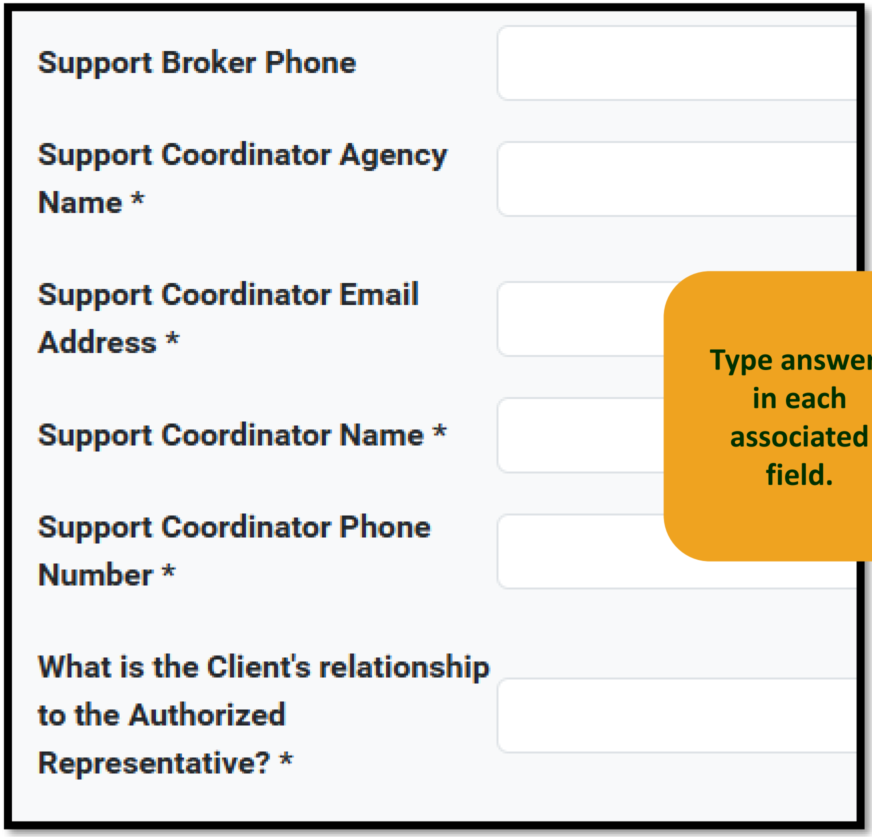
18. Cohort Assignment (Agent Use Only)
19. Enrollment Start Date (Agent Use Only)
20. Primary Language (optional)
21. Referral Choice (Agent Use Only)
22. State ID – DDD ID (**required**)
23. Support Broker Email (optional)
24. Support Broker Name (optional)



Complete Client Registration

Complete Additional Client Details:

25. Support Broker Phone (optional)
26. Support Coordinator Agency Name (**required**)
27. Support Coordinator Email Address (**required**)
28. Support Coordinator Name (**required**)
29. Support Coordinator Phone Number (**required**)
30. What is the Client's relationship to the Authorized Representative? (**required**)



Type answers in each associated field.

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

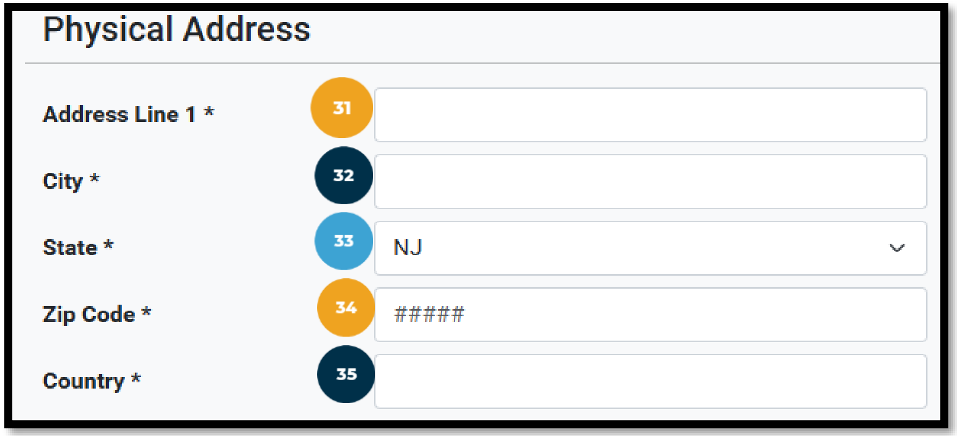
Complete Client Registration

Complete the Physical Address:

31. Address Line 1 (**required**)
32. City (**required**)
33. State (**required**)
34. Zip Code (**required**)
35. Country (**required**)

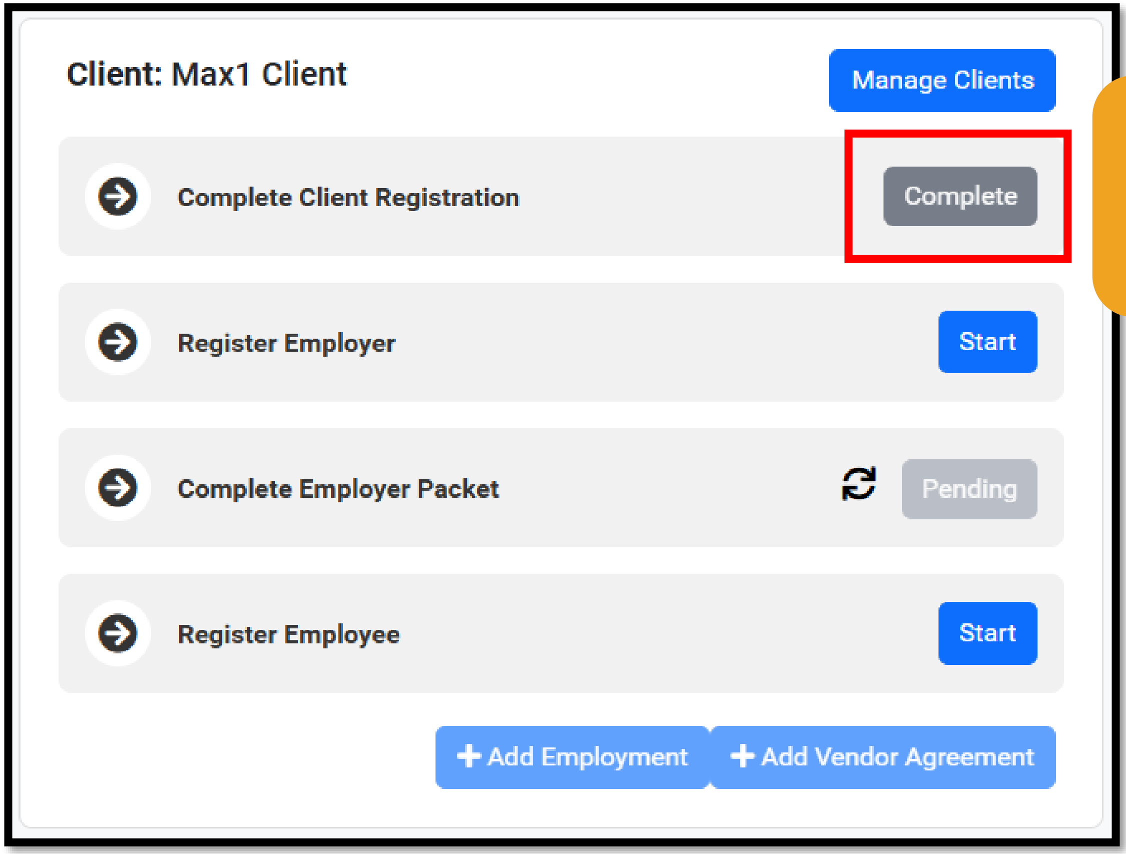
Complete the Case Manager Details:

36. Case Manager Name (Leave Blank)
37. Case Manager Phone (Leave Blank)
38. Case Manager Email (Leave Blank)
39. Click **Save** to complete the Client Registration process



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

Complete Client Registration



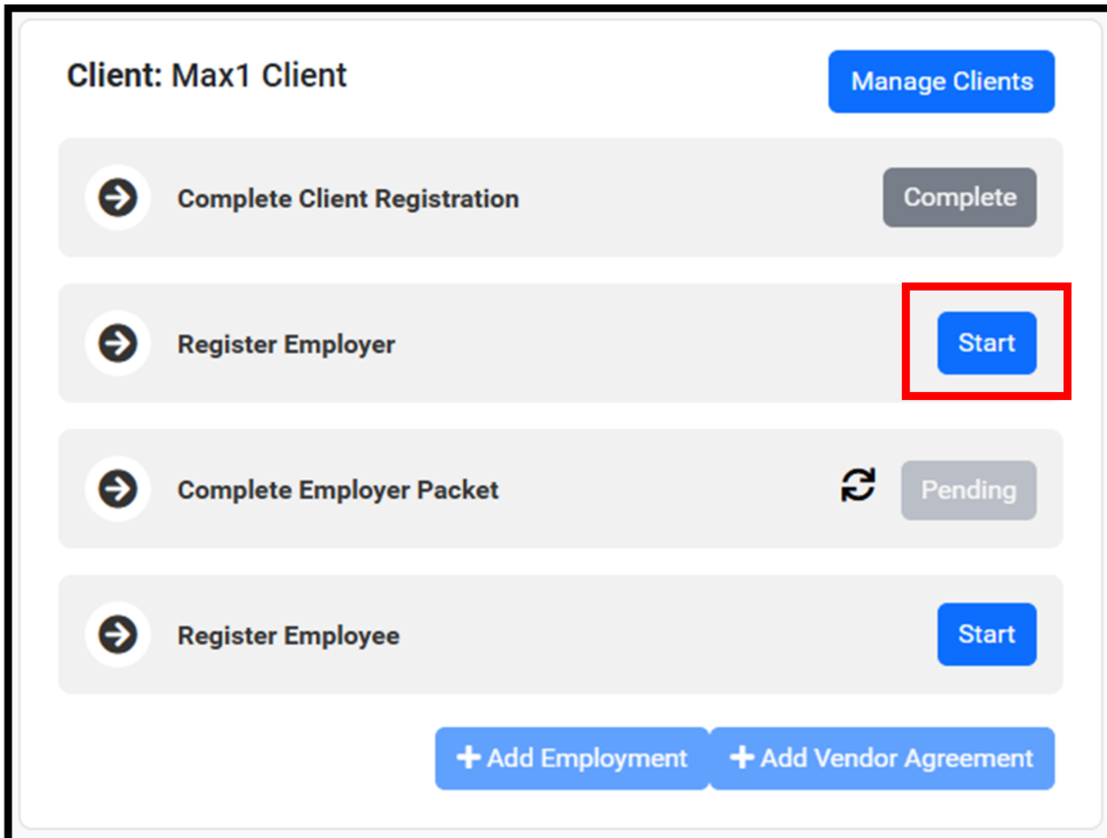
Complete Client Registration is marked Complete

Register Employer

Employer completes this process

Register Employer

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

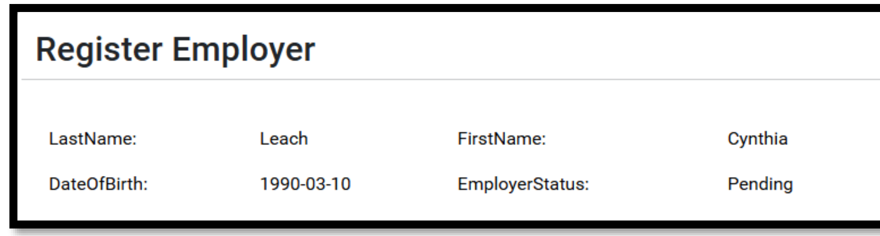


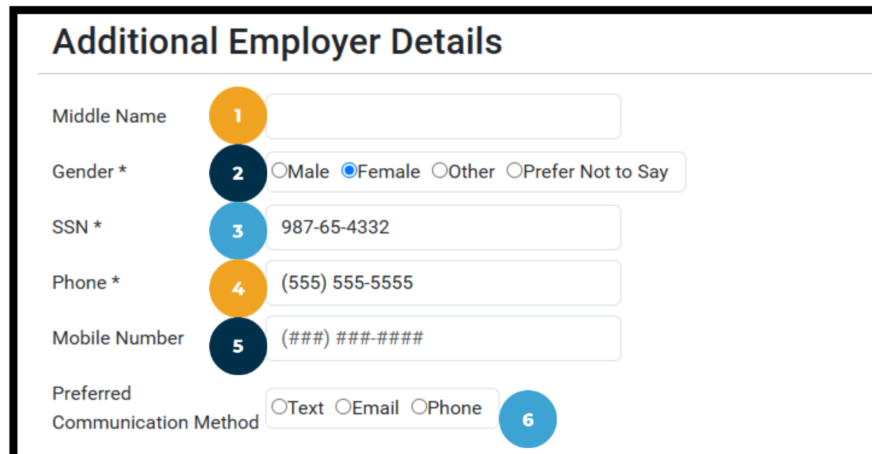
Register Employer

Complete the Additional Employer Details section:

1. Middle Name (optional)
2. Gender (**required**): Select one
   - Male
   - Female
   - Other
   - Prefer Not to Say
3. SSN (**required**)
4. Phone (**required**)
5. Mobile Number (optional) - required to receive SMS text message communication
6. Preferred Communication Method (optional): Select one
   - Text
   - Email
   - Phone

Employer information auto-populates at the top of the page with the information provided during the initial registration

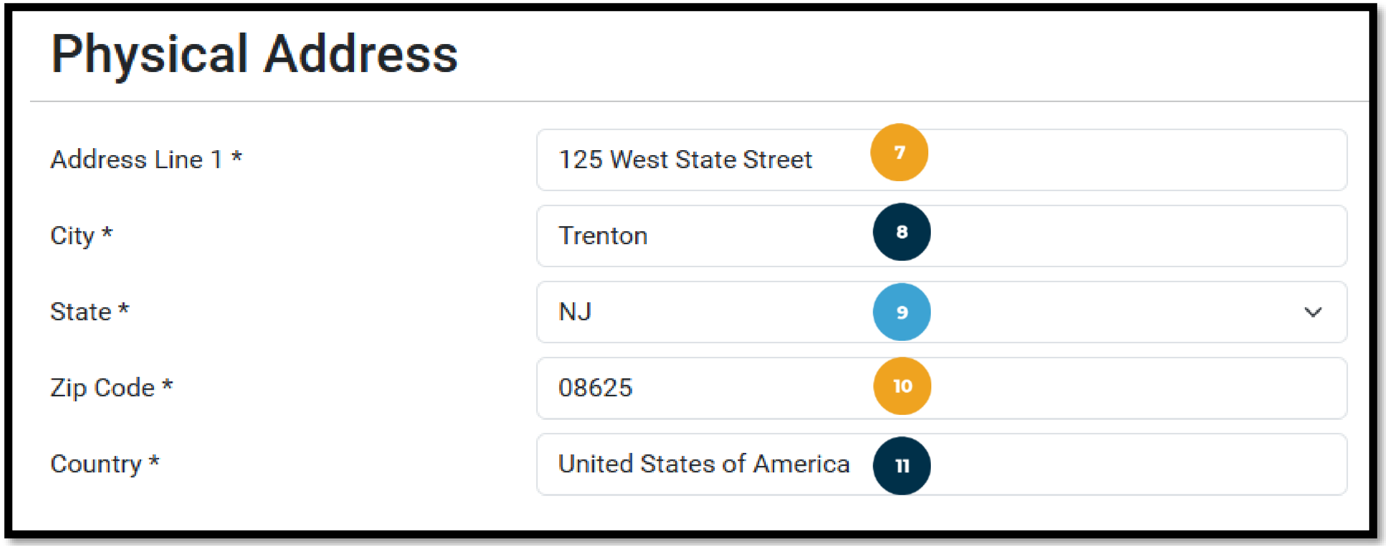




Register Employer

Complete Physical Address details:

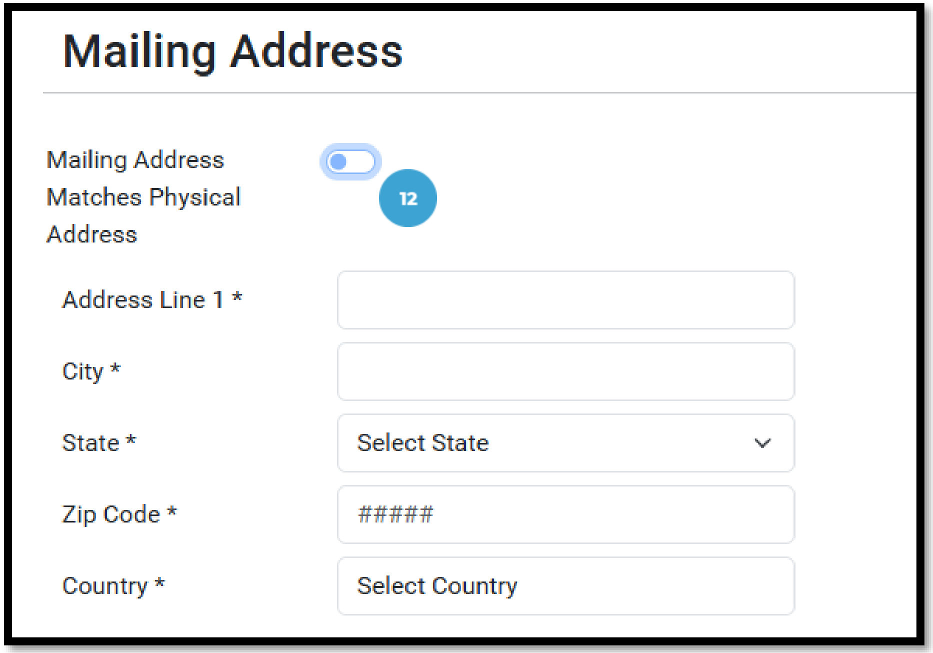
7. Address Line 1 (**required**)
8. City (**required**)
9. State (**required**)
10. Zip Code (**required**)
11. Country (**required**)

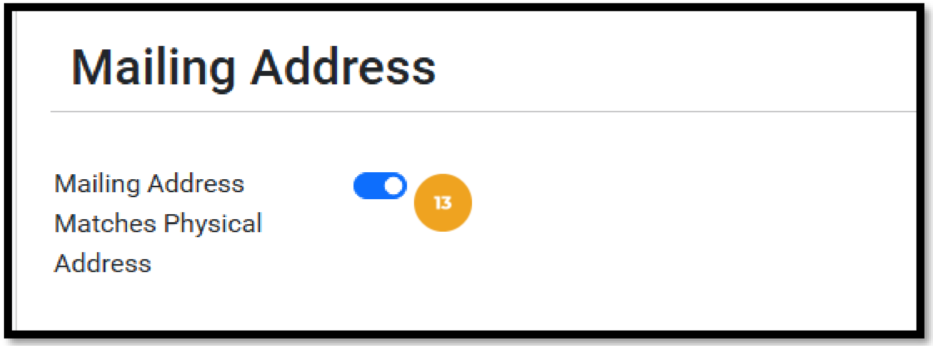


Register Employer

Complete Mailing Address details:

12. Mailing Address Matches Physical Address:
    - Defaults to **OFF**, indicating the mailing address does not match the physical address. Add the mailing address:
        a. Address Line 1 (**required**)
        b. City (**required**)
        c. State (**required**)
        d. Zip Code (**required**)
        e. Country (**required**)
13. Toggle to **ON** position if the mailing address is the same as the physical address





Register Employer

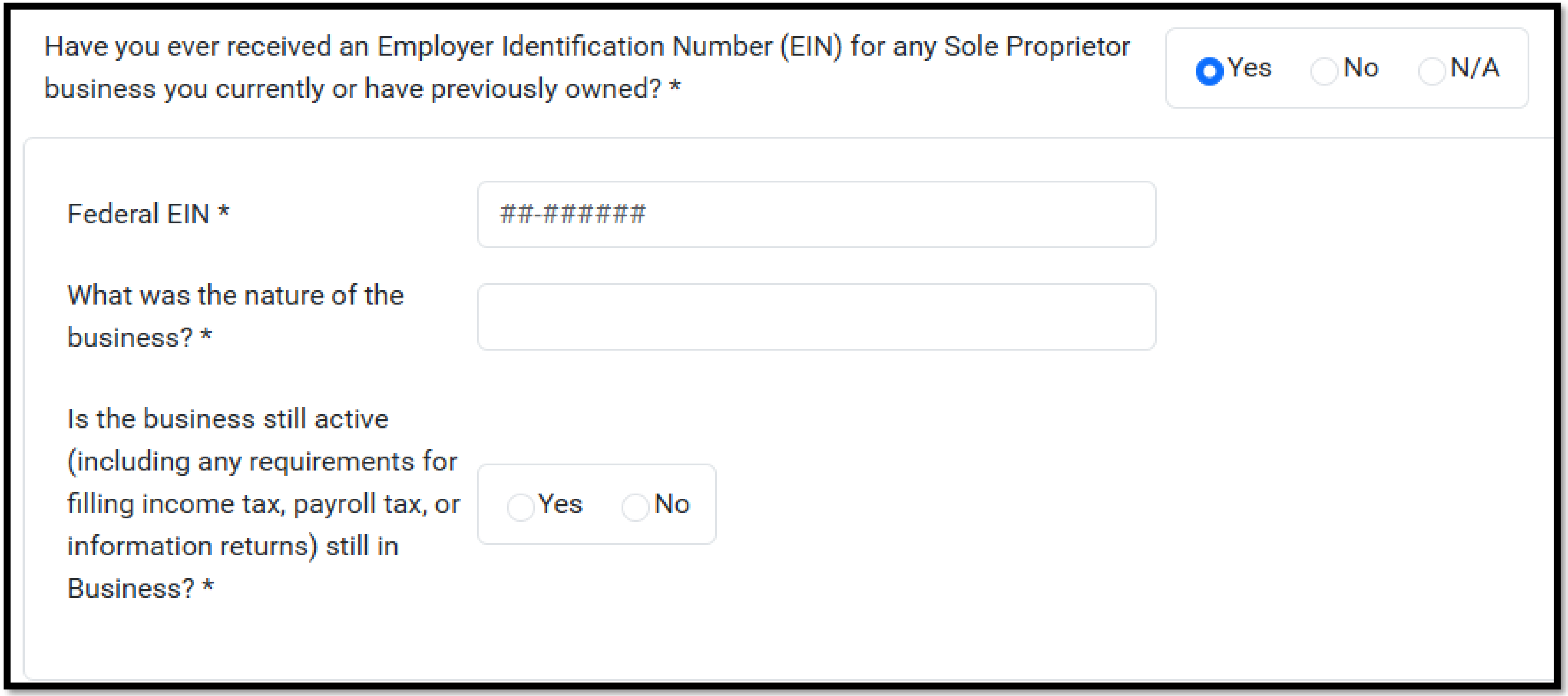
14. Complete Business Details section (**required**)
    - Answer all four questions accurately

Business Details 14

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.

Register Employer

- Options:
  1. Yes – Complete all required additional fields
  2. No – No other information required
  3. N/A – Not Applicable (No other information required)


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

Register Employer

- Options:
  1. Yes – Complete all required additional fields
  2. No – No other information required
  3. N/A – Not Applicable (No other information required)

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 *

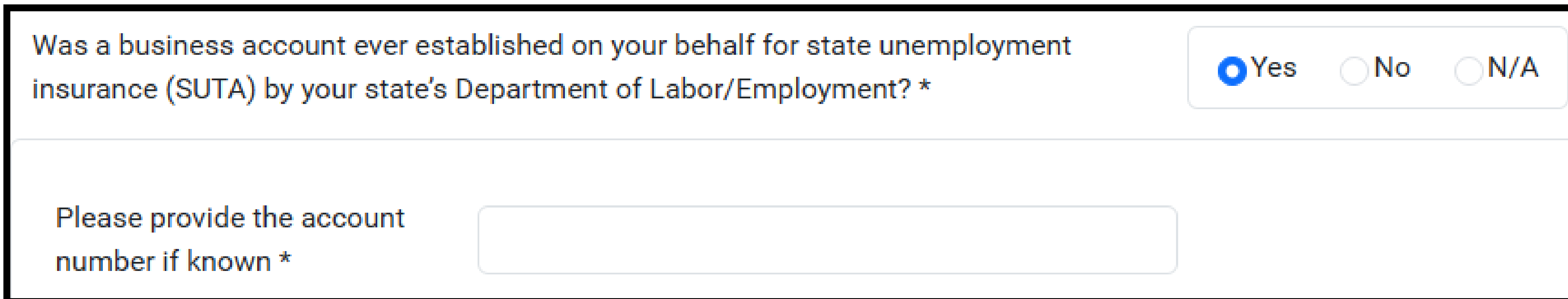
MM/DD/YYYY

MM/DD/YYYY

Register Employer

❖ Options:

1. Yes – Complete all required additional fields
2. No – No other information required
3. N/A – Not Applicable (No other information required)



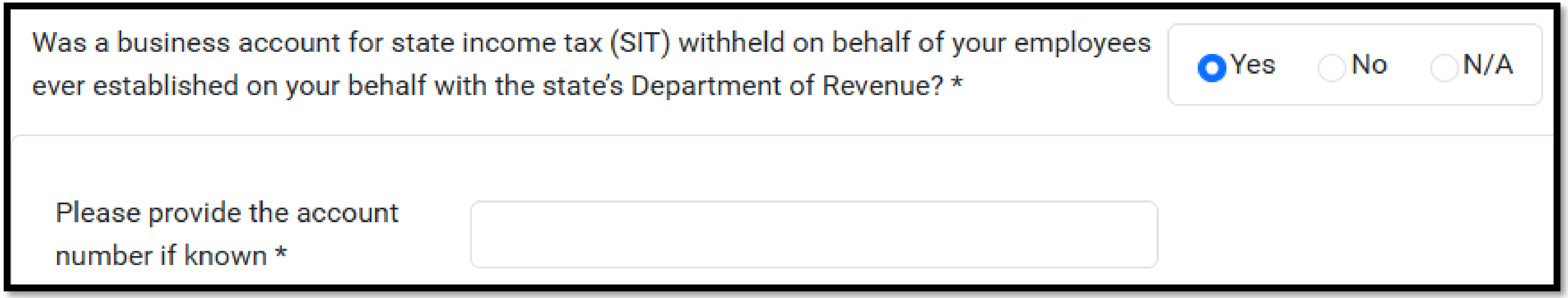
Was a business account ever established on your behalf for state unemployment insurance (SUTA) by your state's Department of Labor/Employment? *

Yes No N/A

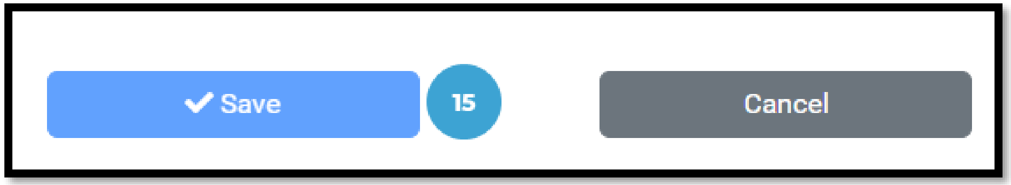
Please provide the account number if known *

Register Employer

❖ Options:
1. Yes – Complete all required additional fields
2. No – No other information required
3. N/A – Not Applicable (No other information required)

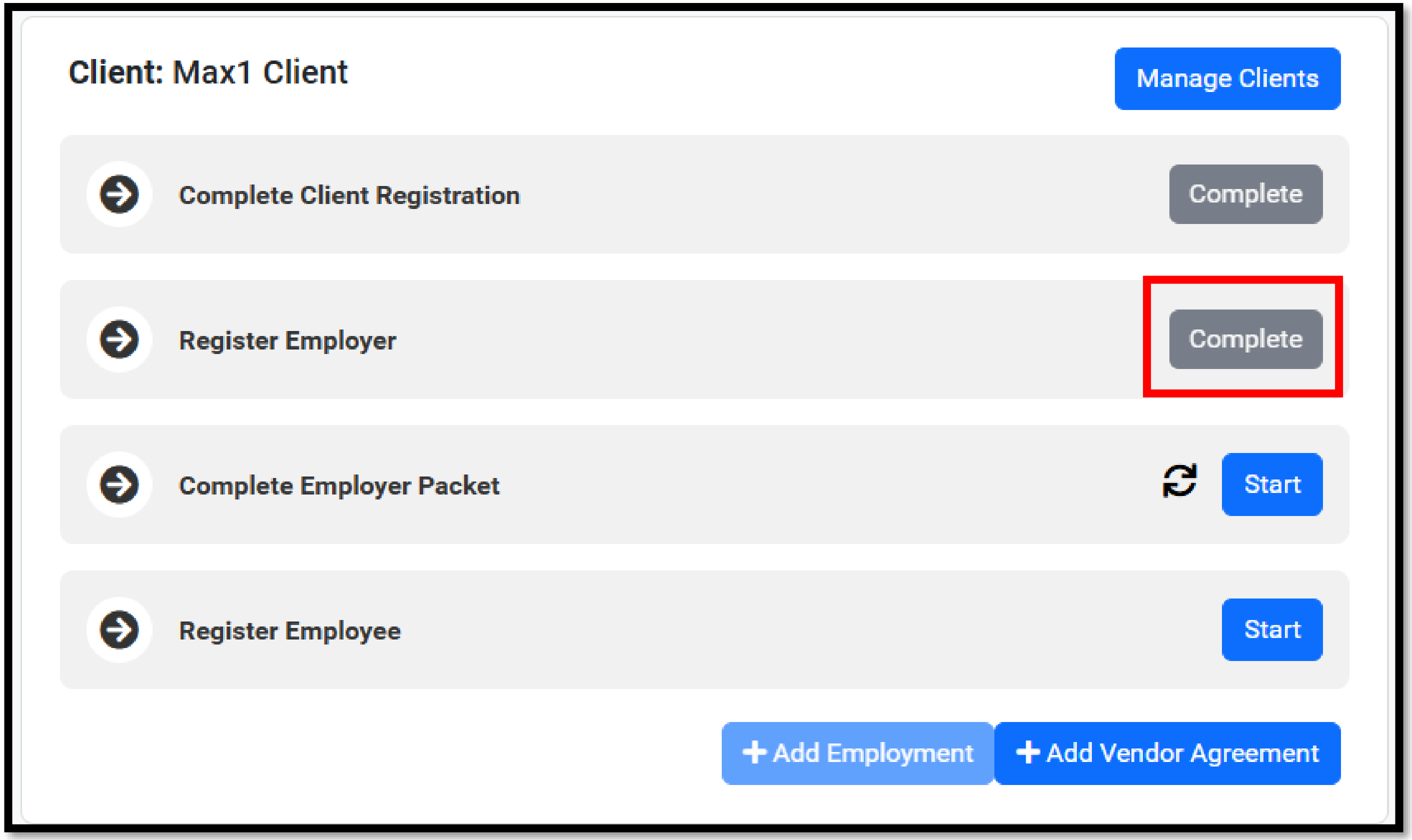


15. Click **Save** after completing all four questions



Register Employer

The Enrollment Dashboard displays with Register Employer marked **Complete**



Complete Employer Packet

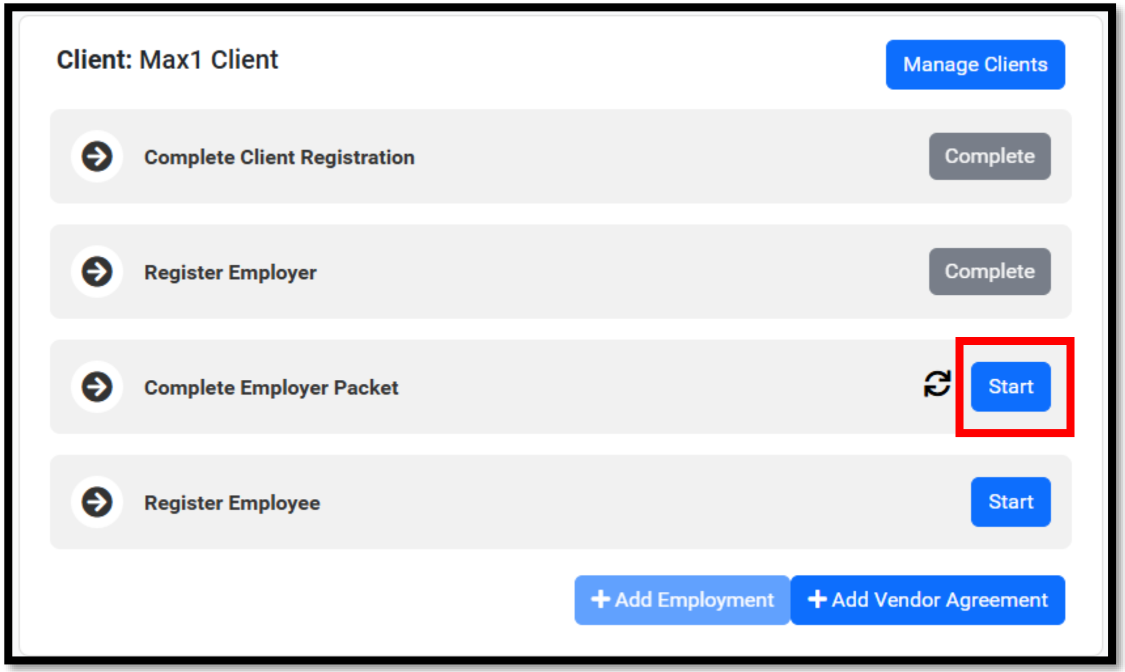
Employer completes this process

Complete Employer Packet

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

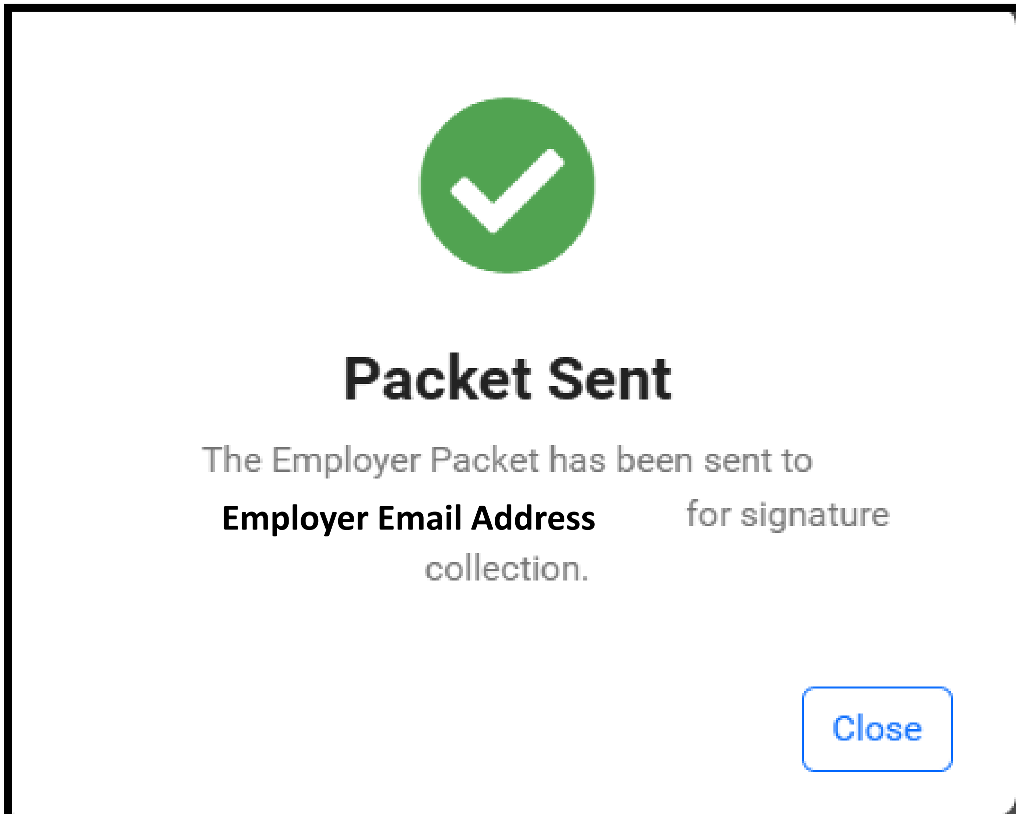
Important! Prior to completing the Employer Packet, the following must be completed:

1. Client Registration
2. Register Employer



Complete Employer Packet

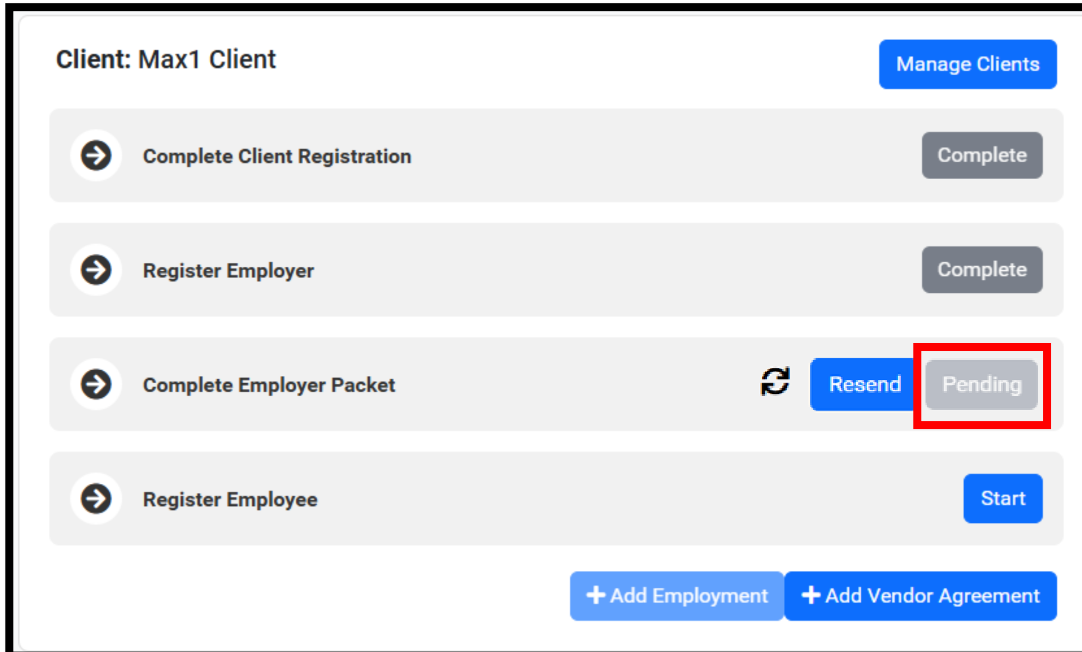
- The pop-up message **The Employer Packet has been sent to [Employer's email address] for signature collection** displays.
- Click **Close**



Complete Employer Packet

- The **Resend** button will resend the DocuSign email so that you can sign the packet.
- **Please note:**
  - ✓ If you changed any information in EES, the changes will not be reflected in the packet you will be receiving through DocuSign.
  - ✓ You will need to contact our agent team to have them send you a new packet with the updated information

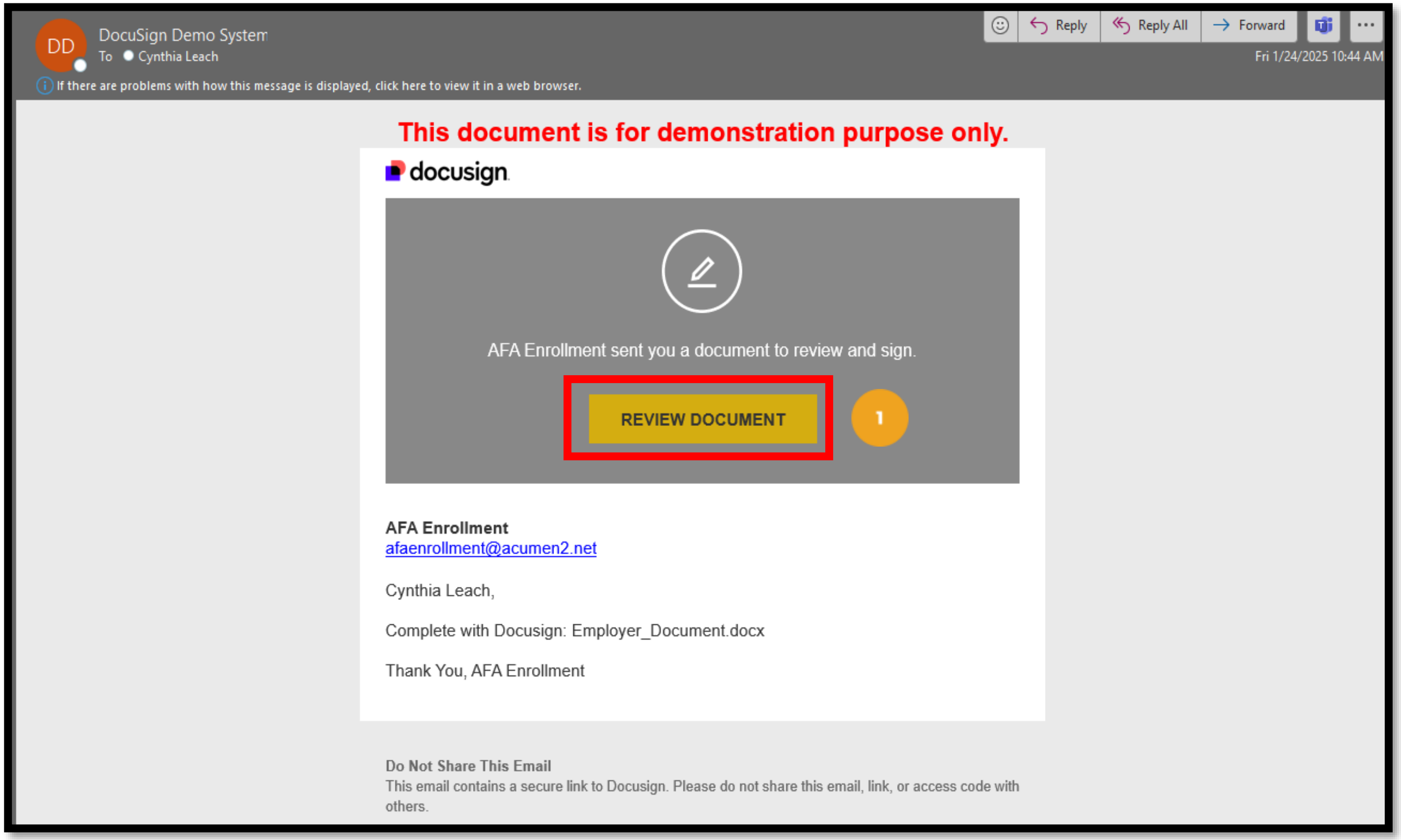
Complete Employer Packet displays Pending



Complete Employer Packet

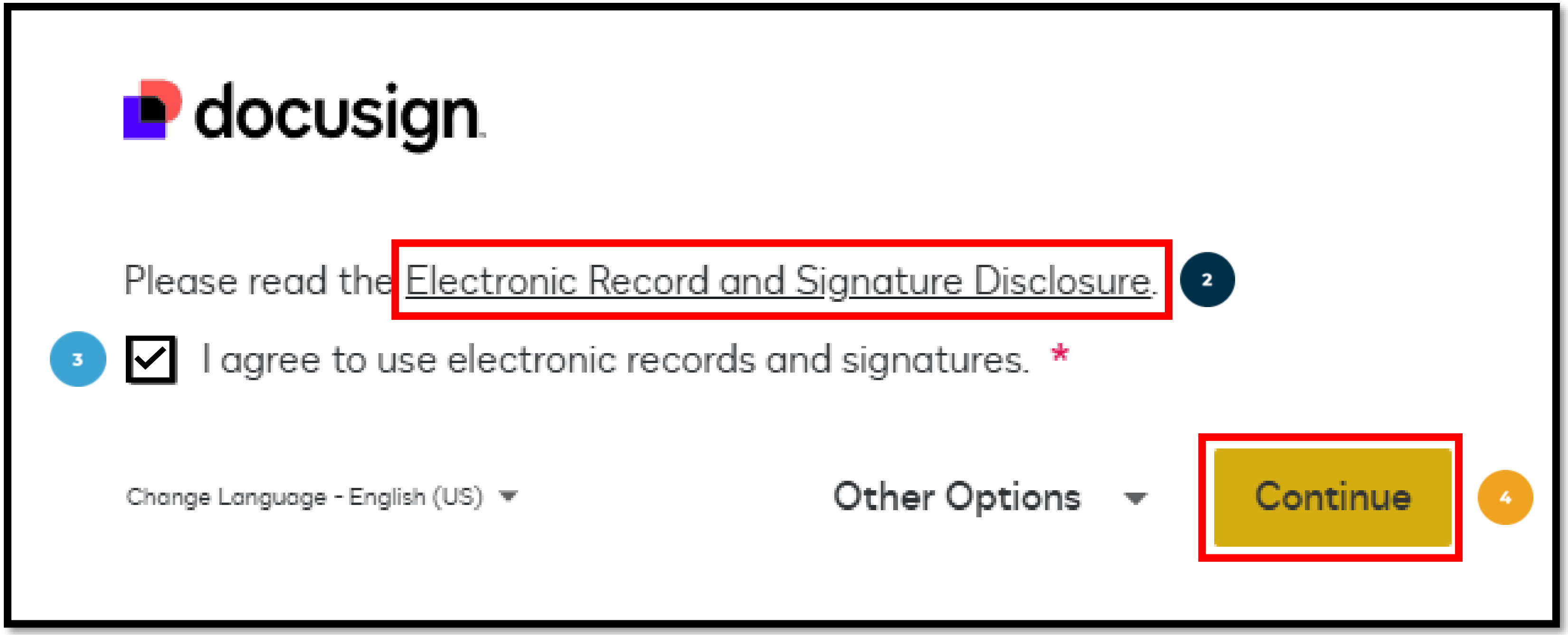
The packet arrives via an email from sender DocuSign. Check junk or spam folders if needed.

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



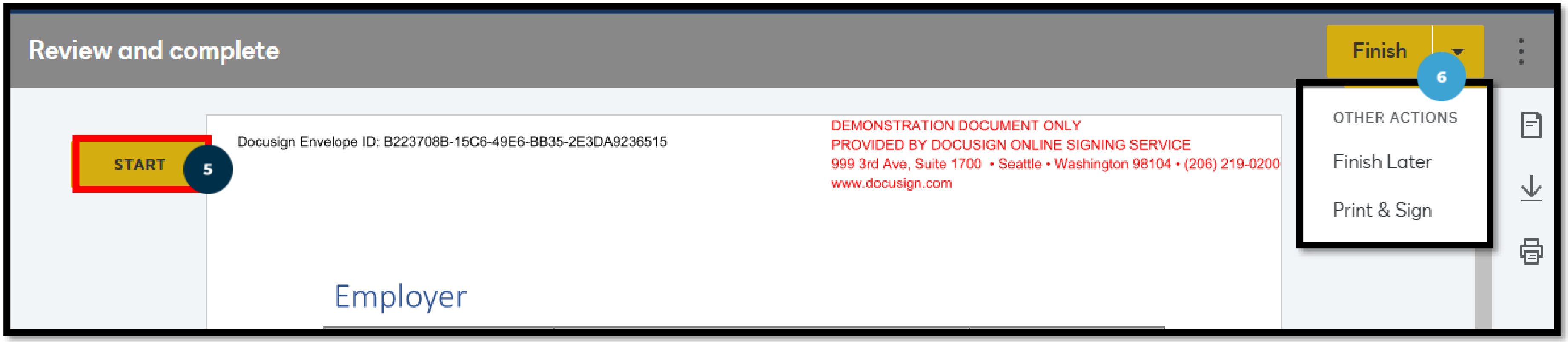
Complete Employer Packet

2. Click the **Electronic Record and Signature Disclosure** link to view the disclosure
3. **Check the box** to agree to using electronic records and signatures
4. Click the yellow **Continue** button



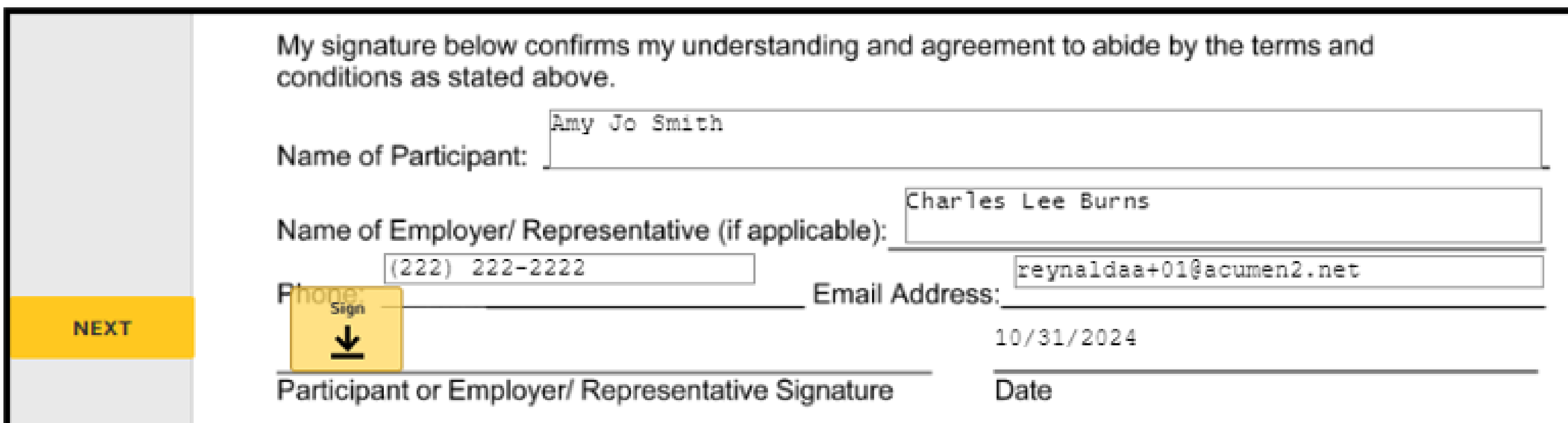
Complete Employer Packet

5. Click the yellow **Start** button
6. Optionally, click the yellow **Finish** button to:
   - Finish Later OR
   - Print & Sign



Complete Employer Packet

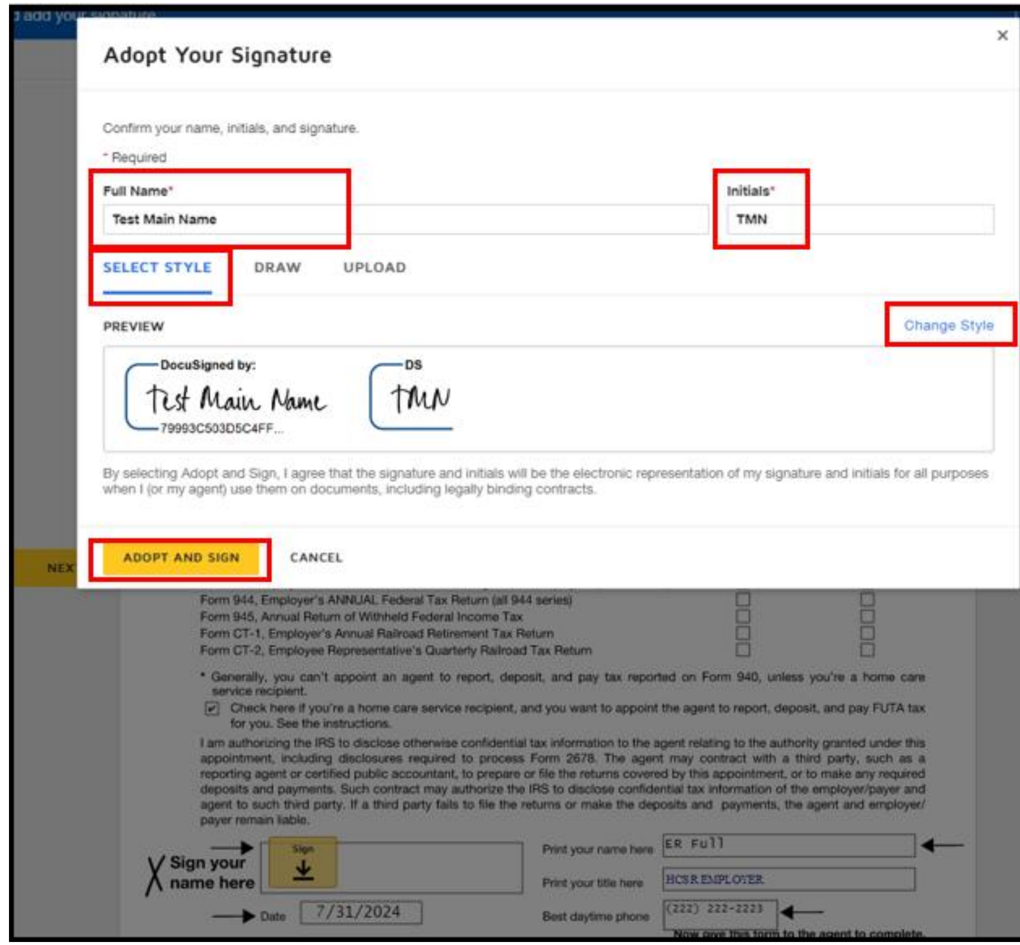
- The Employer packet is prefilled based on the information provided in EES
- Use the tab key on the keyboard to move through each line
- **Important!** Review documents for accuracy.
- If signature and date are required at the bottom of a page, click the yellow **Sign** button to sign and date the form(s).
- Click the yellow **Next** button or scroll down to proceed to the next form



Complete Employer Packet

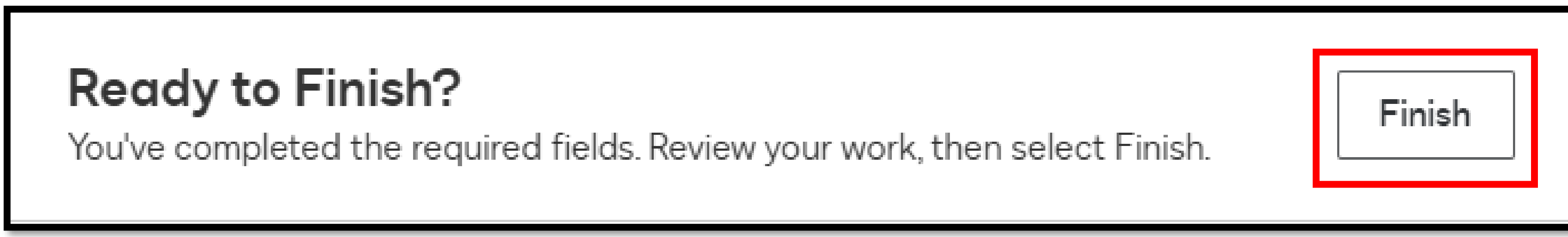
To select a signature style provided by DocuSign:

- ✓ Click the **Select Style** tab
- ✓ Confirm full name
- ✓ Confirm initials
- ✓ Optionally, click the **Change Style** link.
- ✓ Choose a style
- ✓ Click the yellow **Adopt and Sign** button



Complete Employer Packet

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



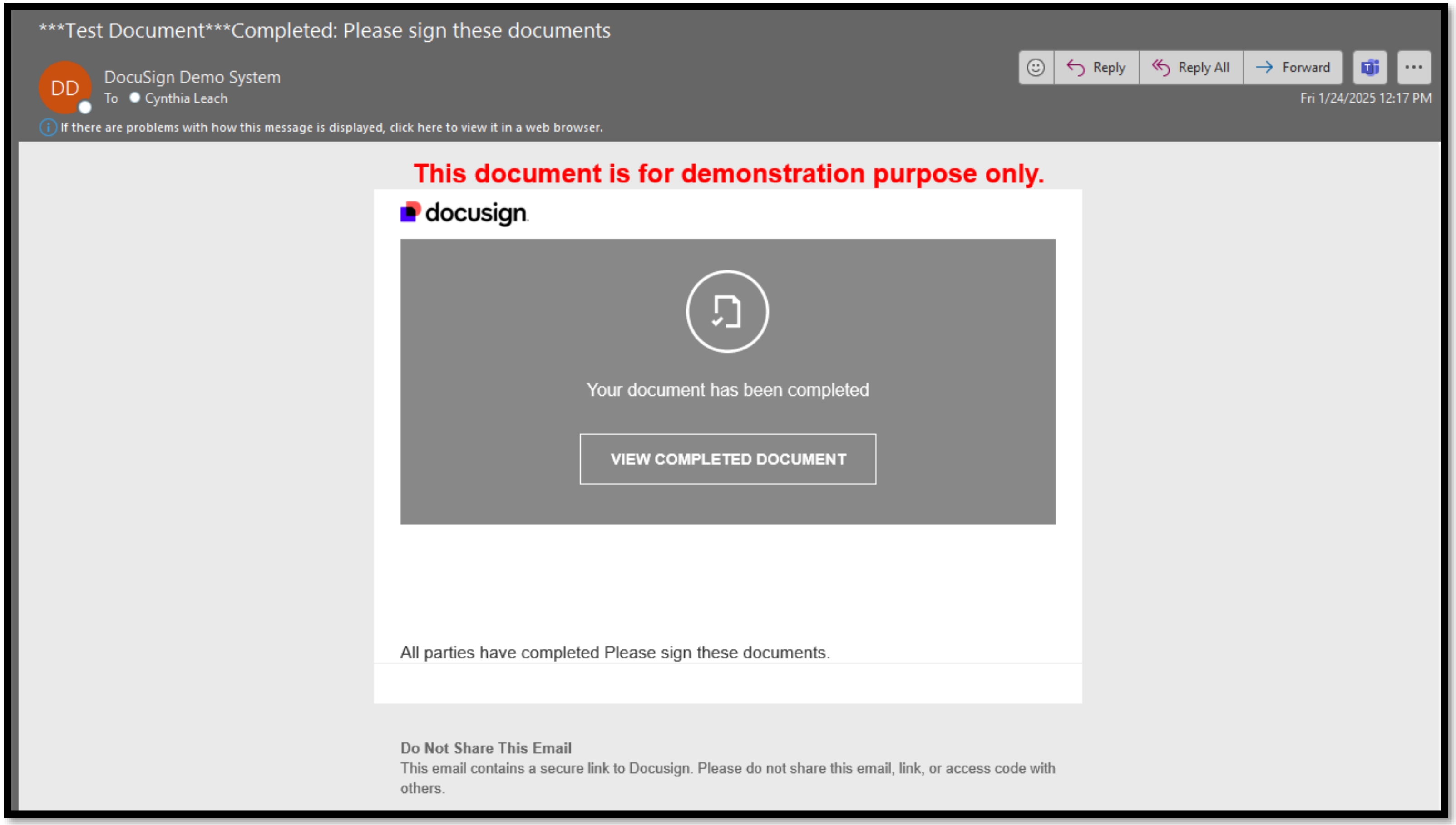
Complete Employer Packet

Congratulations!
The Employer packet is complete.

- Optionally, click the **download icon** to download as a combined PDF or as separate PDFs, or click the **printer icon** to print.
- Click the yellow **Continue** button to proceed

Complete Employer Packet

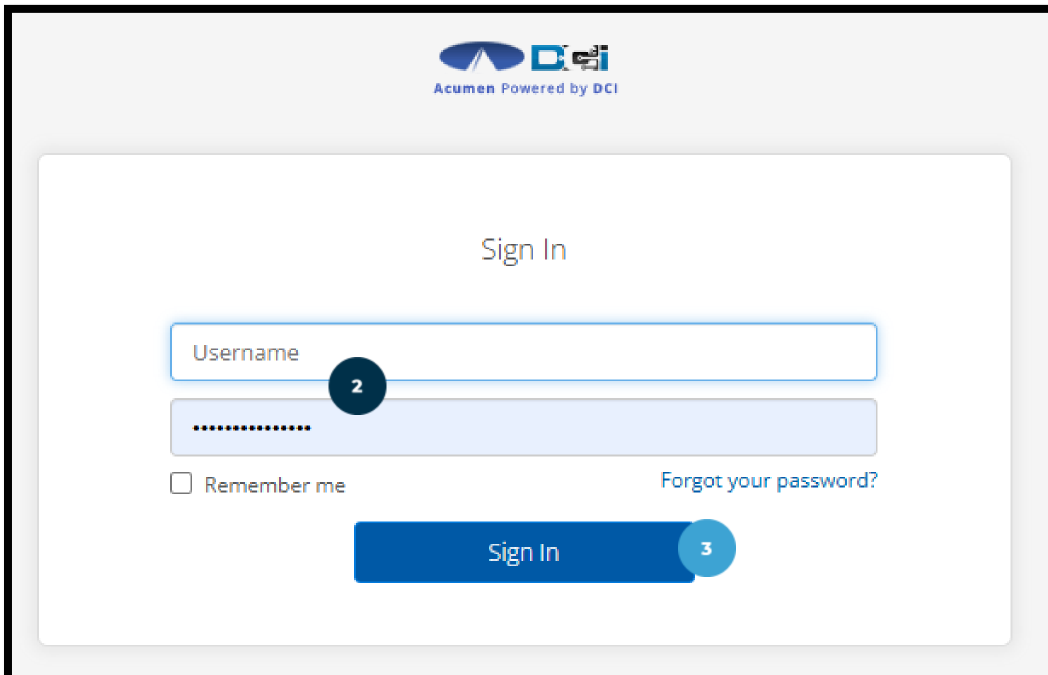
The Employer receives a confirmation email with a link to view the completed document



Logging into EES

1. After completing the Employer packet, **navigate to the DCI login screen.**
2. Enter the **username** and **password** created in the Initial Registration form
3. Click **Sign In**

1 https://acumen.dcisoftware.com/

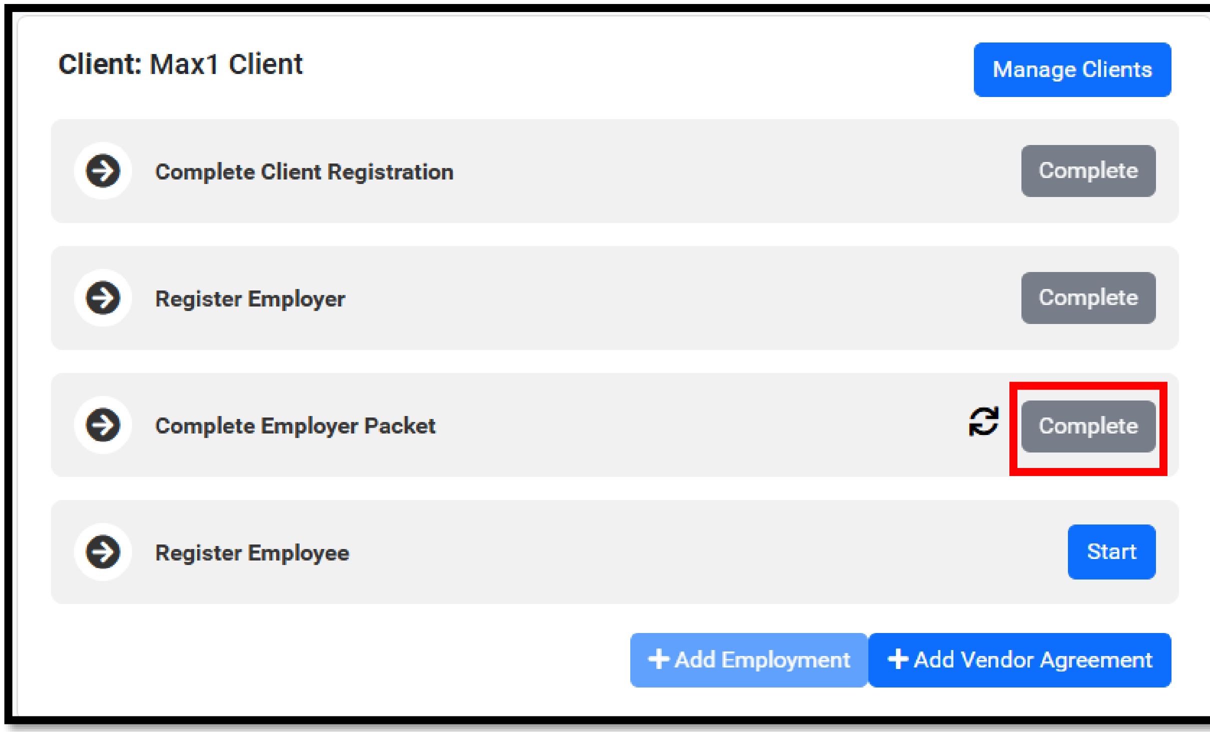


Complete Employer Packet

Please Note:

- The Employer Packet is marked **Pending** until it has been completed
- Use the **Refresh** button to update the status to Complete.
- Please wait **15 minutes** between refresh & resend.

The Enrollment Dashboard displays with Complete Employer Packet marked **Complete**

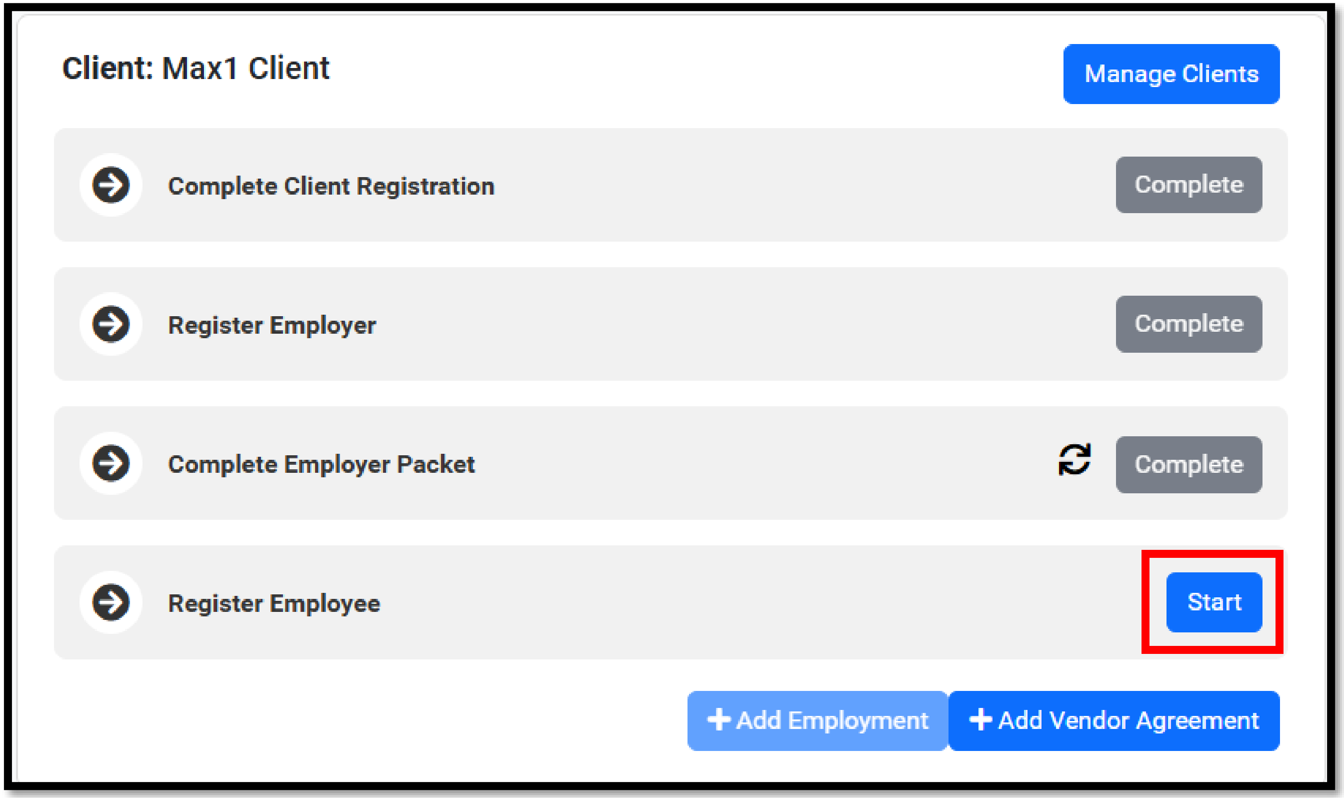


Register Employee

Employer completes this process

Register Employee

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



Register Employee

Complete the Register Employee fields:

1. First Name (**required**)
2. Last Name (**required**)
3. Date of Birth (**required**)
4. SSN (**required**)
5. State (**required**)

Register Employee

First Name *

Last Name *

Date of Birth * MM/DD/YYYY

SSN * ###-##-####

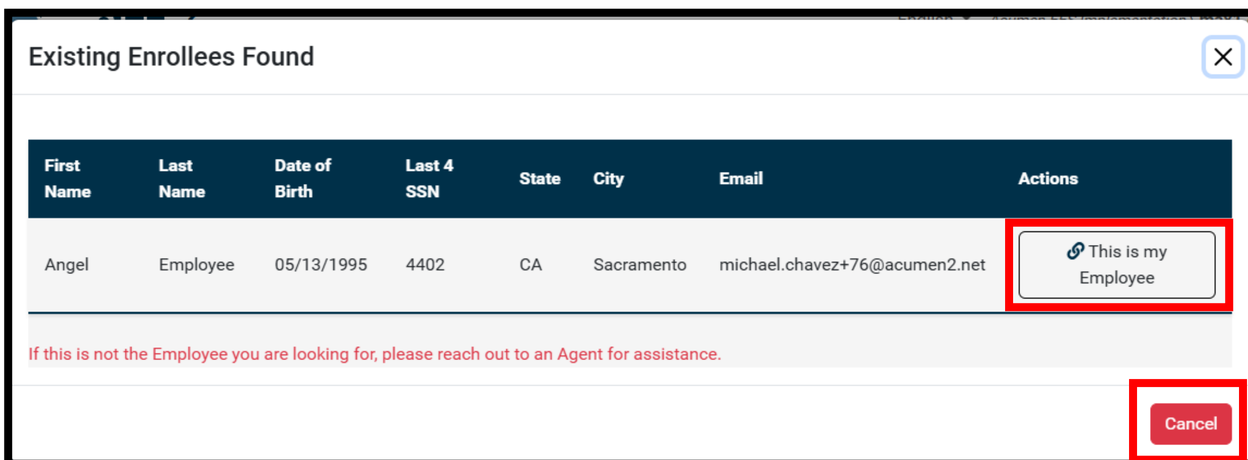
State * Select State

Next Cancel

Add Employee to Employer

❖ If the Employee is found, or the name matches a similar profile, an alert stating **Existing Enrollees Found** displays.

- ✓ Verify if the name, DOB and Last four of SSN match.
  - If **Yes**, click the **This is my Employee** button to avoid creating a duplicate Employee profile
    - ✓ The Employee information populates in the Employee Details fields
    - ✓ Continue to complete Employee Details information by completing **the next required field.**
  - If **No**, click **Cancel.**
    - ✓ Continue to complete Employee Details information by completing the **SSN**



Register New Employee

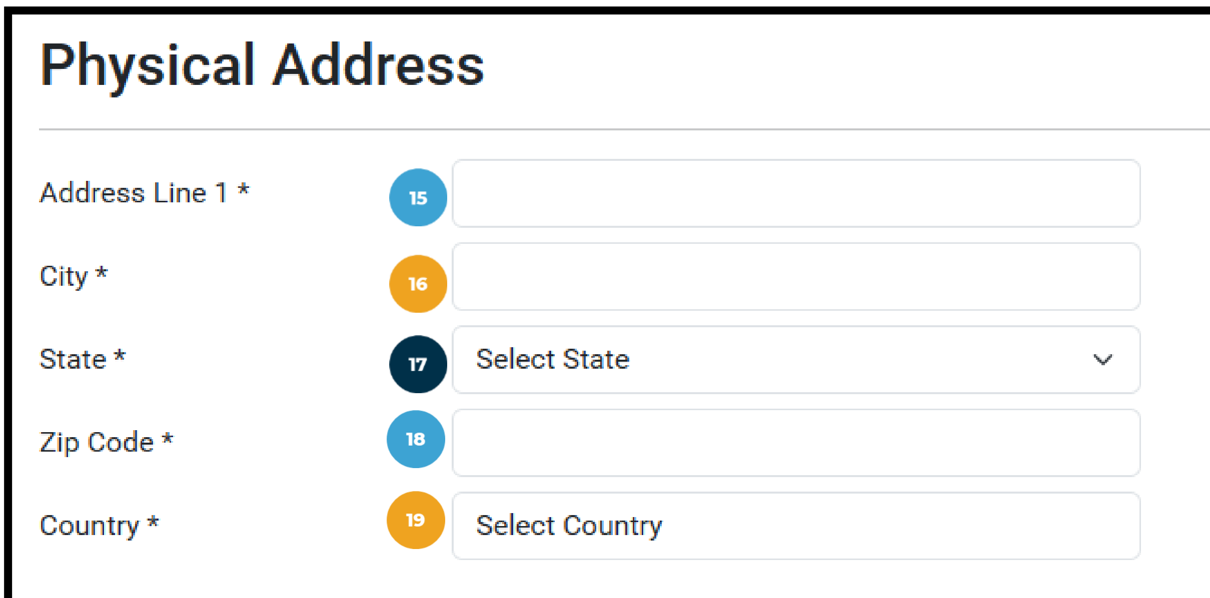
1. First Name (**required**)
2. Middle Name (optional)
3. Last Name (**required**)
4. Other Last Names Used (optional)
5. Date of Birth (**required**)
6. SSN (**required**)
7. Gender (**required**): Select one
   - Male
   - Female
   - Other
   - Prefer Not to Say
8. Phone (**required**)
9. Alternative Phone (optional)
10. Mobile Number (optional) - required to receive SMS text message communication
11. Email (**required**)
12. Citizenship Status (**required**): Select one
    - Citizen
    - Non-Citizen National
    - Permanent Resident
    - Authorized Alien
13. Drivers License Number (optional)
14. How was the Employee's address verified? (Agent Use Only)

Complete the Register Employee fields:

Register Employee

Complete the Physical Address fields:

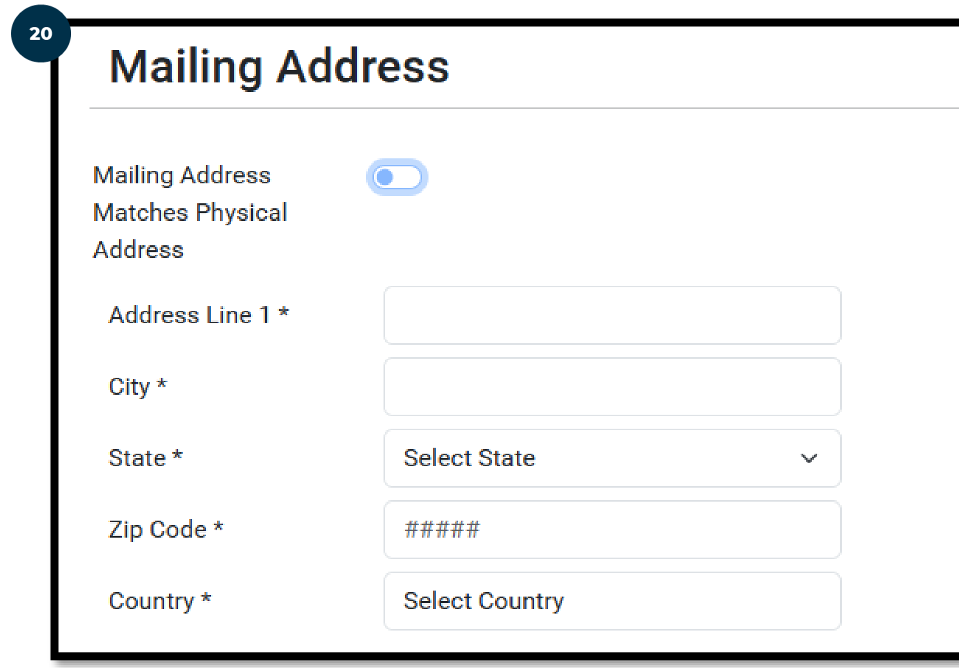
15. Address line 1 (**required**)
16. City (**required**)
17. State (**required**)
18. Zip Code (**required**)
19. Country (**required**)

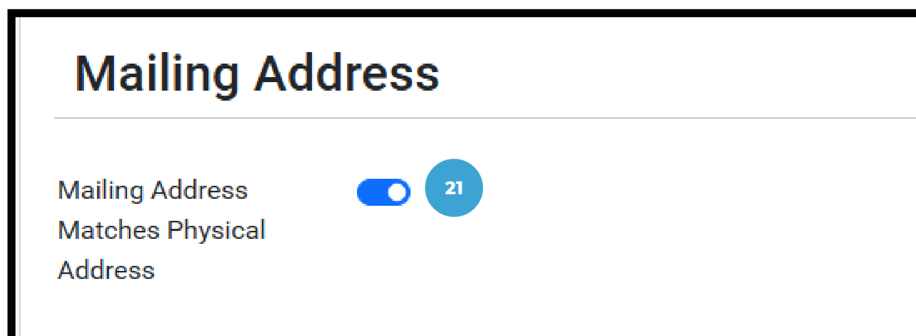


Register Employee

Complete Mailing Address details:

20. Mailing Address Matches Physical Address:
    - Defaults to **OFF**, indicating the mailing address does not match the physical address. Add the mailing address:
        a. Address Line 1 (**required**)
        b. City (**required**)
        c. State (**required**)
        d. Zip Code (**required**)
        e. Country (**required**)
21. Toggle to **ON** position if the mailing address is the same as the physical address



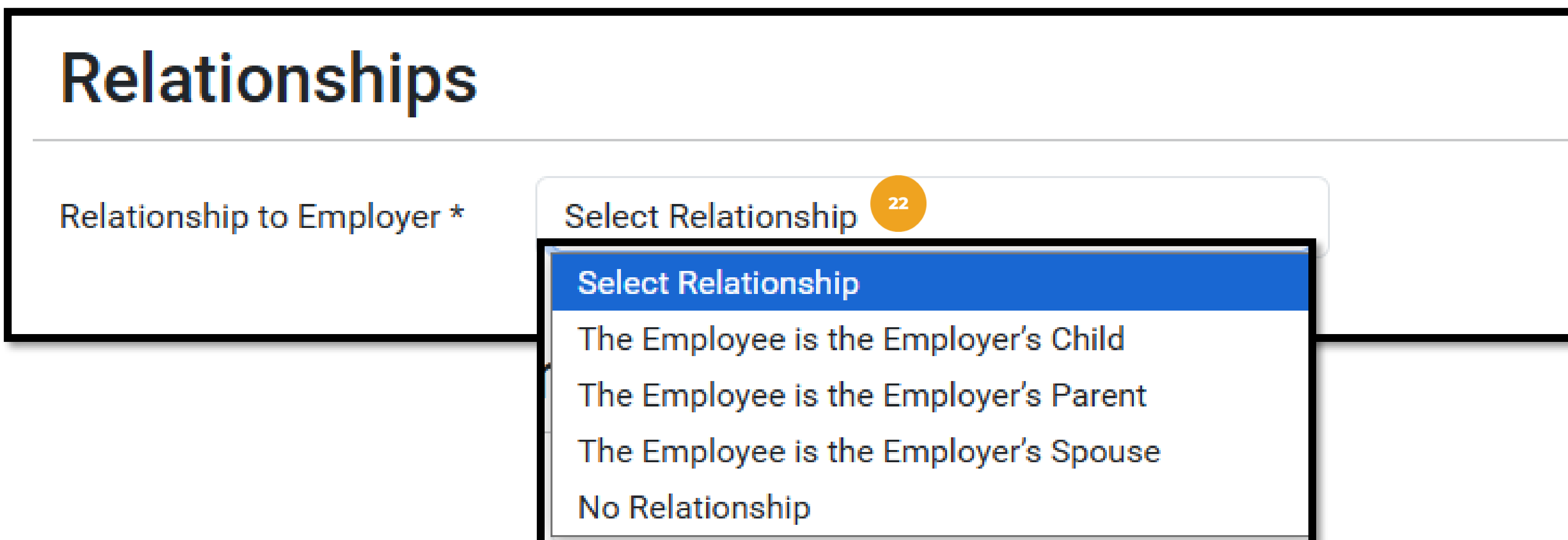


Register Employee

Complete Relationships details:

22. Relationship to Employer (**required**): Select one

- The Employee the Employer's Child
- The Employee the Employer's Parent
- The Employee the Employer's Spouse
- No Relationship
    - ❖ Please Note: The relationship between the client, employer, and employee is not fully complete until the Employment is created.



Register Employee – Payment Information

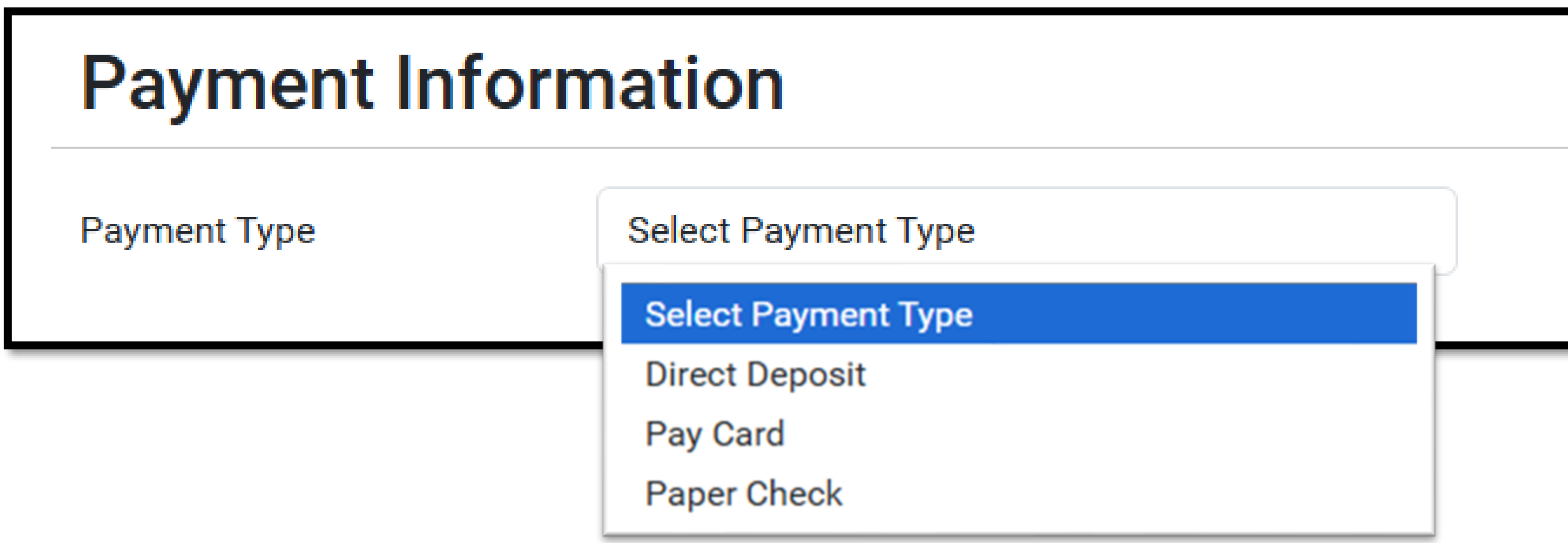
Employer completes this process

Register Employee – Payment Information

Complete Payment Information

Payment Type options: Select one

- Direct Deposit
- Pay Card
- Paper Check



Register Employee – Payment Information

If Pay Card or Paper Check is selected, no further information is needed.

Payment Information

Payment Type | Pay Card

Payment Information

Payment Type | Paper Check

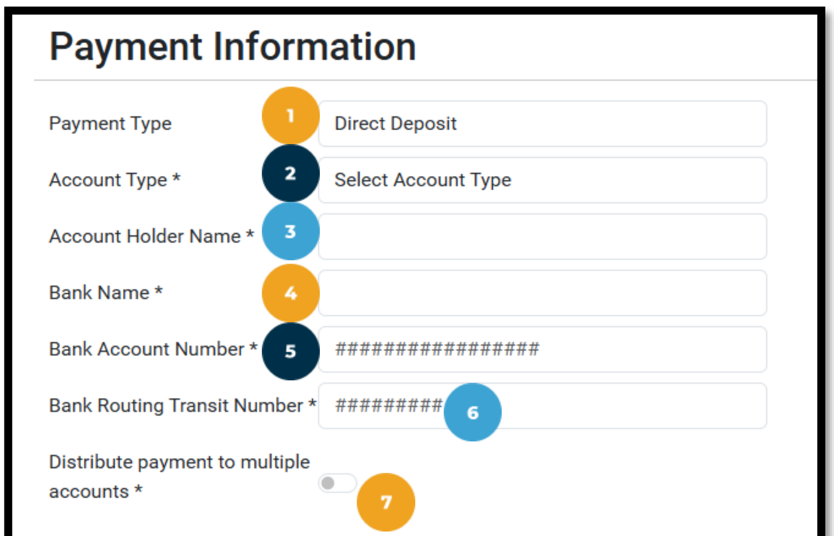
Click **Save** to finish registering the employee

✔ Save   Cancel

Register Employee – Payment Information

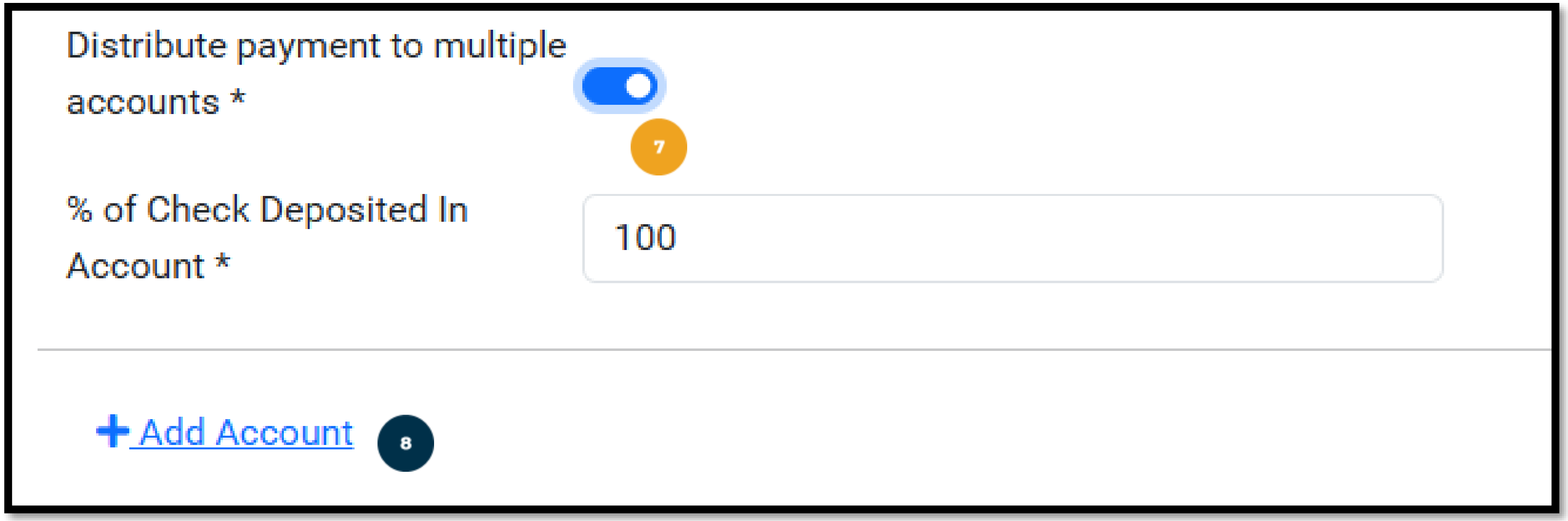
If Direct Deposit is selected, provide the following information:

1. Payment Type: Direct Deposit
2. Account Type (**required**): Select Checking or Savings
3. Account Holder Name (**required**)
4. Bank Name (**required**)
5. Bank Account Number (**required**)
6. Bank Routing Transit Number (**required**)
7. Distribute payment to multiple accounts (**required**): See next slide



Register Employee – Payment Information

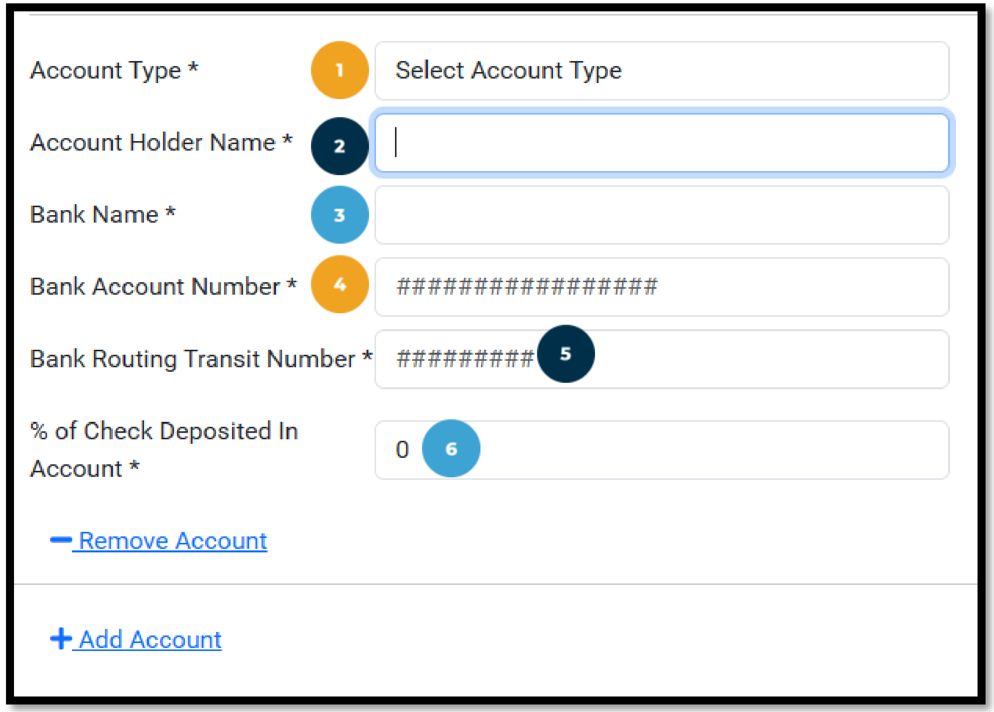
7. Distribute payment to multiple accounts (**required**):
    a. Toggle switch defaults to OFF, indicating all funds are deposited in one account.
    b. Optionally, turn the toggle switch ON to disperse funds to multiple accounts.
        i. % of Check Deposited in Account (**required**): Enter the percentage for this account
8. +Add Account (optional): See next slide



Register Employee – Payment Information

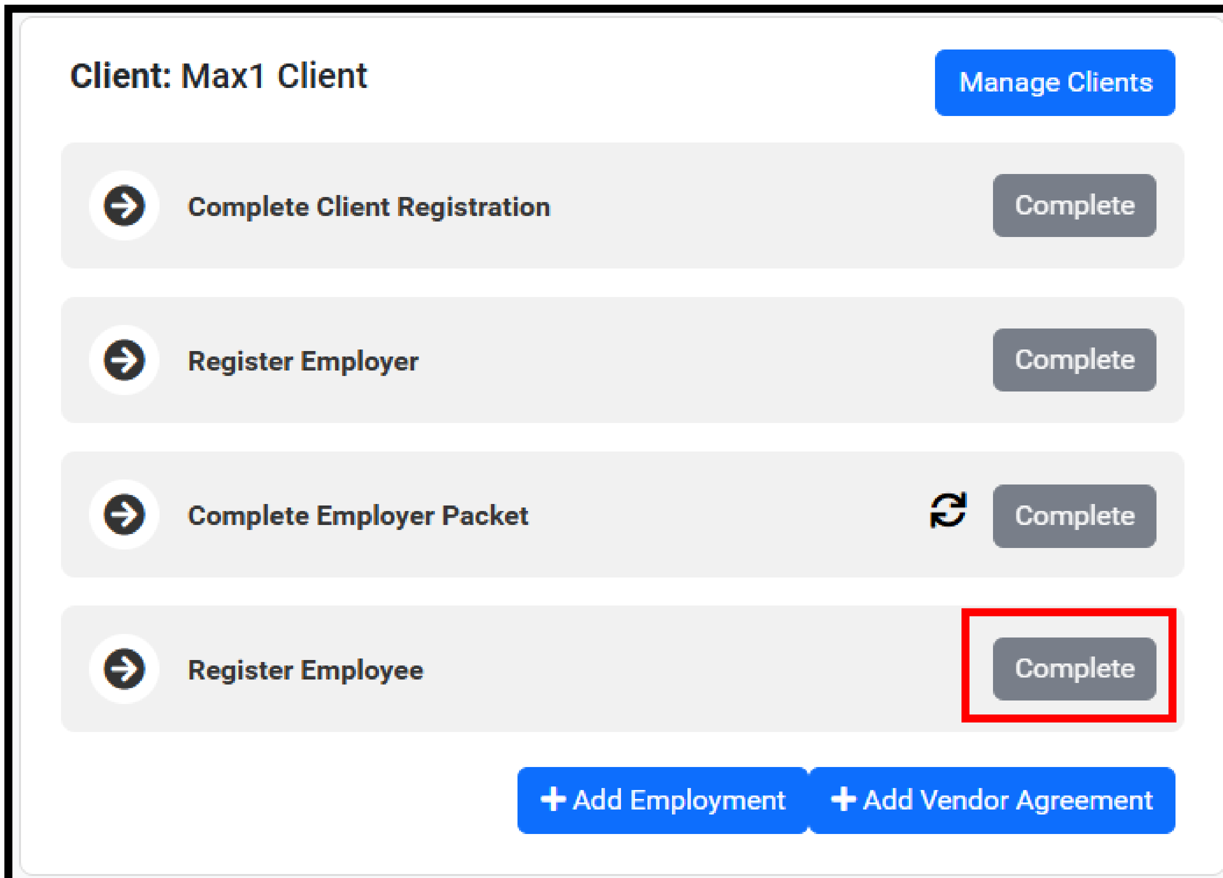
+ Add Account (optional):

- If selected, provide the following details for the additional direct deposit account:
    1. Account Type (**required**): Select Checking or Savings
    2. Account Holder Name (**required**)
    3. Bank Name (**required**)
    4. Bank Account Number (**required**)
    5. Bank Routing Transit Number (**required**)
    6. % of Check Deposited in Account (**required**): Enter the percentage for this account
- Optionally, click the **-Remove Account** link to discard changes, or the **+ Add Account** link to add more accounts.



Register Employee

The Enrollment Dashboard displays with Register Employee marked **Complete**

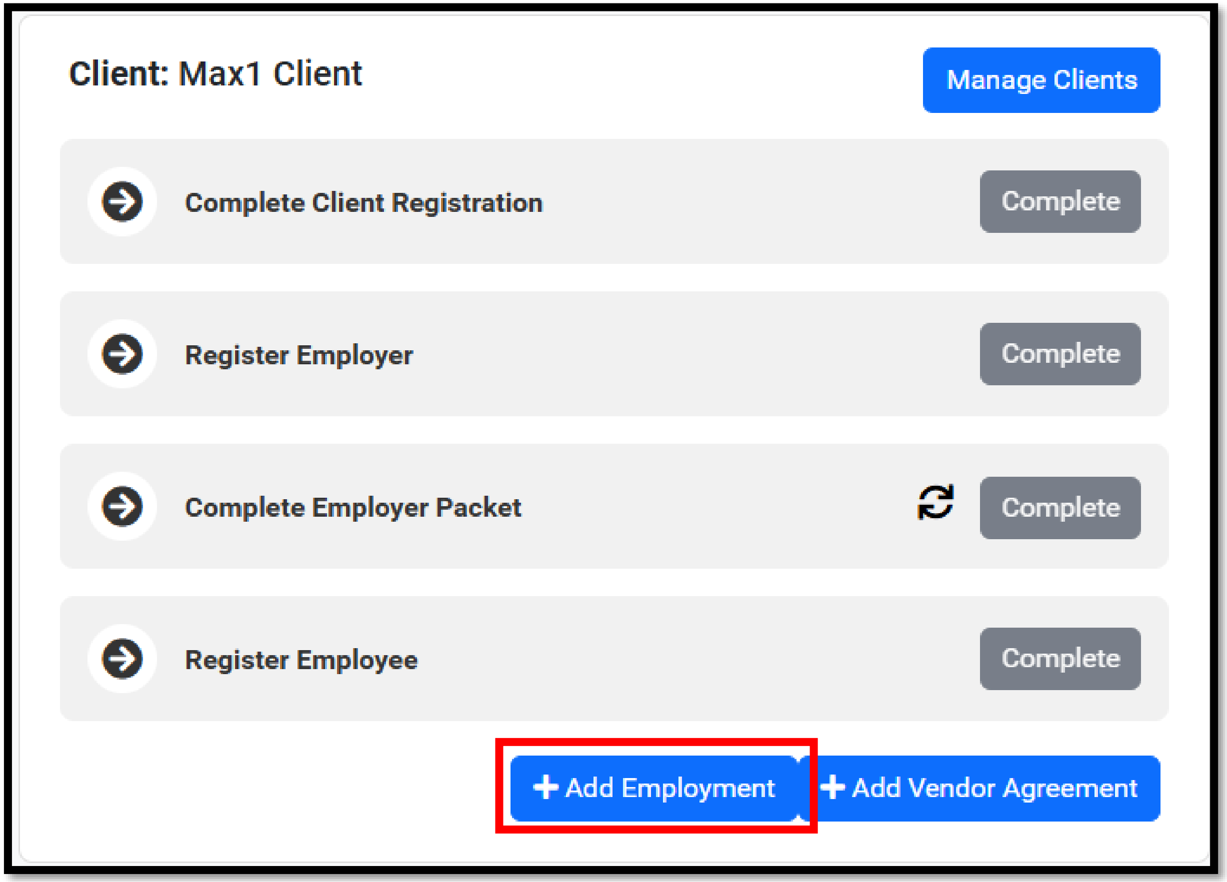


Add Employment

- Employments link the Employee, Client, and Employer.
- Employer completes this process
- **Important! Client, Employer, and Employee registrations must be completed before adding an Employment.**
- **The Employer packet is not required to be completed to add an Employment**

Add Employment

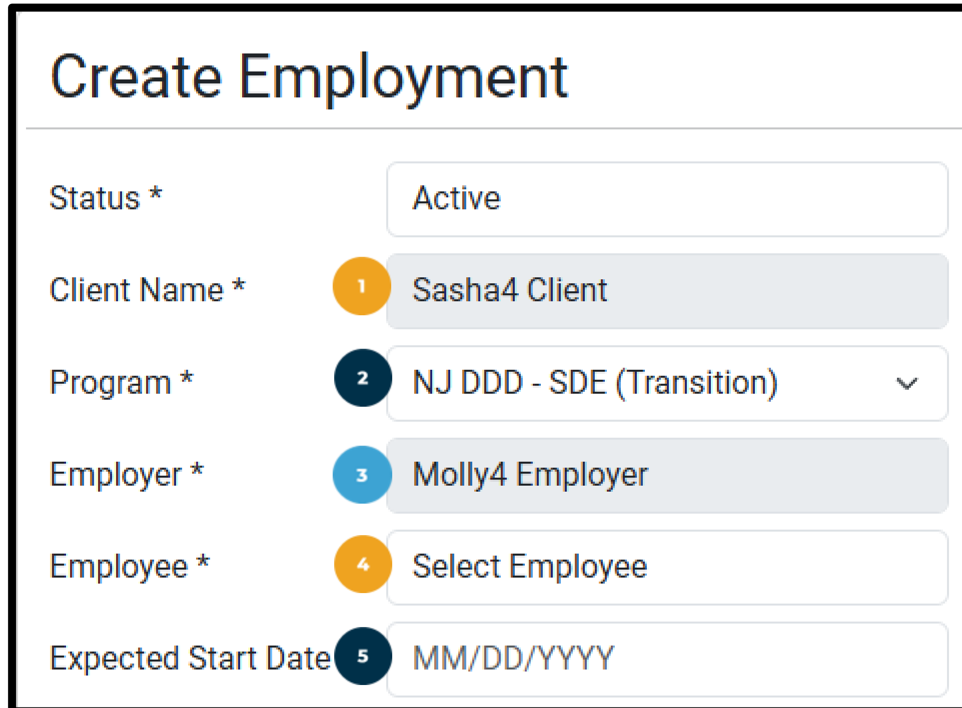
On the Enrollment Dashboard, click the **+Add Employment** button.



Add Employment

Complete Create Employment details:

- Employment Details:
  1. Client Name (**required**): Auto-populates
  2. Program (**required**): Select the program in which the client participates
  3. Employer (**required**): Auto-populates
  4. Employee (**required**): **See next slide**
  5. Expected Start Date (optional): See next slides



Add Employment

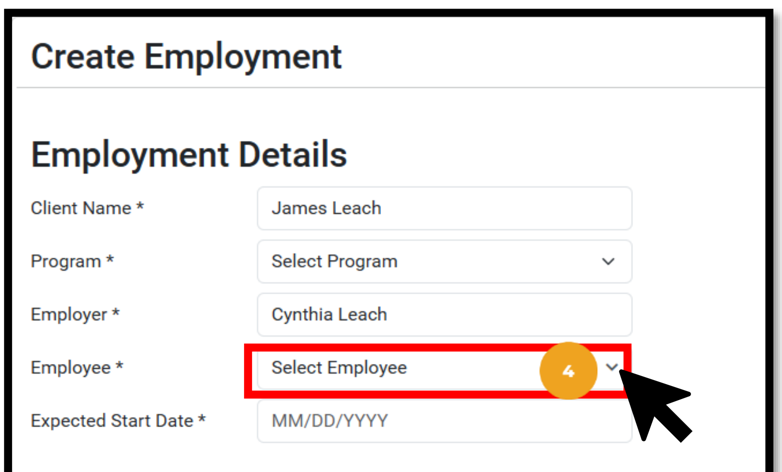
4. Employee (**required**): Click the **Select Employee** drop-down

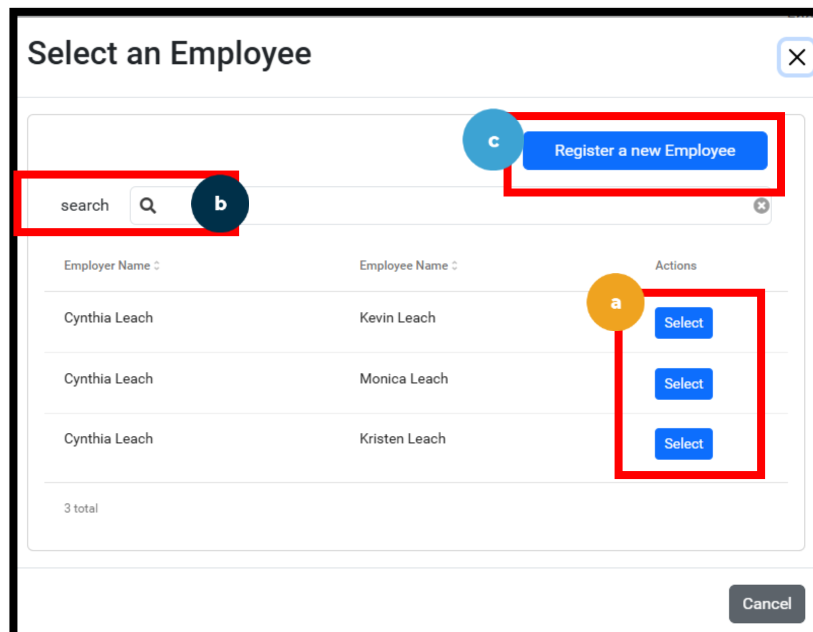
   ➢ The **Select an Employee** screen displays with three options to select an employee:

   a. **Select** a registered employee. Click the **Select** button to select a registered employee.

   b. **Search** for a registered employee.

   c. **Register** a new Employee. Click the **Register a new Employee** button. See Register New Employee instructions.





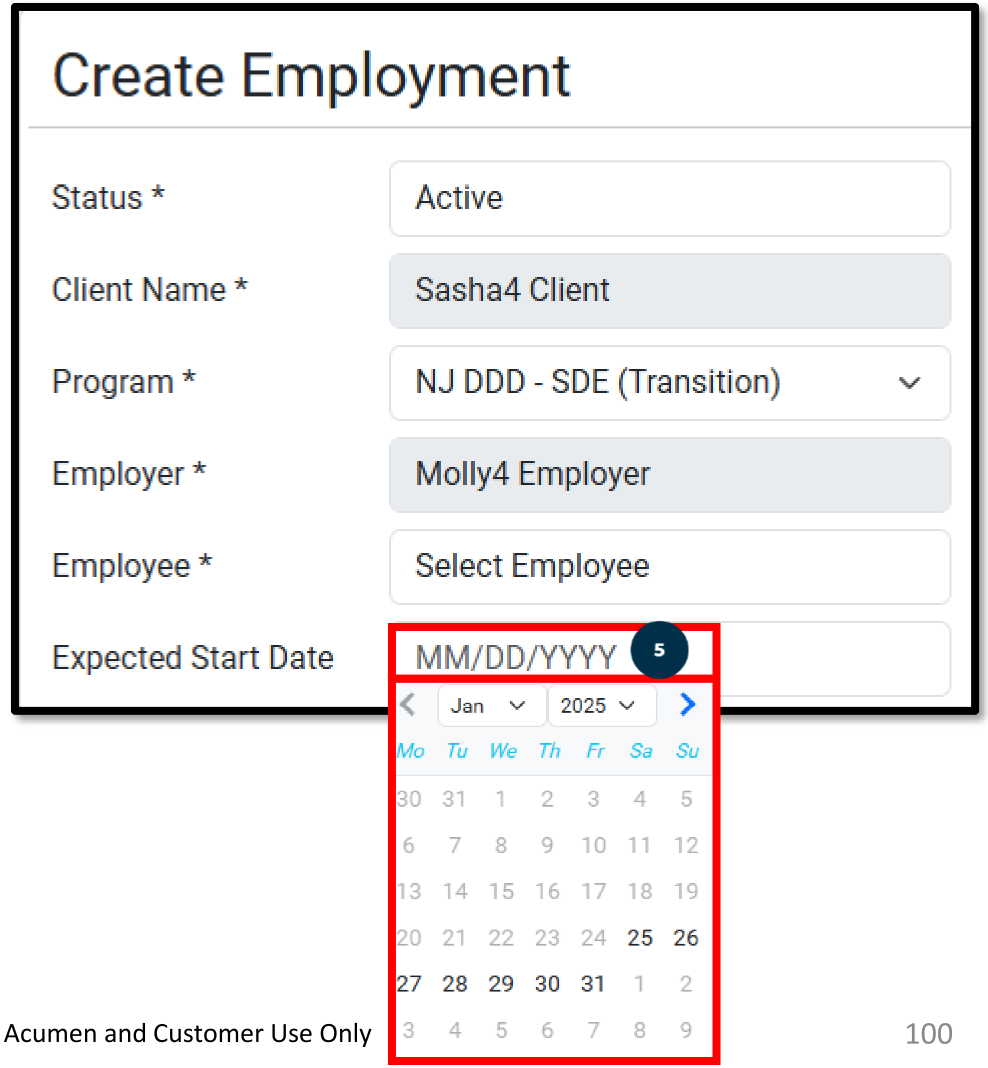
Add Employment

Finish completing the Create Employment details section:

5. Expected Start Date (**optional**):
   - Enter the date in **MM/DD/YYYY** format

   OR

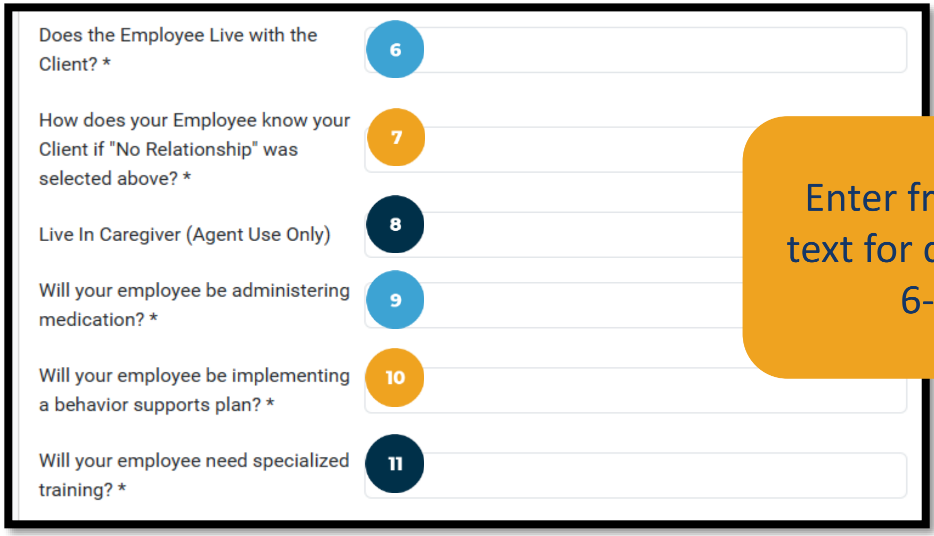
   - Click in the field to select a date from the calendar



Add Employment

Finish completing the Create Employment details section:

6. Does the employee live with the Client? (**required**)
7. How does your Employee know your Client if "No Relationship" was selected above? (**required**)
8. Live in Caregiver (Agent Use Only)
9. Will your employee be administering medication? (**required**)
10. Will your employee be implementing a behavior supports plan? (**required**)
11. Will your employee need specialized training? (**required**)



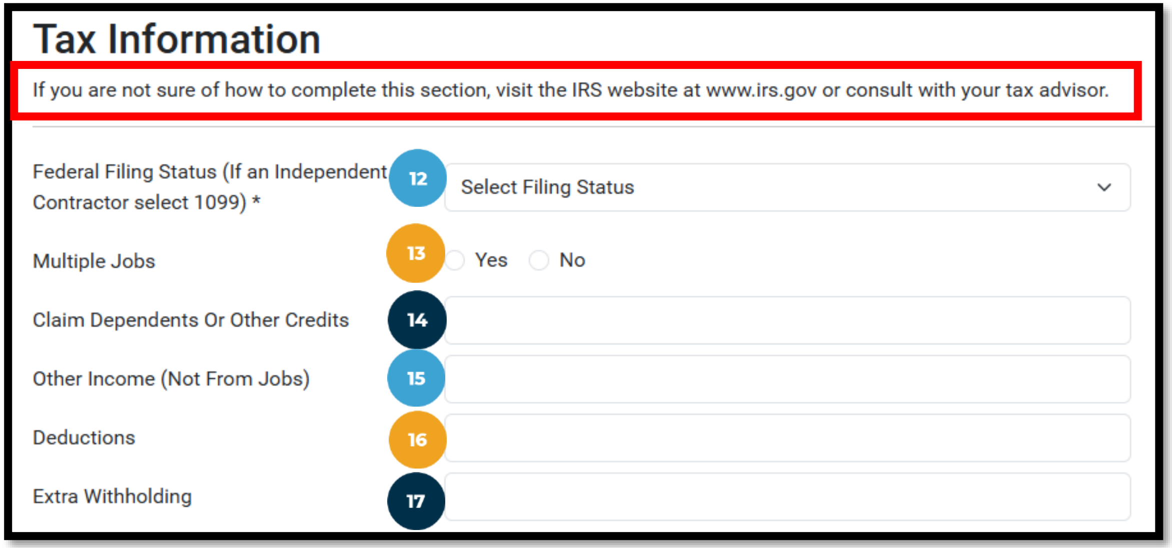
Enter free-form text for questions 6-11

Add Employment

Complete the Tax Information details:

***Please note! Visit www.irs.gov or consult with your tax advisor if unsure how to complete this section.**

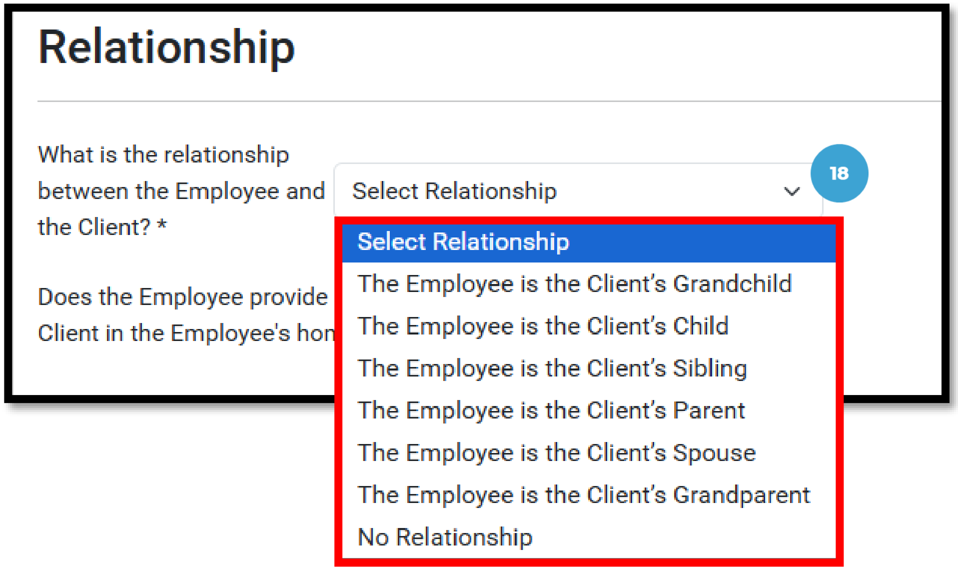
12. Federal Filing Status (**required**): Select one
    - Single or Married filing separately
    - Married or filing jointly or Qualified widow(er)
    - Head of household
    - 1099
13. Multiple Jobs (**required**): Select Yes or No
14. Claim Dependents or Other Credits (optional)
15. Other Income (Not From Jobs) (optional)
16. Deductions (optional)
17. Extra Withholding (optional)



Add Employment

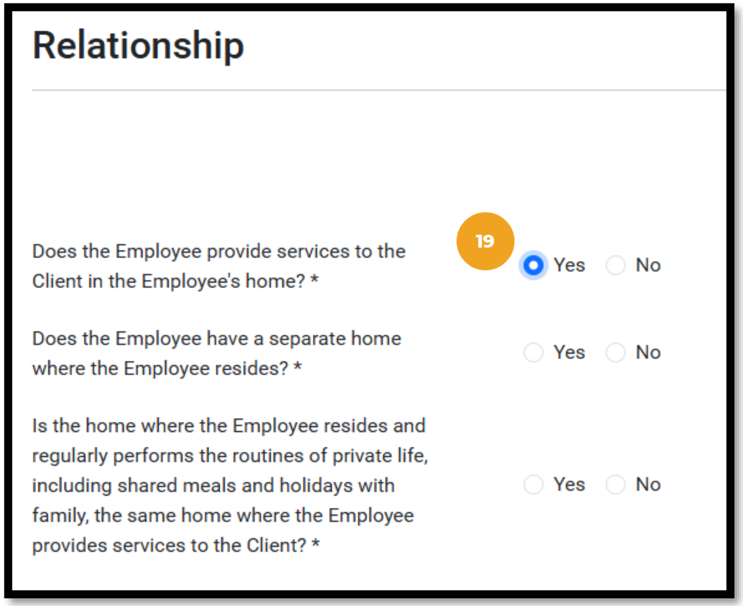
Complete Relationship details:

18. What is the relationship between the Employee and the Client? (**required**): Select one
    - 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



Add Employment

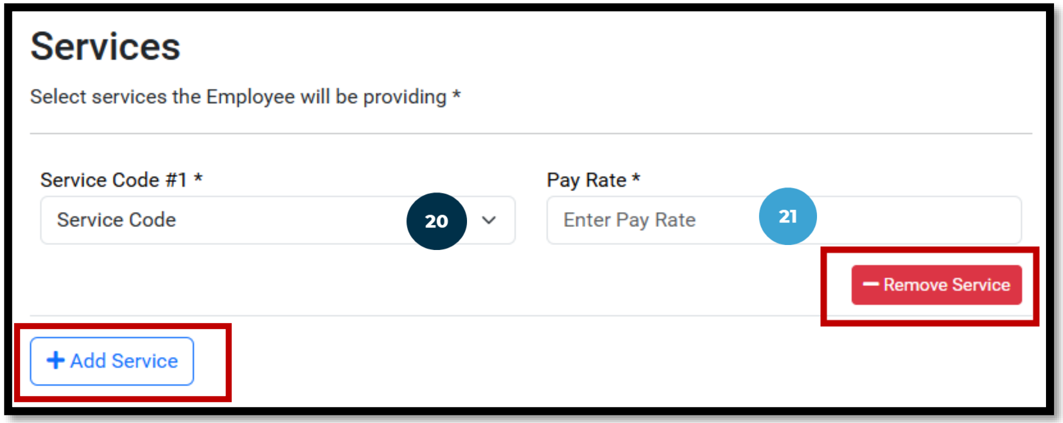
19. Does the Employee provide services to the Client in the Employee's home? (**required**)
    - If Yes is selected, two additional questions are **required**:
        - ✓ Does the Employee have a separate home where the Employee resides? (**Yes** or **No**)
        - ✓ Is the home where the Employee 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** or **No**)
    - If No, proceed to the **Services** section.



Add Employment

Complete the Services details:

20. Service Code #1 (**required**): Click the drop-down to select the service code for services the employee is providing
21. Pay Rate (**required**): Enter the employee's pay rate
    - Optionally:
      - ✓ Click **-Remove Service** to remove a service code
      - ✓ Click **+Add Service** to add another service code



22. Click **Save** to complete the process
23. Optionally, click **Cancel** to discard changes.

Send Employee Packet

Employer completes this process.

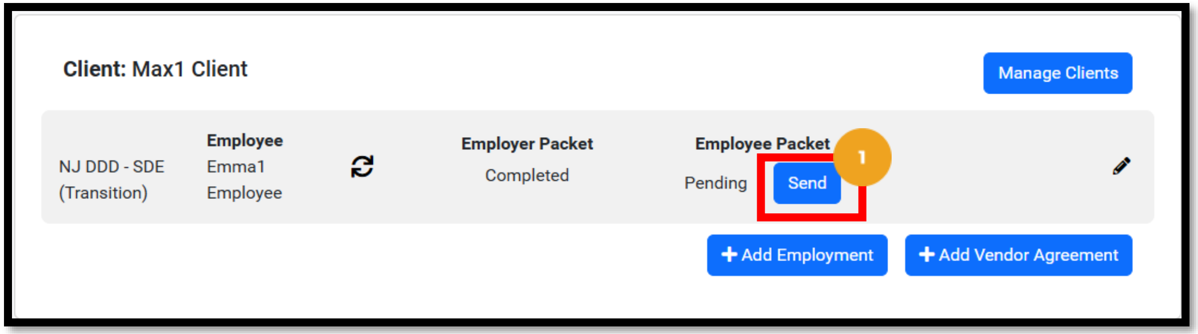
Send Employee Packet

The Enrollment Dashboard displays with Employee Packet marked **Pending**

Important! Before completing the Employee Packet, the following must be completed:

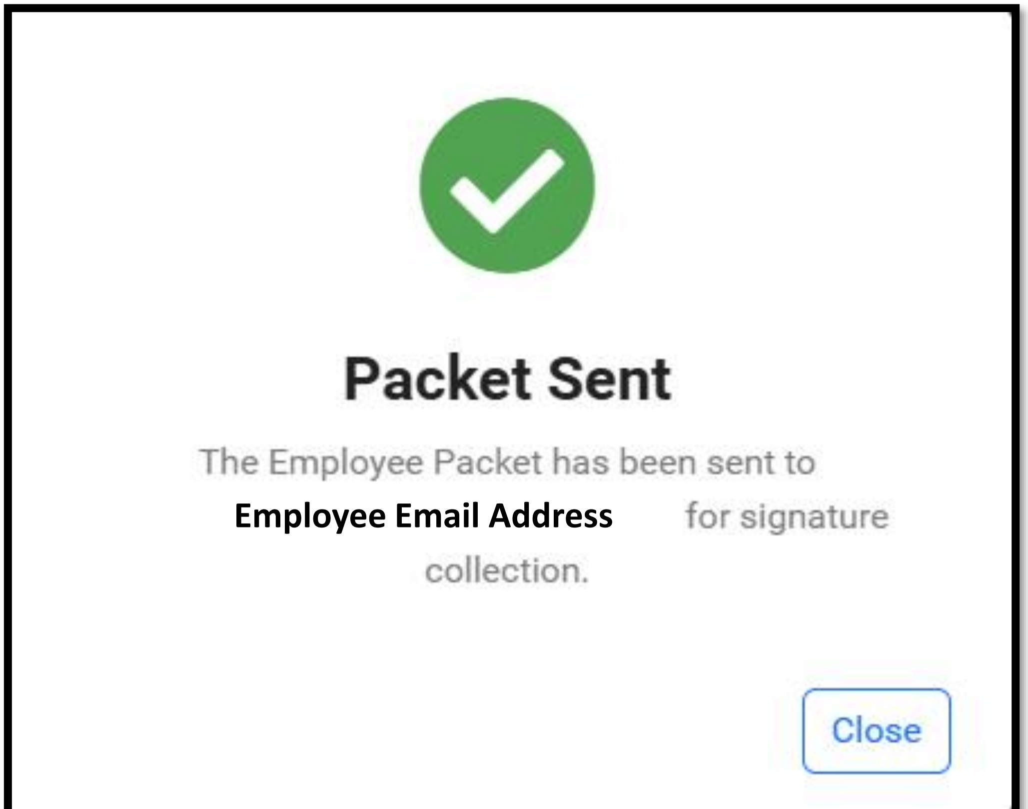
- **Employee Registration**
- **Add the Employment**

1. Click **Send** to send the packet to the employee



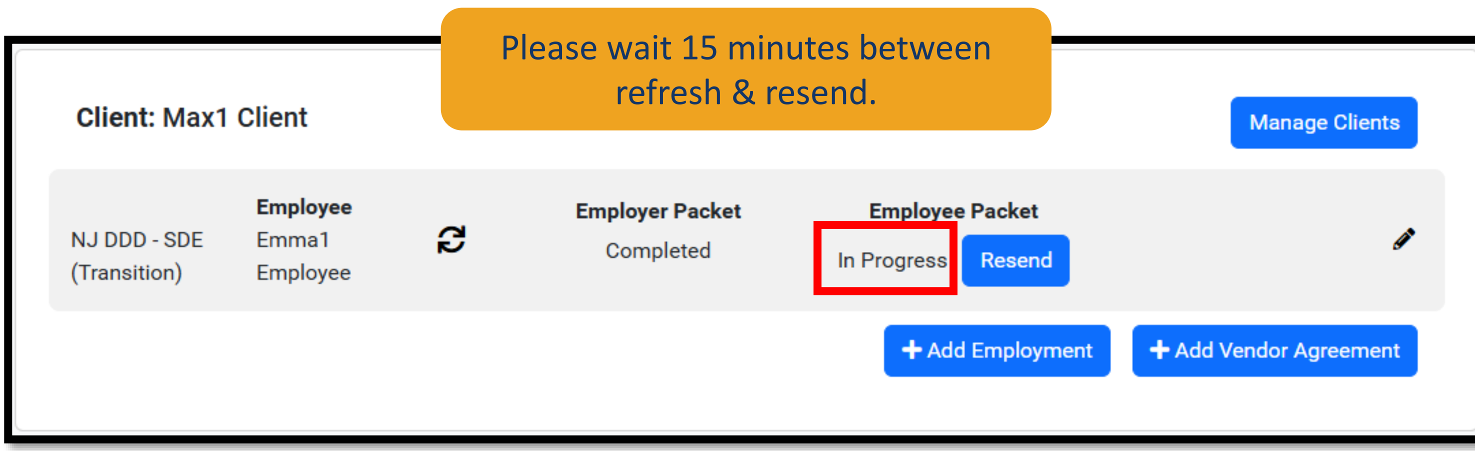
Send Employee Packet

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



Send Employee Packet

- The Employee Packet column displays **In Progress**
- **Please Note**: When clicking the **Resend button**, the packet is not being resent, only the email for signing is resent.
- If the date is altered after the initial send, that will not be captured in the document.
- The Refresh button updates the status of the packet



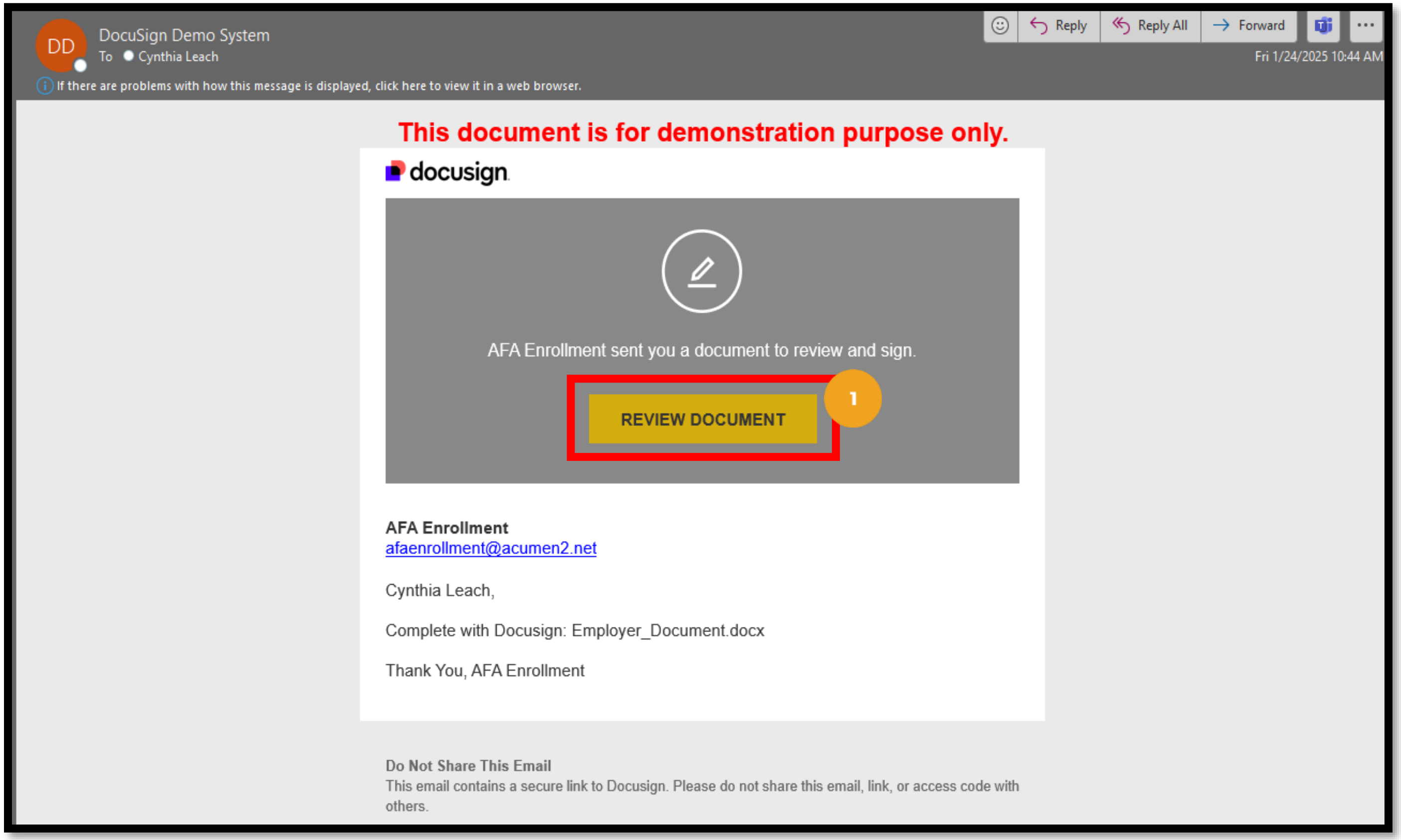
Complete Employee Packet

Employee completes

Complete Employee Packet – DocuSign

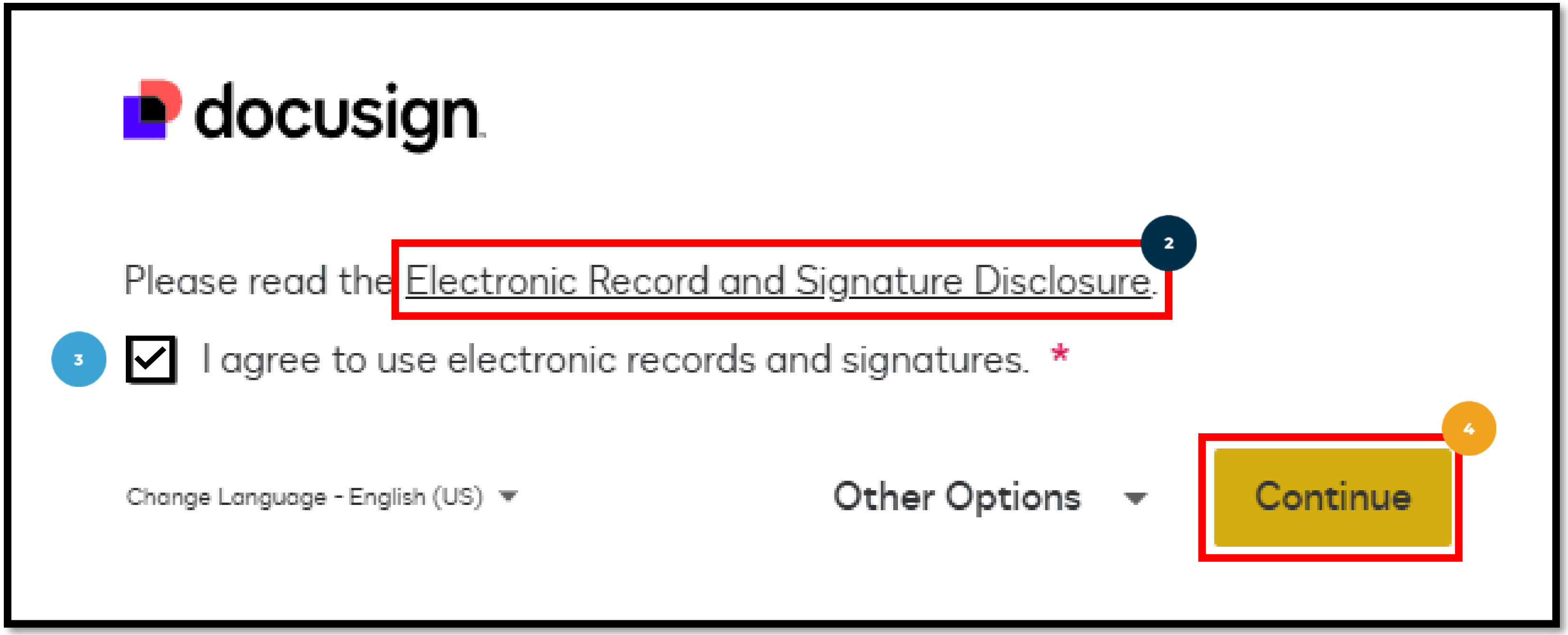
The packet arrives via an email from sender DocuSign. Check junk or spam folders if needed.

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



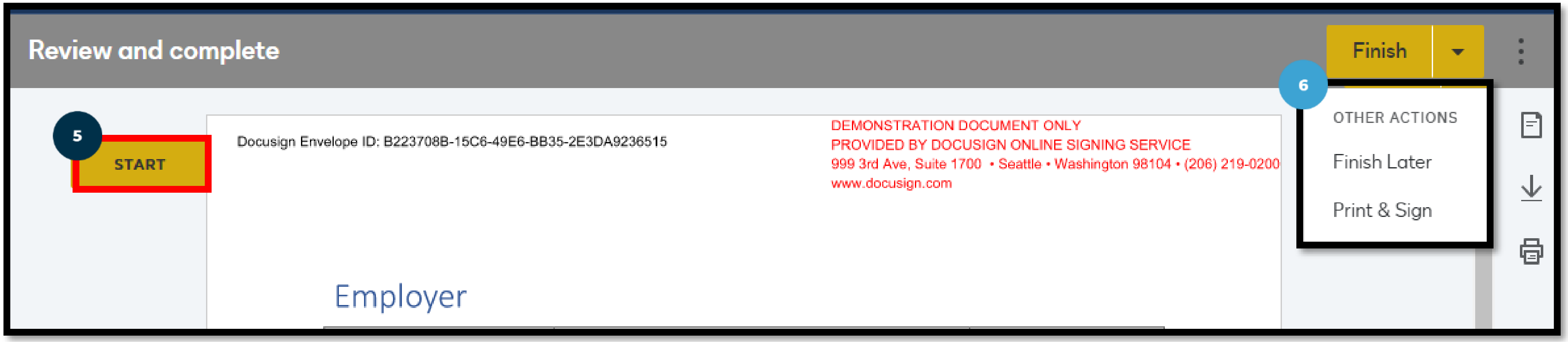
Complete Employee Packet – DocuSign

2. Click the **Electronic Record and Signature Disclosure** link to view the disclosure
3. **Check the box** to agree to using electronic records and signatures
4. Click the yellow **Continue** button



Complete Employee Packet – DocuSign

5. Click the yellow **Start** button
6. Optionally, click the yellow **Finish** button to:
   - Finish Later OR
   - Print & Sign

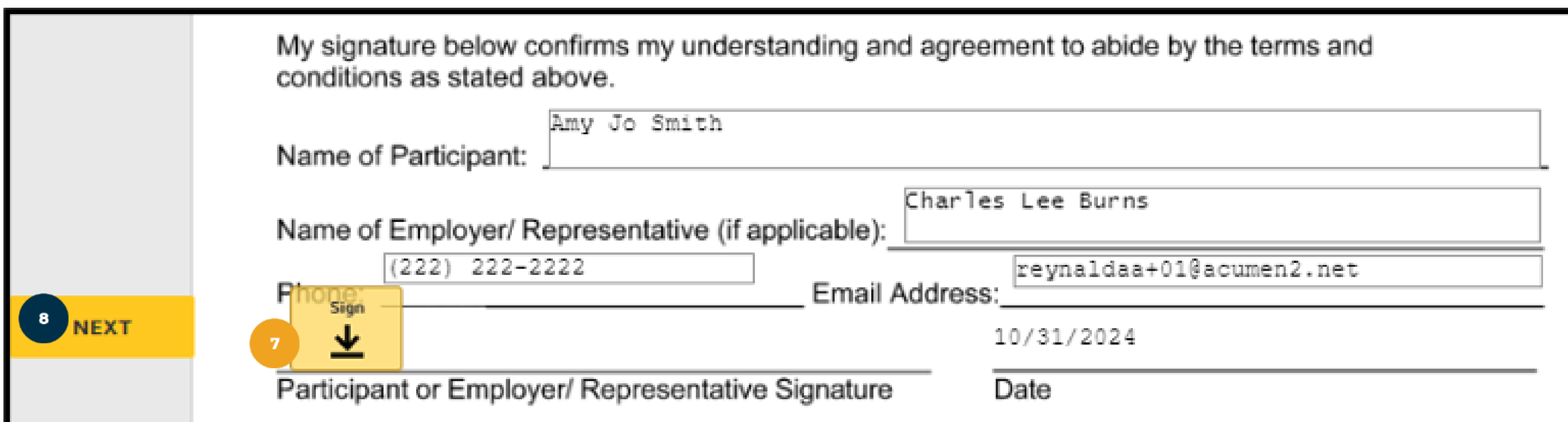


Complete Employee Packet – DocuSign

- The Employee packet is prefilled
- Use the tab key on the keyboard to move through each line
- **Important!** Review documents for accuracy

7. If signature and date are required at the bottom of a page, click the **Sign** button to sign and date the form(s).

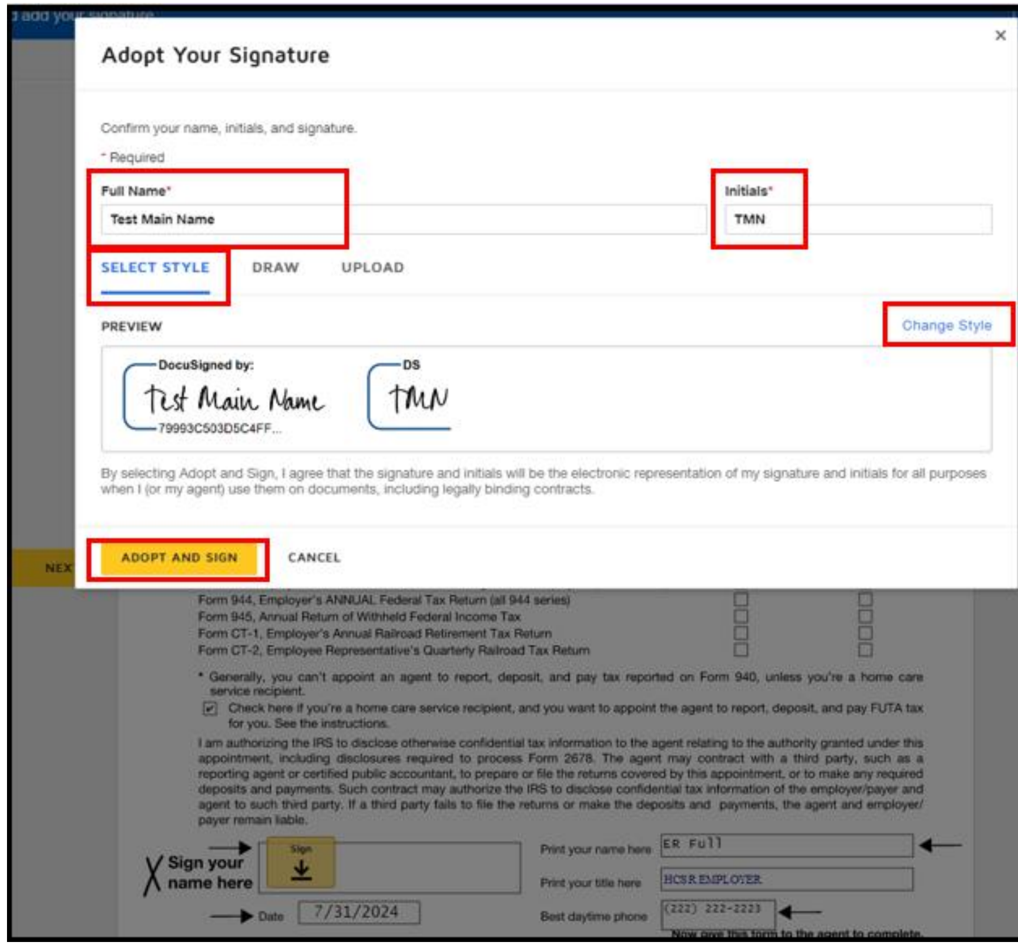
8. Click the yellow **Next** button or scroll down to proceed to the next form



Complete Employee Packet – DocuSign

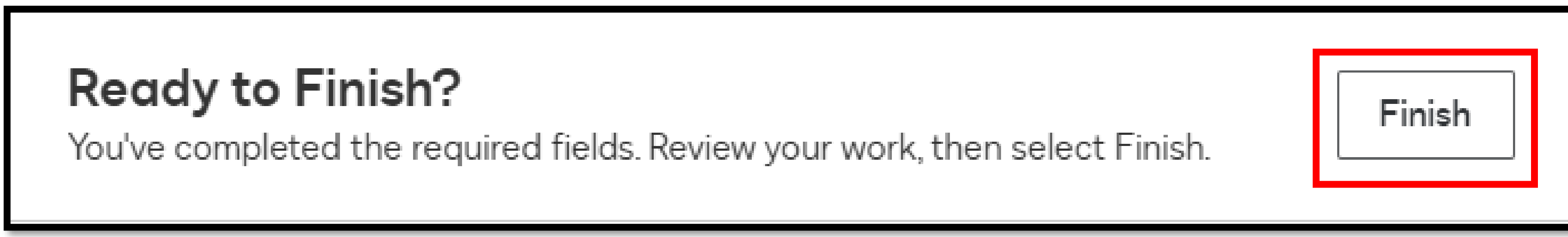
To select a signature style provided by DocuSign:

- ✓ Click the **Select Style** tab
- ✓ Confirm full name
- ✓ Confirm initials
- ✓ Optionally, click the **Change Style** link.
- ✓ Choose a style
- ✓ Click the yellow **Adopt and Sign** button



Complete Employee Packet – DocuSign

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



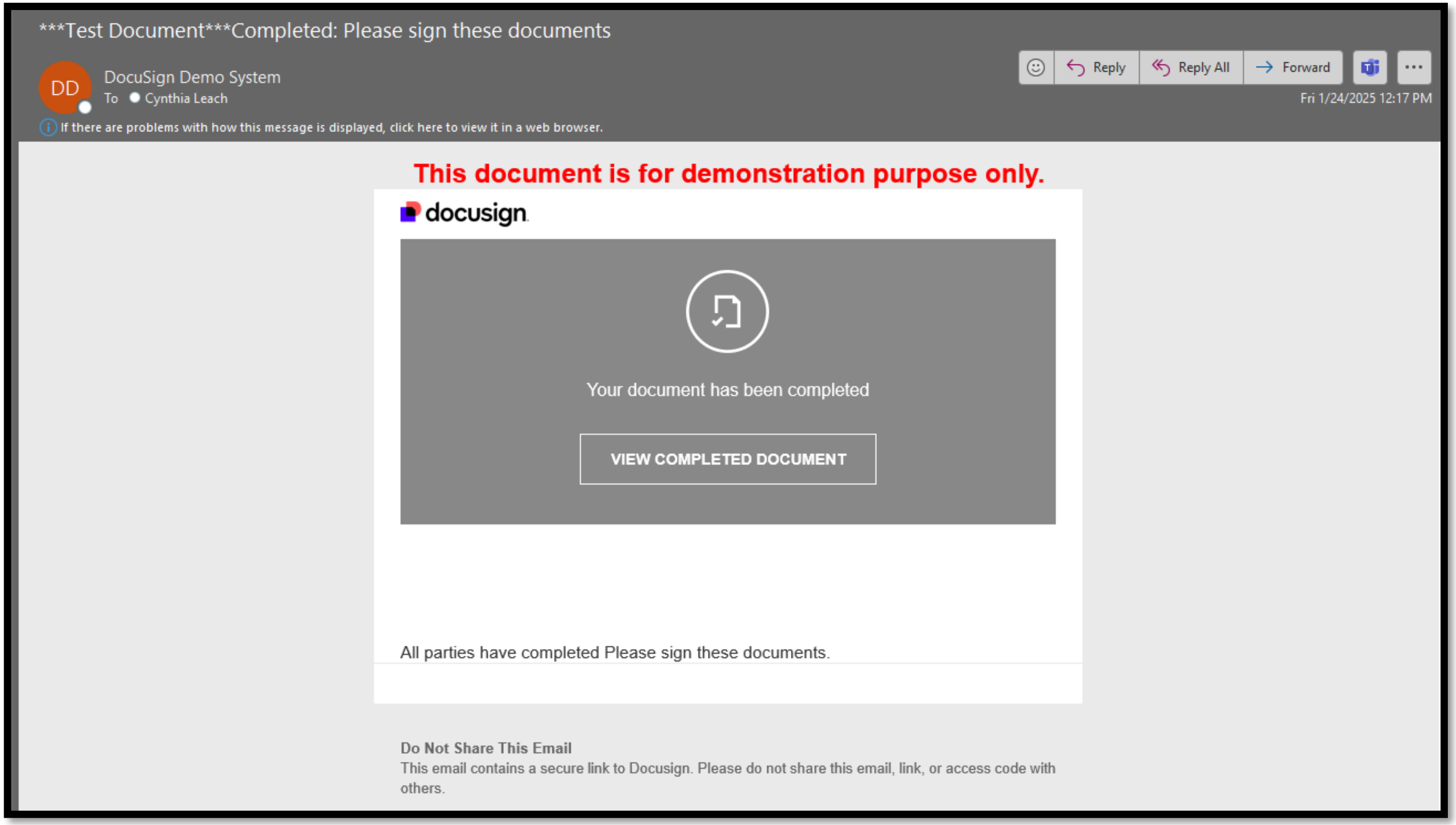
Complete Employee Packet – DocuSign

Congratulations!
The Employee packet is complete.

- Optionally, click the **download icon** to download as a combined PDF or as separate PDFs, or click the **printer icon** to print.
- Click the yellow **Continue** button to proceed

Complete Employee Packet – DocuSign

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



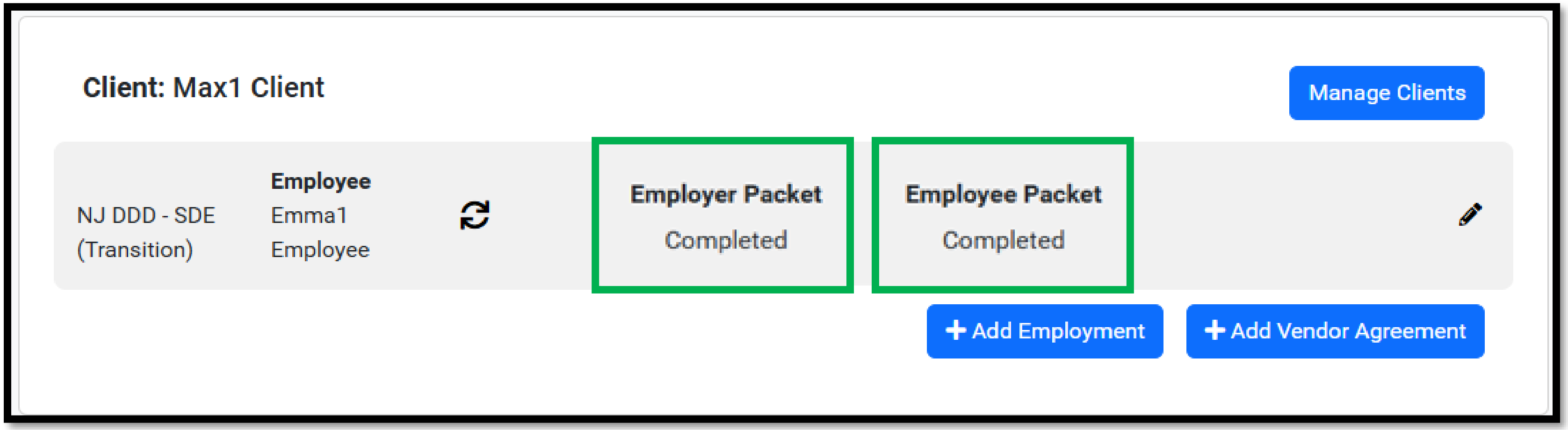
Enrollment Completed*

*Enrollment Completed means the Employment is complete and ready for review by an Agent

Enrollment Completed

The Enrollment Dashboard displays the Employee Packet marked **Completed**.

- If you will be receiving vendor services, continue your enrollment by clicking the **+Add Vendor Agreement** button. See Add Vendor Agreement section.
- If you **will not** be receiving vendor services, continue to the slide titled "Next Steps"



Add Vendor Agreement

- Employer completes this process
- **Important! Client and Employer registrations must be completed before adding the Vendor Agreement.**
- **The Employer packet is not required to be completed to add the Vendor Agreement.**

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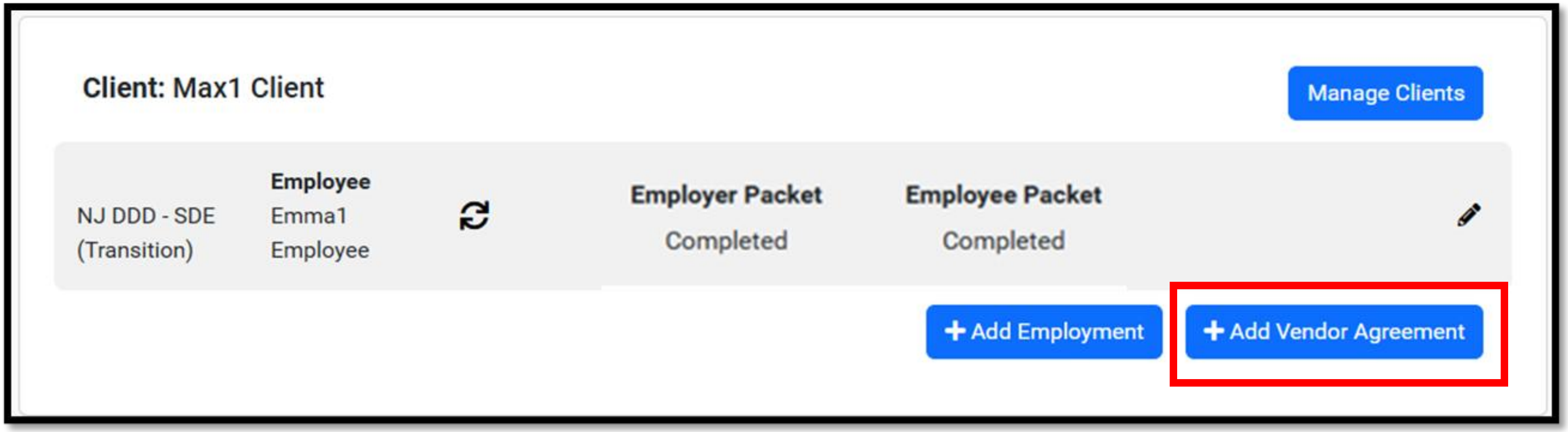
Add Vendor Agreement

On the Enrollment Dashboard, click the **+Add Vendor Agreement** button.

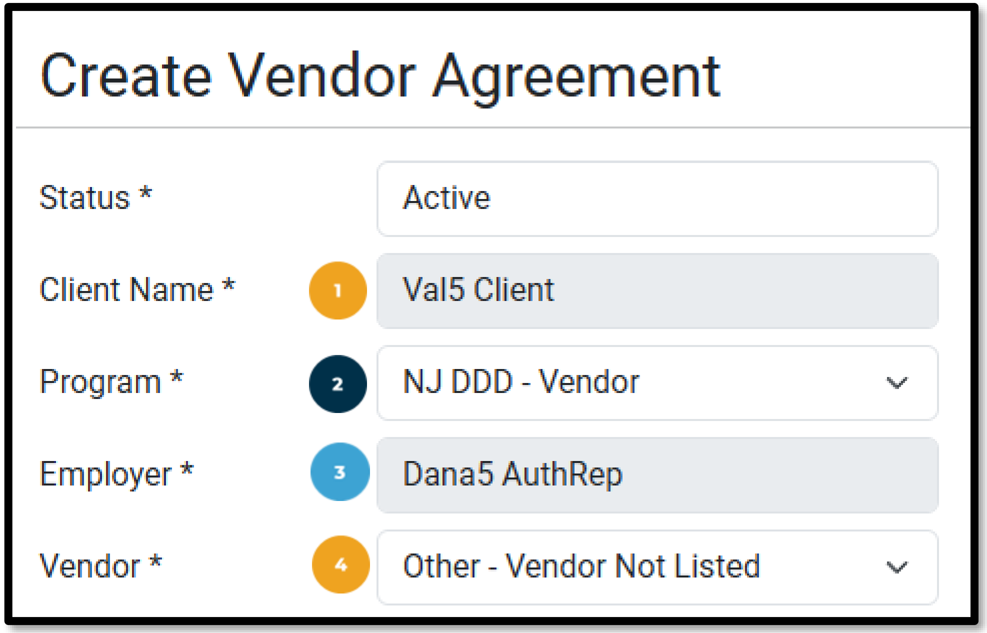


Add Vendor Agreement

Complete Create Vendor Agreement:

Employment Details:

1. Client Name (**required**): Auto-populates
2. Program (**required**): Select the program in which the client participates
3. Employer (**required**): Auto-populates
4. Vendor (**required**): Select from list of vendors **or** select "Other – Vendor Not Listed" if your vendor does not appear on the list.



Add Vendor Agreement

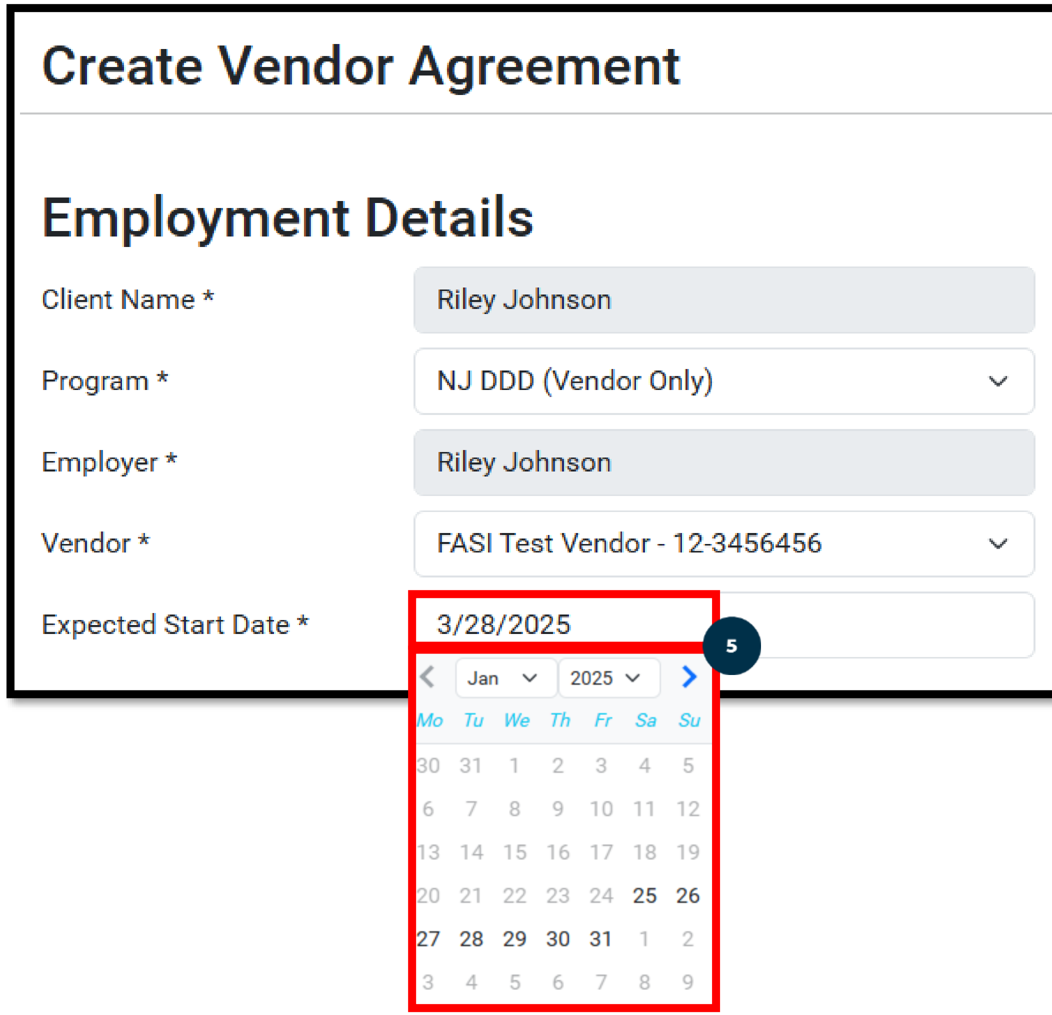
Finish completing the Create Vendor Agreement details section:

5. Expected Start Date (**required**):

   - Enter the date in **MM/DD/YYYY** format

   OR

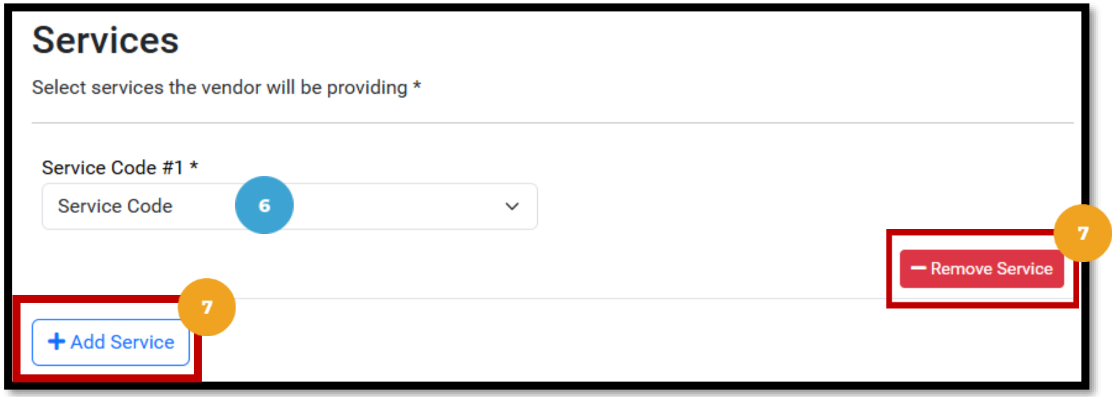
   - Click in the field to select a date from the calendar



Add Vendor Agreement

Complete the Services details:

6. Service Code #1 (required): Click the drop-down to select the services the Vendor will be providing.
7. Optionally:
   - ✓ Click **-Remove Service** to remove a service code
   - ✓ Click **+Add Service** to add another service code



8. Click **Save** to complete the process
9. Optionally, click **Cancel** to discard changes.

Enrollment Phase Completion

After you Add the Employment and Vendor Agreement

After clicking **Save**, The Employer will receive an email:

- ✓ **Title:** Enrollment Phase Completion
- ✓ **Sender:** no-reply@acumen2.net
  - ❖ **Tip**: If the email doesn't appear in the inbox, be sure to check the spam or junk folder.

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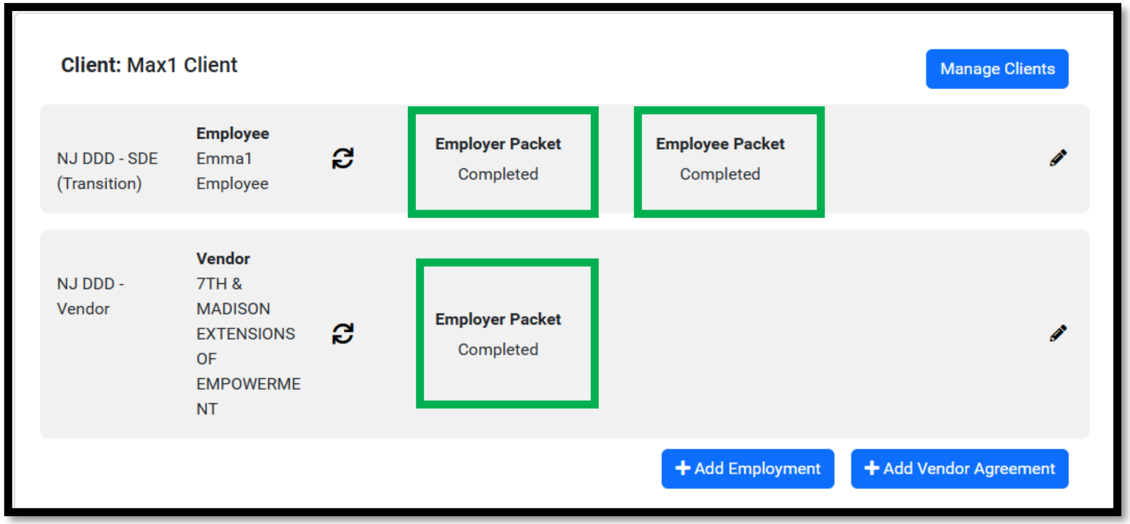
Acumen Fiscal Agent is a trusted provider in the self-direction space of healthcare across the U.S.
For more information, call (877) 211-3738.

www.acumenfiscalagent.com

Enrollment Completed

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

- To add any additional vendor agreements, click the **+Add Vendor Agreement** button. See Add Vendor Agreement section.
- To add an additional employee, click the **+Add Employment** button. See Add Employment section.
- To enroll an additional client, click the **Manage Clients** button. See Manage Clients section.
- If you are finished with your enrollment, continue to the slide titled "Next Steps"

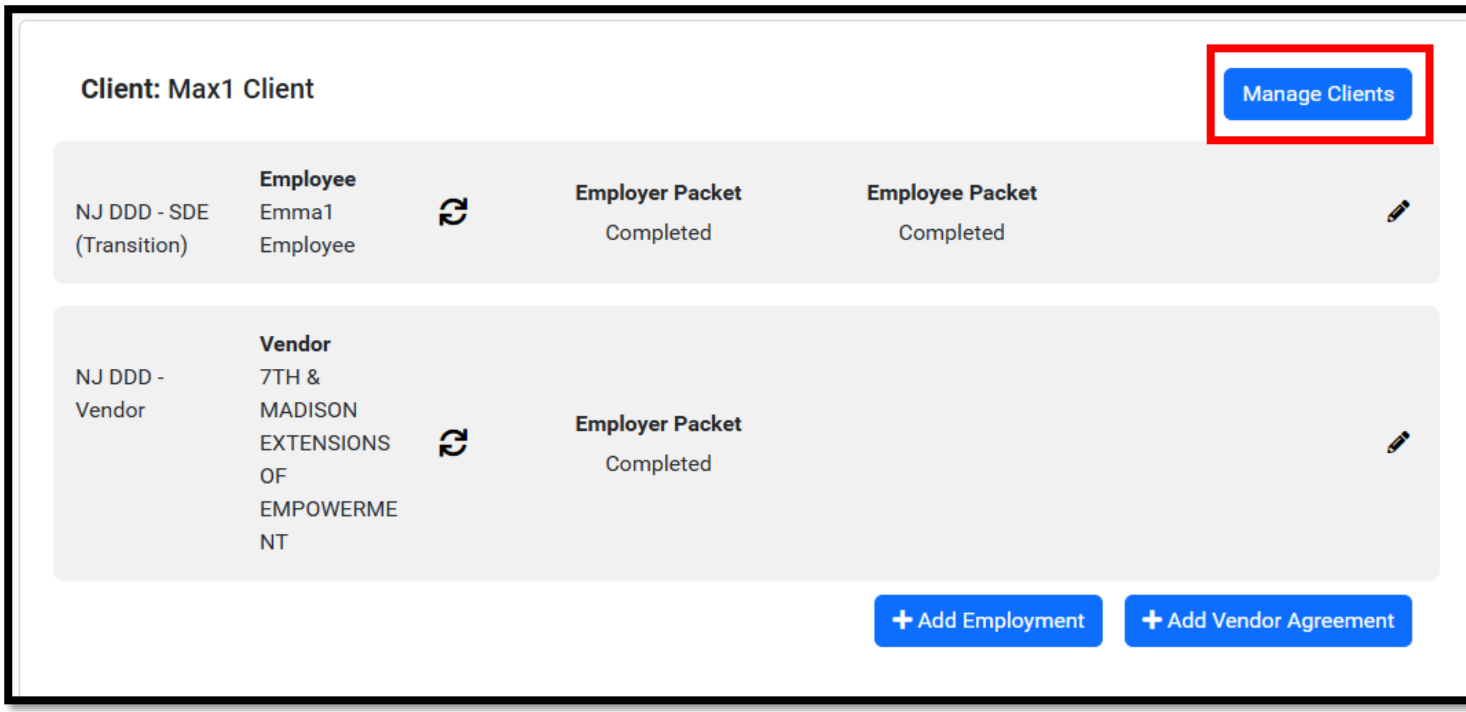


Manage Clients

- ✓ The Manage Clients button may be used when the Employer has more than one Client to enroll.
- ✓ Employer completes this process

Manage Clients

To add or view additional Clients and manage their enrollment, click the **Manage Clients** button.



Manage Clients

To add a new client, click the **+Add New Client** button.

Optionally, click the **Select** button to view and manage the listed Client's enrollment and redirect to the Dashboard.

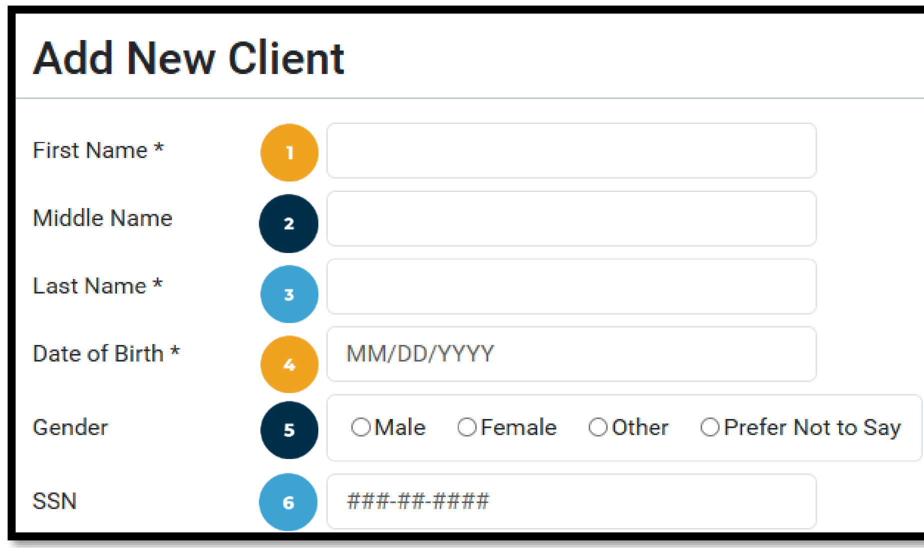
Manage Clients- Add New Client

Complete the Add New Client Form:

1. First Name (**required**)
2. Middle Name (optional)
3. Last Name (**required**)
4. Date of Birth (**required**):
   - Enter the date in **MM/DD/YYYY** format

   OR

   - Click in the field to select a date from the calendar
5. Gender (optional): Select one
   - Male
   - Female
   - Other
   - Prefer Not to Say
6. SSN (optional)

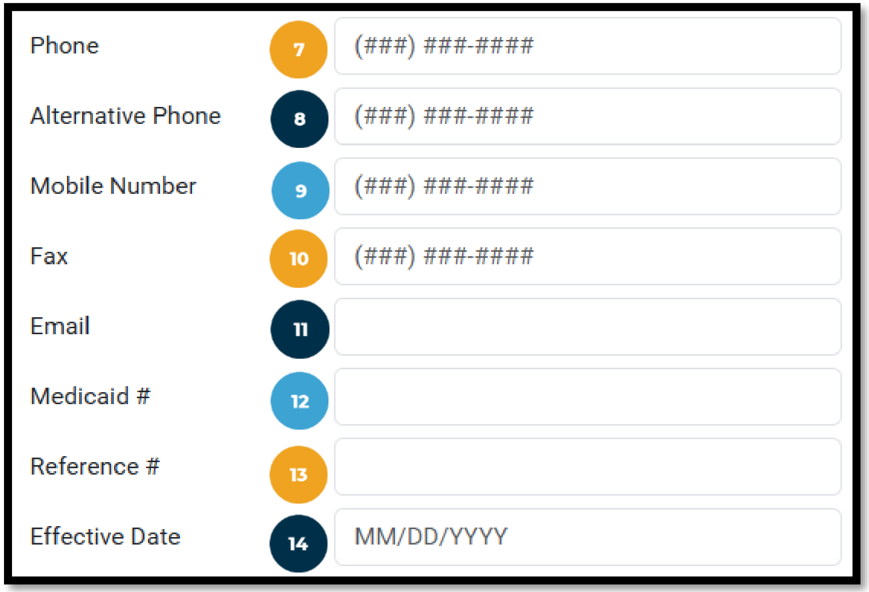


Manage Clients– Add New Client

7. Phone (optional)
8. Alternative Phone (optional)
9. Mobile Number (optional)
10. Fax (optional)
11. Email (optional)
12. Medicaid # (optional)
13. Reference # (optional)
14. Effective Date (optional):
    - Enter the date in **MM/DD/YYYY** format

    OR

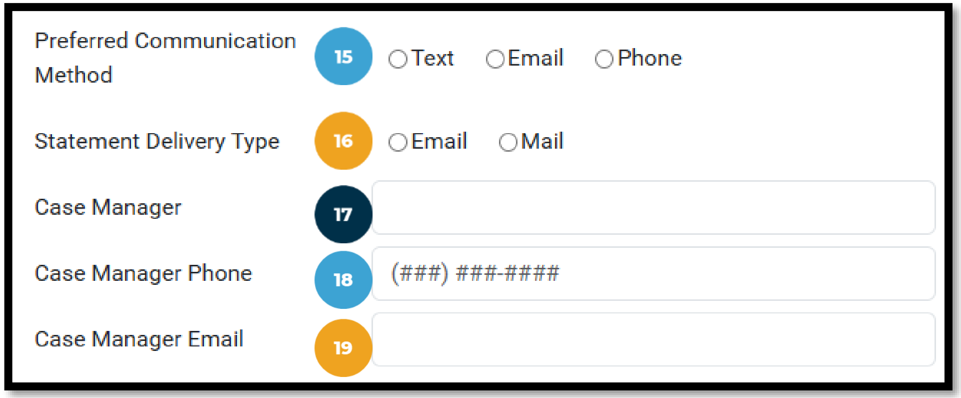
    - Click in the field to select a date from the calendar



Manage Clients- Add New Client

Complete the Add New Client Form, continued:

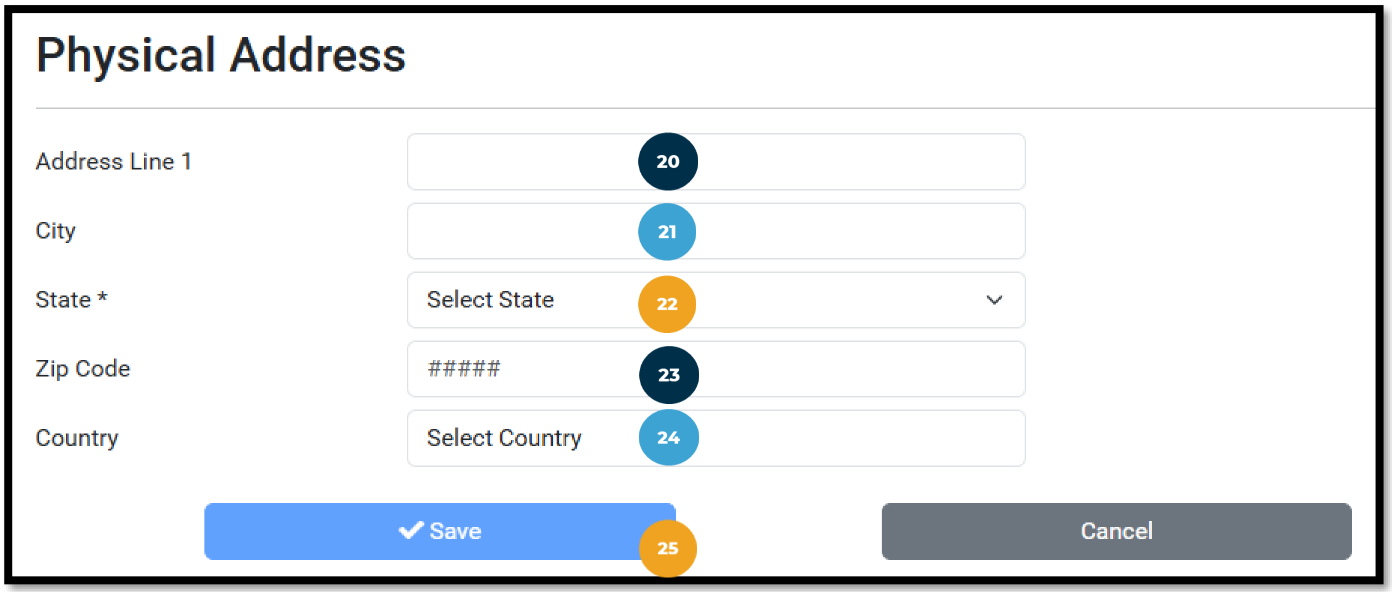
15. Preferred Communication Method (optional): Select one
    - Text
    - Email
    - Phone
16. Statement Delivery Type (optional): Select one
    - Email
    - Mail
17. Case Manager (optional)
18. Case Manager Phone (optional)
19. Case Manager Email (optional)



Manage Clients- Add New Client

Physical Address

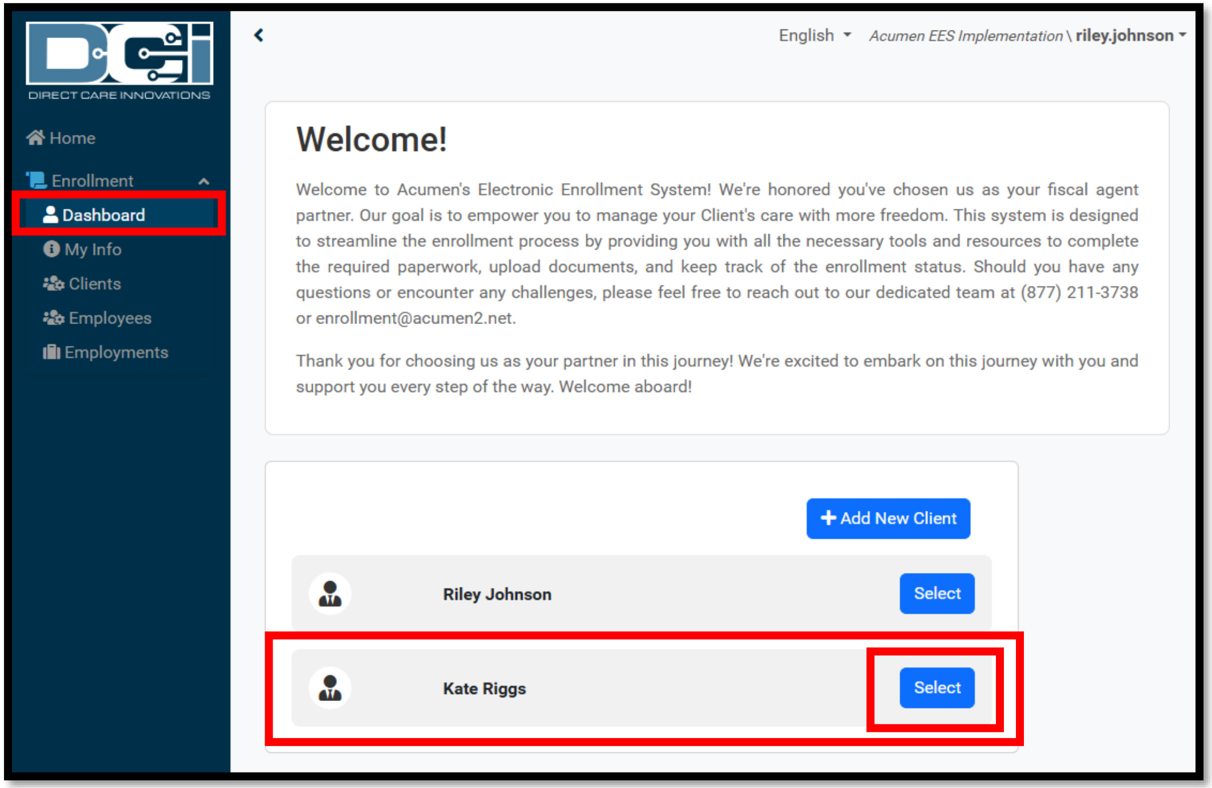
20. Address Line 1 (optional)
21. City (optional)
22. State (**required**)
23. Zip Code (optional)
24. Country (optional)
25. Click **Save**



Manage Clients– Add New Client

Click **Dashboard** on the Enrollment menu

Click the blue **Select** button to view and manage the new Client's enrollment.



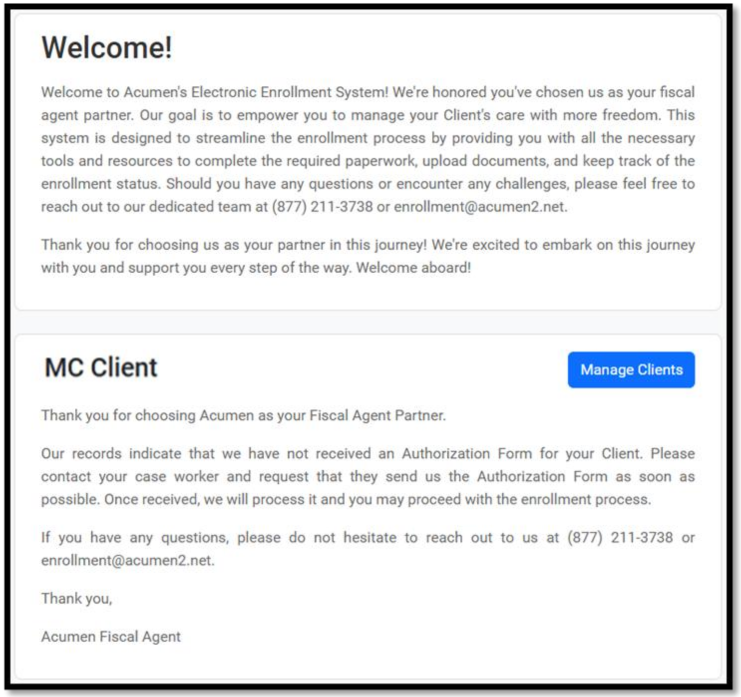
Missing Authorization

After clicking the blue **Select** button, EES verifies that an **Authorization** form has been created for the Client.

❖ If there is **<u>no</u>** authorization form for the Client, an instructional message displays:

"...contact your case worker and request that they send us the Authorization Form as soon as possible. Once received, we will process it and you may proceed with the enrollment process."

❖ Contact the case worker or agent for assistance



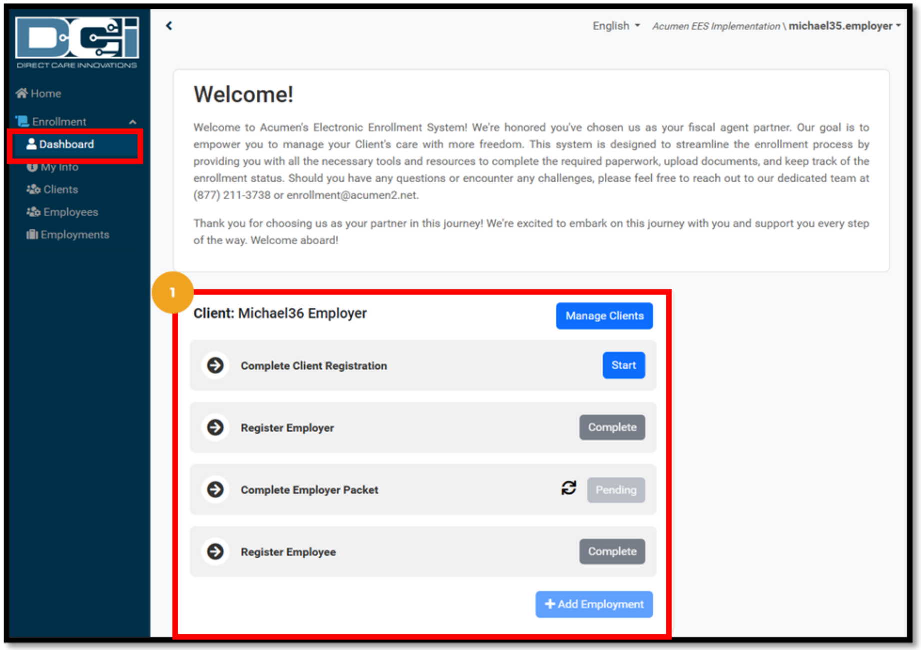
Authorization Preloaded – Next Action

If there **is** an authorization form for the Client:

1. After clicking the blue **Select** button, the Employer is directed to the Dashboard on the user management menu.
2. The Employer may now manage the enrollment for the newly added Client.

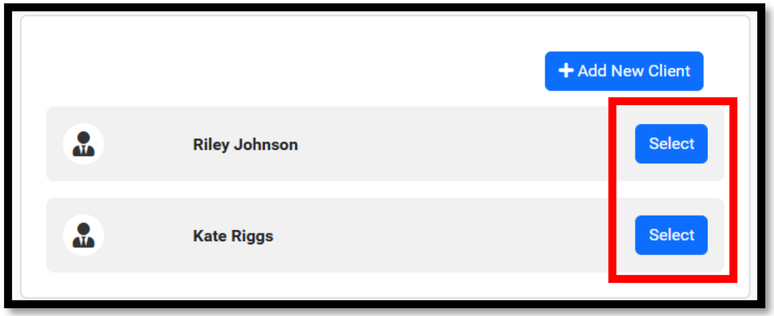
Note: The links below will navigate to the instructions above if you need assistance in managing the additional Client's enrollment.

- Complete Client Registration
- Complete Employer Packet
- Add Employment (may be completed without signing the Employer Packet)
- Send Employee Packet
- Complete Employee Packet

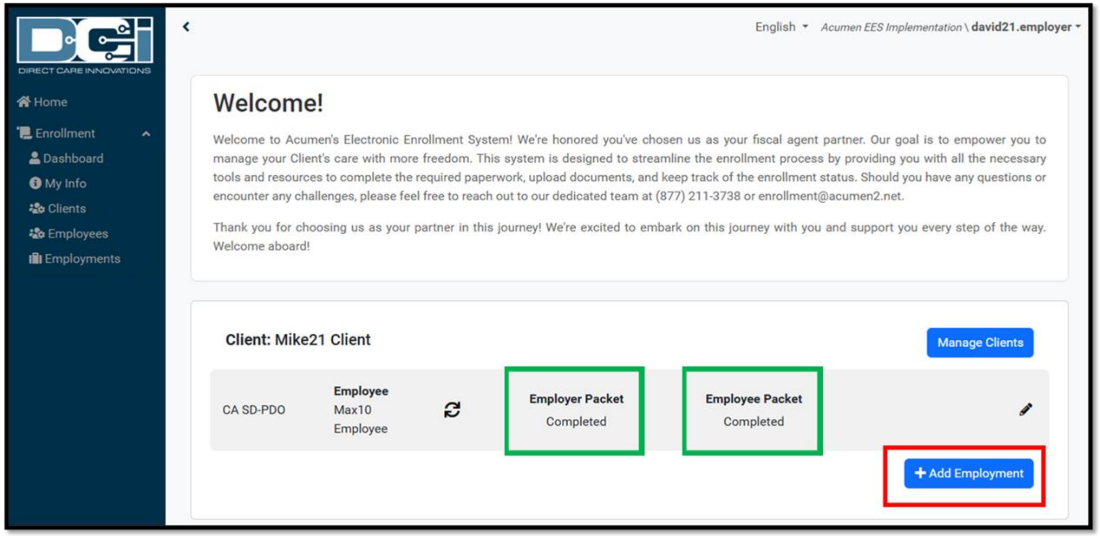


Enrollment Completed

Click the **Manage Clients** button to view and manage the listed Client's enrollment.



The Enrollment Dashboard displays the Employer and Employee Packet marked as **Completed**.



Next Steps

Congratulations! You have completed your portion of the enrollment process! Your enrollment information is now ready to be reviewed by an agent.

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

Click the logo to return to the Table of Contents.

Support & Resources

- You just learned how to complete your enrollment using Acumen's new **Electronic Enrollment System (EES**).
- Acumen is committed to providing comprehensive support during the transition. Participants will have a number of ways to access this support:
  - **In-Person Support** – Schedule an appointment with a Client Services Agent at our local office in Hamilton, NJ
  - **Virtual Video Meetings** – Receive support from the comfort of your home.
  - **Phone Assistance** – To reach Customer Service at our toll-free number: **833-892-0413**
  - **Email support –** Email us at enrollment-nj@acumen2.net
  - **Online Resources -** New Jersey – Training Materials
  - **To update your contact information:** Use our NJ DDD – Contact Information Update form to update your contact details for Acumen.

Reset Password

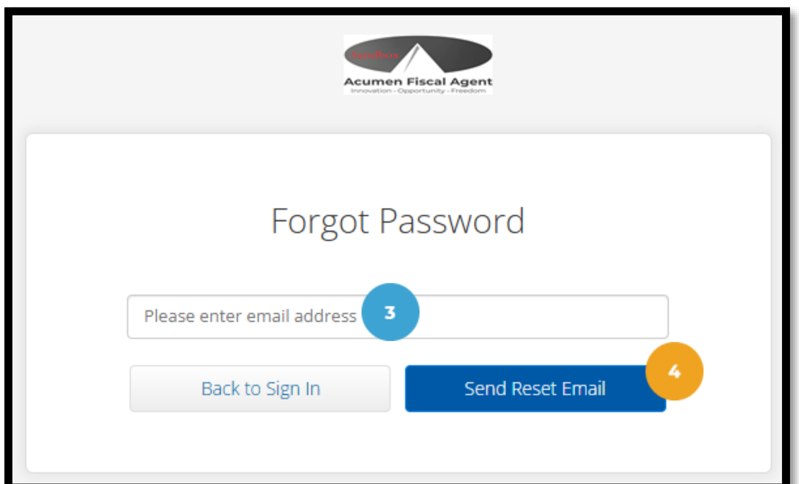
Reset Password

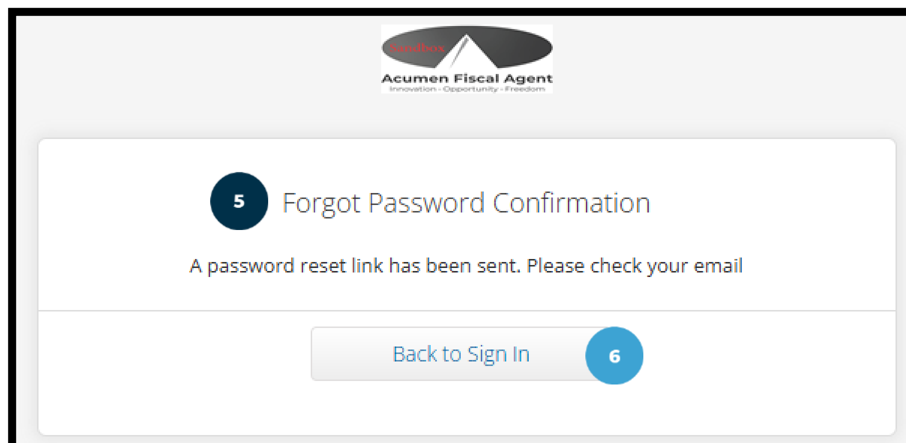
1. To reset your password, navigate to: https://acumen.dcisoftware.com/

2. Click the **Forgot your password** link to reset your password

Reset Password

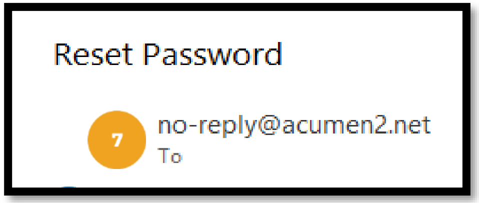
3. In the **Forgot Password** screen, enter the email used during the Initial Registration
4. Click the **Send Reset Email** button.
5. The **Forgot Password Confirmation** screen displays:
    - A password reset link has been sent. Please check your email.
6. Click the **Back to Sign in** button

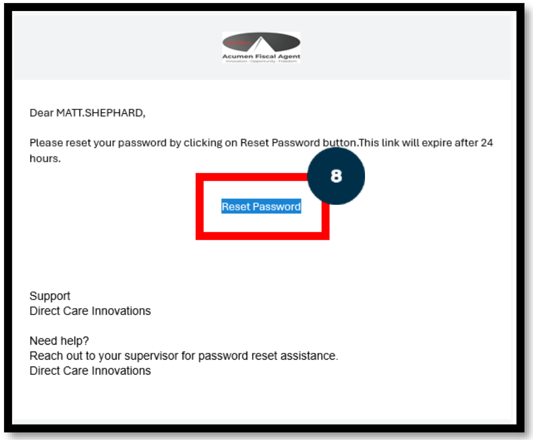


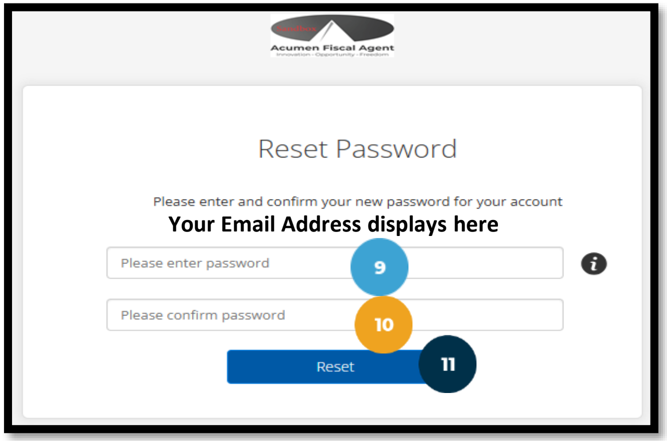


Reset Password

7. Check your email to find the Reset Password email.
   - ✓ Title: Reset Password
   - ✓ Sender: no-reply@acumen2.net
   - ✓ Check the spam 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.
     - No more than two repeated characters in a row
     - Username and password cannot contain three consecutive characters of the Enrollee first or last name.
     - Password cannot contain username
10. Re-enter the new password in the **Please confirm password** field.
11. Click **Reset**

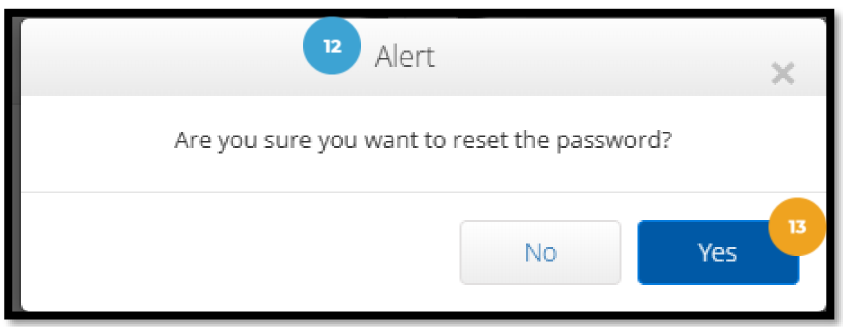


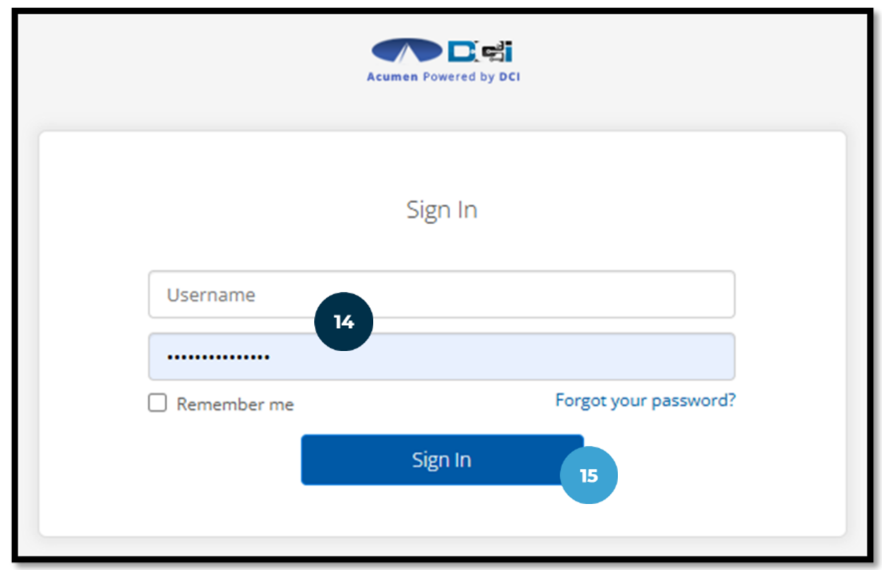




Reset Password

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**.





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Thank you!