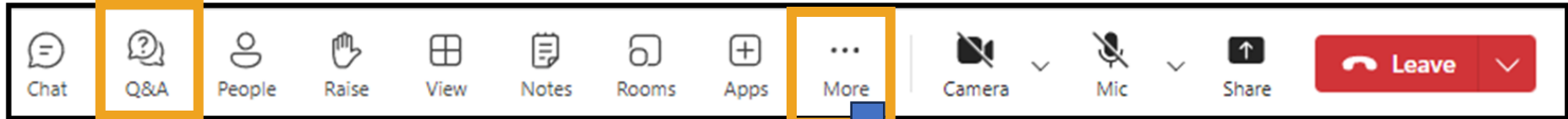




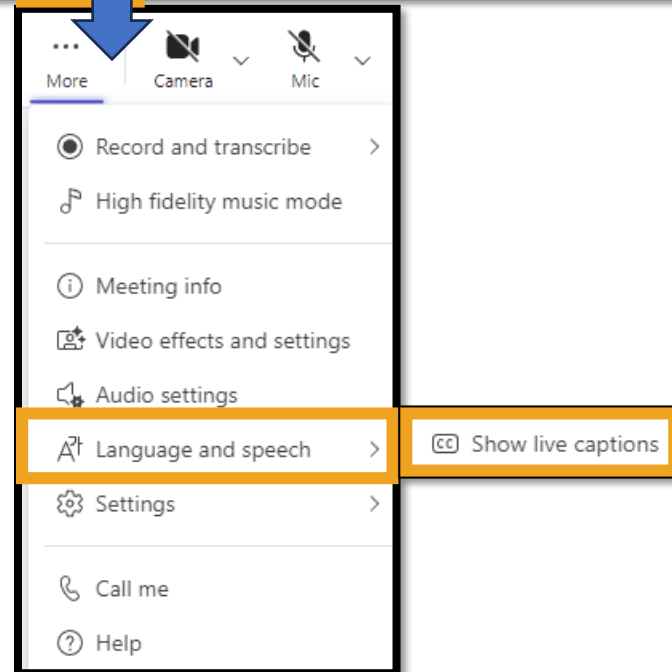
# **EES – Electronic Enrollment System**

## **Self-Enrollment Training for Employers with Employees & Vendors**

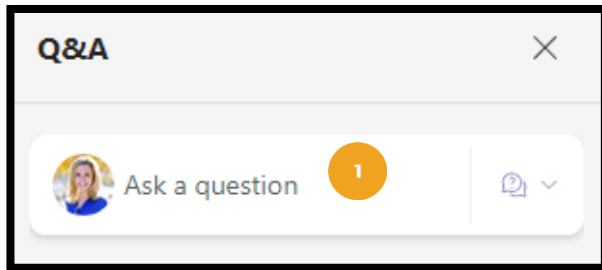
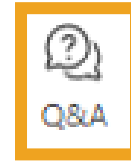
# Using Microsoft Teams



- 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.



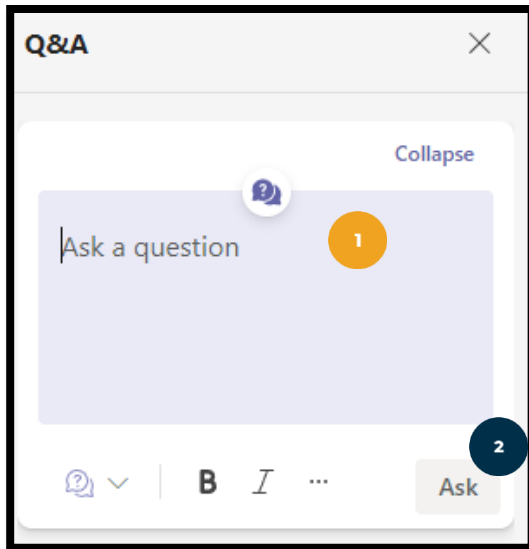
# Using the Q&A button



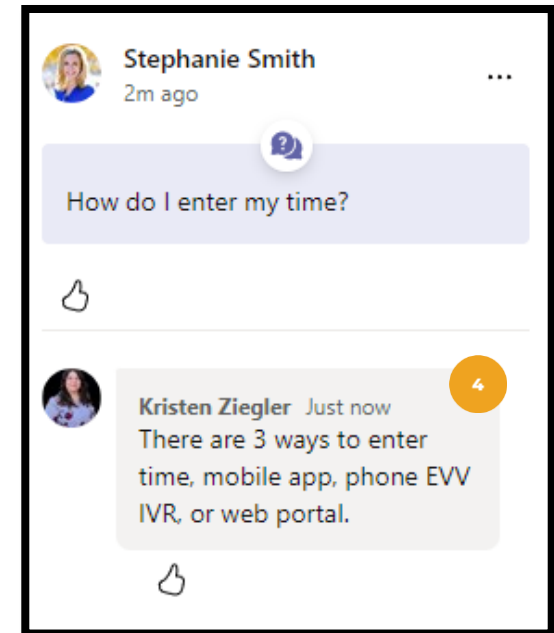
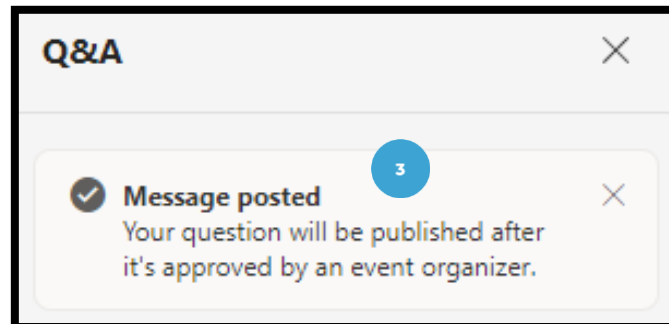
1. After clicking the Q&A button, **type your question** in the Ask a question field.

- Please do not include any confidential information or the question cannot be published & answered.

4. Moderators review, approve & post your question.



2. Click the Ask button
3. Message posted displays



# Welcome to Acumen!

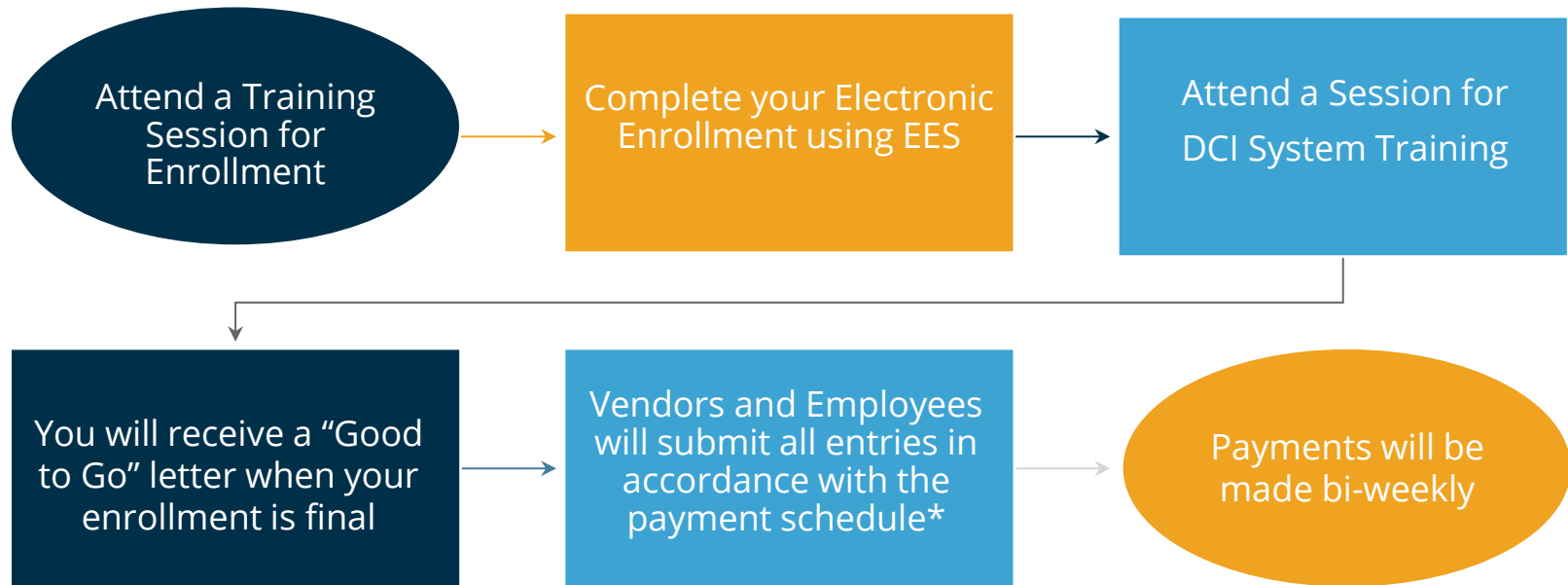
As you may know, the Division of Developmental Disabilities (**DDD**) Vendor Fiscal/Employer Agent Model is transitioning Fiscal Intermediary (**FI**) services from Public Partnerships, LLC (**PPL**) to Acumen Fiscal Agent (**Acumen**), this transition started in *early June*. Acumen will help manage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

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5. [Complete Client Registration](#)
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7. [Complete Employer Packet](#)
8. [Register Employee](#)
9. [Add Employment](#)
10. [Send Employee Packet](#)
11. [Complete Employee Packet](#)
12. [Enrollment Completed](#)
13. [Add Vendor Agreement](#)
14. [Manage Clients](#)
15. [Next Steps](#)
16. [Password Reset](#)

# Overview & Getting Started

---

# 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/>



2

# 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**

Initial Registration Form

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

**Your Information**

First Name \*

Last Name \*

Date of Birth \* MM/DD/YYYY

Email \*

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

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 Form

Are you the person receiving services? \*

9

☒ Yes

☐ No

Next

10

# 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 Form

#### Client Details

State \*

11 Select State

Medicaid ID

12

Case Manager Name

13

Back

Next 14

# Initial Registration (Employer = Client)

## Create login credentials:

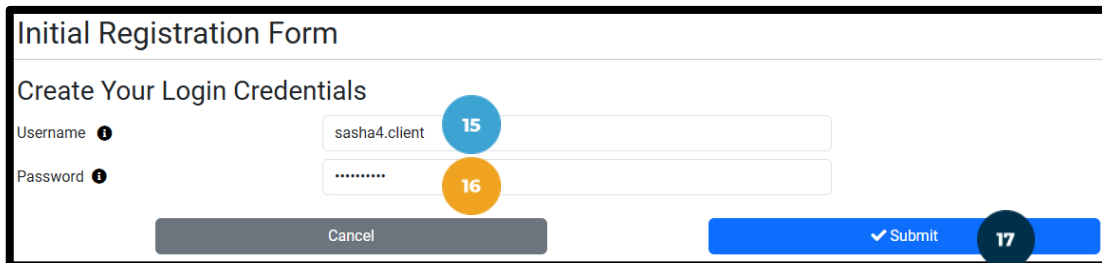
15. Username (**required**): Create a username to log into the EES portal.

- ✓ 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**



Initial Registration Form

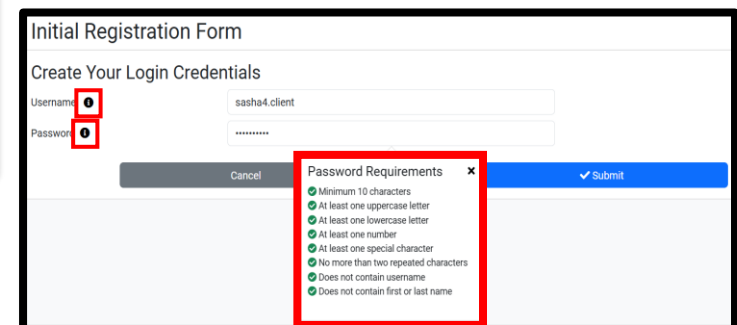
Create Your Login Credentials

Username ⓘ sasha4.client 15

Password ⓘ \*\*\*\*\* 16

Cancel ✓ Submit 17

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



Initial Registration Form

Create Your Login Credentials

Username ⓘ sasha4.client

Password ⓘ \*\*\*\*\*

Cancel ✓ Submit 17

**Password Requirements**

- ✓ 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
- ✓ Does not contain first or last name

# 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.

18

## Initial Registration Form

Thank you for completing the Initial Registration Form.

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.

Resend Activation Email

19

# 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/>



2

# 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**

The screenshot shows the 'Initial Registration Form' for Direct Care Innovations (DCI). The form is titled 'Initial Registration Form' and 'Your Information'. It contains fields for First Name, Last Name, Date of Birth, Email, and Phone, each with a numbered circle (3-7) next to it. A 'Next' button with a numbered circle (8) is at the bottom. The DCI logo is on the left, and 'English' and 'Login' links are at the top right.

**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 Form

Are you the person receiving services? \*

☐ Yes ☒ No

9

Next

10

# 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 Form

### Client Details

First Name *	11	<input type="text"/>
Last Name *	12	<input type="text"/>
Date of Birth *	13	<input type="text" value="MM/DD/YYYY"/>
State *	14	<input type="text" value="Select State"/>
Medicaid ID	15	<input type="text"/>
Case Manager Name	16	<input type="text"/>

# Initial Registration (Employer is NOT the Client)

## Create login credentials:

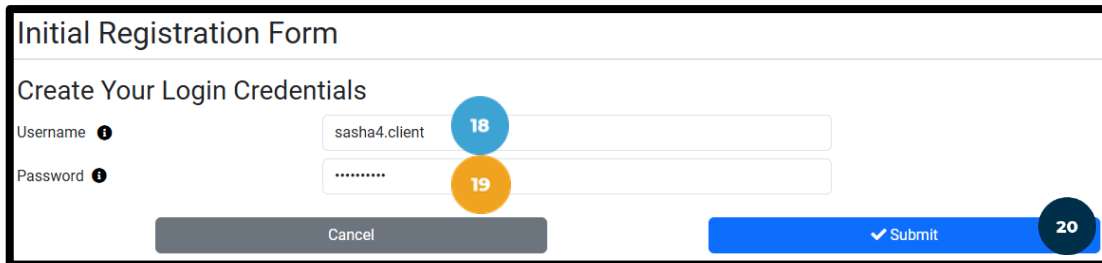
18. Username (**required**): Create a username to log into the EES portal.

- ✓ 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**



Initial Registration Form

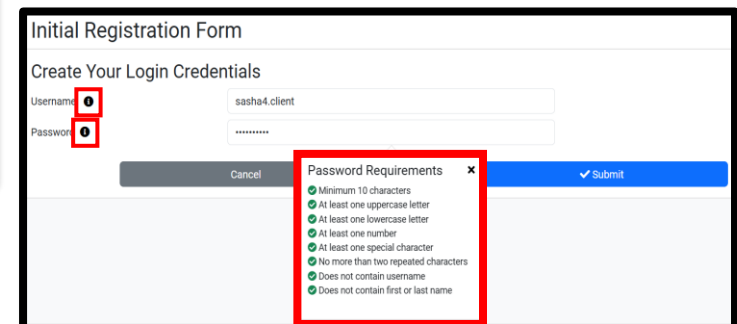
Create Your Login Credentials

Username ⓘ sasha4.client 18

Password ⓘ \*\*\*\*\* 19

Cancel Submit 20

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



Initial Registration Form

Create Your Login Credentials

Username ⓘ sasha4.client

Password ⓘ \*\*\*\*\*

Cancel Submit

**Password Requirements**

- ✓ 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
- ✓ Does not contain first or last name

# 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.

21

## Initial Registration Form

Thank you for completing the Initial Registration Form.

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.

 Resend Activation Email

22

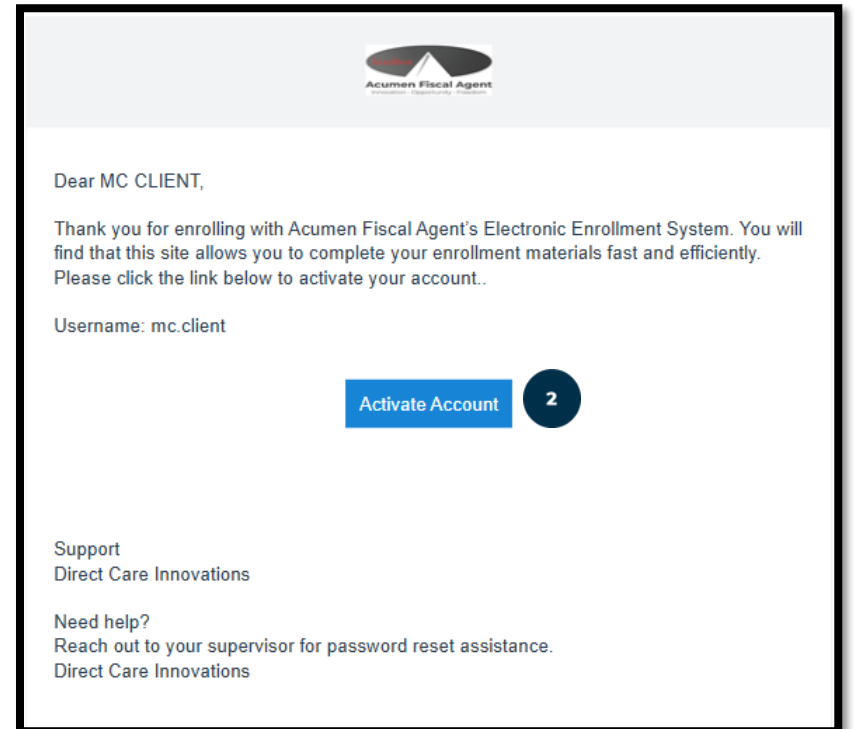
# Instructions for logging into EES using a tablet or mobile device

---

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](mailto: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)

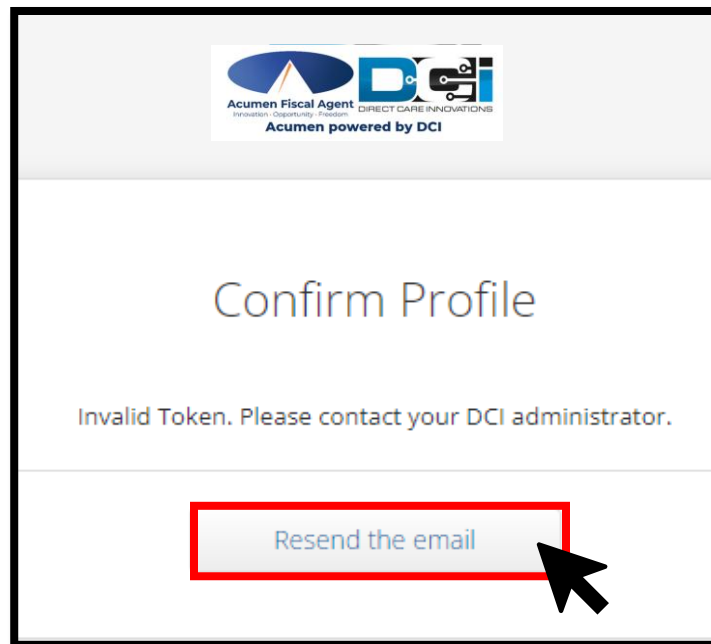




# Activate Profile

## Note:

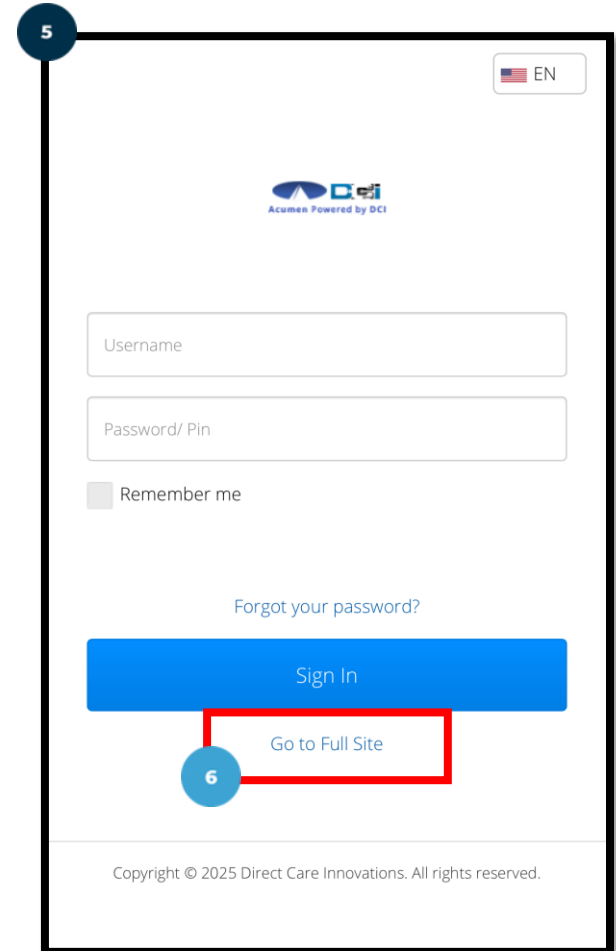
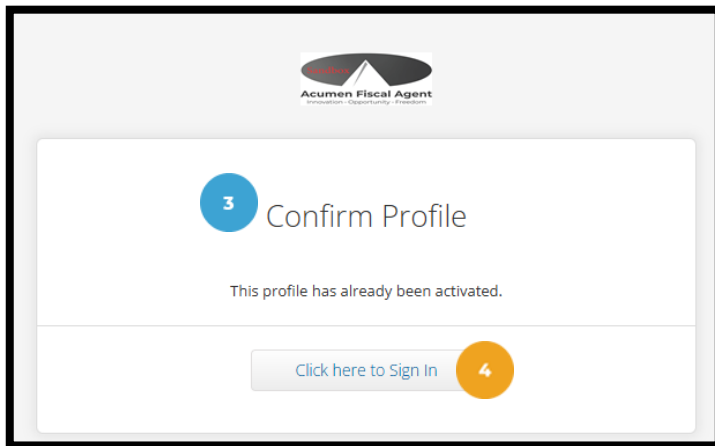
- If you clicked on the activate profile link after 24 hours of receiving it, you may receive an error message saying “Invalid Token - Please contact your DCI administrator”
- Simply click the **Resend the email** button below and check your email for a new link to activate your profile (see step 2).



Proprietary: For Acumen and Customer Use Only

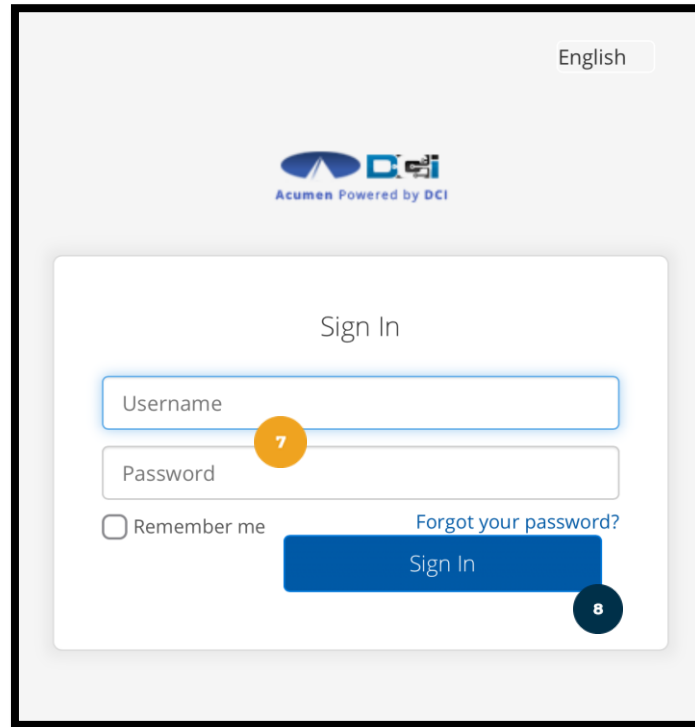
# Activate Profile –DCI Mobile Full Site

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



The screenshot shows the 'Sign In' page of the DCI Mobile application. At the top right, there is a language selector set to 'English'. Below the header is the DCI logo with the text 'Acumen Powered by DCI'. The main content area is titled 'Sign In' and contains a form with two input fields: 'Username' and 'Password'. A blue callout circle with the number '7' points to the 'Password' field. Below the 'Password' field is a checkbox labeled 'Remember me' and a link that says 'Forgot your password?'. At the bottom of the form is a blue 'Sign In' button, which is highlighted by a blue callout circle with the number '8'.

# Instructions for logging into EES using a desktop or laptop computer

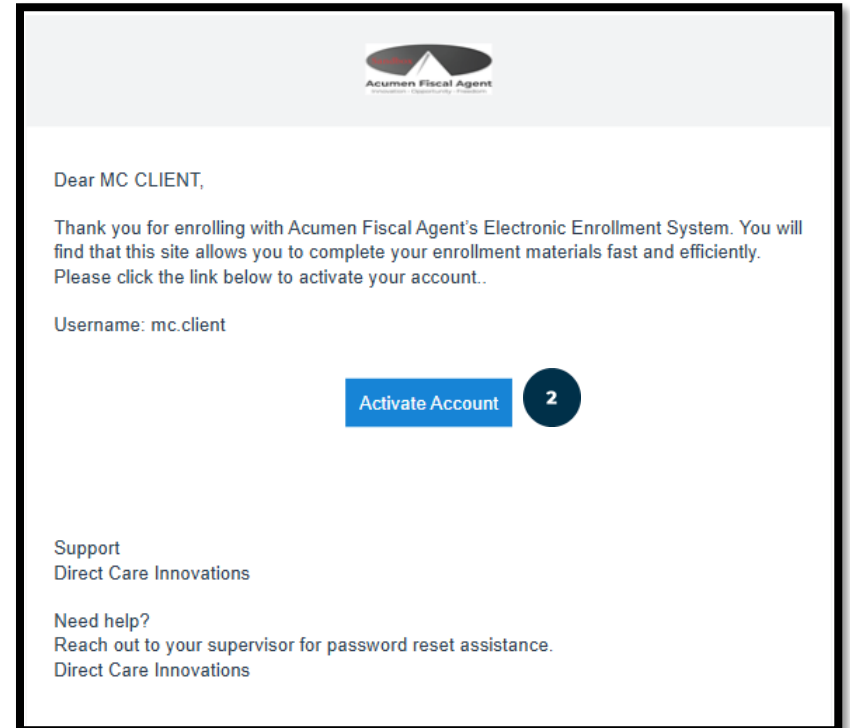
---

\*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

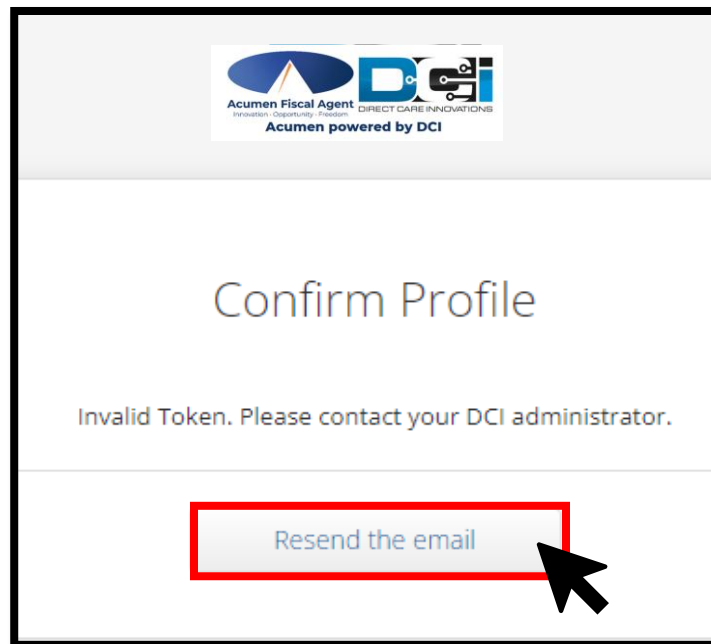
1. Upon completing Initial Registration, an email is sent to the Employer for account activation.
  - ✓ **Title:** Welcome to Acumen's Electronic Enrollment System
  - ✓ **Sender:**  
[no-reply@acumen2.net](mailto:no-reply@acumen2.net)
  - ✓ Check the spam folder if necessary
2. Click the blue **Activate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



# Activate Profile

## Note:

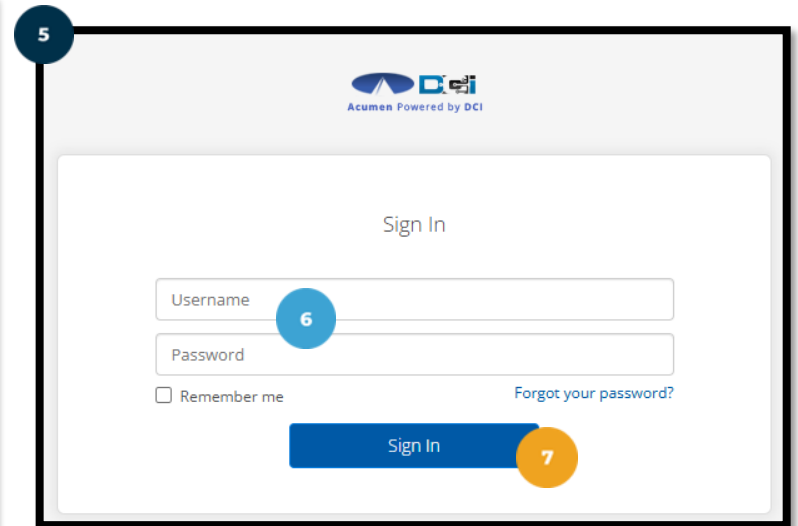
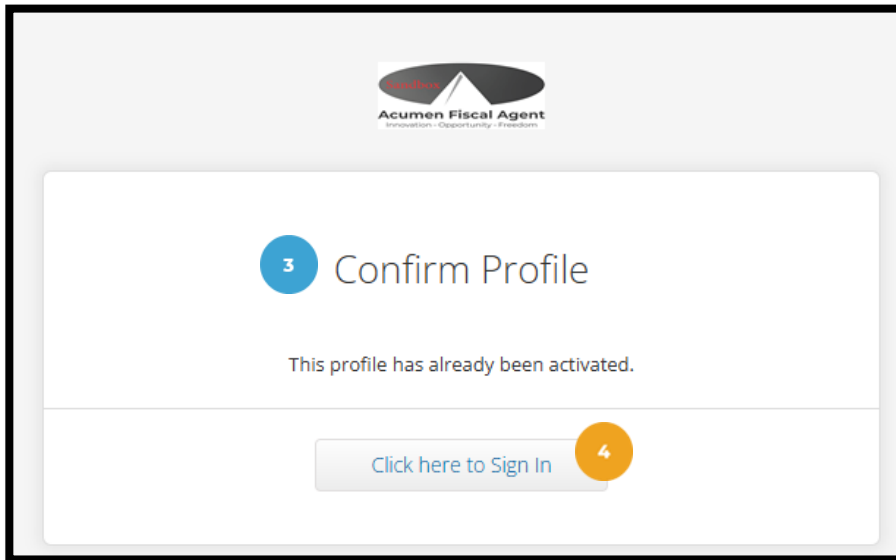
- If you clicked on the activate profile link after 24 hours of receiving it, you may receive an error message saying “Invalid Token - Please contact your DCI administrator”
- Simply click the **Resend the email** button below and check your email for a new link to activate your profile (see step 2).



Proprietary: For Acumen and Customer Use Only

# 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.

The screenshot displays the Acumen EES Implementation dashboard for a client named 'max1.client'. The interface includes a sidebar with 'Home' and 'Enrollment' links. The main content area features a 'Welcome!' message and a list of tasks for the 'Client: Max1 Client'. The 'Complete Client Registration' task is highlighted with a red box around its 'Start' button. Other tasks include 'Register Employer', 'Complete Employer Packet' (which is in a 'Pending' state), and 'Register Employee'. At the bottom, there are buttons for '+ Add Employment' and '+ Add Vendor Agreement'.

English ▾ Acumen EES Implementation \ max1.client ▾

## Welcome!

Welcome to Acumen's Electronic Enrollment System! We're honored you've chosen us as your fiscal agent partner. Our goal is to empower you to manage your Client's care with more freedom. This system is designed to streamline the enrollment process by providing you with all the necessary tools and resources to complete the required paperwork, upload documents, and keep track of the enrollment status. Should you have any questions or encounter any challenges, please feel free to reach out to our dedicated team at (877) 211-3738 or [enrollment@acumen2.net](mailto:enrollment@acumen2.net).

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

Client: Max1 Client [Manage Clients](#)

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

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

# 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):

Agent Email (Agent Use Only)	7	
Agent Full Name (Agent Use Only)	8	
Agent Phone (Agent Use Only)	9	
Authorized Representative City	10	
Authorized Representative Email	11	
Authorized Representative First Name	12	
Authorized Representative Last Name	13	
Authorized Representative Phone	14	
Authorized Representative Physical Address	15	
Authorized Representative State	16	
Authorized Representative Zip Code	17	

Type answers in each associated field.

# 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)

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

Type answers  
in each  
associated  
field.

# 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)**

Support Broker Phone	<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"/>
What is the Client's relationship to the Authorized Representative? *	<input type="text"/>

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:

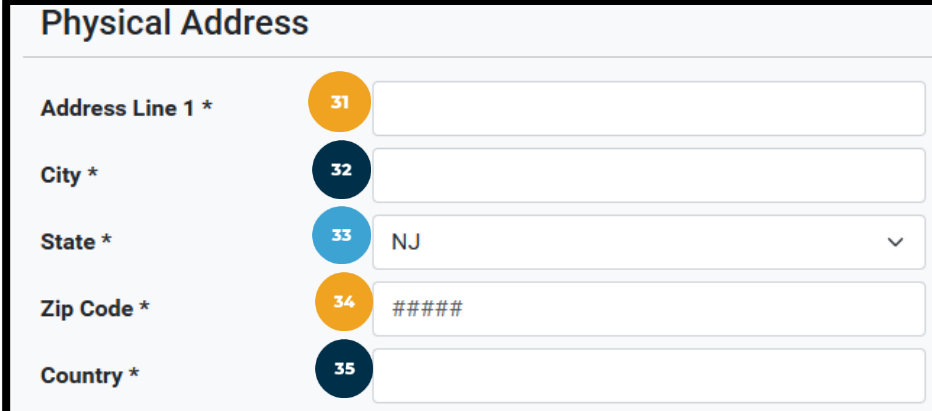
31. Address Line 1 (**required**)

32. City (**required**)

33. State (**required**)

34. Zip Code (**required**)

35. Country (**required**)



Physical Address

Address Line 1 \* 31

City \* 32

State \* 33 NJ

Zip Code \* 34 #####

Country \* 35

## 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



Case Manager Details

Case Manager Name 36

Case Manager Phone 37 (###) ###-####

Case Manager Email 38

39

**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

Client: Max1 Client Manage Clients

→ Complete Client Registration	<span>Complete</span>
→ Register Employer	<span>Start</span>
→ Complete Employer Packet	<span>↻ Pending</span>
→ Register Employee	<span>Start</span>

+ Add Employment + Add Vendor Agreement

**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.

Client: Max1 Client [Manage Clients](#)

- ➔ Complete Client Registration [Complete](#)
- ➔ Register Employer [Start](#)
- ➔ Complete Employer Packet [Refresh](#) [Pending](#)
- ➔ Register Employee [Start](#)

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

# 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

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

## Additional Employer Details

Middle Name	1	<input type="text"/>
Gender *	2	<input type="radio"/> Male <input checked="" type="radio"/> Female <input type="radio"/> Other <input type="radio"/> Prefer Not to Say
SSN *	3	<input type="text" value="987-65-4332"/>
Phone *	4	<input type="text" value="(555) 555-5555"/>
Mobile Number	5	<input type="text" value="(###) ###-####"/>
Preferred Communication Method	6	<input type="radio"/> Text <input type="radio"/> Email <input type="radio"/> Phone

# Register Employer

## Complete Physical Address details:

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

### Physical Address

Address Line 1 *	125 West State Street	7
City *	Trenton	8
State *	NJ	9
Zip Code *	08625	10
Country *	United States of America	11

# 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

### Mailing Address

Mailing Address Matches Physical Address  12

Address Line 1 \*

City \*

State \*

Select State ▼


Zip Code \*

#####

Country \*

Select Country

### Mailing Address

Mailing Address Matches Physical Address  13

# 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)

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

☒ Yes ☐ No ☐ N/A

Please provide the account number if known \*

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

15

# Register Employer

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

Client: Max1 Client

Manage Clients

→ Complete Client Registration

Complete

→ Register Employer

Complete

→ Complete Employer Packet

↺ Start

→ Register Employee

Start

+ Add Employment

+ Add Vendor Agreement

# Complete Employer Packet

---

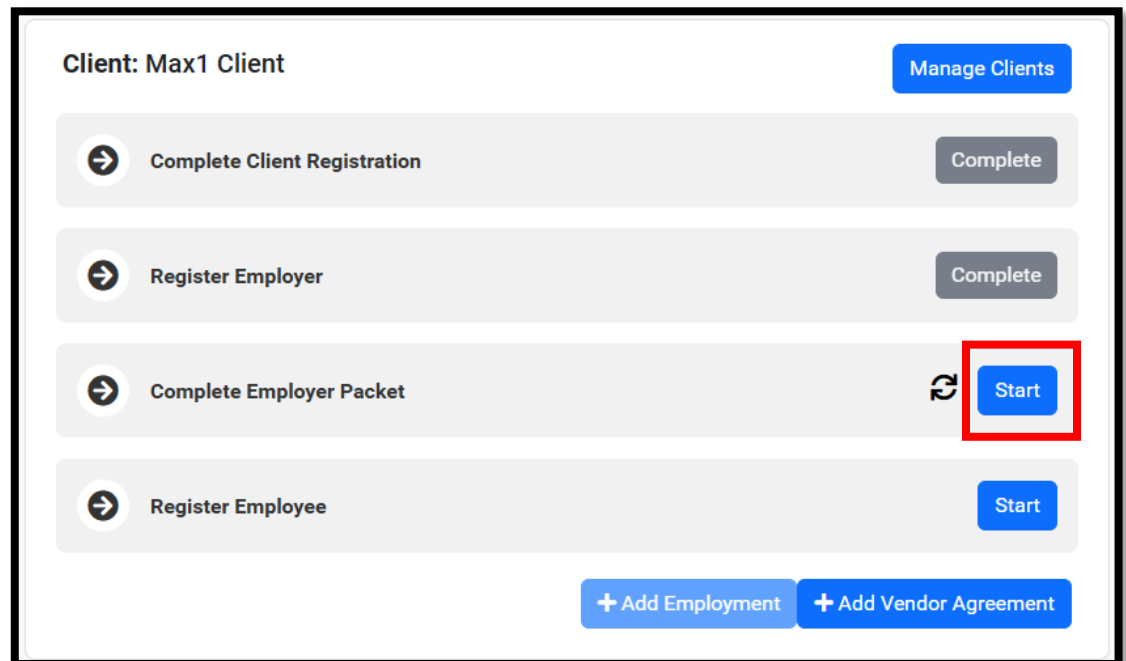
Employer completes this process

# 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



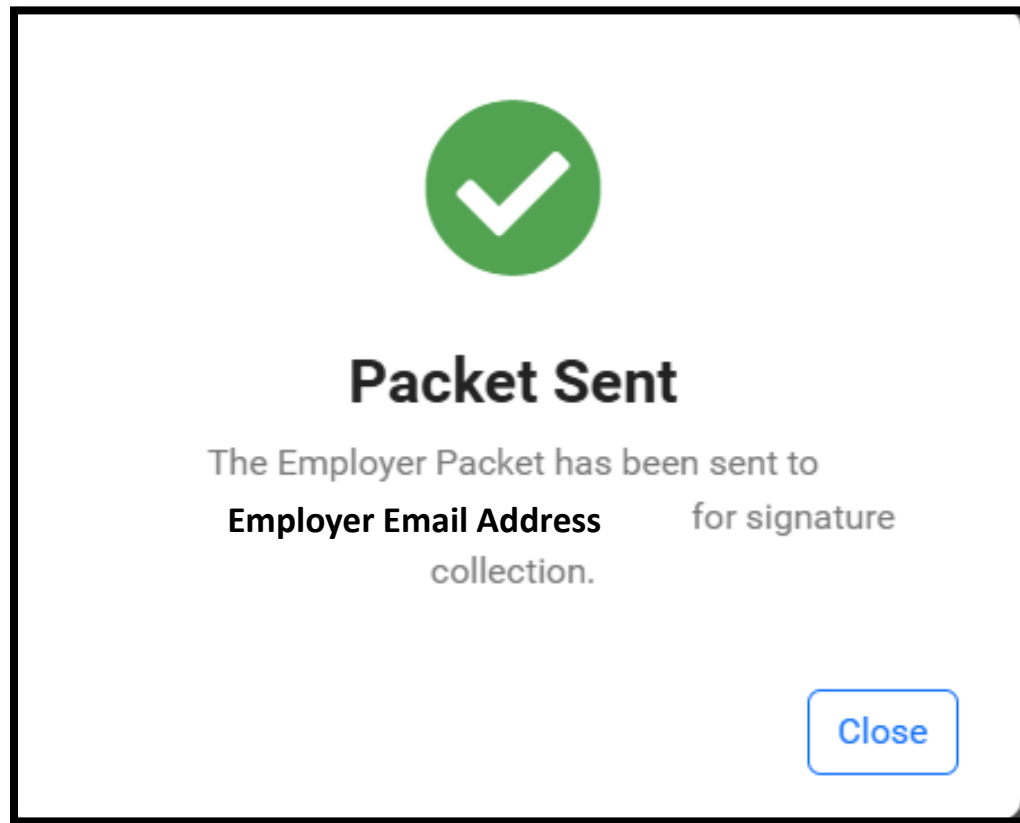
The screenshot displays the 'Enrollment Dashboard' for 'Client: Max1 Client'. At the top right is a 'Manage Clients' button. Below this is a checklist of four tasks, each with a right-pointing arrow icon in a circle:

- Complete Client Registration**: Status 'Complete' (grey button).
- Register Employer**: Status 'Complete' (grey button).
- Complete Employer Packet**: Status 'Start' (blue button, highlighted with a red rectangle and a refresh icon to its left).
- Register Employee**: Status 'Start' (blue button).

At the bottom of the dashboard are two buttons: '+ Add Employment' and '+ Add Vendor Agreement'.

# 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

Client: Max1 Client [Manage Clients](#)

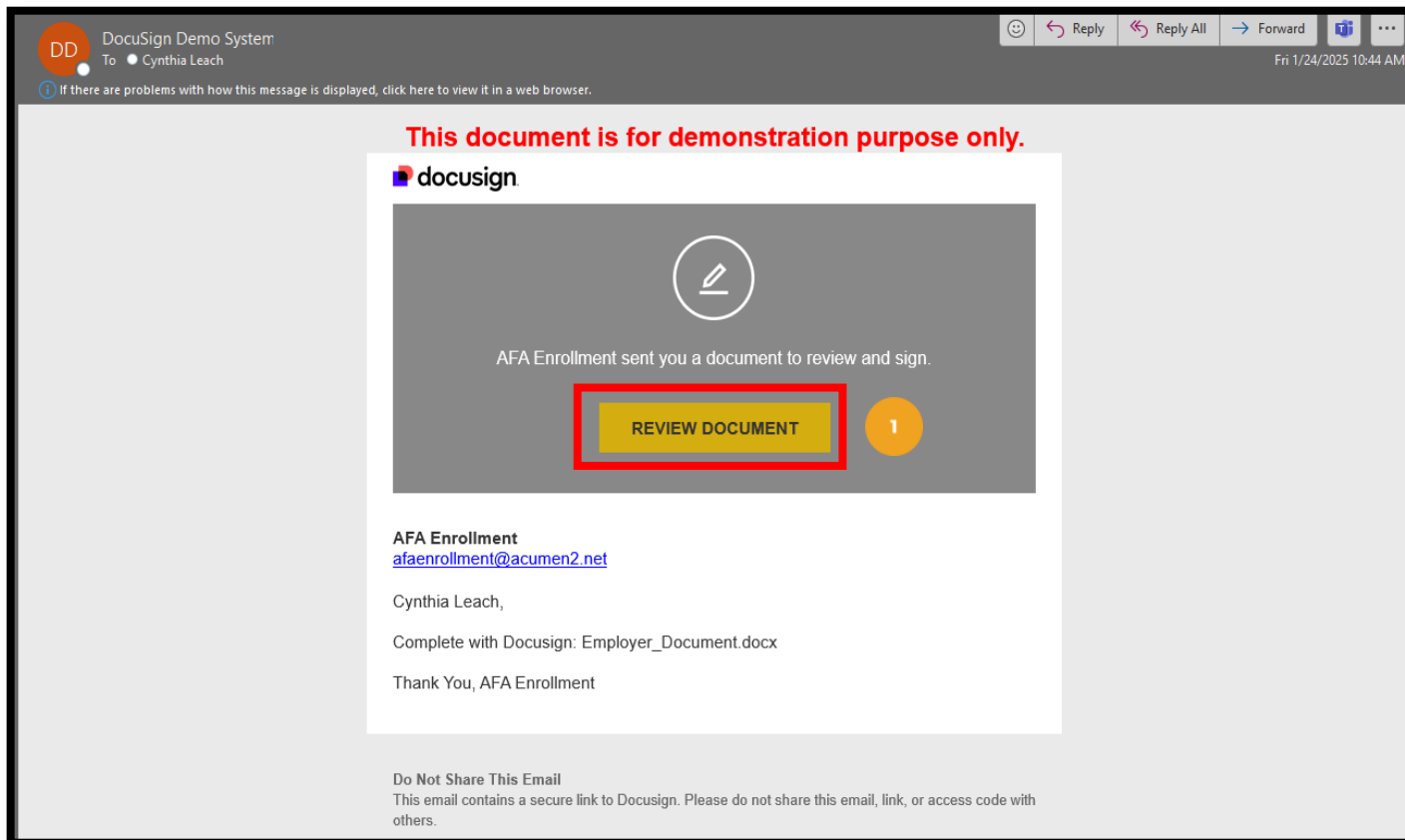
➔ Complete Client Registration	Complete
➔ Register Employer	Complete
➔ Complete Employer Packet <a href="#">↺</a>	<a href="#">Resend</a> <b>Pending</b>
➔ Register Employee	<a href="#">Start</a>

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

# Complete Employer Packet

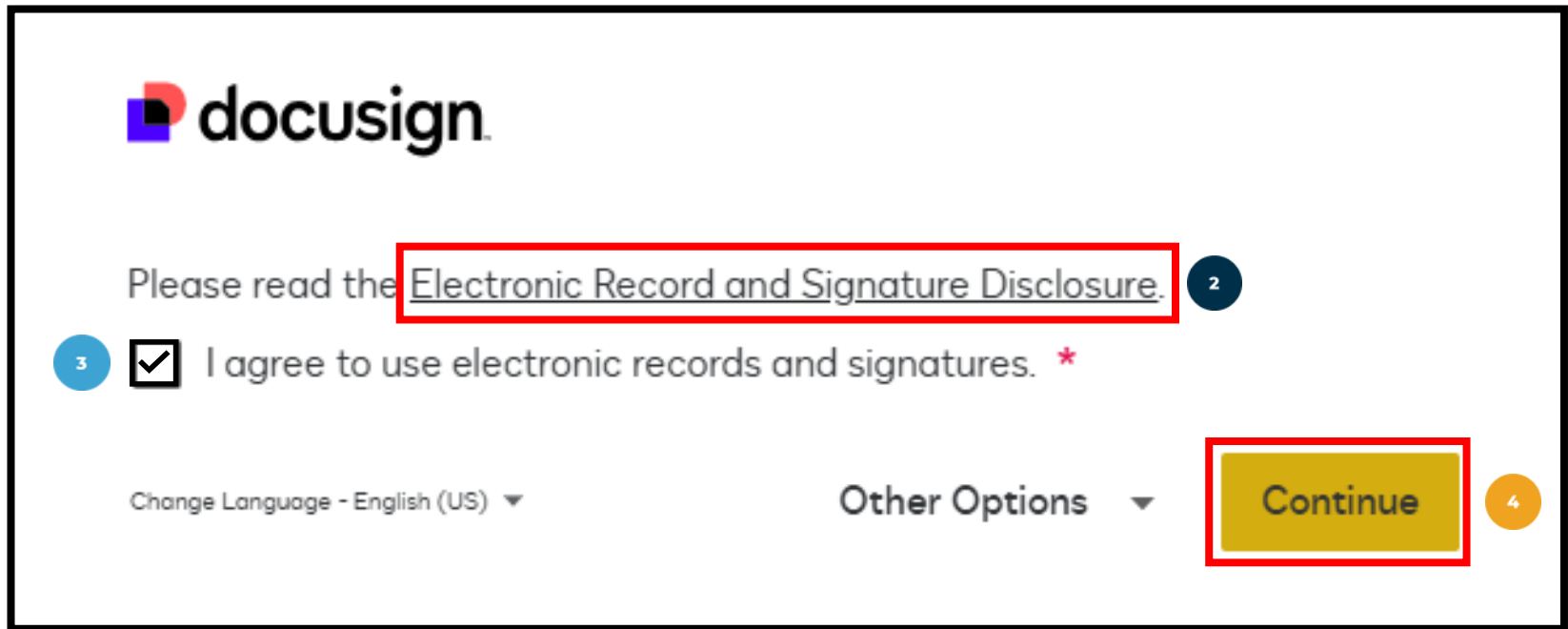
The packet arrives via an email from sender DocuSign. Check junk or spam folders if needed.

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



The screenshot shows the DocuSign interface. At the top left is the DocuSign logo. Below it, the text "Please read the" is followed by a red-bordered box containing the link "Electronic Record and Signature Disclosure.". To the right of this link is a blue circle with the number "2". Below this, there is a blue circle with the number "3" followed by a checked checkbox and the text "I agree to use electronic records and signatures." with a red asterisk. At the bottom left, there is a link "Change Language - English (US)" with a dropdown arrow. In the center bottom, there is a link "Other Options" with a dropdown arrow. On the bottom right, there is a yellow "Continue" button with a red border. To the right of the button is an orange circle with the number "4".



# Complete Employer Packet

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

Review and complete

START 5

DocuSign Envelope ID: B223708B-15C6-49E6-BB35-2E3DA9236515

DEMONSTRATION DOCUMENT ONLY  
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE  
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200  
www.docusign.com

Finish 6

OTHER ACTIONS

Finish Later

Print & Sign

Employer

# 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

<b>NEXT</b>	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

# 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

Adopt Your Signature

Confirm your name, initials, and signature.

\* Required

Full Name\*  
Test Main Name

Initials\*  
TMN

**SELECT STYLE** DRAW UPLOAD

PREVIEW

DocuSigned by:  
Test Main Name  
79993C503D5C4FF...

DS  
TMN

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 [Signature] Date 7/31/2024

Print your name here ER Full  
Print your title here HCSR EMPLOYER  
Best daytime phone (222) 222-2223

# Complete Employer Packet

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

# Complete Employer Packet

**Congratulations!**

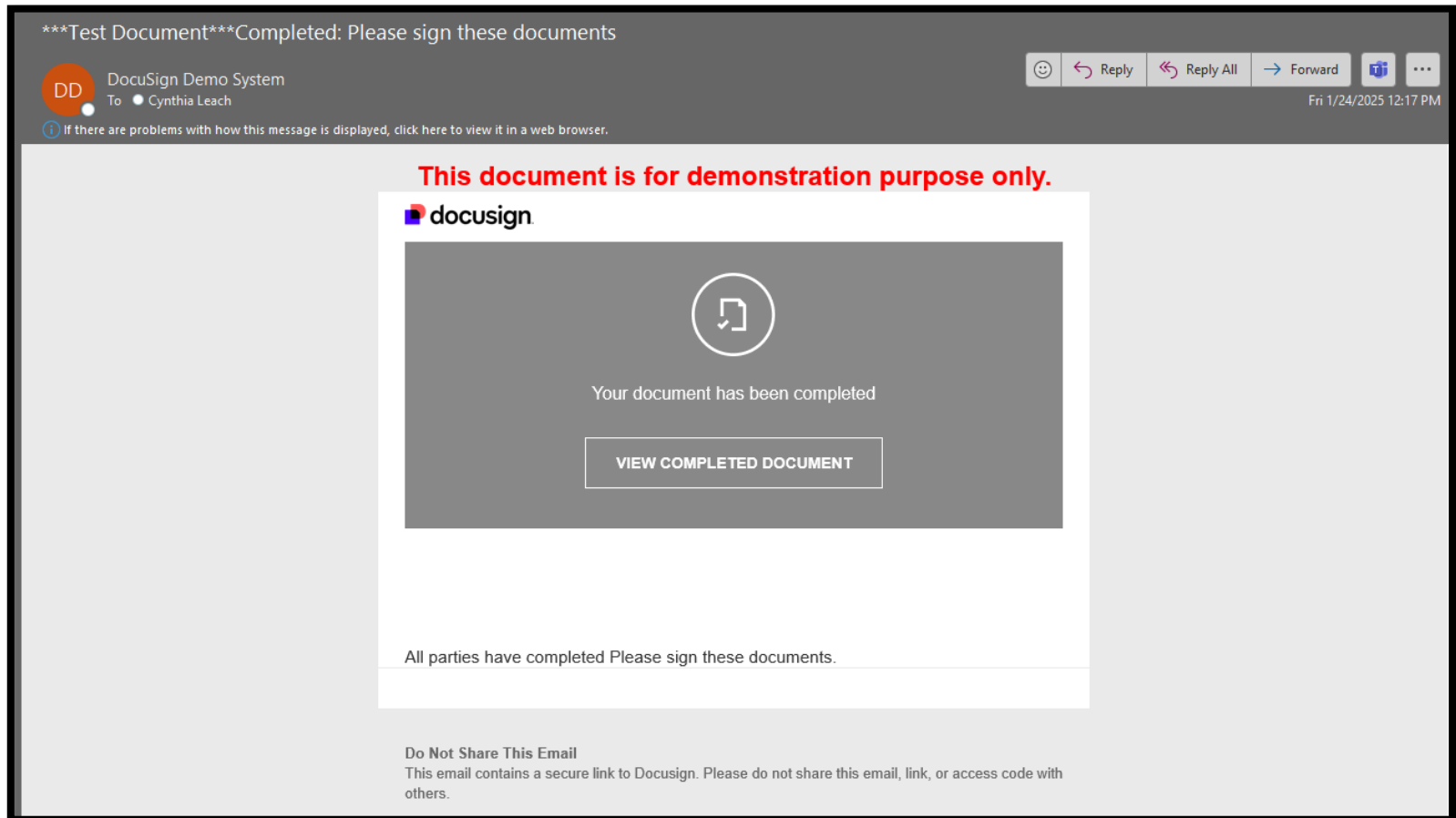
The Employer packet is complete.



- 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

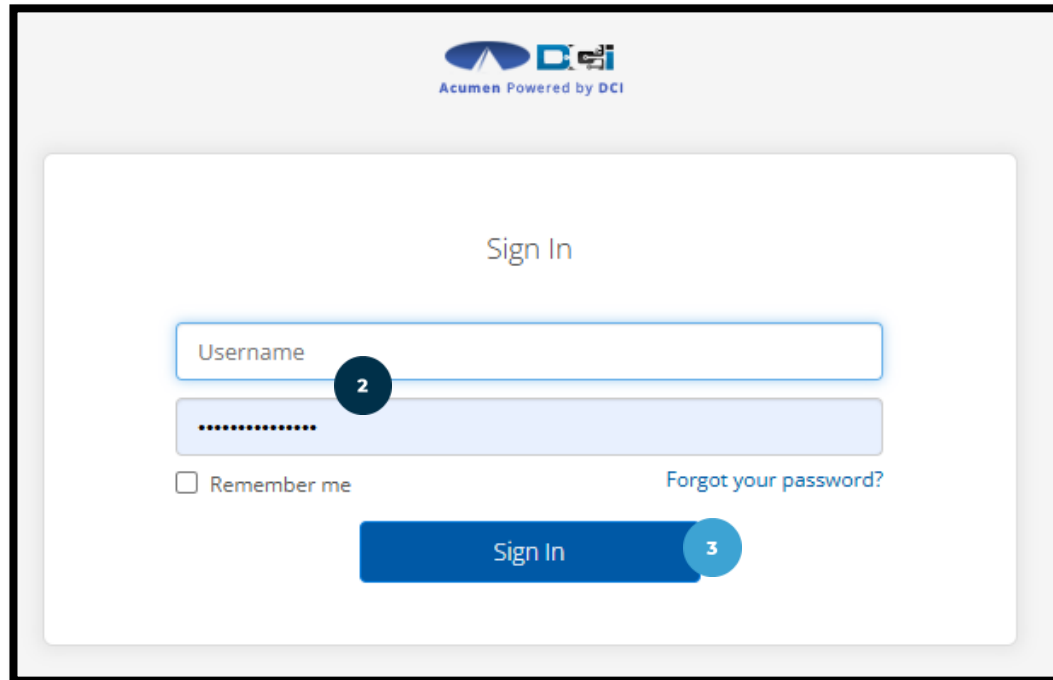
The Employer receives a confirmation email with a link to view the completed document



# 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/>

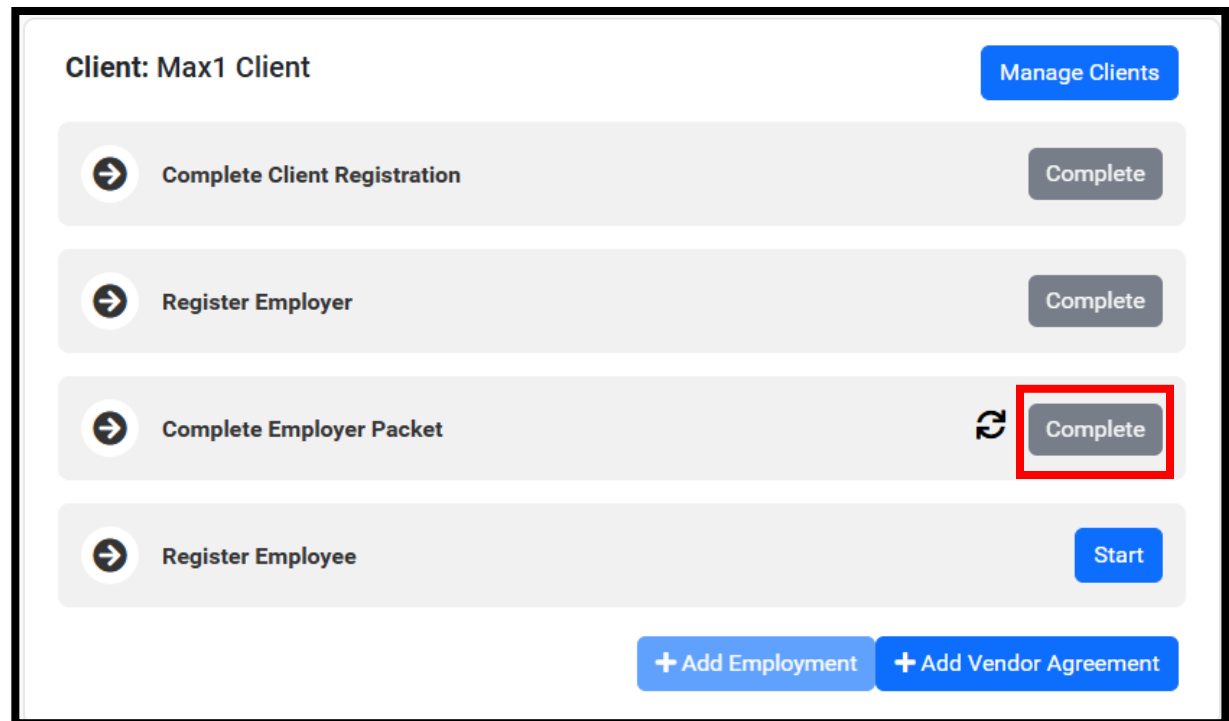
A screenshot of the DCI login interface. At the top, the DCI logo is displayed with the text "Acumen Powered by DCI" below it. The main heading is "Sign In". Below this, there are two input fields: "Username" and a password field represented by dots. A blue circle with the number "2" is positioned over the password field. Below the password field is a checkbox labeled "Remember me" and a link "Forgot your password?". At the bottom is a blue "Sign In" button, with a blue circle containing the number "3" next to it.

# Complete Employer Packet

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

## 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 screenshot shows the Enrollment Dashboard for 'Client: Max1 Client'. At the top right is a 'Manage Clients' button. Below this is a list of four tasks, each with a right-pointing arrow icon and a status button:

- Complete Client Registration (Complete button)
- Register Employer (Complete button)
- Complete Employer Packet (Complete button, highlighted with a red box and a refresh icon to its left)
- Register Employee (Start button)

At the bottom right are two buttons: '+ Add Employment' and '+ Add Vendor Agreement'.



# Register Employee

---

Employer completes this process

# Register Employee

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

Client: Max1 Client [Manage Clients](#)

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

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

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

✓ 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**

Existing Enrollees Found

First Name	Last Name	Date of Birth	Last 4 SSN	State	City	Email	Actions
Angel	Employee	05/13/1995	4402	CA	Sacramento	michael.chavez+76@acumen2.net	<a href="#">This is my Employee</a>

If this is not the Employee you are looking for, please reach out to an Agent for assistance.

Cancel

# 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

First Name *	1	Emma1
Middle Name	2	
Last Name *	3	Employee
Other Last Names Used	4	
Date of Birth *	5	5/30/1990
SSN *	6	987-65-4412
Gender *	7	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other <input type="radio"/> Prefer Not to Say
Phone *	8	(###) ###-####
Alternative Phone	9	(###) ###-####
Mobile Number	10	(###) ###-####
Email *	11	
Citizenship Status *	12	Select Citizenship Status
Drivers License Number	13	
How was the Employee's address verified? (Agent Use Only)	14	

# 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**)

## Physical Address

Address Line 1 \*

15

City \*

16

State \*

17

Select State ▼

Zip Code \*

18

Country \*

19

Select Country

# 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

20

### Mailing Address

Mailing Address Matches Physical Address ☐

Address Line 1 \*

City \*

State \*  ▼

Zip Code \*

Country \*

21

### Mailing Address

Mailing Address Matches 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.

## Relationships

Relationship to Employer \*

Select Relationship 22

Select Relationship

The Employee is the Employer's Child

The Employee is the Employer's Parent

The Employee is the Employer's Spouse

No Relationship



# 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

### Payment Information

Payment Type

Select Payment Type

Select Payment Type

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

### Payment Information

---

Payment Type

Click **Save** to finish registering the employee

# 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

### Payment Information

Payment Type	1	Direct Deposit
Account Type *	2	Select Account Type
Account Holder Name *	3	
Bank Name *	4	
Bank Account Number *	5	#####
Bank Routing Transit Number *	6	#####
Distribute payment to multiple accounts *	7	<input type="checkbox"/>

# 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

Distribute payment to multiple accounts \*

☒

7

% of Check Deposited In Account \*

100

[+ Add Account](#)

8

# 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.

The screenshot shows a form for adding a new direct deposit account. It includes the following fields and callouts:

- Account Type \***: A dropdown menu with the text "Select Account Type". A yellow circle with the number 1 is next to it.
- Account Holder Name \***: A text input field. A dark blue circle with the number 2 is next to it.
- Bank Name \***: A text input field. A blue circle with the number 3 is next to it.
- Bank Account Number \***: A text input field containing "#####". A yellow circle with the number 4 is next to it.
- Bank Routing Transit Number \***: A text input field containing "#####". A dark blue circle with the number 5 is next to it.
- % of Check Deposited In Account \***: A text input field containing "0". A blue circle with the number 6 is next to it.

Below the fields are two links: [- Remove Account](#) and [+ Add Account](#).

# Register Employee

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

Client: Max1 Client

Manage Clients

→ Complete Client Registration

Complete

→ Register Employer

Complete

→ Complete Employer Packet

↺ Complete

→ Register Employee

Complete

+ Add Employment

+ Add Vendor Agreement

# Add Employment

---

- 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.

Client: Max1 Client

Manage Clients

➔ Complete Client Registration

Complete

➔ Register Employer

Complete

➔ Complete Employer Packet

↺ Complete

➔ Register Employee

Complete

+ Add Employment

+ Add Vendor Agreement

# Add Employment

## 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

### Create Employment

Status *	<input type="text" value="Active"/>
Client Name *	<div>1 <input type="text" value="Sasha4 Client"/></div>
Program *	<div>2 <input type="text" value="NJ DDD - SDE (Transition)"/></div>
Employer *	<div>3 <input type="text" value="Molly4 Employer"/></div>
Employee *	<div>4 <input type="text" value="Select Employee"/></div>
Expected Start Date	<div>5 <input type="text" value="MM/DD/YYYY"/></div>

# 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.

**Create Employment**

**Employment Details**

Client Name \* James Leach

Program \* Select Program ▼

Employer \* Cynthia Leach

Employee \* **Select Employee** 4 ▼

Expected Start Date \* MM/DD/YYYY

**Select an Employee**

search Q b

Register a new Employee c

Employer Name	Employee Name	Actions
Cynthia Leach	Kevin Leach	<b>Select</b> a
Cynthia Leach	Monica Leach	<b>Select</b>
Cynthia Leach	Kristen Leach	<b>Select</b>

3 total

Cancel

# 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

## Create Employment

Status \*

Active

Client Name \*

Sasha4 Client

Program \*

NJ DDD - SDE (Transition) ▼

Employer \*

Molly4 Employer

Employee \*

Select Employee

Expected Start Date

MM/DD/YYYY

5

< Jan ▼ 2025 ▼ >

Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

# 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)**

Does the Employee Live with the Client? \*

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

Live In Caregiver (Agent Use Only)

Will your employee be administering medication? \*

Will your employee be implementing a behavior supports plan? \*

Will your employee need specialized training? \*

Enter free-form  
text for questions  
6-11

# Add Employment

Complete the Tax Information details:

**\*Please note! Visit [www.irs.gov](http://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)

### Tax Information

If you are not sure of how to complete this section, visit the IRS website at [www.irs.gov](http://www.irs.gov) or consult with your tax advisor.

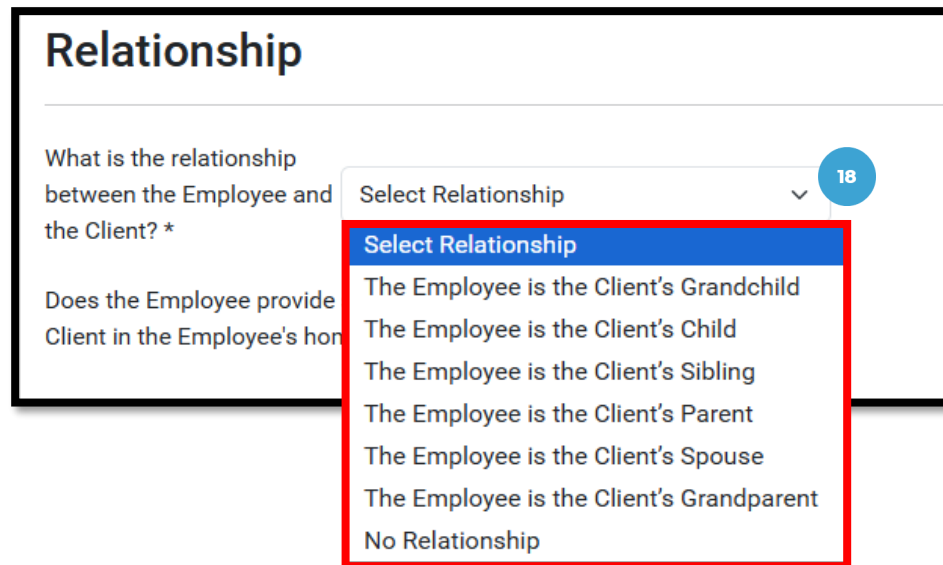
Federal Filing Status (If an Independent Contractor select 1099) *	12	Select Filing Status	▼
Multiple Jobs	13	<input type="radio"/> Yes <input type="radio"/> No	
Claim Dependents Or Other Credits	14		
Other Income (Not From Jobs)	15		
Deductions	16		
Extra Withholding	17		

# 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



The screenshot shows a form titled "Relationship". It contains a question: "What is the relationship between the Employee and the Client? \*". Below the question is a dropdown menu labeled "Select Relationship". The dropdown menu is open, displaying a list of options: "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", and "No Relationship". A red box highlights the dropdown menu. A blue circle with the number "18" is visible in the top right corner of the form area.

# 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.

### Relationship

---

19 Does the Employee provide services to the Client in the Employee's home? \*

☒ Yes ☐ No

Does the Employee have a separate home where the Employee resides? \*

☐ Yes ☐ No

Is the home where the Employee resides and regularly performs the routines of private life, including shared meals and holidays with family, the same home where the Employee provides services to the Client? \*

☐ Yes ☐ No



# 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

The screenshot shows a form titled "Services" with the instruction "Select services the Employee will be providing \*". It contains two main input fields: "Service Code #1 \*" and "Pay Rate \*". The "Service Code #1 \*" field is a dropdown menu with a circular callout "20" and the text "Service Code" inside. The "Pay Rate \*" field is a text input with a circular callout "21" and the text "Enter Pay Rate" inside. Below the "Pay Rate \*" field is a red button labeled "- Remove Service". At the bottom left of the form is a blue button labeled "+ Add Service". Both the "+ Add Service" and "- Remove Service" buttons are highlighted with red rectangular boxes.

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

The screenshot shows the bottom of the form with two buttons: a blue "Save" button with a circular callout "22" and a grey "Cancel" button with a circular callout "23". Both buttons are highlighted with black rectangular boxes.

# 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

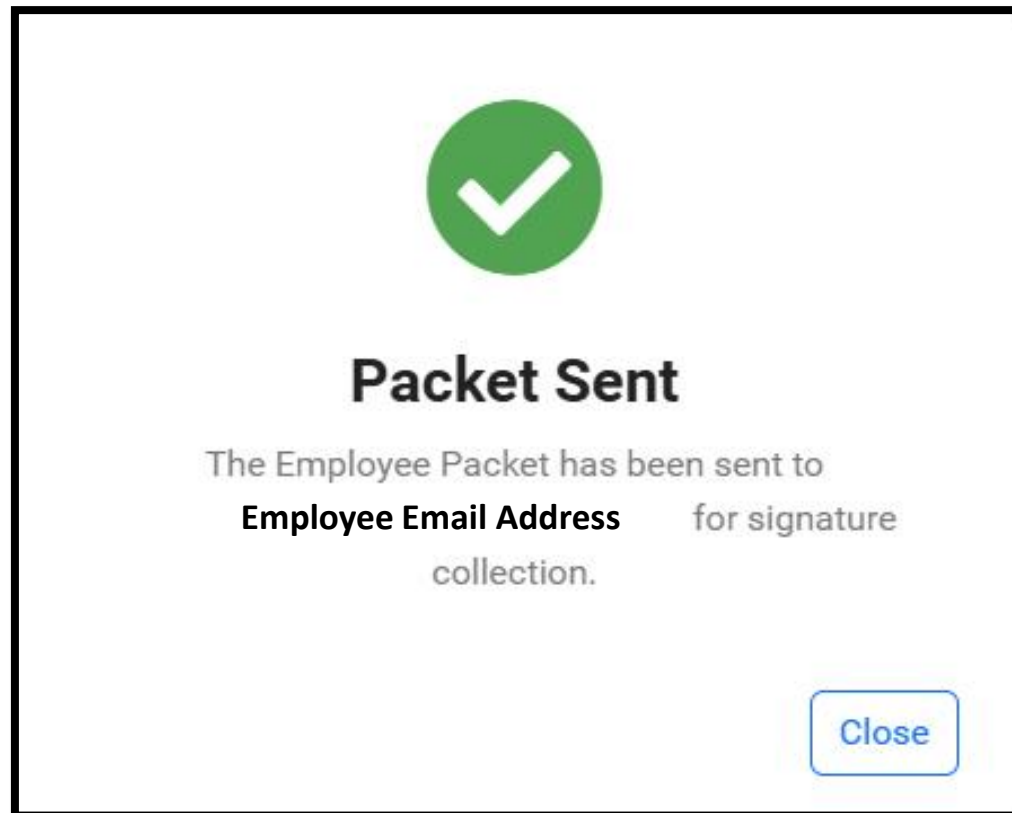
Client: Max1 Client Manage Clients

	Employee		Employer Packet	Employee Packet	
NJ DDD - SDE (Transition)	Emma1 Employee	↻	Completed	Pending	<span>Send</span>

+ Add Employment + Add Vendor Agreement

# 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

Please wait 15 minutes between refresh & resend.

Client: Max1 Client [Manage Clients](#)

NJ DDD - SDE (Transition)	<b>Employee</b> Emma1 Employee		<b>Employer Packet</b> Completed	<b>Employee Packet</b> <b>In Progress</b>	<a href="#">Resend</a>	
------------------------------	--------------------------------------	---	-------------------------------------	--	------------------------	---

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

# Complete Employee Packet

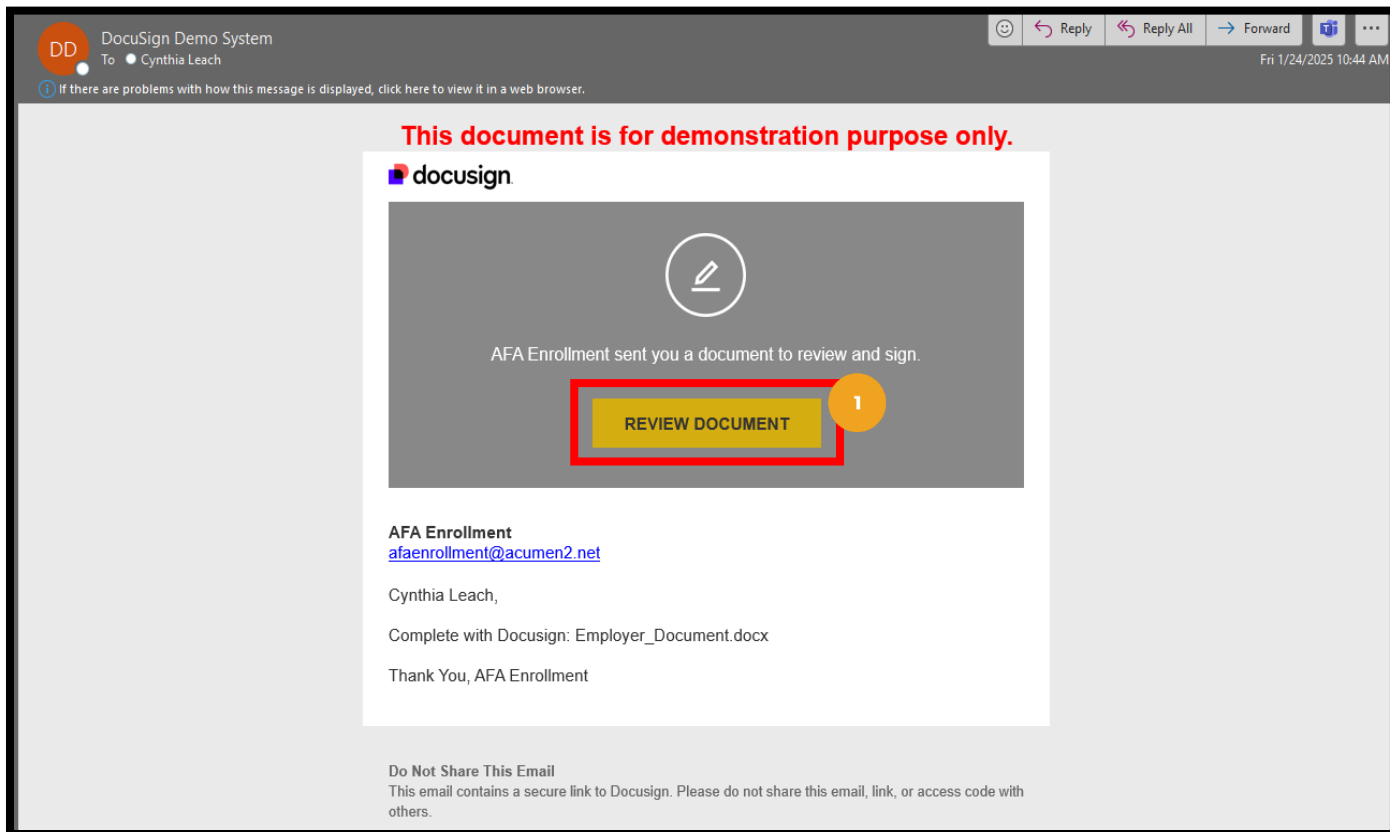
---

Employee completes

# Complete Employee Packet – DocuSign

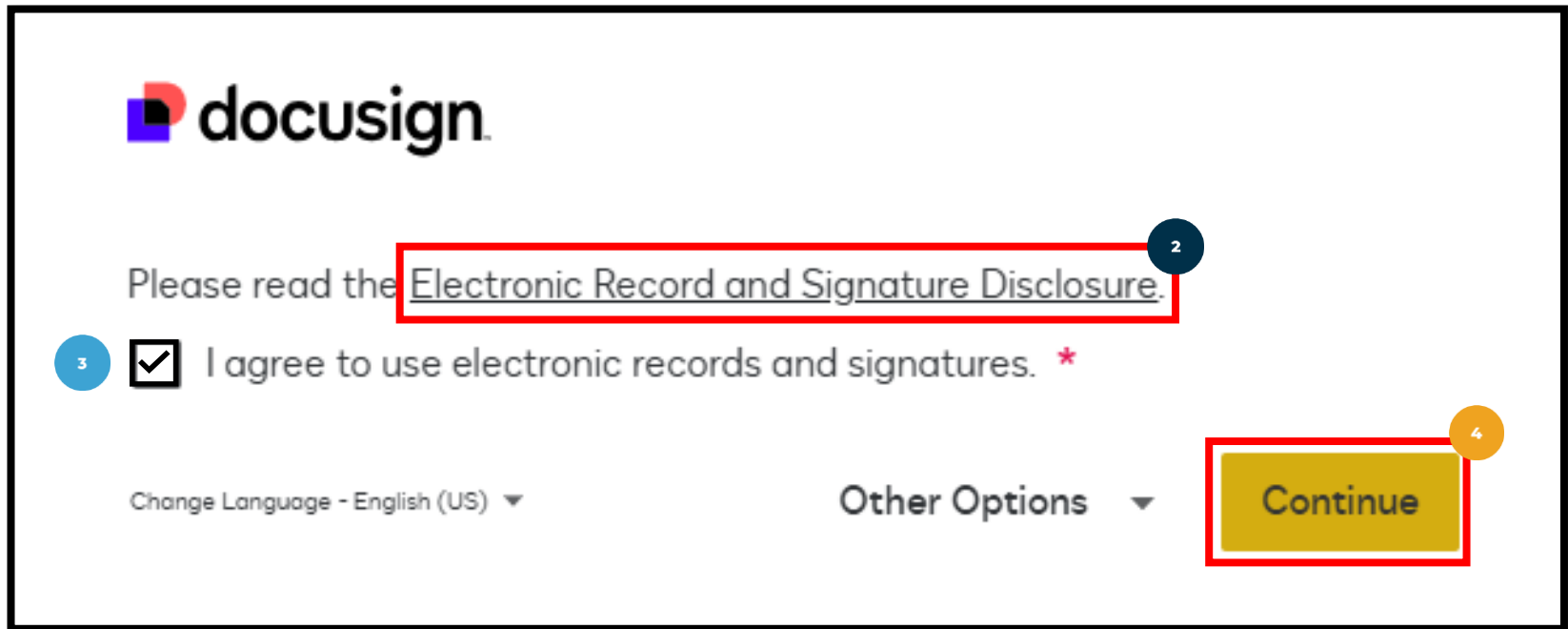
The packet arrives via an email from sender DocuSign. Check junk or spam folders if needed.

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

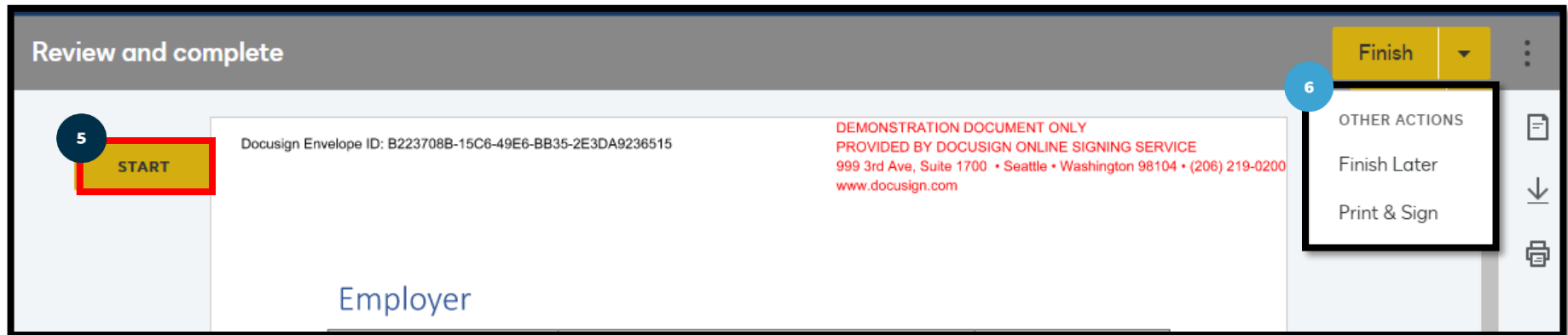


The screenshot shows the DocuSign interface. At the top left is the DocuSign logo. Below it, the text "Please read the" is followed by a red rectangular box containing the link "Electronic Record and Signature Disclosure." with a blue circle containing the number "2" next to it. Below this, there is a blue circle containing the number "3" next to a checked checkbox and the text "I agree to use electronic records and signatures." with a red asterisk. At the bottom left, there is a link "Change Language - English (US)" with a dropdown arrow. In the center bottom, there is a link "Other Options" with a dropdown arrow. On the bottom right, there is a yellow rectangular button labeled "Continue" with a red rectangular box around it and an orange circle containing the number "4" next to it.



# 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

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

Name of Participant:

Name of Employer/ Representative (if applicable):

Phone:  Email Address:

**8** NEXT

**7** Sign  
↓

Participant or Employer/ Representative Signature

Date

# 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

## Ready to Finish?

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

Finish

# Complete Employee Packet - DocuSign

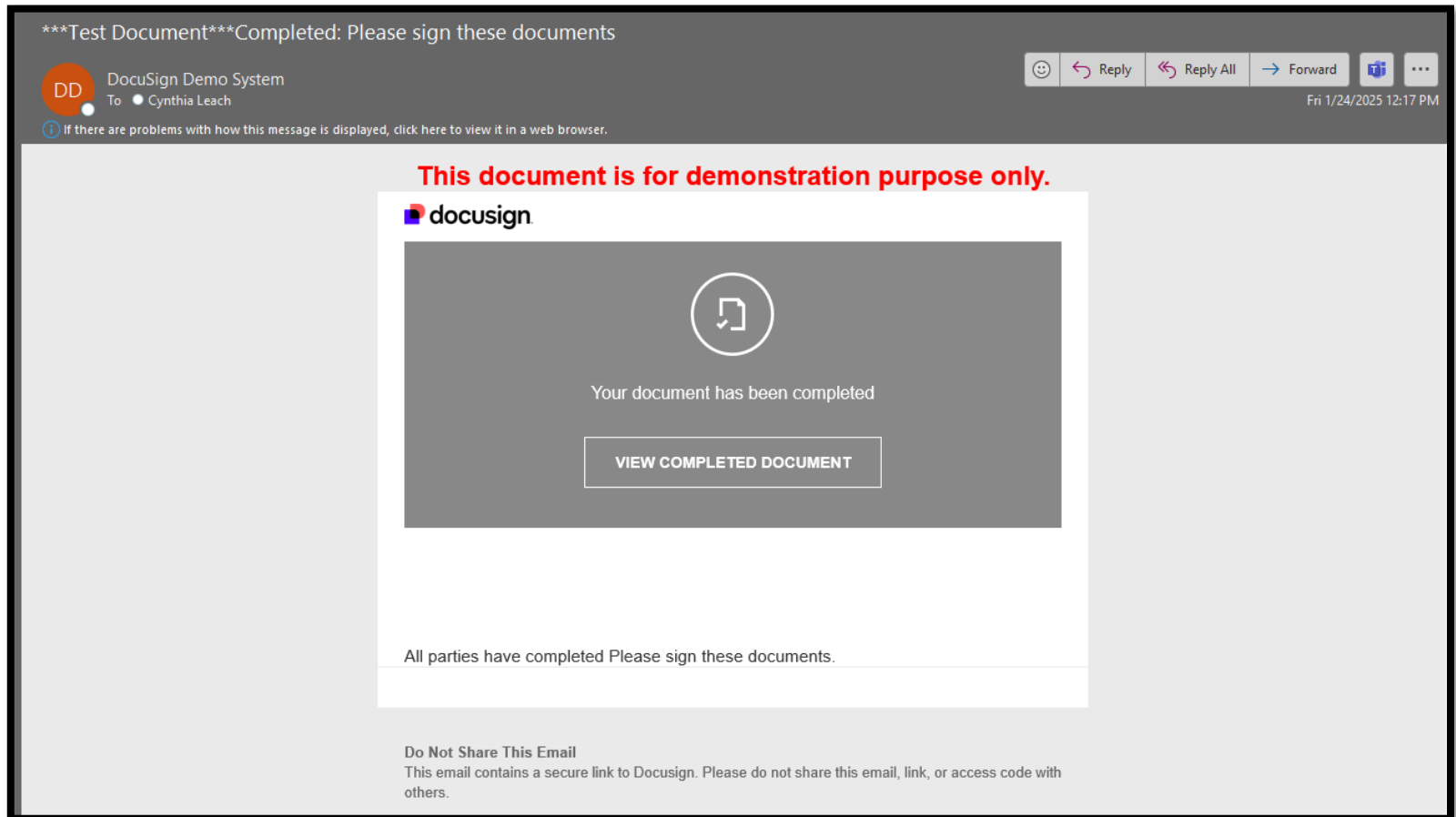
**Congratulations!**  
The Employee packet is complete.



- 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](#)”

Client: Max1 Client

Manage Clients

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

+ Add Employment + Add Vendor Agreement



# 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.**

# Add Vendor Agreement

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

The screenshot displays the 'Client: Max1 Client' dashboard. At the top right is a 'Manage Clients' button. Below this is a table with the following data:

	Employee		Employer Packet	Employee Packet	
NJ DDD - SDE (Transition)	Emma1 Employee		Completed	Completed	

Below the table are two buttons: '+ Add Employment' and '+ Add Vendor Agreement'. The '+ Add Vendor Agreement' button is highlighted with a red rectangular box.

# 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.

### Create Vendor Agreement

Status *		Active
Client Name *	1	Val5 Client
Program *	2	NJ DDD - Vendor ▼
Employer *	3	Dana5 AuthRep
Vendor *	4	Other - Vendor Not Listed ▼

# 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

## 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

< Jan 2025 >

Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

# 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

**Services**  
Select services the vendor will be providing \*

Service Code #1 \*

Service Code 6

+ Add Service

- Remove Service

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

Save

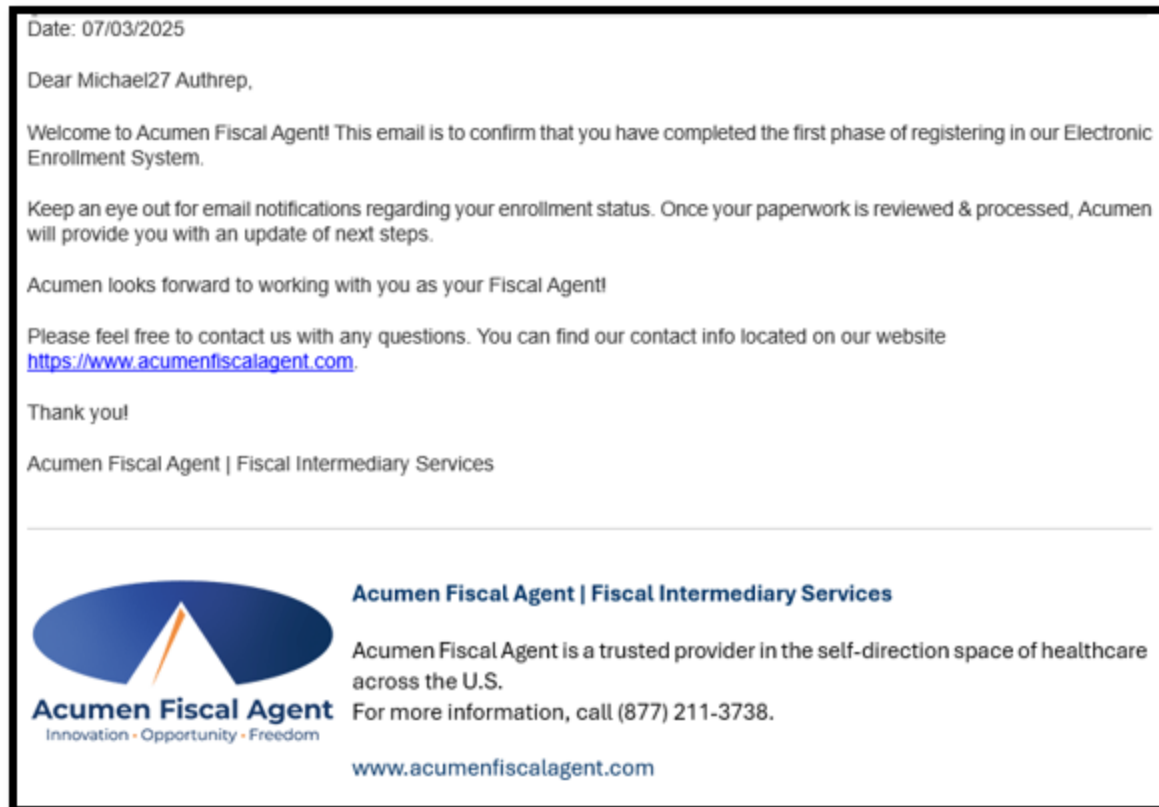
Cancel

# 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](mailto:no-reply@acumen2.net)
  - ❖ **Tip:** If the email doesn't appear in the inbox, be sure to check the spam or junk folder.



# 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](#)”

Client: Max1 Client Manage Clients

NJ DDD - SDE (Transition)	Employee Emma1 Employee	↻	Employer Packet Completed	Employee Packet Completed	✎
NJ DDD - Vendor	Vendor 7TH & MADISON EXTENSIONS OF EMPOWERMENT	↻	Employer Packet Completed		✎

+ Add Employment + Add Vendor Agreement

# 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.

**Client: Max1 Client**

Manage Clients

NJ DDD - SDE (Transition)	<b>Employee</b> Emma1 Employee	↻	<b>Employer Packet</b> Completed	<b>Employee Packet</b> Completed	✎
NJ DDD - Vendor	<b>Vendor</b> 7TH & MADISON EXTENSIONS OF EMPOWERME NT	↻	<b>Employer Packet</b> Completed		✎

+ Add Employment

+ Add Vendor Agreement

# 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)

The screenshot shows a web form titled "Add New Client". It contains the following fields and options:

- First Name \***: Text input field, labeled with a blue circle containing the number 1.
- Middle Name**: Text input field, labeled with a blue circle containing the number 2.
- Last Name \***: Text input field, labeled with a blue circle containing the number 3.
- Date of Birth \***: Text input field with the placeholder "MM/DD/YYYY", labeled with a blue circle containing the number 4.
- Gender**: Radio button options: "Male", "Female", "Other", and "Prefer Not to Say", labeled with a blue circle containing the number 5.
- SSN**: Text input field with the placeholder "###-##-####", labeled with a blue circle containing the number 6.

# 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

Phone	7	(###) ###-####
Alternative Phone	8	(###) ###-####
Mobile Number	9	(###) ###-####
Fax	10	(###) ###-####
Email	11	
Medicaid #	12	
Reference #	13	
Effective Date	14	MM/DD/YYYY

# 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)

The screenshot displays a portion of a web form for adding a new client. It contains five rows of input fields, each with a numbered circular icon to its left. Row 15: 'Preferred Communication Method' with a blue circle containing '15' and three radio button options: 'Text', 'Email', and 'Phone'. Row 16: 'Statement Delivery Type' with an orange circle containing '16' and two radio button options: 'Email' and 'Mail'. Row 17: 'Case Manager' with a dark blue circle containing '17' and a text input field. Row 18: 'Case Manager Phone' with a blue circle containing '18' and a text input field with a placeholder '(###) ###-####'. Row 19: 'Case Manager Email' with an orange circle containing '19' and a text input field.

# 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**

### Physical Address

Address Line 1

20

City

21

State \*

Select State

▼

22

Zip Code

23

Country

Select Country

24

✓ Save

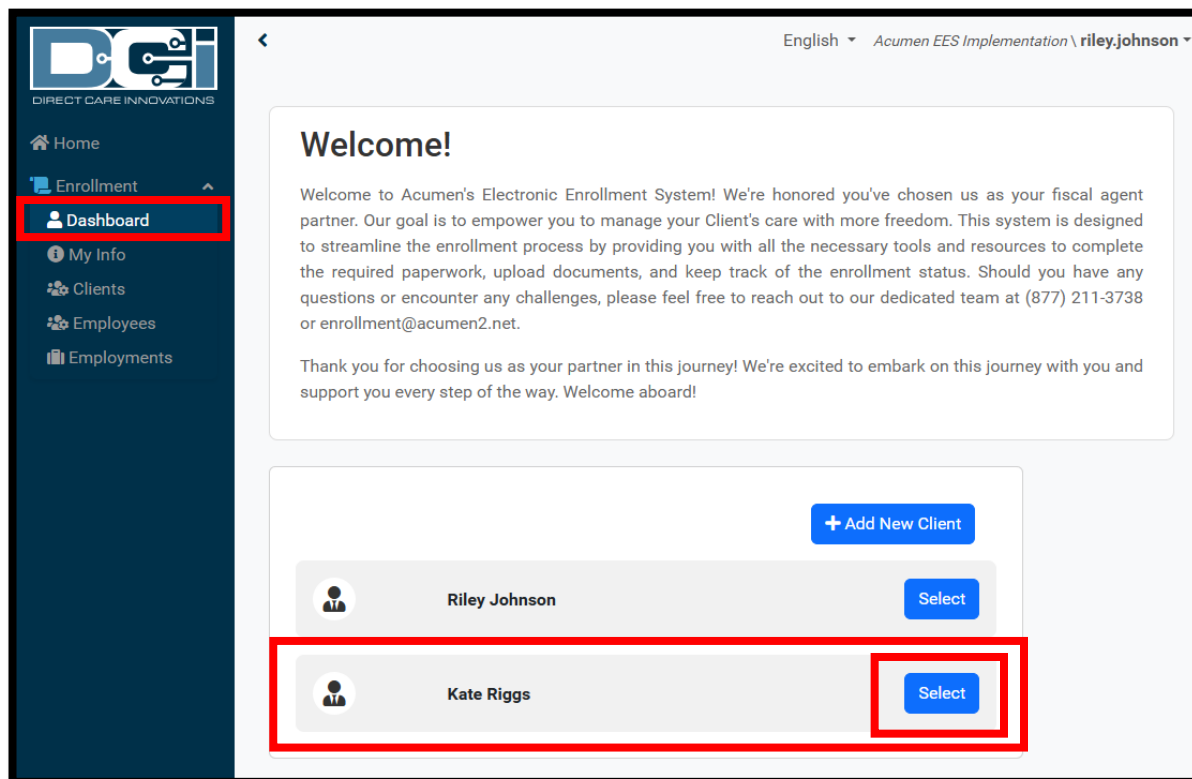
25

Cancel

# 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 **no** 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

## Welcome!

Welcome to Acumen's Electronic Enrollment System! We're honored you've chosen us as your fiscal agent partner. Our goal is to empower you to manage your Client's care with more freedom. This system is designed to streamline the enrollment process by providing you with all the necessary tools and resources to complete the required paperwork, upload documents, and keep track of the enrollment status. Should you have any questions or encounter any challenges, please feel free to reach out to our dedicated team at (877) 211-3738 or [enrollment@acumen2.net](mailto:enrollment@acumen2.net).

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

## MC Client

[Manage Clients](#)

Thank you for choosing Acumen as your Fiscal Agent Partner.

Our records indicate that we have not received an Authorization Form for your Client. Please 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.

If you have any questions, please do not hesitate to reach out to us at (877) 211-3738 or [enrollment@acumen2.net](mailto:enrollment@acumen2.net).

Thank you,

Acumen Fiscal Agent



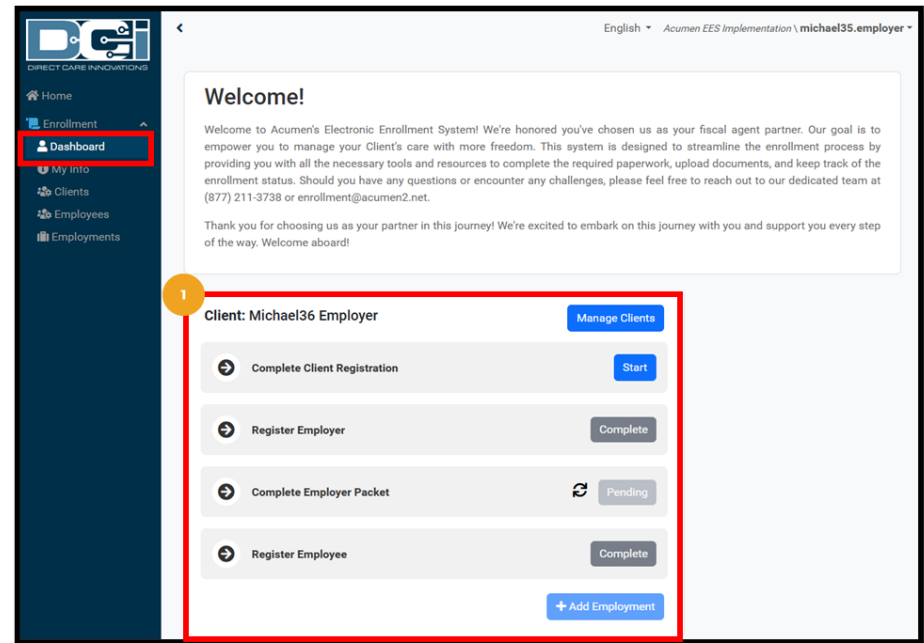
# Authorization Preloaded – Next Action

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.

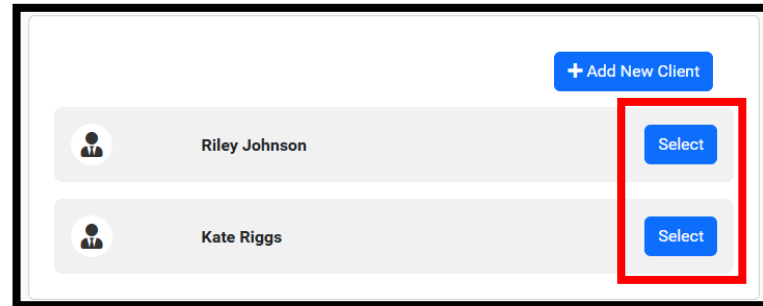
**Note:** The links below will navigate to the instructions above if you need assistance in managing the additional Client's enrollment.

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

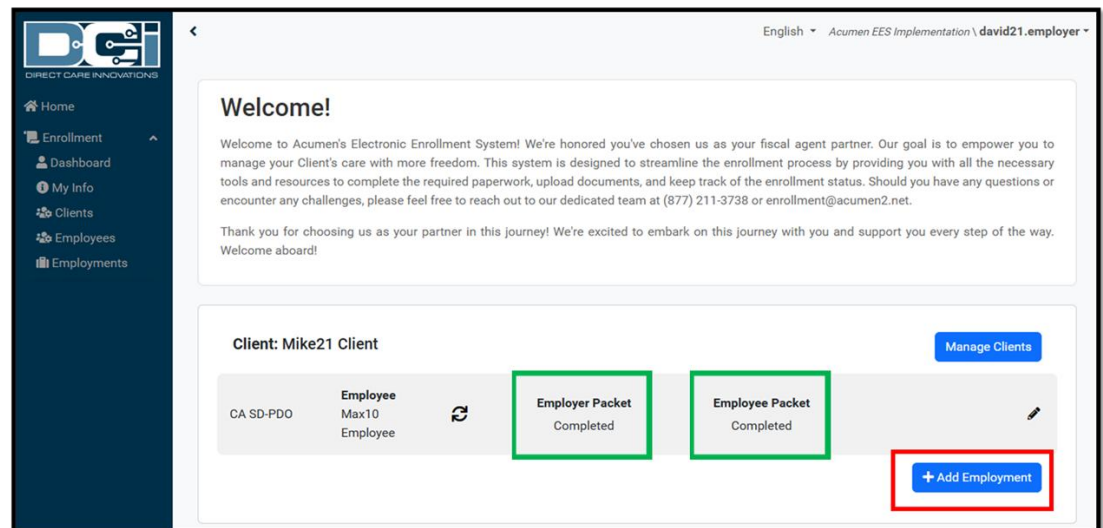


# Enrollment Completed

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](mailto: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.

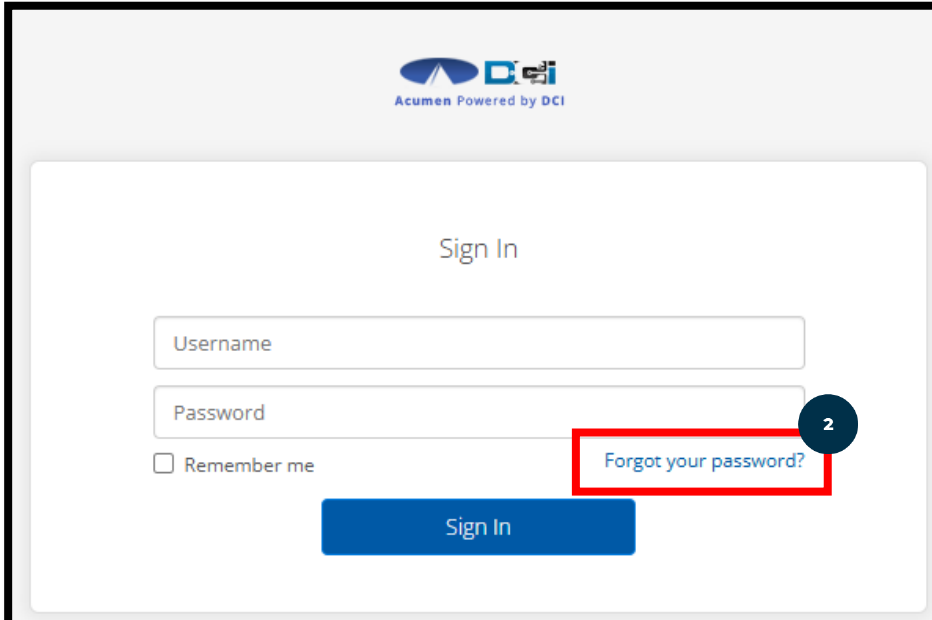
# Reset Password

---

# Reset Password

1. To reset your password, navigate to: <https://acumen.dcisoftware.com/>
2. Click the **Forgot your password** link to reset your password

1 <https://acumen.dcisoftware.com/>



The screenshot shows the Acumen login interface. At the top, the DCI logo and 'Acumen Powered by DCI' are displayed. Below this is a 'Sign In' heading. There are two input fields: 'Username' and 'Password'. A checkbox labeled 'Remember me' is positioned to the left of the 'Forgot your password?' link. The link is highlighted with a red rectangle and a blue circle containing the number '2'. At the bottom of the form is a blue 'Sign In' button.

Sign In

Username

Password

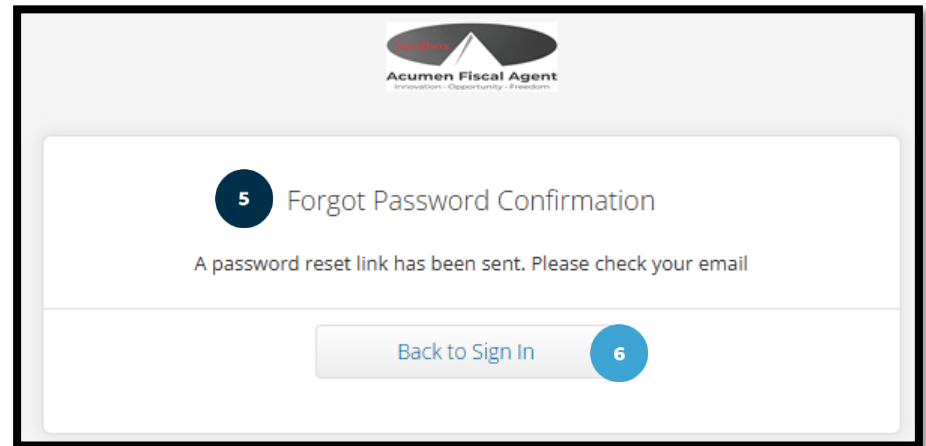
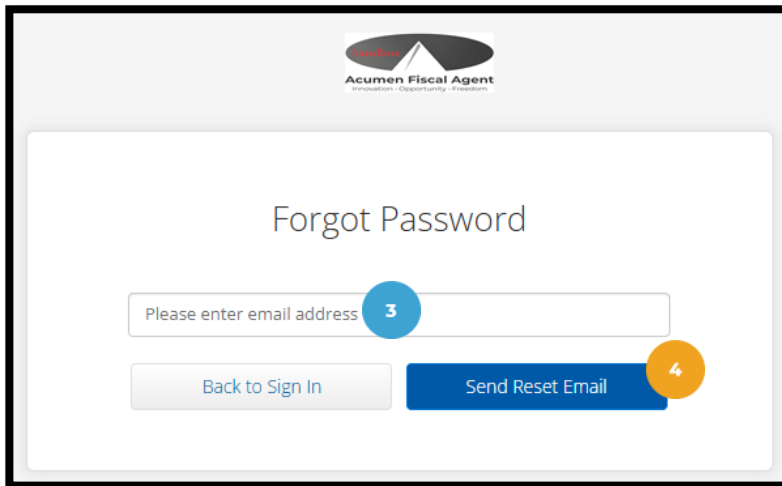
☐ Remember me

[Forgot your password?](#)

Sign In

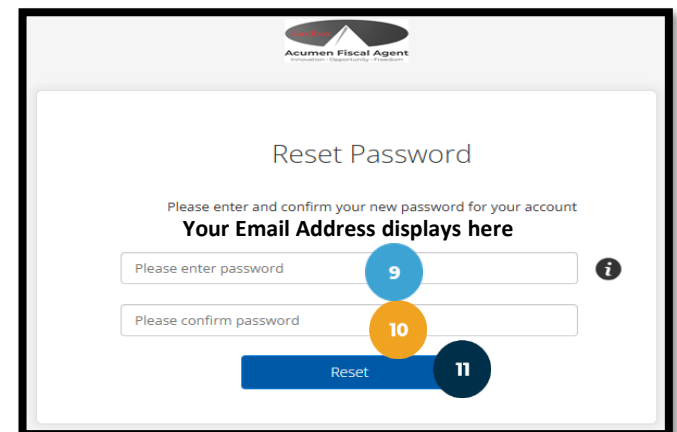
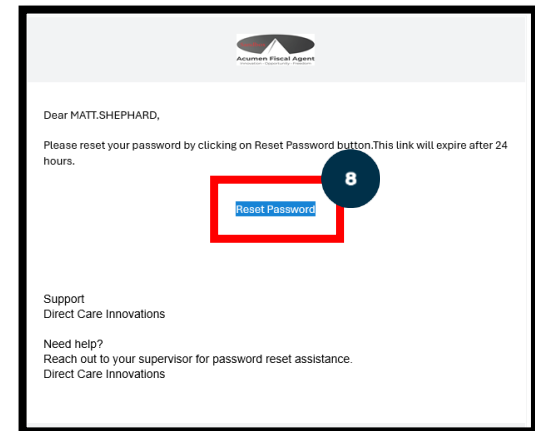
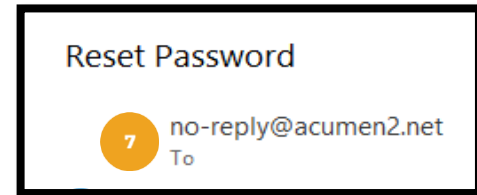
# Reset Password

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

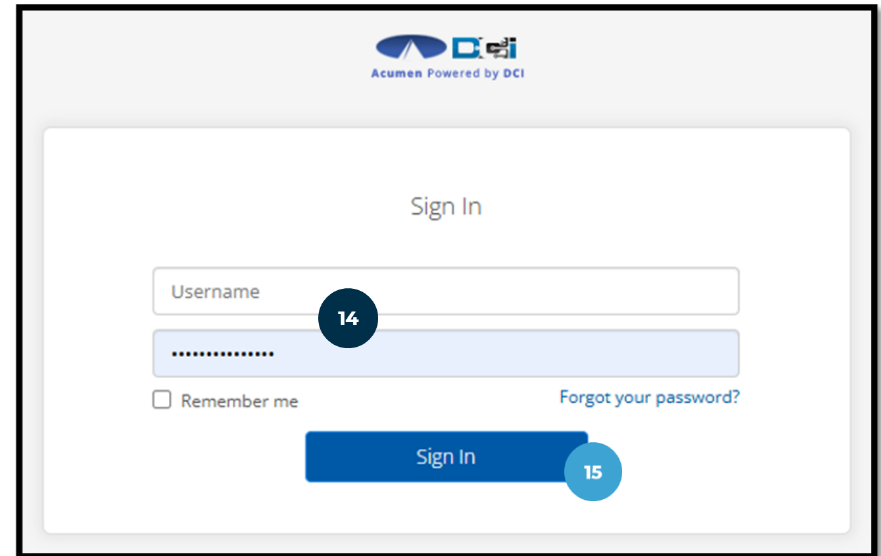
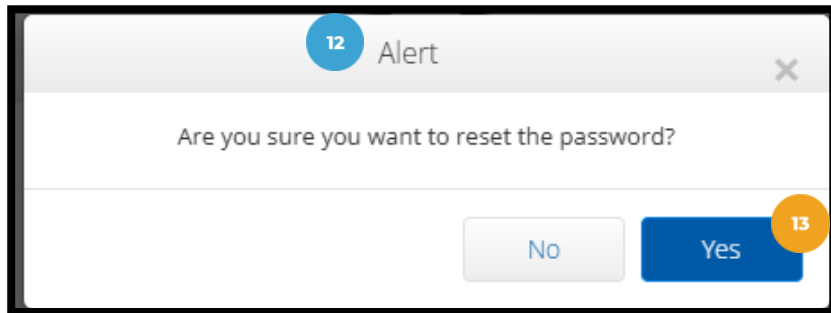
7. Check your email to find the Reset Password email.
  - ✓ Title: Reset Password
  - ✓ Sender: no-reply@acumen2.net
  - ✓ Check the spam folder if necessary
8. Click the **Reset Password** button within the email.
  - ✓ You will be directed to the Reset Password screen.
9. On the Reset Password screen, 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!