



**VDC**

**EES – Electronic Enrollment System**

**Self-Enrollment Training**

**Presentation**

# Table of Contents

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1. [Overview & Getting Started](#)
2. [Initial Registration](#)
3. [Activate Profile – Computer](#)
4. [Activate Profile – Mobile Device](#)
5. [Complete Client Registration](#)
6. [Complete Employer Registration](#)
7. [Complete Employer Packet](#)
8. [Complete Employee Registration](#)
9. [Send Employee Packet](#)
10. [Complete Employee Packet](#)
11. [Enrollment Completed\\*](#)

# Overview & Getting Started

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# 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

# 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 (spending plan/authorization)
- ✓ Verifying documentation is completed accurately
- ✓ Granting a Good to Go/Welcome letter to the Employer and Client



# **EES Terms**

1. **Client:** The Veteran receiving services
2. **Employer:** An individual who is allowed to represent a Client, manage the Client's care, and manage the Client's enrollment. For VDC, the Client and Employer are usually 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

# 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)

## Clients Employer Profile:

- First Name
- Last Name
- Date of Birth
- Social Security Number
- Gender
- Physical Address (No P.O Box)
- Mailing Address (if different)
- Email

# 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
- Date of birth
- Social Security Number (and any other names/aliases used )
- Physical and Mailing address
- Contact info (email and phone)
- Citizenship status and relationship to the employer
- PDF or JPG of the Employees I-9 supporting documents
  - Some programs will require the Employer or Employee to upload a file containing the Employees I-9 documentation (Passport, Drivers License, Social Security Card, etc.)

# Initial Registration:

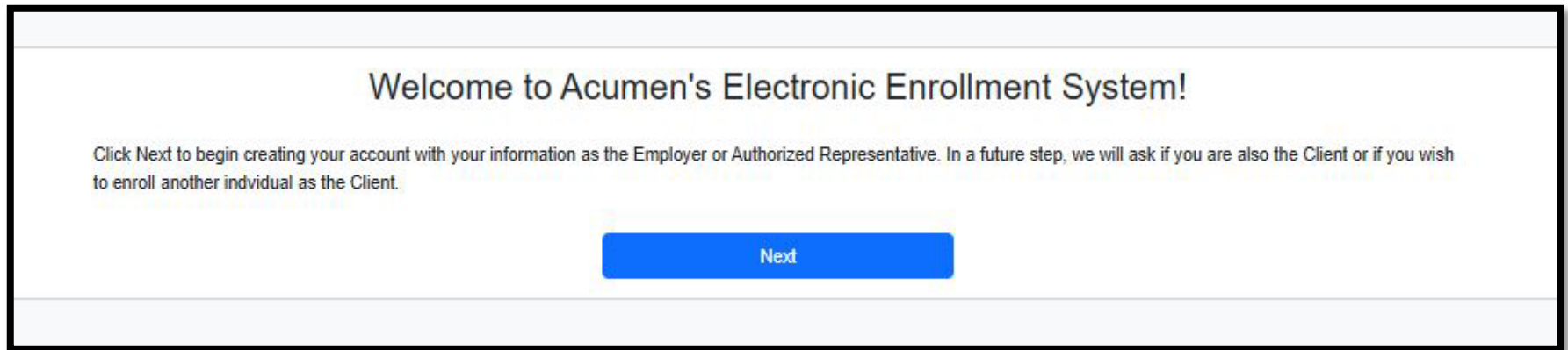
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# Employer is the Client

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# Employer is the Client

1. Click the **Enroll Now** link in the email sent to you by Acumen.
2. Your browser will pop up. Click the **NEXT** button



# Employer is the 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 \*  3

Last Name \*  4

Date of Birth \*  5

Email \*  6

Phone \*  7

Next 8

**Veteran/Employer must enter their name as it is with the Program. ONLY enter your First Name and Last Name. If you are a SR, JR, III etc., please put that after your last name.**

# Employer is the Client

Are you the person receiving services?  
If this screen appears:

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 (Leave Blank)
13. Case Manager Name: (Leave Blank)
14. Click **Next**

The screenshot shows a web form titled "Initial Registration Form" with a sub-section "Client Details". It contains three input fields: "State \*" with a dropdown menu, "Medicaid ID", and "Case Manager Name". Each field has a numbered circular icon to its left: 11 (dark blue), 12 (light blue), and 13 (orange). At the bottom right, there are two buttons: "Back" and "Next". The "Next" button has a dark blue circular icon with the number 14 on top of it.

# Initial Registration (Employer = Client)

## Create login credentials:

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

- ✓ Minimum 6 characters
- ✓ Only letters, digits, or period “.”
- ✓ No special characters
- ✓ No spaces

16. Password (**required**): Create and Confirm a password to log into the EES portal.

- ✓ Must contain 10 characters (1 uppercase letter, lowercase letter, number, and special character)
- ✓ No more than two repeated characters
- ✓ Does not contain username
- ✓ Does not contain first or last name

17. Click **Submit**

**Tip:** Click the information icons next to the username and password fields to view the specific requirements. As you type, green checkmarks will appear to indicate that your username and password meet the necessary criteria.



Initial Registration Form

Create Your Login Credentials

Username 15 human.bean

Password 16 .....

Confirm Password 17 .....

Cancel Submit

Initial Registration Form

Create Your Login Credentials

Username

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 / Client)

18. The confirmation message populates. An email is sent to the Enrollee for account activation. See [Activate Enrollee Profile](#) section 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

# Activate Employer Profile & Log into EES via DCI Web Portal\*

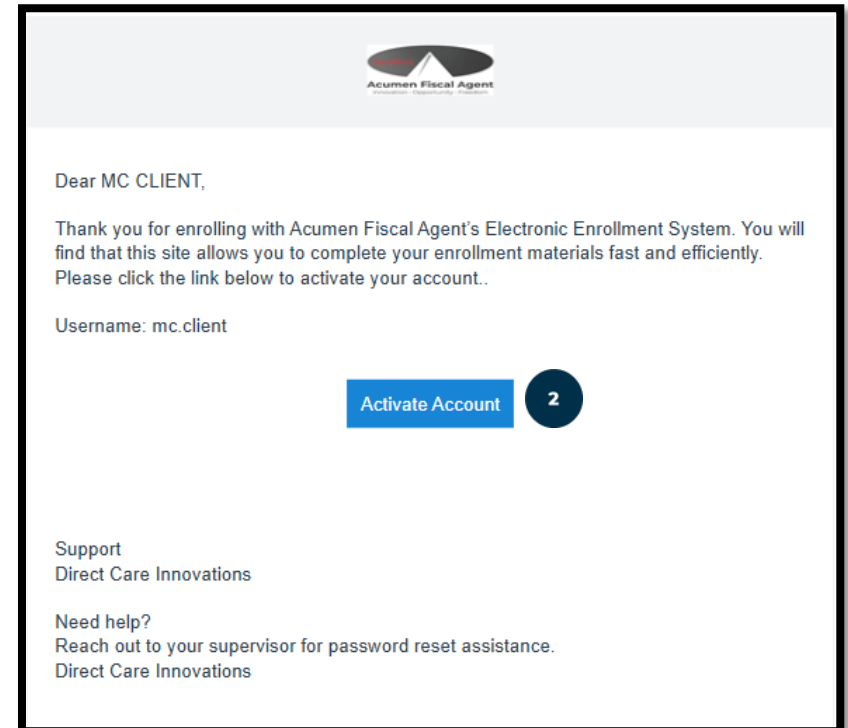
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\*Employer completes this process by using a desktop or laptop computer.



# Activate Enrollee Profile

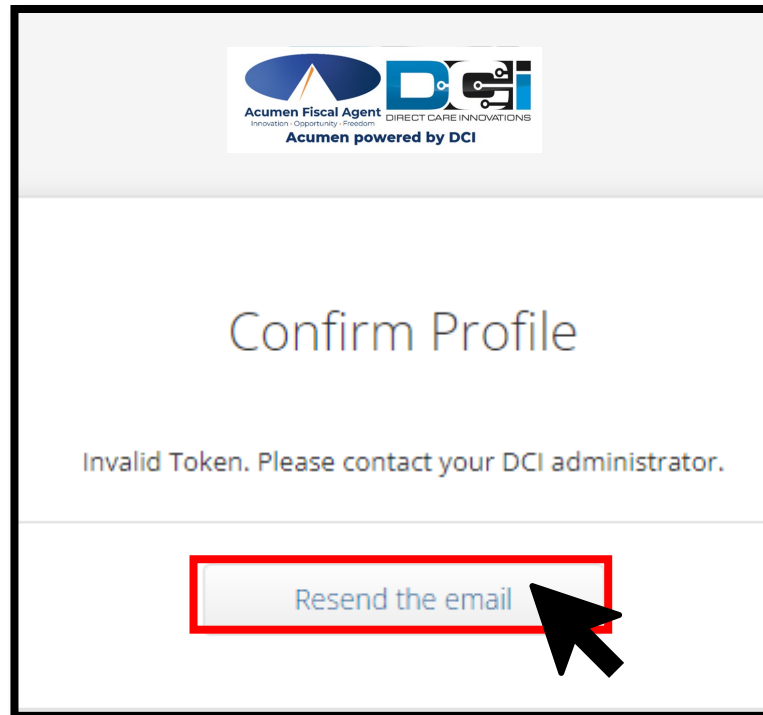
1. Upon completing Initial Registration, an email is sent to the Enrollee for account activation.
  - ✓ **Title:** Welcome to Acumen's Electronic Enrollment System
  - ✓ **Sender:**  
[no-reply@acumen2.net](mailto:no-reply@acumen2.net)
  - ✓ Check the spam folder if necessary
2. Click the blue **Activate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



# Activate Employer Profile

## Troubleshooting Note:

- If after clicking the Activate Account button, the link is inactive, an alert stating Invalid Token - Please contact your DCI administrator populates.
- Click the **Resend the email** button and return to [step 2](#)

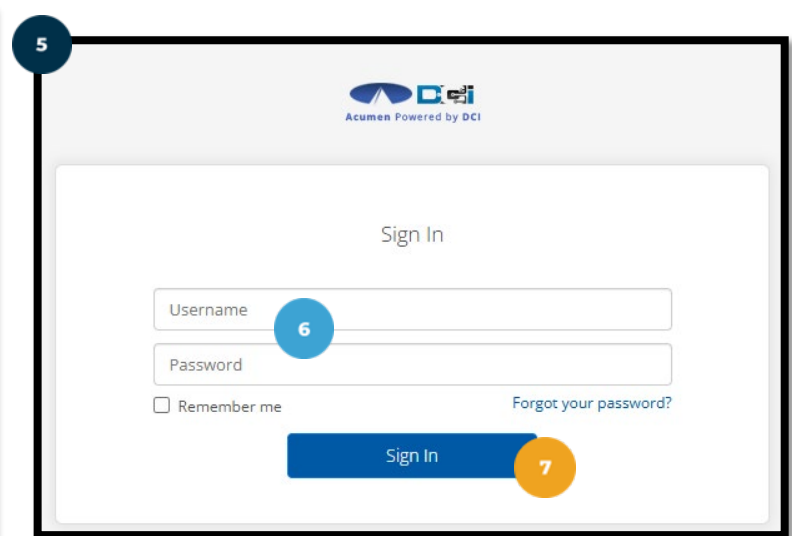
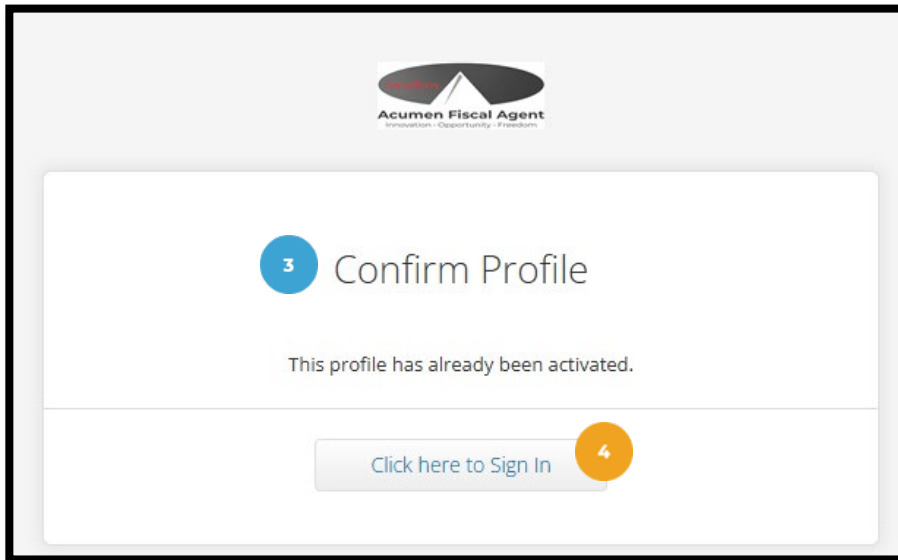


Proprietary: For Acumen and Customer Use Only



# 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



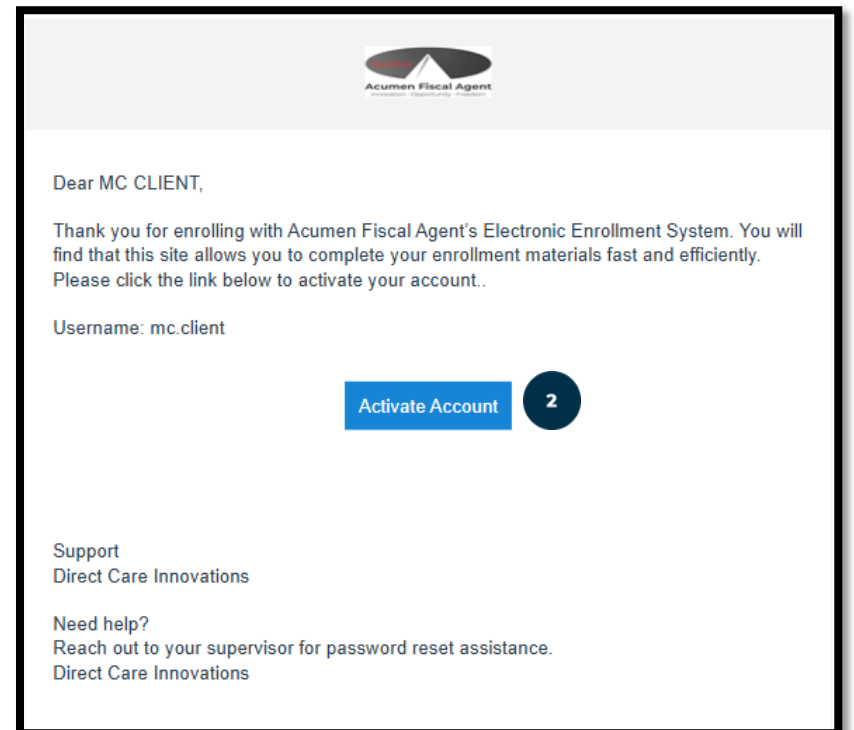
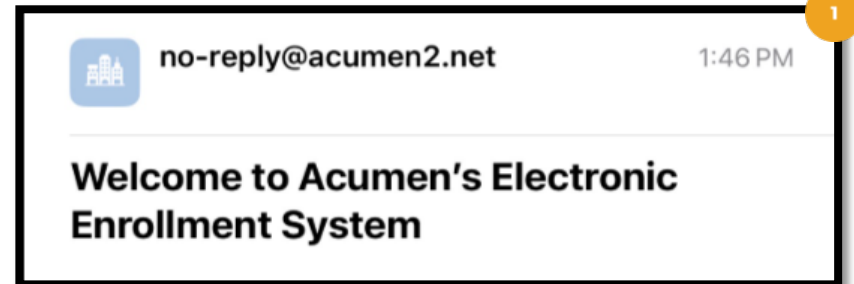
# Activate Employer Profile & Log into EES via DCI Mobile Full Site

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

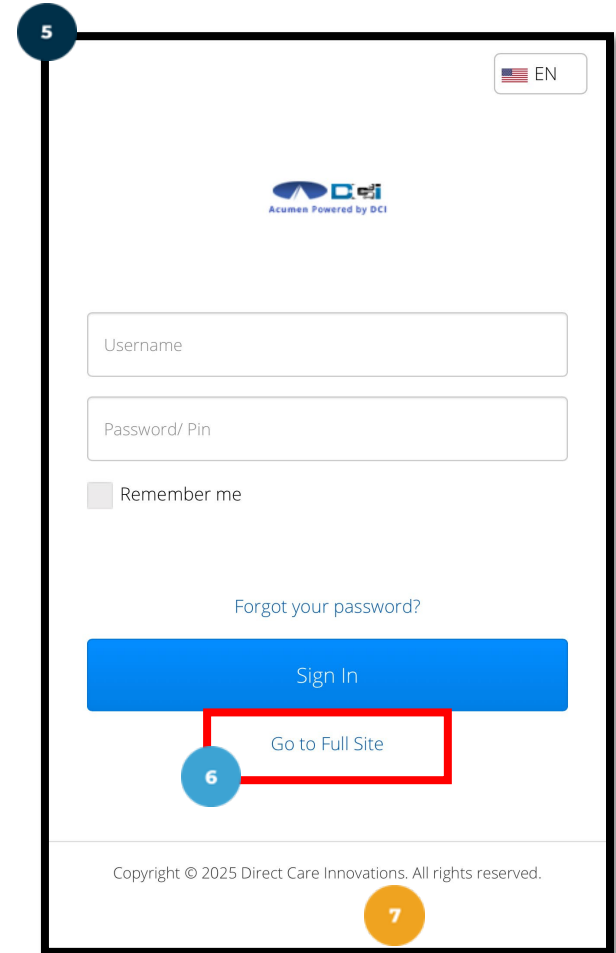
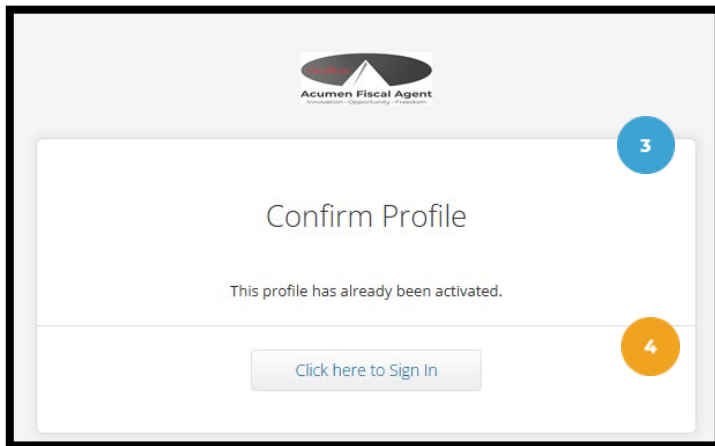
# Activate Profile –DCI Mobile Full Site

1. Upon completing Initial Registration, an email is sent to the Enrollee 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 –DCI Mobile Full Site

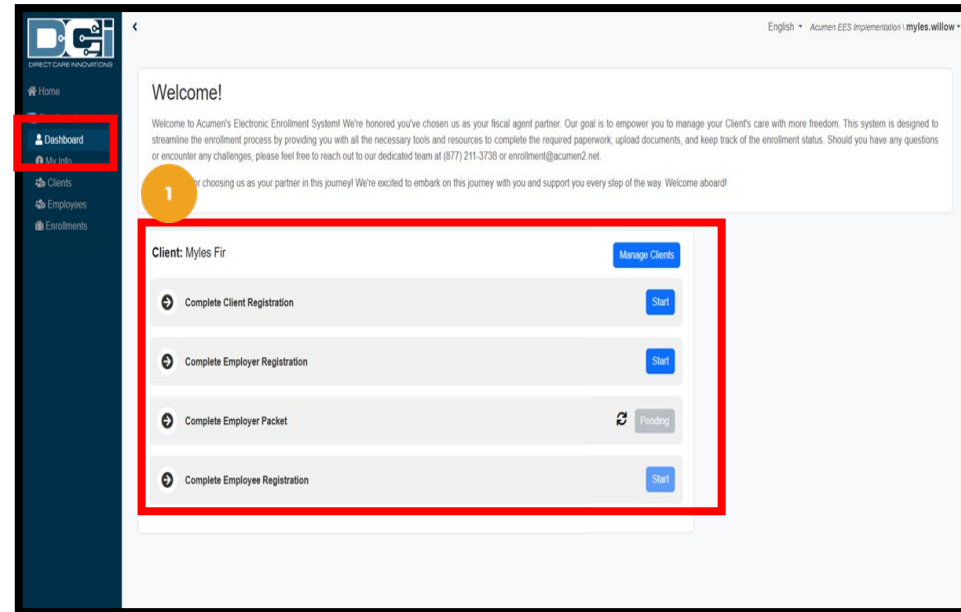
3. The Activate Account button opens a web page that states **Confirm Profile: This Profile has already been activated**
4. Tap the **Click here to Sign In** button
5. The Enrollee is redirected to the **DCI Mobile Web** login screen.
6. **\*Important!** Tap **Go to Full Site** to access the **DCI Mobile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



# Authorization Preloaded – Next Action

If there is an authorization form for the Client:

1. Upon login, the Enrollee is directed to the Dashboard on the Enrollment menu.
  - Proceed with enrollment.
  - The following items can be completed in any order:
    - ✓ Complete Client Registration
    - ✓ Register Employer
    - ✓ Register Employee
  - Add Employment may then be completed without signing the Employer Packet
  - Manage Clients button may be used to add and manage additional Client enrollments



# Missing Authorization Screen

During enrollment EES verifies that the information you've entered matches the Spending Plan/Authorization information we have already received. If you see this "Missing Authorization" screen, it means the information you provided does not match the information in our system.

- ❖ Please contact your Acumen Agent for assistance. They will help correct any discrepancies so you can continue your enrollment.

## 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

# Complete Client Registration

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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 Enrollment Dashboard. On the left sidebar, the 'Dashboard' menu item is highlighted with a red box. The main content area features a 'Welcome!' message and a list of tasks for client Myles Fir. The 'Complete Client Registration' task has a 'Start' button highlighted with a red box.

**Client:** Myles Fir Manage Clients

- Complete Client Registration Start
- Complete Employer Registration Start
- Complete Employer Packet Pending
- Complete Employee Registration Start

# 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	<input type="text"/>
Medicaid #	<input type="text" value="123456"/>
Gender *	<input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other <input type="radio"/> Prefer Not to Say
Phone	<input type="text" value="(###) ###-####"/>
Mobile Number	<input type="text" value="(###) ###-####"/>
Email	<input type="text"/>

# Complete Client Registration

## Complete the Physical Address:

7. Address Line 1 (**required**)
8. City (**required**)
9. County (optional)
10. State (**required**)
11. Zip Code (**required**)
12. Country (**required**) Defaults to United States of America

The screenshot shows a form titled "Physical Address" with the following fields and their corresponding step numbers in colored circles:

- Address Line 1 \* (Step 7)
- City \* (Step 8)
- County (Step 9)
- State \* (Step 10)
- Zip Code \* (Step 11)
- Country \* (Step 12) - Default: United States of America

## Complete the Case Manager Details:

13. Case Manager Name (optional)
14. Case Manager Phone (optional)
15. Case Manager Email (optional)
16. Click **Save** to complete the Client Registration process

The screenshot shows a form titled "Case Manager Details" with the following fields and their corresponding step numbers in colored circles:

- Case Manager Name (Step 13)
- Case Manager Phone (Step 14) - Format: (###) ###-####
- Case Manager Email (Step 15)

At the bottom of the form, there are two buttons: a blue "Save" button with a checkmark (Step 16) and a grey "Cancel" button.

# Complete Client Registration

17. The Enrollment Dashboard displays with Complete Client Registration marked **Complete**

The screenshot shows the Acumen EES Enrollment Dashboard for Client Myles Fir. The dashboard includes a navigation sidebar on the left with options like Home, Enrollment, My Info, Clients, Employees, and Enrollments. The main content area features a 'Welcome!' message and a list of registration tasks. The 'Complete Client Registration' task is highlighted with a red box and a 'Complete' status button. A blue circle with the number '17' is next to it.

Client: Myles Fir

- Complete Client Registration (Complete)
- Complete Employer Registration (Start)
- Complete Employer Packet (Pending)
- Complete Employee Registration (Start)

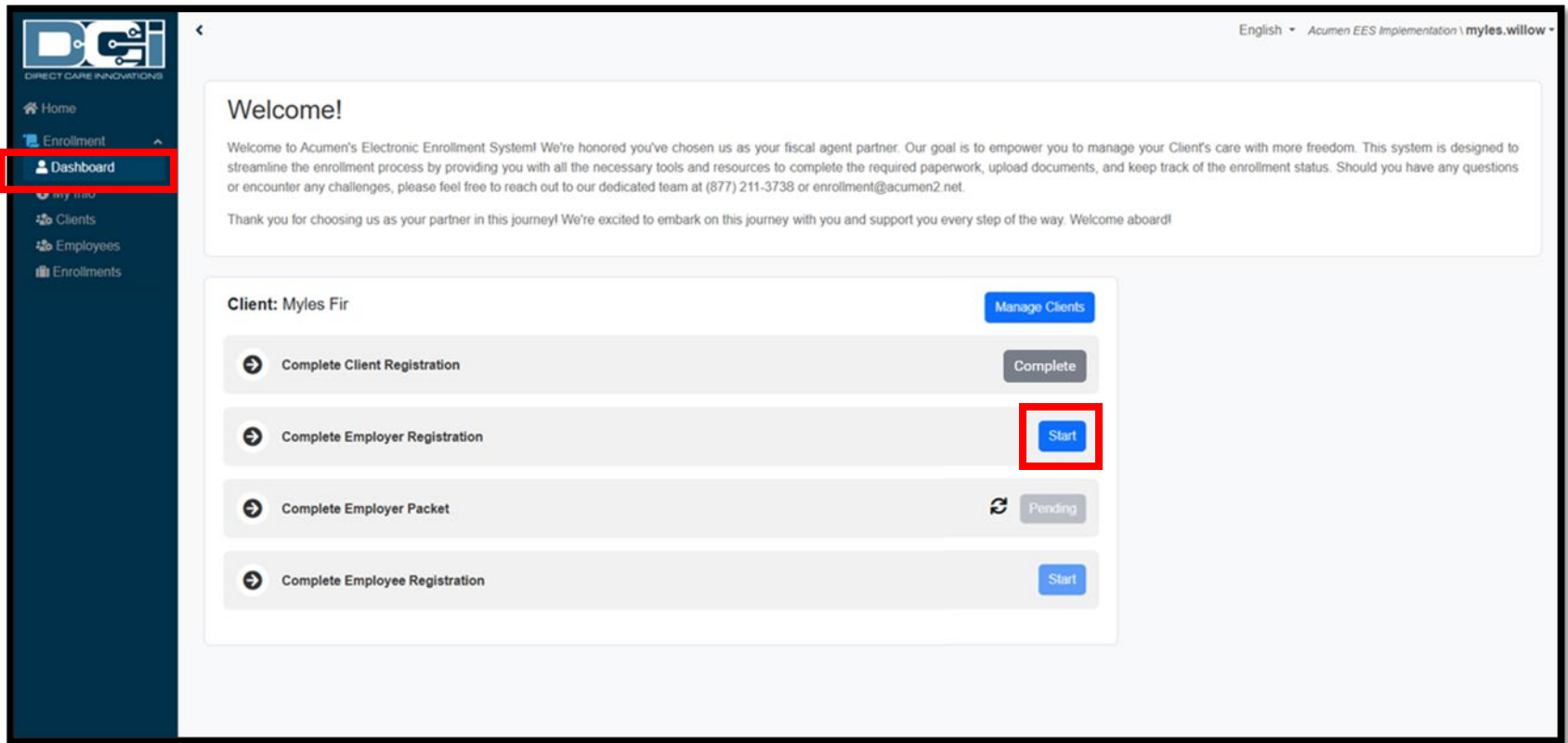
# Complete Employer Registration

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Employer completes this process

# Complete Employer Registration

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



The screenshot displays the Acumen EES Implementation dashboard for user 'myles.willow'. The left sidebar contains navigation options: Home, Enrollment, **Dashboard** (highlighted with a red box), my team, Clients, Employees, and Enrollments. The main content area features a 'Welcome!' message and a list of tasks for 'Client: Myles Fir'. The tasks are:

- Complete Client Registration (Complete button)
- Complete Employer Registration (Start button highlighted with a red box)**
- Complete Employer Packet (Pending button)
- Complete Employee Registration (Start button)

# Complete Employer Registration

## 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:	Employer	FirstName:	Michael38
DateOfBirth:	1990-07-31	EmployerStatus:	Pending

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

# Complete Employer Registration

## Complete Physical Address details:

7. Address Line 1 (**required**)
8. City (**required**)
9. County (**required**)
10. State (**required**)
11. Zip Code (**required**)
12. Country (**required**): Defaults to United States of America

### Physical Address

Address Line 1 \*

City \*

County

State \*

Zip Code \*

Country \*

# Complete Employer Registration

## Complete Mailing Address details:

### 13. Mailing Address Matches Physical Address:

- Defaults to **ON**, indicating the mailing address matches the physical address. Add the mailing address:

### 14. Toggle to **OFF** position if the mailing address is different than the physical address. Add the mailing address:

- Address Line 1 (required)
- City (**required**)
- County (**required**)
- State (**required**)
- Zip Code (**required**)
- Country (**required**): Defaults to United States of America

### Mailing Address

---

Mailing Address Matches Physical Address

### Mailing Address

---

Mailing Address Matches Physical Address

Address Line 1 \*

City \*

County

State \*

Zip Code \*

Country \*

# Complete Employer Registration

15. Complete Business Details section
  - Answer all four questions accurately

## Business Details

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

# Complete Employer Registration

❖ 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

# Complete Employer Registration

❖ 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

# Complete Employer Registration

❖ 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 \*

# Complete Employer Registration

❖ 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 \*

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

# Complete Employer Registration

The Enrollment Dashboard displays with Complete Employer Registration marked Complete

The screenshot shows the Acumen EES Enrollment Dashboard for Client Myles Fir. The dashboard includes a navigation sidebar on the left with options like Home, Enrollment, Dashboard, My Info, Clients, Employees, and Enrollments. The main content area features a welcome message and a list of tasks. The 'Complete Employer Registration' task is highlighted with a red box and has a 'Complete' button, indicating it is finished. Other tasks include 'Complete Client Registration' (Complete), 'Complete Employer Packet' (Start), and 'Complete Employee Registration' (Start).

Task	Status
Complete Client Registration	Complete
Complete Employer Registration	Complete
Complete Employer Packet	Start
Complete Employee Registration	Start

# Complete Employer Packet

---

Employer completes this process

# Complete Employer Packet

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

The screenshot shows the Acumen EES Enrollment Dashboard for Client Myles Fir. The dashboard includes a navigation menu on the left with options like Home, Enrollment, Dashboard, My Info, Clients, Employees, and Enrollments. The main content area displays a 'Welcome!' message and a list of tasks for the client. The tasks are:

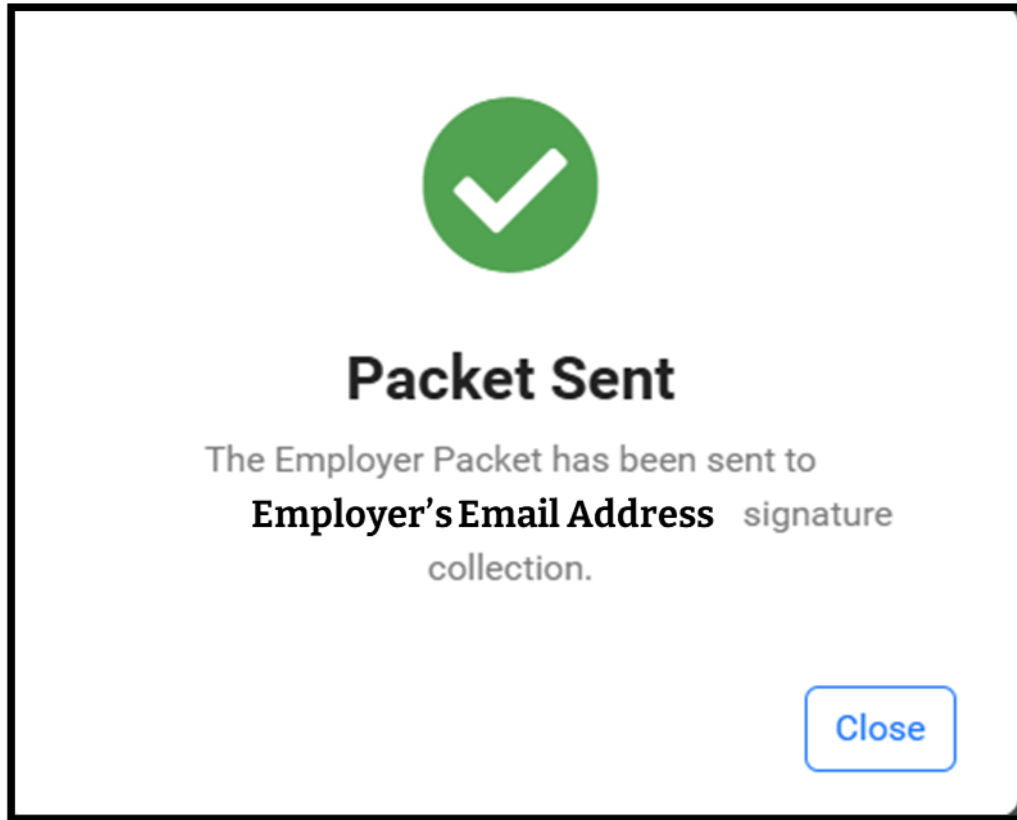
- Complete Client Registration (Complete button)
- Complete Employer Registration (Complete button)
- Complete Employer Packet (Start button, highlighted with a red box)
- Complete Employee Registration (Start button)

An orange callout box on the right contains the text: **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

- **Please Note:** When clicking the **Resend** button, the packet is not being resent, only the email for signing is resent.
- If date is altered after initial send, that will not be captured in the document.
- Use the **Refresh** button to update the status to **Complete**.

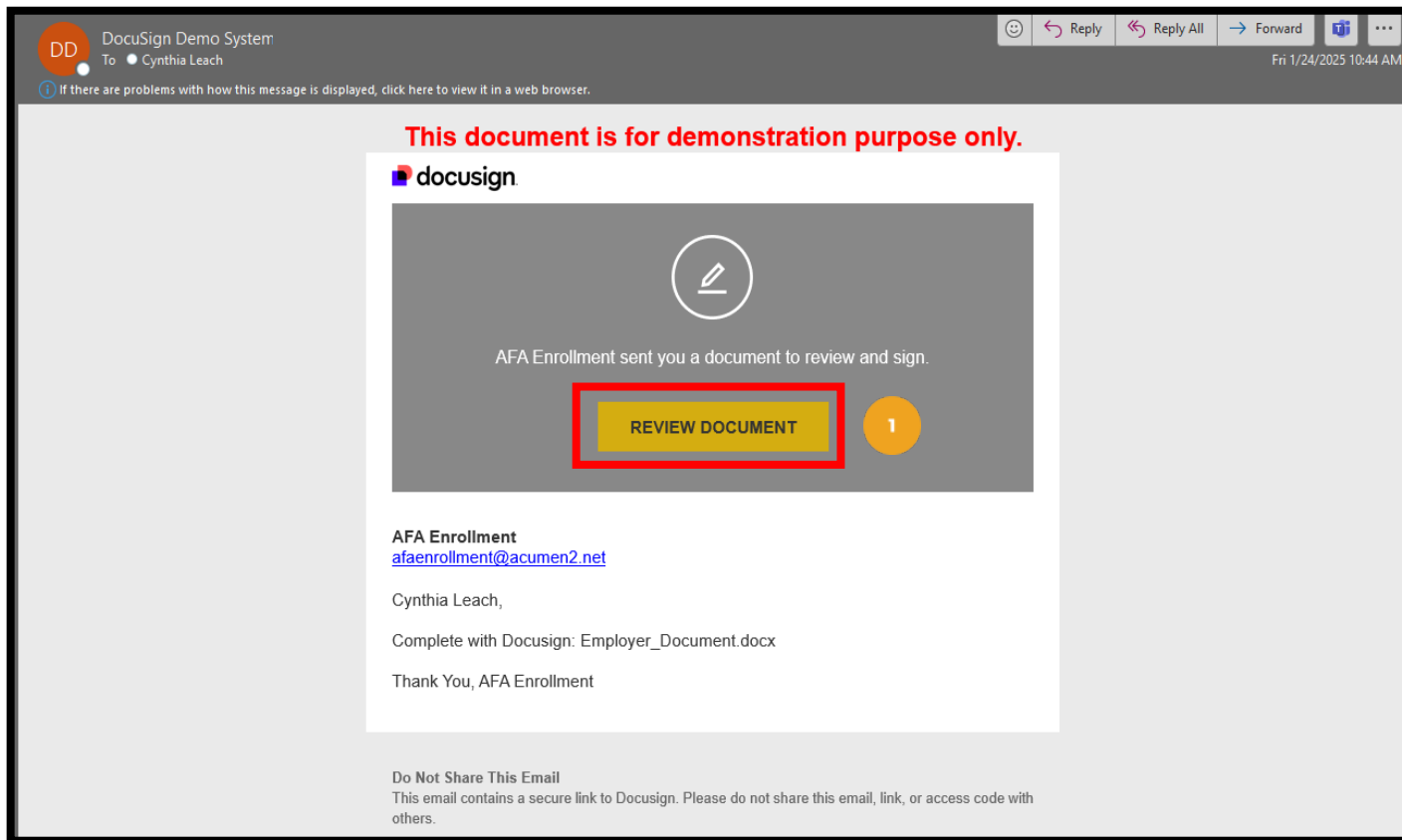


The Complete Employer Packet button displays **Pending**

# Complete Employer Packet - DocuSign

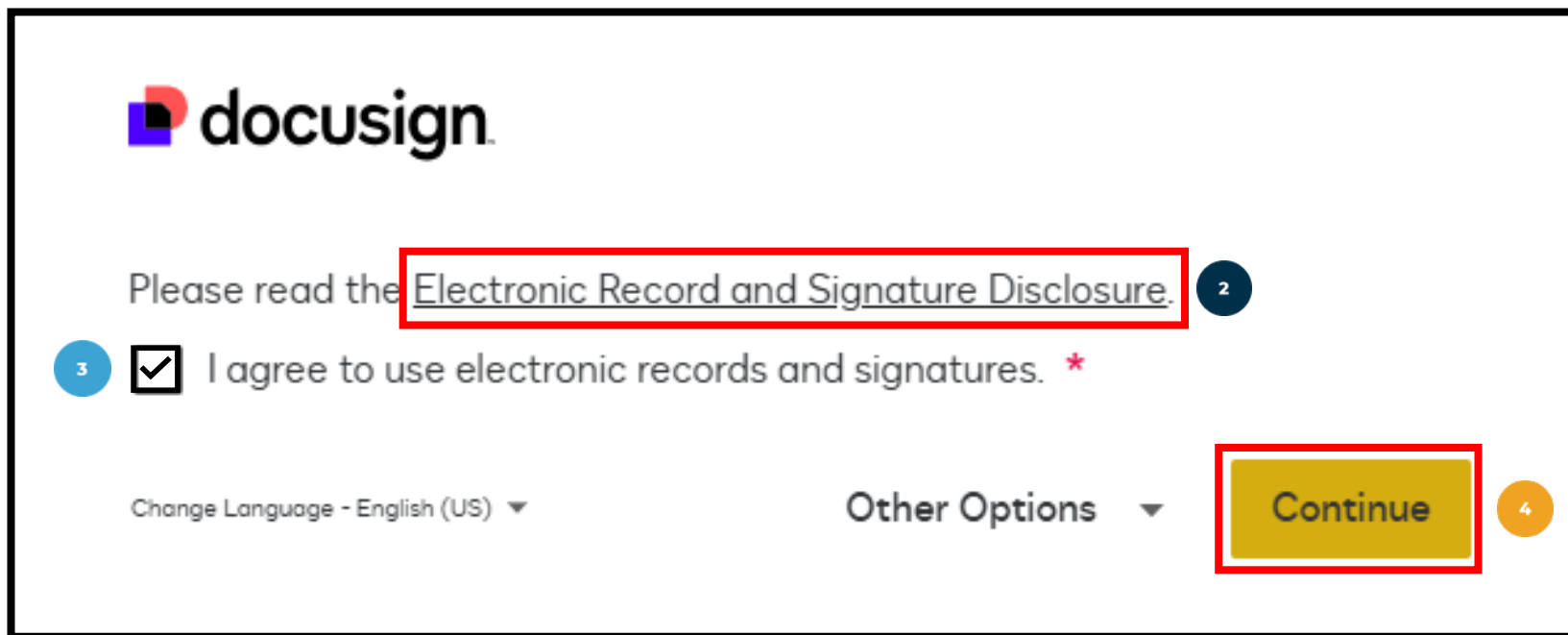
The packet arrives via an email from sender DocuSign. Check junk or spam folders if needed.

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



# Complete Employer 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 displays the DocuSign interface. At the top left is the DocuSign logo. Below it, the text "Please read the [Electronic Record and Signature Disclosure](#)." is shown, with the link text highlighted by a red box and a blue circle containing the number 2. Below this, a checkbox is checked, with a blue circle containing the number 3 to its left and a red asterisk to its right. At the bottom, there are three elements: "Change Language - English (US)" with a dropdown arrow, "Other Options" with a dropdown arrow, and a yellow "Continue" button highlighted by a red box with a blue circle containing the number 4 to its right.

# Complete Employer Packet - DocuSign

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

Employer

Finish 6

OTHER ACTIONS

Finish Later

Print & Sign

# Complete Employer Packet - DocuSign

- The Employer packet is prefilled based on the information provided in the initial registration
- **Important!** Review documents for accuracy and make updates where allowed if necessary.
- 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

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:

Participant or Employer/ Representative Signature Date

**NEXT** **Sign** ↓

# Complete Employer Packet - DocuSign

A signature can be added in one of three ways:

1. Select a signature style OR
2. Draw the signature OR
3. Upload an image of the signature

To select a signature style provided by DocuSign (option 1):

- ✓ 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 [Change Style](#)

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

NEXT

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  Sign

Date


Print your title here

Best daytime phone

Now give this form to the agent to complete.

# Complete Employer Packet - DocuSign

\*Some fields may include an option to include free-form text

		employer.Fax	
	Gender*	employer.Gender	Female
	Date of Birth	employer.DateOfBirth	3/10/1990
	SSN*	employer.SocialSecurityNumber	<input type="text"/>
	Preferred Communication Method	employer.PreferredCommunicationMethod	<input type="text"/>

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 - DocuSign

**Congratulations!**

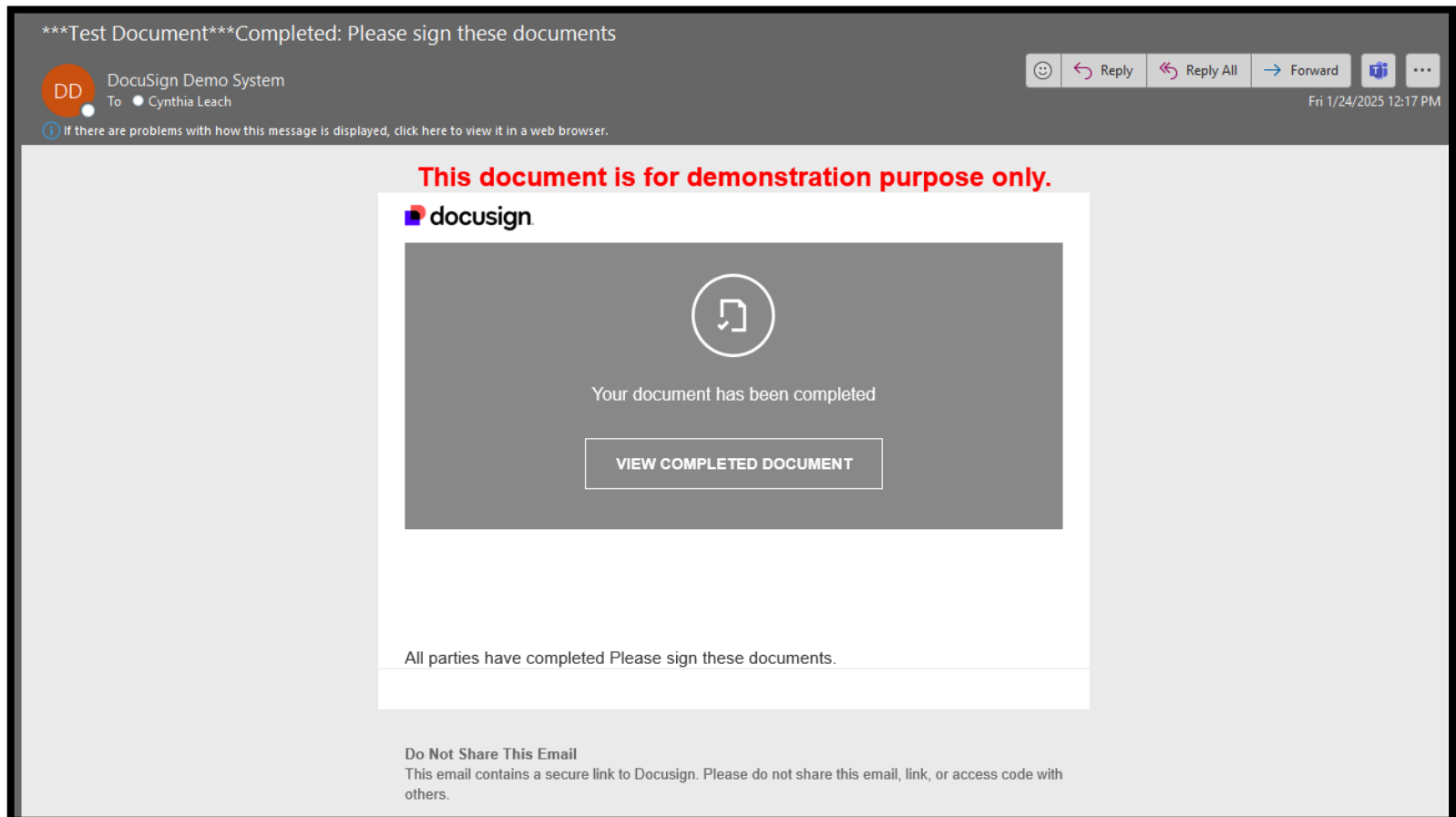
The Employer packet is complete.



- 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 - DocuSign

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



# Complete Employer Packet

## Please Note:

- The Employer Packet is marked **Pending** until it has been completed
- After signing, if needed, 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**

# Complete Employee Registration

---

Employer completes this process

# Complete Employee Registration

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

The screenshot displays the Acumen EES Enrollment Dashboard for Client Myles Fir. The interface includes a navigation sidebar on the left with options like Home, Enrollment, Dashboard, My Info, Clients, Employees, and Enrollments. The main content area features a 'Welcome!' message and a list of tasks for the client. The tasks are:

- Complete Client Registration (Complete button)
- Complete Employer Registration (Complete button)
- Complete Employer Packet (Complete button with refresh icon)
- Complete Employee Registration (Start button, highlighted with a red box)

# Complete Employee Registration

Complete the Register a new Employee fields:

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

English ▾ Acumen EES Implementation \ myles.willow ▾

Register a new Employee

Complete Employee

Client Name \*

Program \*

Employer \*

Employee \*

Expected Start Date MM/DD/YYYY

First Name \*

Last Name \*

Date of Birth \* MM/DD/YYYY

SSN \* ### ## ####

State \* Select State ▾

Next Cancel

Please ensure the Date of Birth is accurate—several entries have mistakenly used the current year as the birth year, which causes validation issues.

# Complete Employee Registration

## Complete the Register Employee fields:

- ❖ 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/or Last four of SSN.
    - If **Yes**, click the **This is my Employee** button to avoid creating a duplicate Employee profile.
      - ✓ The Employee information populates in the Register a new Employee form.
      - ✓ Continue to complete Employee Details information by completing **the next required field**.
    - If **No**, click **Cancel**.
      - ✓ Continue to the Register Employee form
- ❖ If no match is found, the alert will not display. Continue to next slide

### 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

# Complete Employee Registration

## Complete the Register Employee fields:

1. First Name (**required, auto populates**)
2. Middle Name (optional)
3. Last Name (**required, auto populates**)
4. Other Last Names Used (optional)
5. Date of Birth (**required, auto populates**)
6. SSN (**required, auto populates**)
7. Gender (**required**): Select one
  - Male
  - Female
  - Other
  - Prefer Not to Say

First Name *	Jack
Middle Name	
Last Name *	Employee1
Other Last Names Used	
Date of Birth *	02/11/1980
SSN *	010-98-2942
Gender *	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other <input type="radio"/> Prefer Not to Say

# Complete Employee Registration

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

The screenshot displays a registration form with the following fields:

- Phone \* (required): Input field with placeholder text "(###) ###-####"
- Alternative Phone (optional): Input field with placeholder text "(###) ###-####"
- Mobile Number (optional): Input field with placeholder text "(###) ###-####"
- Email \* (required): Empty input field
- Citizenship Status \* (required): Dropdown menu with the text "Select Citizenship Status" and a downward arrow. The dropdown menu is open, showing the following options: "Select Citizenship Status" (highlighted in blue), "Citizen", "Non-Citizen National", "Permanent Resident", and "Authorized Alien".

**Please note:** Complete any additional custom fields that may be applicable to the program.

# Complete Employee Registration

Complete the Physical Address fields:

13. Address line 1 (**required**)
14. City (**required**)
15. County (optional)
16. State (**required**)
17. Zip Code (**required**)
18. Country (**required**): Defaults to United States of America

### Physical Address

Address Line 1 *	13	<input type="text"/>
City *	14	<input type="text"/>
County	15	<input type="text"/>
State *	16	<input type="text" value="v"/>
Zip Code *	17	<input type="text"/>
Country *	18	<input type="text" value="United States of America"/>

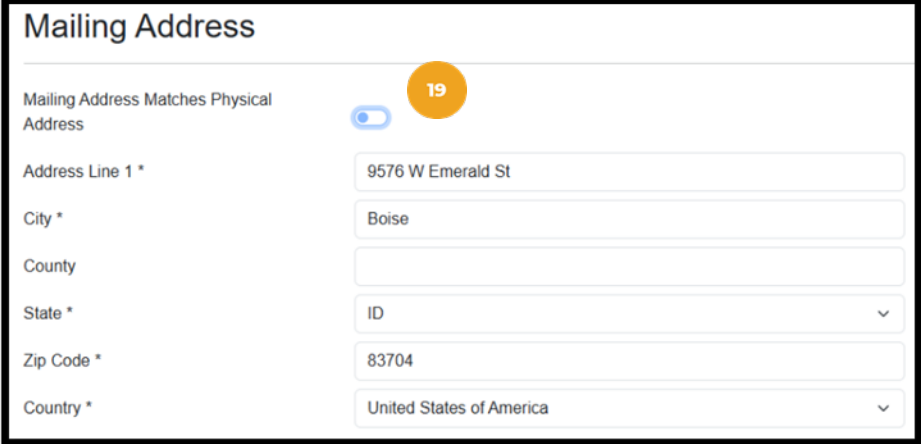
# Complete Employee Registration

## Complete Mailing Address details:

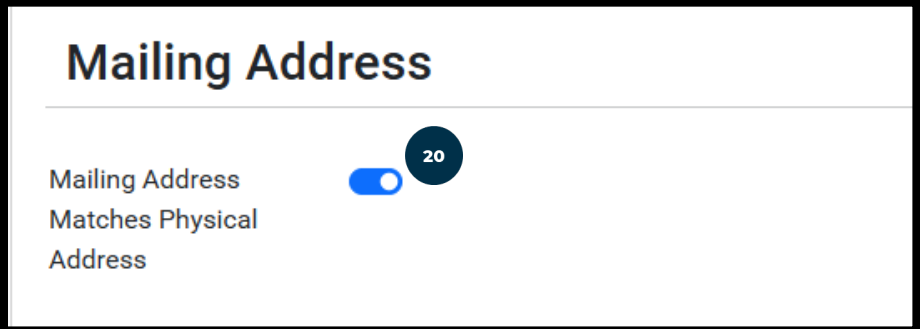
### 19. Mailing Address Matches Physical Address:

- 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. County (optional)
  - d. State (**required**)
  - e. Zip Code (**required**)
  - f. Country (**required**): Defaults to United States of America

### 20. Toggle to **ON** position if the mailing address is the same as the physical address



The screenshot shows a form titled "Mailing Address". At the top, there is a toggle switch for "Mailing Address Matches Physical Address" which is currently turned off (to the left). A yellow circle with the number "19" is positioned above the toggle. Below the toggle are several input fields: "Address Line 1 \*" containing "9576 W Emerald St", "City \*" containing "Boise", "County" (empty), "State \*" containing "ID" with a dropdown arrow, "Zip Code \*" containing "83704", and "Country \*" containing "United States of America" with a dropdown arrow.



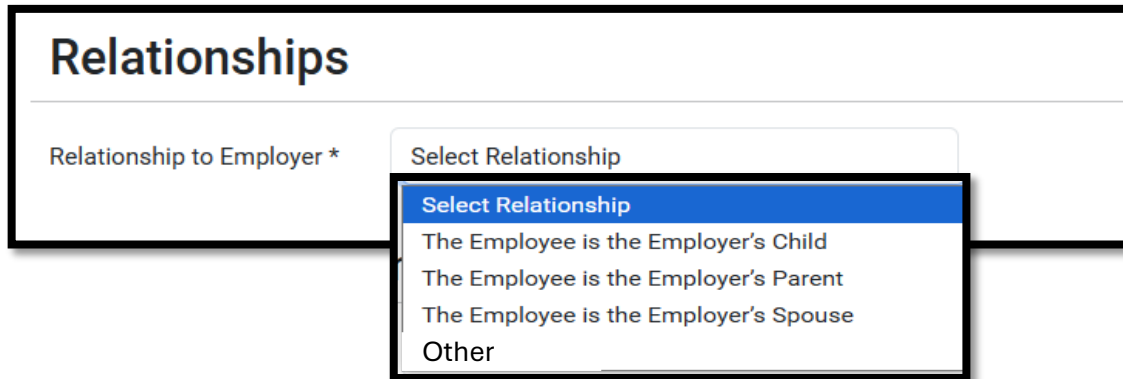
The screenshot shows the same "Mailing Address" form. The toggle switch for "Mailing Address Matches Physical Address" is now turned on (to the right). A dark blue circle with the number "20" is positioned above the toggle. The rest of the form fields are identical to the previous screenshot.

# Complete Employee Registration

## Complete Relationships details:

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

- The Employee the Employer's Child
- The Employee the Employer's Parent
- The Employee the Employer's Spouse
- Other



The screenshot shows a form titled "Relationships". Below the title is a label "Relationship to Employer \*" followed by a dropdown menu. The dropdown menu is open, showing the following options: "Select Relationship" (highlighted in blue), "The Employee is the Employer's Child", "The Employee is the Employer's Parent", "The Employee is the Employer's Spouse", and "Other".

22. Click **Save** to continue completing Employee Registration



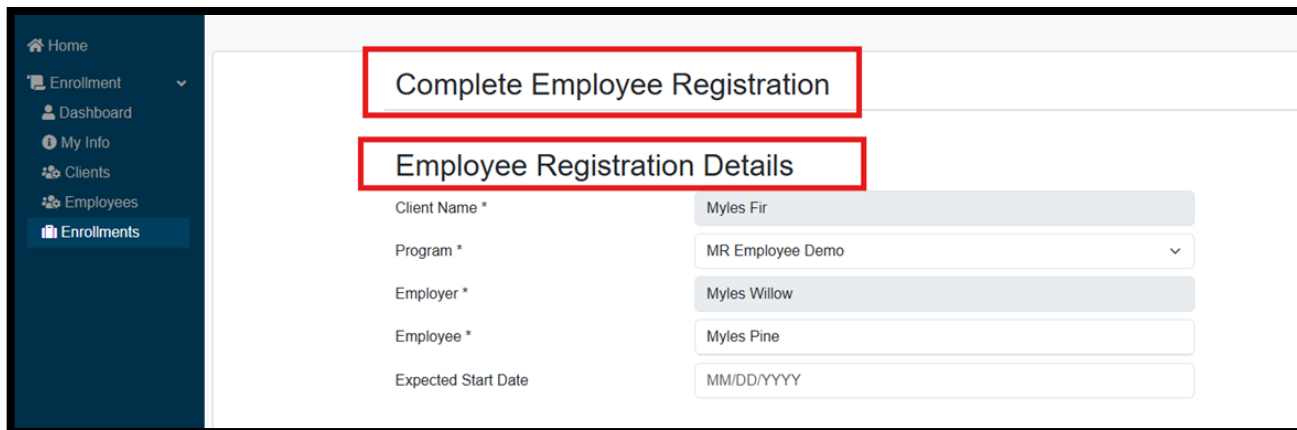
The screenshot shows two buttons: a blue "Save" button and a grey "Cancel" button.

# Complete Employee Registration

## Complete Employee Registration:

### Employee Registration Details:

22. Client Name (**required**): Auto-populates
23. Program (**required**): Select the program in which the client participates
24. Employer (**required**): Auto-populates
25. Employee (**required**): Auto-populates
26. Expected Start Date (optional): Enter the date in **MM/DD/YYYY** format
  - Can be backdated up to three days prior from when the Enrollment is created



The screenshot shows a web application interface for "Complete Employee Registration". The left sidebar contains navigation links: Home, Enrollment (selected), Dashboard, My Info, Clients, Employees, and Enrollments. The main content area is titled "Complete Employee Registration" and "Employee Registration Details". The form fields are as follows:

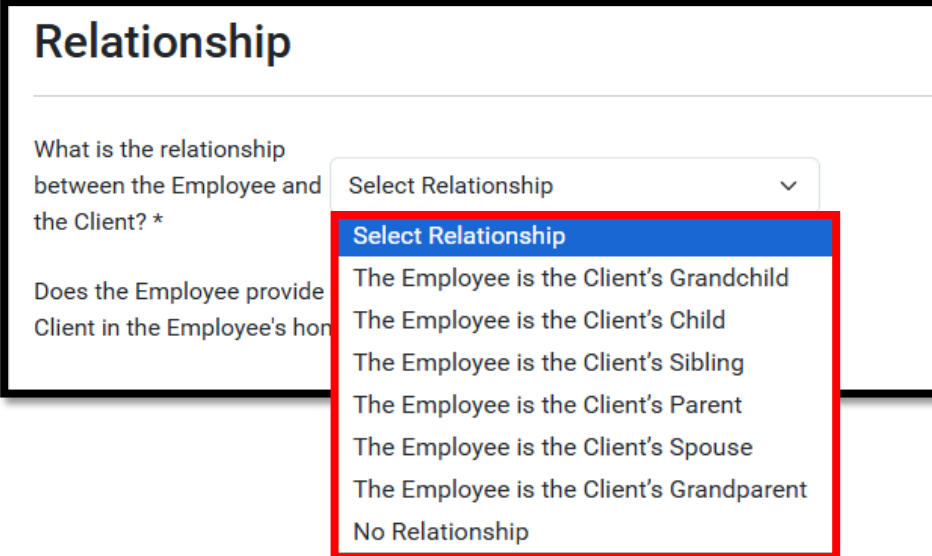
Client Name *	Myles Fir
Program *	MR Employee Demo
Employer *	Myles Willow
Employee *	Myles Pine
Expected Start Date	MM/DD/YYYY

# Complete Employee Registration

## Complete Relationship details:

27. 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". The main question is "What is the relationship between the Employee and the Client? \*". Below this question is a dropdown menu with the placeholder text "Select Relationship". The dropdown menu is open, showing 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". The dropdown menu is highlighted with a red border. Below the main question, there is another question: "Does the Employee provide Client in the Employee's hon".

# Complete Employee Registration

28. 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

---

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

# Complete Employee Registration

## Complete the Services details:

29. Service Code #1 (**required**): Click the drop-down to select the service code for services the employee is providing
30. 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

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

Service Code #1 \*      Pay Rate \*

Service Code      Enter Pay Rate

+ Add Service      - Remove Service

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

Save      Cancel

# Send Employee Packet

---

Employer completes this process.

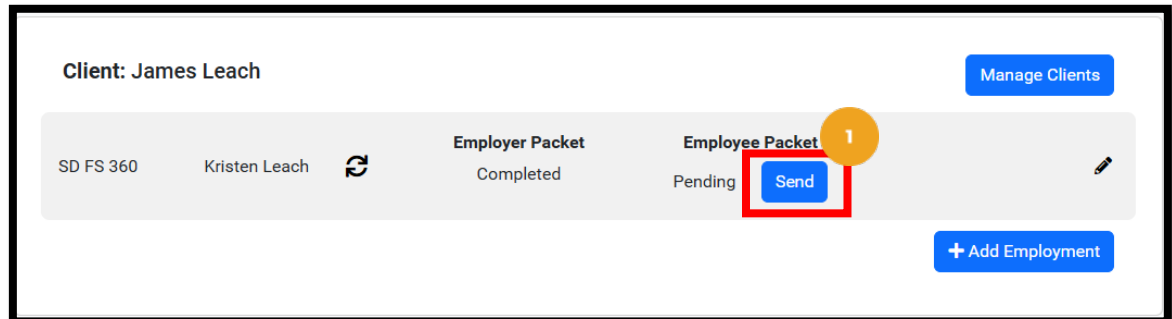
# Send Employee Packet

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

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

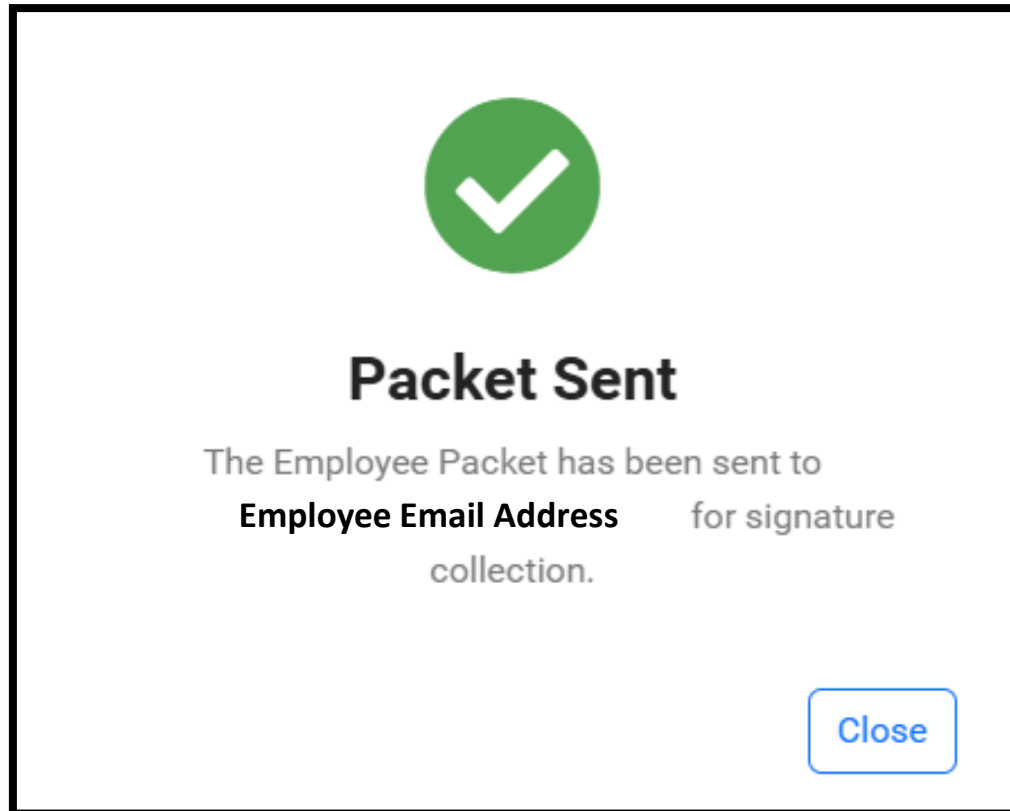
- **Employee Registration**
- **Add the Employment**

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

Client: James Leach [Manage Clients](#)

SD FS 360	Kristen Leach	Refresh	Employer Packet	Employee Packet	Edit
			Completed	<b>In Progress</b> <a href="#">Resend</a>	

Please wait 15 minutes between refresh & resend. [+ Add Employment](#)

# Complete Employee Packet

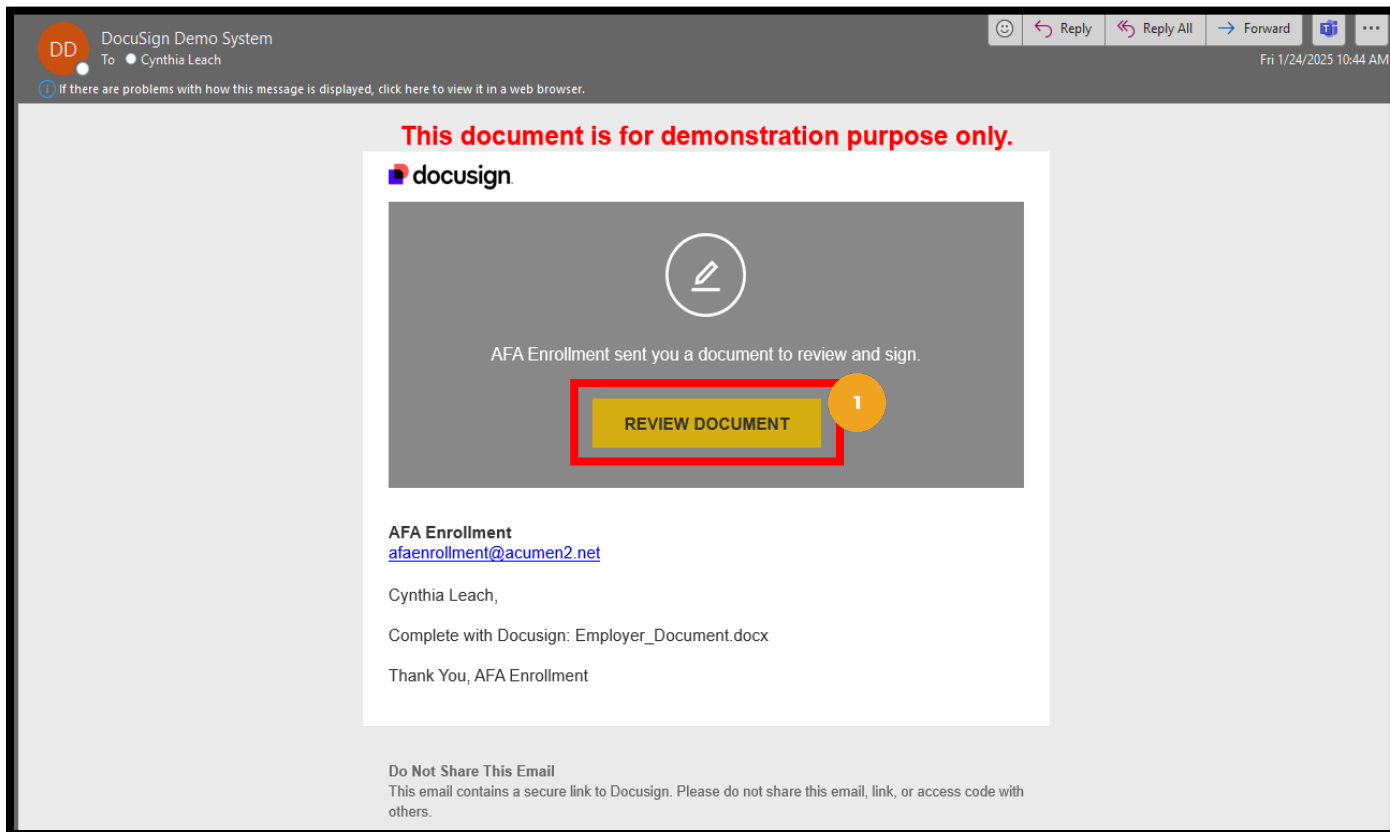
---

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 [Electronic Record and Signature Disclosure](#)." is displayed, with the link text highlighted by a red box and a blue callout '2'. Below this, there is a checkbox with a checkmark, followed by the text "I agree to use electronic records and signatures. \*", with the checkbox highlighted by a blue callout '3'. At the bottom, there are three elements: "Change Language - English (US) ▾", "Other Options ▾", and a yellow "Continue" button highlighted by a red box and an orange callout '4'.

# Complete Employee Packet - DocuSign

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

Review and complete

5 **START**

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

6 **Finish**

OTHER ACTIONS

Finish Later

Print & Sign

Employer

# Complete Employee Packet - DocuSign

- The Employer 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 yellow **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:

10/31/2024

Participant or Employer/ Representative Signature Date

**8 NEXT**

**7 Sign**

# Complete Employee Packet - DocuSign

A signature can be added in one of three ways:

1. Select a signature style OR
2. Draw the signature OR
3. Upload an image of the signature

To select a signature style provided by DocuSign (option 1):

- ✓ 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

Change Style

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

ADOPT AND SIGN CANCEL

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 [Sign button]

Date 7/31/2024


Print your name here ER Full

Print your title here HCSR EMPLOYER

Best daytime phone (222) 222-2223

# Complete Employee Packet - DocuSign

\*Some fields may include an option to include free-form text

		employer.Fax	
	Gender*	employer.Gender	Female
	Date of Birth	employer.DateOfBirth	3/10/1990
	SSN*	employer.SocialSecurityNumber	
	Preferred Communication Method	employer.PreferredCommunicationMethod	

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

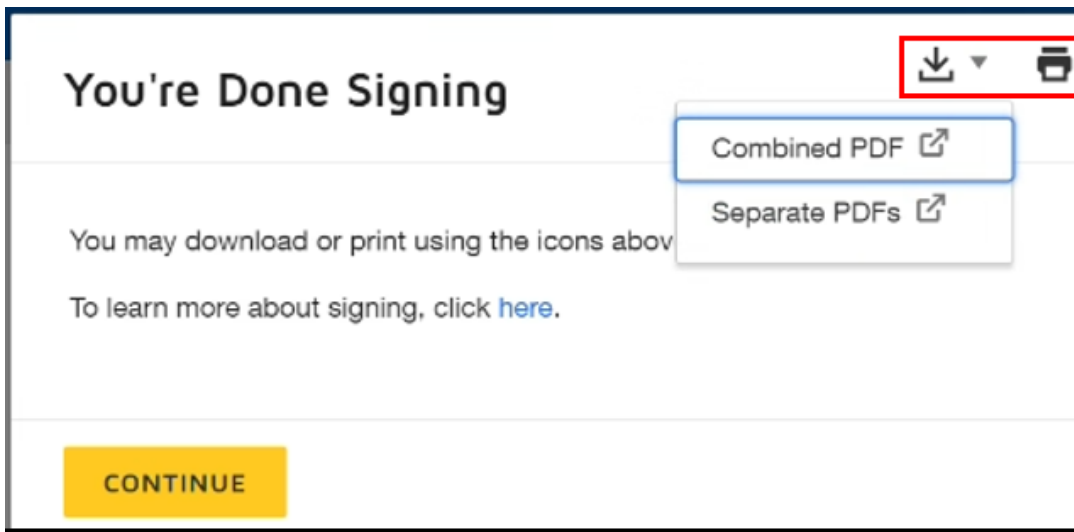
**Ready to Finish?**  
You've completed the required fields. Review your work, then select Finish.

**Finish**

# Complete Employee Packet - DocuSign

**Congratulations!**

The Employee packet is complete.

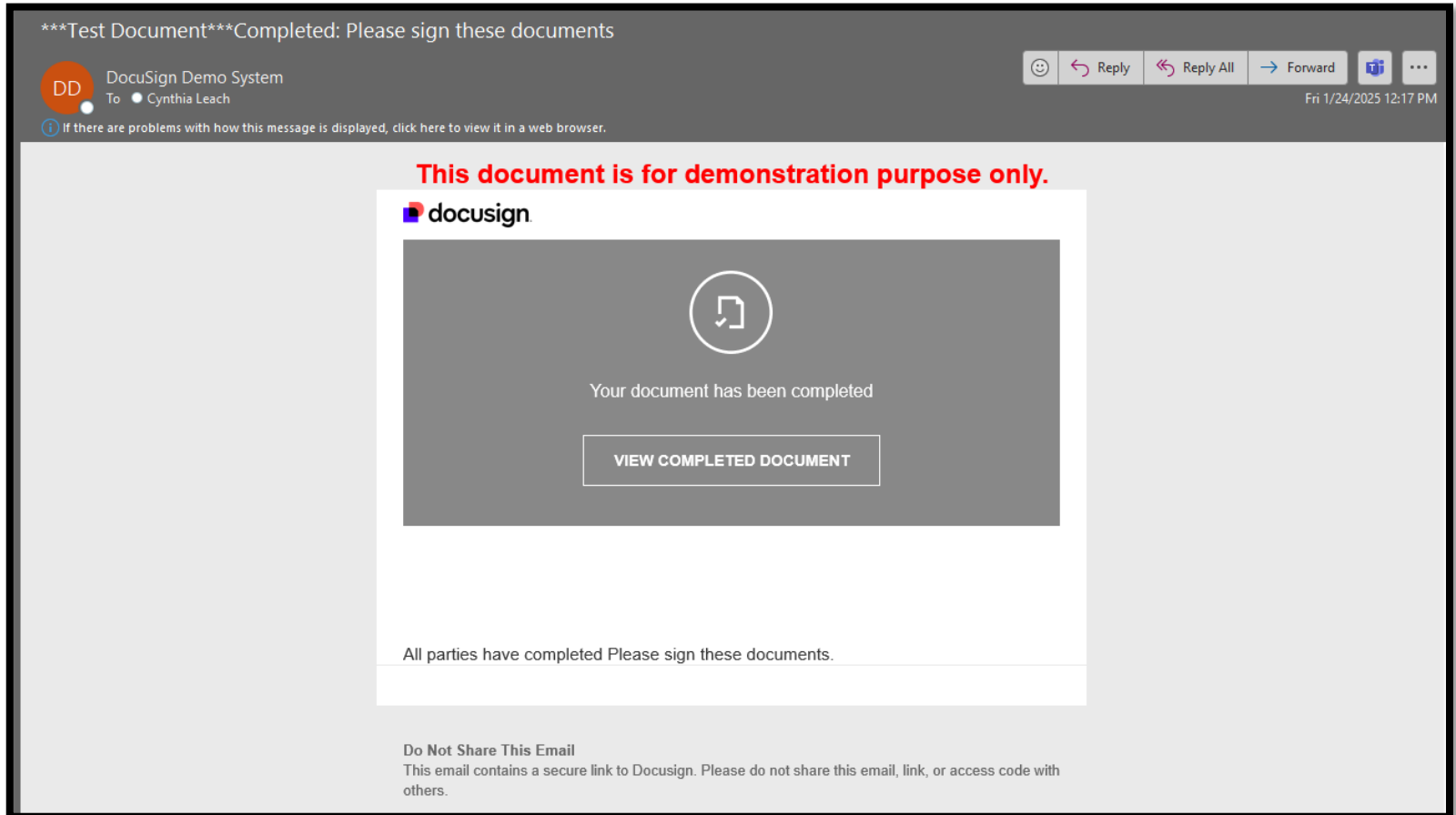


- Optionally, click the **download icon** to download as a combined PDF or as separate PDFs, or click the **printer icon** to print.
- Click the yellow **Continue** button to proceed

**Please note: The employer receives a copy of the packet after all required individuals have signed, which may include the employee and employer.**

# Complete Employee Packet - DocuSign

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



# Enrollment Completed\*

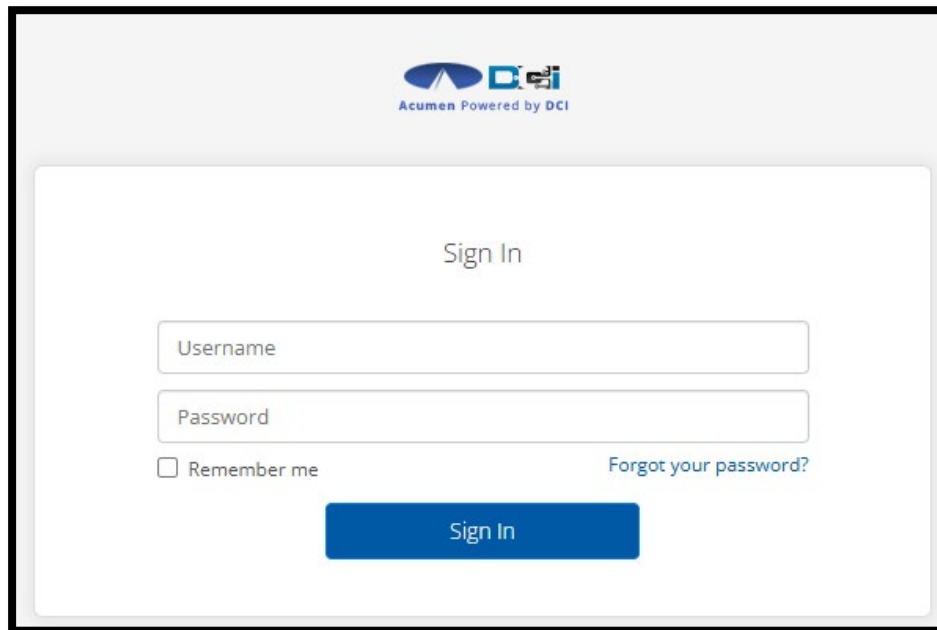
---

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

# Logging into EES

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

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



The screenshot shows the Acumen Sign In page. At the top center is the Acumen logo, which consists of a blue stylized 'A' and 'DCI' text, with the tagline 'Acumen Powered by DCI' below it. The main heading is 'Sign In'. Below this are two input fields: 'Username' and 'Password'. Under the 'Username' field is a checkbox labeled 'Remember me'. To the right of the 'Password' field is a link that says 'Forgot your password?'. At the bottom center is a blue button labeled 'Sign In'.

# Enrollment Completed

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

English ▾ Acumen EES Implementation \ michael38.employer ▾

## 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.

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: Michael25 Client** Manage Clients

	Employee		Employer Packet	Employee Packet	
TX Training	Emma22	↻	Completed	Completed	✎
MC Test - EE	Employee				

+ Add New Employee

**Optional:** Click the blue **+Add New Employee** button to add additional Employees for the Client. Return to **Complete Employee Registration** section to view instructions.

# Next Steps

## Congratulations!

- ✓ You have completed your portion of the enrollment process!
- ✓ Your enrollment information is now ready to be reviewed by an agent.
- ✓ An Agent will contact you with the next steps after they have reviewed the information received.

# Questions?

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