



**Acumen Fiscal Agent**

Innovation • Opportunity • Freedom

# NJ Vendor Fiscal/Employer Agent Introduction to Acumen Webinar

Date: February 28, 2025

# AGENDA:



- ✓ Get to know Acumen
- ✓ It starts with the  
**“Transition Packet”**
- ✓ EVV and Service Documentation
- ✓ Managing Time Entries
- ✓ What’s Next?
- ✓ Q & A

# OUR TEAM

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J Auer - CEO



Jakob Schmidt - COO



Chelsea Huntington - CIO



Elizabeth Kiefer –  
EVP of Field Operations



Kristen Ziegler– Director  
of Training and  
Development



Daniela Bulla –  
Project Manager



Asia Tang –  
Executive Director



Jocelyn Summers–  
Associate Director



## OUR MISSION

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*Acumen Fiscal Agent facilitates freedom, choice and opportunity through innovative fiscal agent solutions.*



**Acumen Fiscal Agent**  
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# Who We Are

We approach each project with an attitude of service:

- How can we make life simpler for the people we serve?
- How can we help them to save money?
- Are we doing the best we can?



We take great pride in our ability to listen to our customers and use what we have learned through our diverse experience to shape how we best meet their needs.

While research and theory are important, we've found that our value to our customers comes primarily from our ability to actually implement and follow through on real projects that have a positive, long-lasting impact on people's lives.

# Who We Are

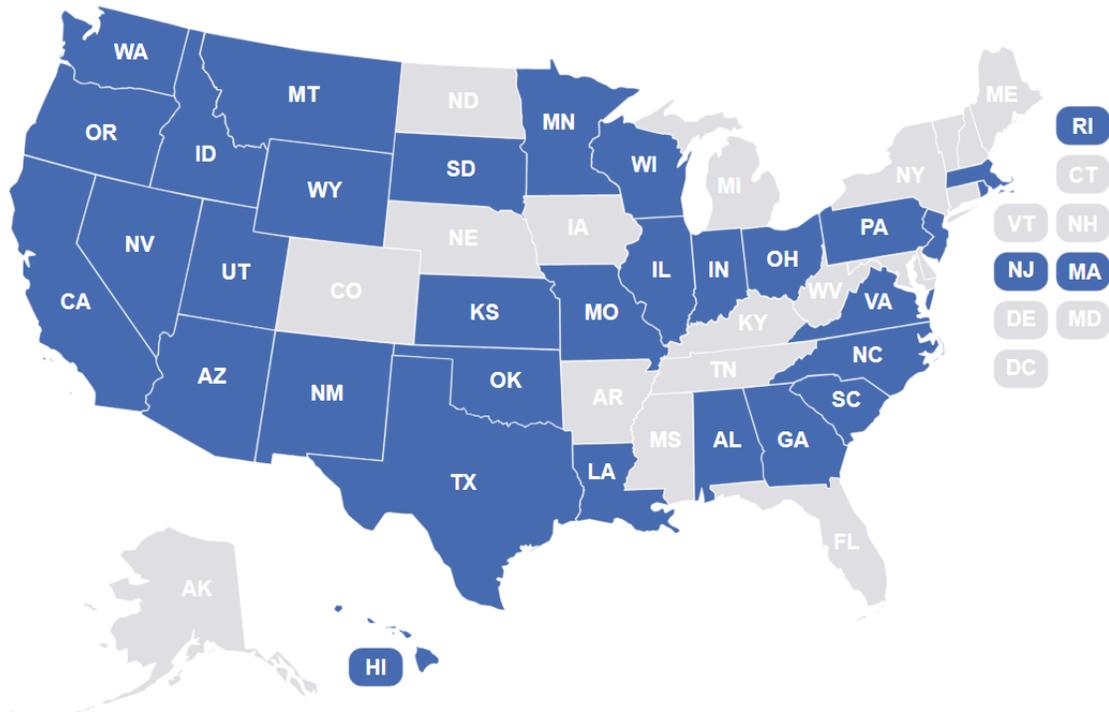
[Acumen Fiscal Agent](#) was founded in 1995 by executives in the human services industry on a simple premise:



There has to be a better, simpler, and more personal and efficient way to provide [self-directed services](#) to individuals with disabilities and their families.

Acumen has been part of hundreds of creative and innovative programs designed to empower thousands of participants across the nation. Since then, we have steadily grown by keeping that premise in mind and are now one of the largest providers of fiscal agent services in the country.

# Who We Are



- Servicing the majority of states across the country
- Over 29 years of experience
- Customized approach for your needs
- A+ workers' compensation rating
- 99% error-free payroll processing
- 98% national customer satisfaction rating

# Who We Are

- We help individuals perform:
  - Payroll
  - Employer-related duties
  - Track and monitor budget expenditures
  - Transition Packet (enrollment packet)
  - Ensure program compliance
  - Technical Software Tools and Support



# Our Participant Services Agent Model

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Acumen's Agents facilitate fast onboarding and personalized New Jersey-based FMS support.



- Each Participant is assigned a dedicated, locally based Participant Services Agent
  - 24/7 back up support from Customer Service call center.
- The Agent provides:
  - Information & Assistance
  - Training
  - Answers to payroll questions
- Facilitates easy enrollment for Individuals, Employers, Self-Directed Employees and Vendors
- Supportive liaison between families and programs
- ***Community committed: authentic relationships, genuine support***
  - ***99% report satisfaction working with Agent.***

# IT STARTS WITH TRANSITION PACKETS

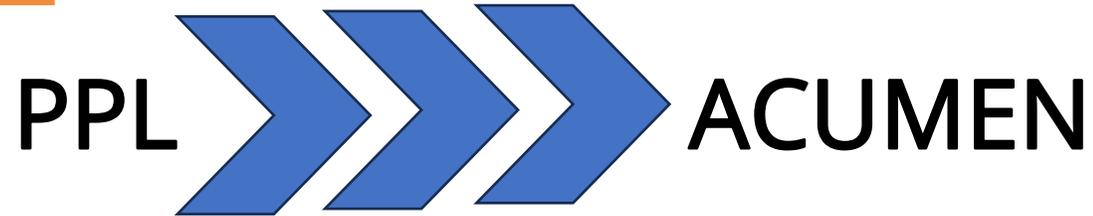
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Check our website for ongoing updates:

<https://www.acumenfiscalagent.com/state/new-jersey/>



# Introduction



- To facilitate the transition from PPL to Acumen, employers will complete a transition (enrollment) packet.
- Individuals will be sent the appropriate packet and will only complete that packet.
  - ✓ Employer with self-directed employees packet OR
  - ✓ Vendor only packet (without self-directed employees)
- The packet will be emailed **End of March**
  - ✓ Those who do not have email addresses or who do not have one on file with Acumen may attend in-person sessions in **April** or contact Acumen to have the email address added and the packet sent electronically.
- Employers must complete the packet online via DocuSign by **End of April**
- Enrollment training will be provided to employers who need additional support



## Transition Packet Good to Go/Pay



### Forms For the Employer of Record (EOR)

1. Acumen Authorization Form
2. Form 2678 Participant/Payer Appointment of Agent
3. Form SS-4 Application for EIN
4. M-5008-R Appointment of Taxpayer Representative
5. Employers Previous Business Information
6. Employer Agreement
7. Authorized Representative Form (optional)
8. Support Broker Form (optional)



### Forms For the Self-Directed Employee (SDE)

1. Employee Wage Form
2. I-9 Employment Eligibility Verification
3. W-4
4. NJ W-4
5. Pay Selection Employee Options
6. Application for Tax Exemption (optional)
7. Difficulty of Care Statement of Compliance (optional)
8. NJ-165 (Pennsylvania resident)
9. Employee Agreement

# What is EVV?

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- The 21st Century Cures Act, signed into law December 13<sup>th</sup>, 2016, by President Obama, requires state agencies to use a system of **electronic visit verification (EVV)** for all Medicaid personal care services (PCS) and home health care services (HHCS) that require an in-home visit by a provider.
- EVV uses electronic devices to verify a provider's visit
- The following data is collected for each visit:
  - ✓ The date of the service
  - ✓ The location of the service delivery
  - ✓ The time the service begins and ends
  - ✓ The individual receiving the service
  - ✓ The individual providing the service
  - ✓ The type of service performed



# Why DCI & EVV (Electronic Visit Verification)?

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- DCI increases compliance with the 21<sup>st</sup> Century Cures Act by capturing real-time punch entries at Clock In/Out at the Start/End of the shift
- Greater accuracy in service tracking, reporting, and billing for in-home care workers.
- Reduction of manual work needed with paper processes
- Faster corrections of pay issues ensuring timely payment



# Procedure Codes for EVV

- The self-directed employee will use EVV when they are providing the following 3 services:
  - ✓ Community Based Supports
  - ✓ Individual Supports
  - ✓ In-Home Respite
- EVV Exemptions:
  - ✓ Live-in
  - ✓ 100% in the community
  - ✓ Services provided by community vendors



# Ways to Enter Time

## Only use one per shift (each clock in/out)

### Mobile App



- **\*Preferred Method**
- Real Time Entry – EVV compliant
- Quick & Easy
- [Mobile App Guide](#)

OR

### Phone EVV



- Landline
- Real Time Entry – EVV compliant
- Historical Entry – Non-EVV compliant
- Option when access to a mobile device or computer is limited

OR

### Web Portal



- Only used for service interruptions
- Time Management
- [Historical Entry](#) & Corrections – Non-EVV compliant
- Manual Time Approval
- [Profile Settings](#)
- **\*Includes Mobile Web Portal** – Mobile-friendly web portal version accessed via smartphone or tablet

# Clock Out Process After the EVV and Service Documentation



## The employee:

1. Enters service documentation for the punch. Including 2-3 sentences detailing services provided (required)
2. Adds an attachment for the punch (optional)
3. Selects the task(s)/statement(s) that was completed during the shift
  - ✓ Tasks/statements are a quick way to document the duties completed with/for the participant
  - ✓ The entry cannot be saved without a selection
4. Clicks the blue **Confirm Clock Out** button when ready
  - ✓ *This will stop the time for the shift*
5. Punch Confirmation
  - ✓ Punch details, including verification option selected, display.

**Clock Out**

Clock Out Time: 05:23 PM (CST)

Add Notes **1**

**2** Add Attachment

Personal hygiene

Cleaning **3**

Grocery shopping

**4** Confirm Clock Out

Client Name: Steph Client2  
Service Code: PCC

**Punch Information**

Client Name: Steph Client2  
Service Code: PCS  
Clock Out Time : 05:22 PM (CST)  
verified by Client PIN or Password

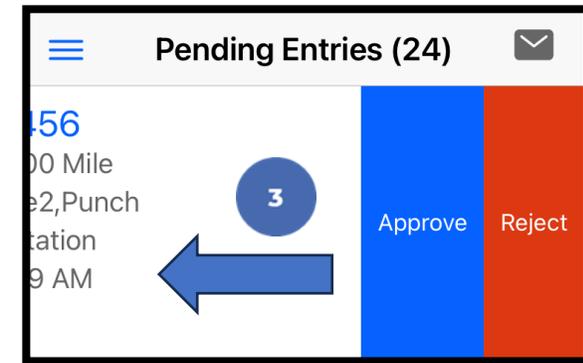
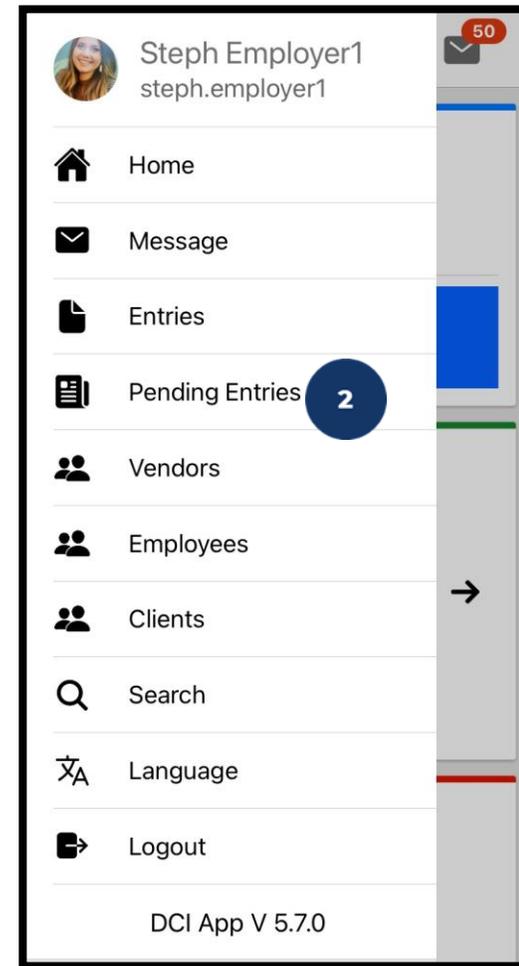
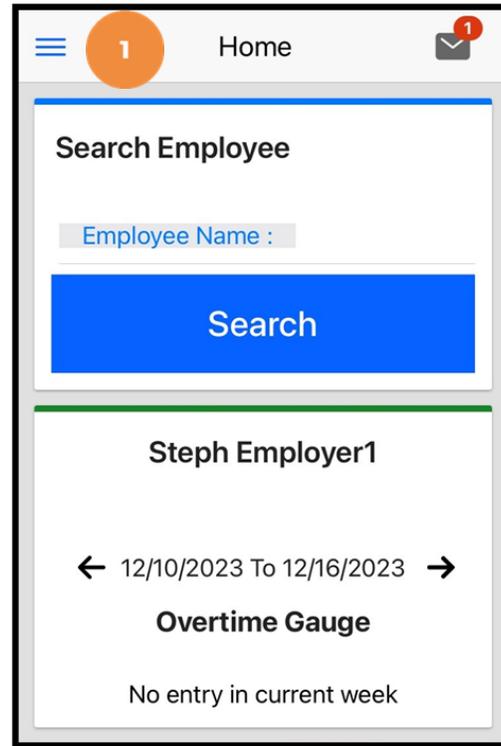
**5** Home

# How Employers will Manage Entries

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# Review & Approve Entries

1. Click the **Menu** in the top left corner of the screen
2. Select **Pending Entries** on the submenu
3. **Swipe left** on the punch to select either the blue **Approve** button or the red **Reject** button



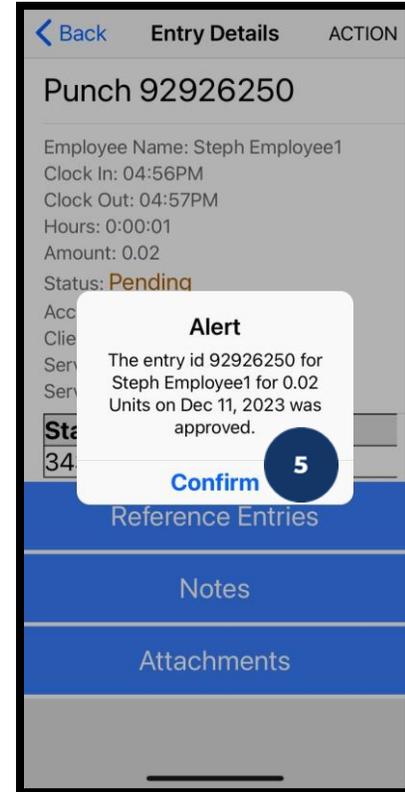
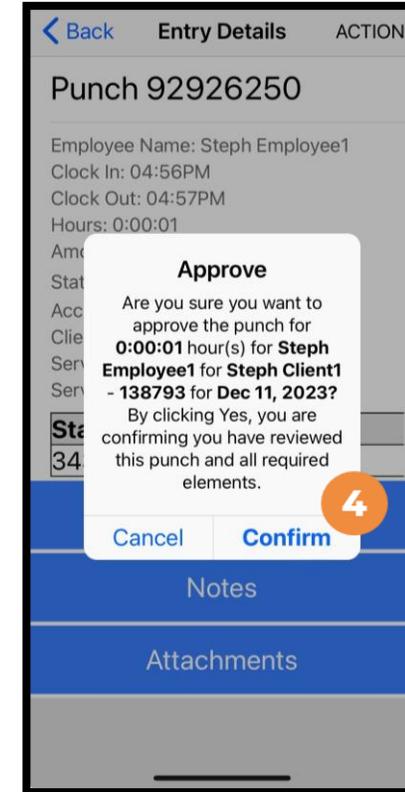
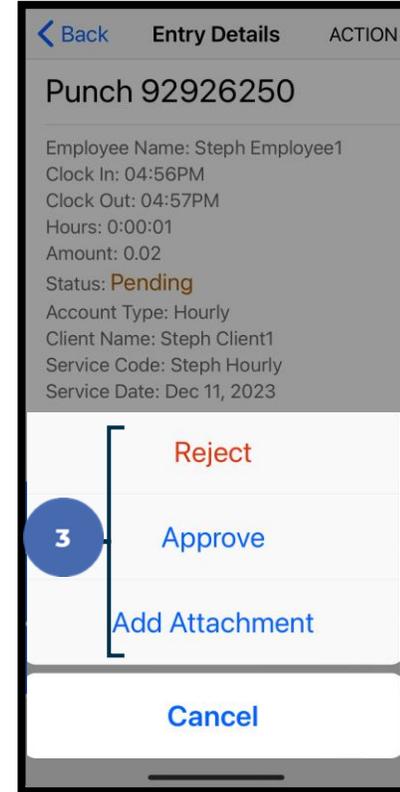
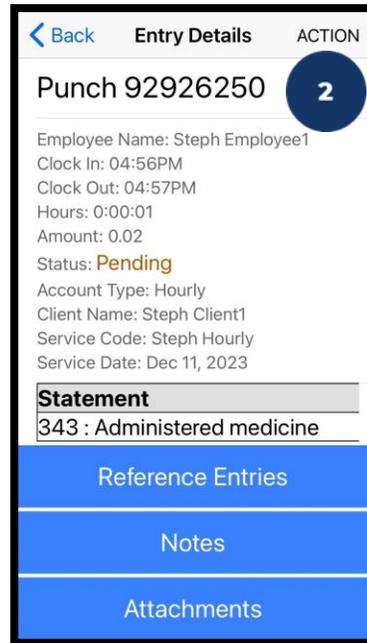
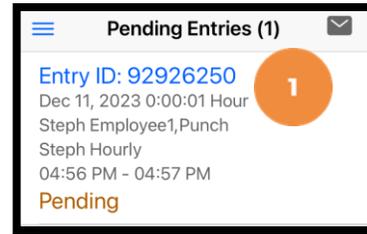
# Review & Approve Entries (cont.)



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1. Alternatively, click the blue entry ID hyperlink to open the entry details
2. Click **ACTION** in the top right corner
3. Select **Reject**, **Approve**, or **Add Attachment**.
4. On the pop-up alert window, view the punch details and Click **Confirm** to initiate the confirmation process.
5. On the pop-up alert window, click **Confirm** again to complete the confirmation process.



## **\*Please note:**

If the action taken was to approve the entry, the status changes to Approved and the entry will be processed for payment.

\*The program may have a timely filing rule meaning that entries must be approved within a certain number of days from the date of service.

# UPCOMING TRAINING

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Check our website for ongoing updates:

[New Jersey - Training Materials – Acumen Fiscal Agent](#)



# Training Delivery Methods

- Virtual Instructor-Led Training (VILT)
  - Live webinars delivered via Microsoft Teams
    - ✓ Q & A features enabled and moderated in real time
    - ✓ Live captions available
  - Training content is delivered with a mix of presentation via PowerPoint, real time video demonstrations, and screen sharing of training resources.
    - ✓ Located on the Acumen Training Help Center and Acumen Fiscal Agent website
- Video on Demand Training (VOD)
  - Recorded webinar or pre-recorded training
  - Allows users to access anytime, anywhere, and as often as needed.
  - Option to pause and enable captions
  - Chapters allow users to navigate content quick and easily
- In addition to Acumen training on their EVV system, DDD will be providing an additional webinar on EVV for VF/EA participants.



# What's Next

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- Acumen will review the forms. If changes are required, we will contact Support Coordinators and the employer.
- **Email** is our preferred way to communicate during the enrollment process as it is the best way to ask for lists of requirements or corrections that are needed
- If we do not have an email address for the employer, Acumen will contact them by phone or have the Support Coordinator contact them by phone.
  - ❖ Acumen will email the Support Coordinators with the corrections needed for those without an email address as a follow-up
- Acumen uses a secure email system to protect the employer and their workers' information
- When sending in paperwork corrections, whether by email or fax, the **corrections may take up to 4 – 7 business days to reach Acumen for review** due to high volume.
  - ❖ Please keep this in mind when contacting Acumen to confirm that corrections were received
- When the enrollment process is complete, the employer will receive a “Good to Go” letter via email or via mail if the employer does not have an email address. The letter includes:
  - ❖ How to submit time worked
  - ❖ A payment schedule
  - ❖ Other employer resources

# THANK YOU!

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***Customer Service: 833-892-0413***



***Website:***

<https://www.acumenfiscalagent.com/state/new-jersey/>

