



**Acumen Fiscal Agent**

Innovation • Opportunity • Freedom

# **NJ Vendor Fiscal/Employer Agent Acumen Transition Update Webinar**

**Date: April 10, 2025**

# AGENDA:

- ✓ Transition Update
- ✓ It starts with the  
“Transition Packet”
- ✓ Available Support and Training
- ✓ 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



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.*

# Transition Update

To ensure a smooth transition we will be taking a phased approach for enrollment.

Benefits to a phased approach:

- Allows more time for Individuals, Employers, Authorized Representatives, and Employees to complete enrollment
- Helps improve the accuracy of information received during the enrollment process

# Phased Approach

With the Phased approach we will be identifying Cohorts.

- Cohorts will start with Individuals who have community vendor services only followed by all Individuals who have one or more self-directed employees.
  - Cohorts 1-4 Vendor Service Only
  - Cohort 5 SDE Services
- Cohorts are selected by three factors:
  - If you have a self-directed employee
  - Which Community Vendor(s) you use
  - Which Support Coordination Agency you are with
    - Due to volume, request to switch cohorts cannot be accepted

If you do not receive or misplace your cohort letter, you can call **833-892-0413** or email **[enrollment@acumen2.net](mailto:enrollment@acumen2.net)** to ask for your cohort information. Be sure to have your DDD ID, participant details, and Support Coordinator information when calling to get Cohort information.



# Community Vendor Services

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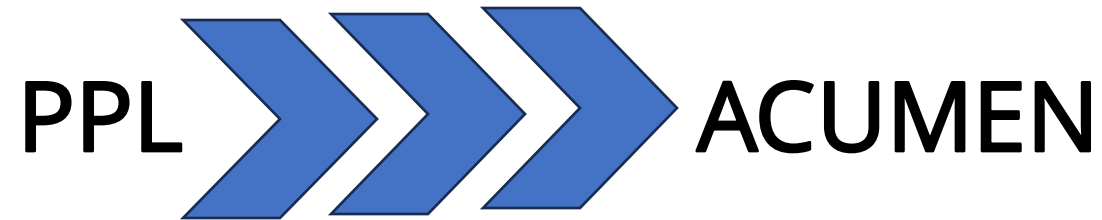
Services provided by a Community Vendor:

- Assistive Technology
- Environmental Modification
- Goods and Services
- Natural Supports Training
- Transportation – Single Passenger
- Vehicle Modification



Proprietary: For Acumen and Customer Use Only

# Vendor Enrollment



Cohort	Enrollment Start Date	Enrollment End Date
Community Vendor Pilot	April 8, 2025	April 18, 2025
Cohort 1	May 4, 2025	May 16, 2025
Cohort 2	May 17, 2025	May 30, 2025
Cohort 3	May 30, 2025	June 14, 2025
Cohort 4	June 15, 2025	June 30, 2025

**It is best to complete and return your transition enrollment documents early in the window, so your Support Coordinator has enough time to make plan revisions and get the plan approved.**



# Self-Directed Employee Services

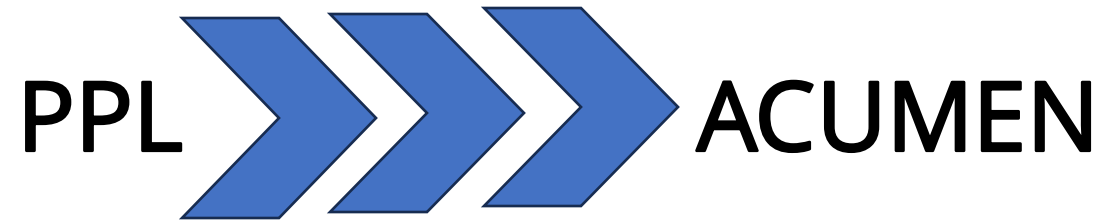
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## Services Provided by a Self-Directed Employee:

- Community Based Supports
- Individual Supports-Hourly
- Interpreter Services
- Respite
- Supports Brokerage
- Transportation - Self-Directed Employee



# SDE Enrollment



Cohort	Enrollment Start Date	Enrollment End Date
Employer & Self-Directed Employee Pilot	June 9, 2025	June 20, 2025
Cohort 5	July 7, 2025	August 1, 2025

**It is best to complete and return your transition enrollment documents early in the window, so your Support Coordinator has enough time to make plan revisions and get the plan approved.**

# IT STARTS WITH TRANSITION PACKETS

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Transition Enrollment can be completed:

- On your own electronically through our electronic enrollment system
  - Utilizing the electronic enrollment system will help to expedite your enrollment process
  - You will receive an email with the enrollment link when your cohort begins
- If you are unable to complete the enrollment electronically on your own, one of our Client Services Agents can conduct the enrollment on your behalf
- By completing a paper enrollment packet
  - If Acumen does not have an email, a Client Services Agent will contact you to obtain an email or confirm your mailing address for a paper packet







## Transition Enrollment Packet Good to Go/Pay



### Forms For the Individuals or Authorized Representatives

1. Acumen Individual or Authorized Rep Enrollment Form
2. Acumen Individual or Authorized Rep Agreement Form



### Forms For the Vendor

1. W-9
2. Electronic Funds Transfer Form

# Vendor Service- Information Needed

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Please have the following information ready when it's time to enroll as the Individual or Authorized Representative:

- Participant full name, date of birth, and Social Security Number
- Current physical and mailing address (no P.O. boxes for the physical address)
- Contact information (email and phone)
- Support Coordinator's name and contact info
- If applicable: Authorized Representative's full name, DOB, address, SSN, and relationship to individual
- For vendor services: Vendor names and services provided



## Transition Enrollment 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



# Employer- Information Needed

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Please have the following information ready when it's time to enroll as the Employer:

- Full name, date of birth, Social Security Number, and any other names/aliases used
- Current address
- Federal Employer Identification Number (EIN)
- Contact info (email and phone)
- Employment details including services provided, hourly wage, and expected start date

# Employee- Information Needed

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Please have the following information ready when it's time to enroll as the Employee:

- 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
- Driver's license (if transporting the participant)
- Payment preference (check, direct deposit, or paycard)
  - If using direct deposit: bank name, routing/account numbers, and account type
- Whether the employee lives with the participant or will administer medication or behavior support

# Enrollment Support

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**Acumen's Agents facilitate fast and personalized enrollment support.**

Each Participant is assigned a dedicated, locally based Client Services Agent

- 24/7 back up support from Customer Service call center.

The Agent provides:

- Information & Assistance
- Additional Training
- Answers to payroll questions

Facilitates easy enrollment for Individuals, Employers, Self-Directed Employees and Community Vendors

- 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 – Connect with an agent for direct enrollment support.
- Partnering with Support Coordination and Broker Agencies to help facilitate training and enrollment



# 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
    - ✓ Multiple Dates Scheduled- Individuals, Authorized Representatives, Employers, Employees, Community Vendors, Support Coordinators and Support Brokers can attend as many trainings as they would like.
  - 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.

# Coming Soon-Mid April

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## Communication to Individuals, Authorized Representatives and Employers

- Will include transition updates, identification of the Individual's Cohort, and training schedule

## Communication to Community Vendors

- Will include transition updates, transition enrollment packets, and training schedule

## Communication to Support Coordinators

- Will include transition updates, copy of communications that went to Individuals and Community Vendors, and training schedule



# THANK YOU!

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



***Website:***

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

