

# EES-Electronic Enrollment System: TX Self-Enrollment Guide (AACOG)

**Welcome to Acumen!** In this guide, you will learn how to complete your **TX AACOG** enrollment using Acumen's new Electronic Enrollment System (EES). Before getting started, here are a few important terms to know when using EES:

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. The Client is the same person as the Employer for TX AACOG.
  - **Note:**
    - ✓ Clients can have Authorized Representatives but during enrollment only use the Clients information in EES.
3. **Authorized Representative:** Any person appointed by the Client to manage services on their behalf.
  - **Important:** **An Authorized Representative will not enter their information into EES.**
4. **Agent:** An Acumen employee who assists the enrollee through the enrollment process
5. **Add Employment :** The Veterans enters the information about the services the employee will provide into EES. Information includes the employee(s) name, the service the employee will be providing and the Expected Start Date of September 16<sup>th</sup>, 2025.

## Initial Registration:

- Clients are their own Employers and only the Clients information should be used during Initial Registration.

To complete the **Initial Registration**:

1. Navigate to the **TX Programs Electronic Enrollment** page: [Enroll Now](#)
2. Click the **NEXT** button
3. Complete the **Initial Registration Form** (Required fields are marked with an asterisk (\*))

Notes:

- Medicaid ID leave blank (If prefilled do not change)
- Case Manager Name leave blank (If prefilled do not change)

## 4. Create Your Login Credentials:

- **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 or period (.)

- **Password** (required): Create a password to log into the EES portal
  - 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 your first or last name.
  - Password cannot contain your username
- 5. Click **Submit** to complete the Initial Registration Form
- 6. A confirmation message populates. You will receive an email to confirm your account. See **Employer Profile** section to continue.

## Activate Employer Profile

1. Upon completing Initial Registration, an email is sent to you for account activation. (Check the email you provided during the Initial Registration.)
  - Title: Welcome to Acumen's Electronic Enrollment System
  - Sender: **no-reply@acumen2.net**
  - Check the spam folder if necessary
2. Click the blue **Activate Account** button in the email (Link is active for a specific amount of time; typically 24 hours).
  - Note: If after clicking the Activate Account button, the link is inactive, an alert stating Invalid Token - Please contact your DCI administrator appears.
  - Click the **Resend the email** button and return to **step 2**
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. You will be directed 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.
8. You are directed to the **Enrollment Dashboard**. See **Complete Client Registration** section for next steps.

## Complete Client Registration

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To complete Client Registration:

1. On the Enrollment Dashboard, click the **Start** button to Complete Client Registration.
2. Complete **Additional Client Details**:
  - Required fields are marked with an asterisk (\*)
  - **Important!** If Agent Information, Employer EIN, Employer Name, Case Manager Name, Email, or Phone Number is incorrect, do not delete the information that was pre-populated and do not change any prepopulated information.
  - **Important!** Changing the information will result in enrollment delays.
3. Complete the **Physical Address**
  - Required fields are marked with an asterisk (\*)
4. Click **Save** to complete the Client Registration process
  - **Tip:** To save the information you have entered, ensure all required fields have been completed. Otherwise, the **Save** button will not be enabled.
5. On the Enrollment Dashboard, Complete Client Registration is now marked **Complete**. See **Register Employer** section for next steps.

## Register Employer

To register Employer:

1. On the Enrollment Dashboard, click the **Start** button to Register Employer.
2. Complete **Employer Details** section:
  - Required fields are marked with an asterisk (\*)
3. Complete **Physical Address**
  - Required fields are marked with an asterisk (\*)
4. **Mailing Address**
  - Defaults to **OFF**, indicating the mailing address does not match the physical address.
    - i. Add the mailing address
  - Toggle to **ON** position if the mailing address is the same as the physical address
5. Complete **Business Details** section
  - Answer all four questions as **N/A** (Not Applicable)
6. Click **Save** to complete the Register Employer process.
7. EES directs you back to the Enrollment Dashboard. Register Employer is now marked as **Complete**. See **Complete the Employer Packet** for next steps.

## Complete the Employer Packet

1. On the Enrollment Dashboard, click the **Start** button to Complete Employer Packet
  - The pop-up message The Employer Packet has been sent to [Employers email address] for signature collection displays.
  - Click **Close**
  - EES will direct you back to the Enrollment Dashboard
2. On the Enrollment Dashboard, Complete Employer Packet now displays **Pending**.
3. Check your email to find the packet to sign.
  - The packet will come from a DocuSign sender.
  - Check junk or spam folders if needed.
4. Click the **Review Document** button in the email to complete the forms
5. Click the **Electronic Record and Signature Disclosure** link to view the disclosure
6. Check the **box** to agree to using electronic records and signatures
7. Click the **Continue** button
8. Click the **Start** button
  - Review documents for accuracy
  - If signature and date are required at the bottom of a page, click the **Sign** button to sign and date the form(s).
9. Click the **Next** button or scroll down to proceed to the next form
10. Click the **Finish** button at the bottom of the last document
11. Click the **Continue** button to proceed
  - The Employer receives a confirmation email with a link to view the completed document
12. Once you have signed the DocuSign packet, return to EES to finish your enrollment.
  - To log back into EES later, navigate to: <https://acumen.dcisoftware.com/>
  - Enter the **username** and **password** created in the Initial Registration form
  - Click **Sign In**
13. The Enrollment Dashboard displays and Complete Employer Packet is marked as **Complete**

## Register Employee:

To register the Employee:

1. On the Enrollment Dashboard, click the **Start** button to Register Employee.
2. Complete **Employee Details** section:
  - Required fields are marked with an asterisk (\*)

## 3. Complete **Physical Address**

- Required fields are marked with an asterisk (\*)

## 4. **Mailing Address**

- Defaults to **OFF**, indicating the mailing address does not match the physical address.
  - i. Add the mailing address
- Toggle to **ON** position if the mailing address is the same as the physical address

## 5. Complete **Relationships** section

- Choose one of the noted relationships or NO RELATIONSHIP.

## 6. **Payment Information** section

- Optional section. Do not enter anything into the box.

## 7. Click **Save** to complete the Register Employer process.

### Add Employment:

Once you are back in EES, on the Enrollment Dashboard, click the **+Add Employment** button.

## 1. Complete **Create employment** section:

- Required fields are marked with an asterisk (\*)
- **Employee:** The Select an employee screen displays with three options to select an employee:
  - i. Select a registered employee
  - ii. Search for a registered employee
  - iii. Register a new Employee

## 2. Complete the **Tax Information** section:

- Click the drop-down to select the federal filing status.

## 3. Complete **Relationships** section

- Choose one of the noted relationships or NO RELATIONSHIP.
- Choose if Employee provide services to the Client in the Employee's home

## 4. Complete the **Services** section:

- Click the drop-down to select the services the employee will be providing.

## 5. Click **Save** to complete the process.

## Enrollment Completed

Enrollment Completed means your portion of the enrollment is completed and ready for review by an Agent.

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

## Next Steps:

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

## Logging into EES after Enrollment Completed

1. To log back into EES later, 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 **Forgot your password** to reset your password (see **Reset Password**)

## Reset Password

1. Navigate to: <https://acumen.dcisoftware.com/>
2. Click the **Forgot your password** link to begin the process of resetting your 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
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**

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**