



# **TX AACOG EES – Electronic Enrollment System Self-Enrollment Training Presentation**

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# 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



# Resources

- In this training, you will learn how to complete your enrollment using Acumen's new **Electronic Enrollment System (EES)**.
- Acumen is committed to providing comprehensive support during the transition. Veterans will have a number of ways to access this support listed in the enrollment email you will receive:



- **Virtual Video Meetings** – Receive support from the comfort of your home via a virtual appointment with an Acumen Client Services Agent.



- **Email support** – Email us at [enrollment-txvets@acumen2.net](mailto:enrollment-txvets@acumen2.net)



- **Online Resources** - [Texas – Training Materials](#)



# 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 TX AACOG the Client and Employer are 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.

# 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
- W4 Information –
  - Filing status (Single, Married, etc)
  - Do they work multiple jobs?
  - Deductions
  - Extra Withholdings

# Pre-Loaded Information During Enrollment

Once your account is registered and you log in, Acumen will already have the employer's EIN and employer name pre-loaded into the client profile. This information has been confirmed by the IRS and should not be changed. Changing the information will result in enrollment delays.

A screenshot of a web form with two input fields. The first field is labeled "Employer EIN (Do NOT Change) \*" and the second field is labeled "Employer Name (Do NOT Change) \*". Both fields are empty, indicating that the information has been pre-loaded into the system.

Employer EIN (Do NOT Change) *	
Employer Name (Do NOT Change) *	

**You may see additional Pre-Loaded information during the enrollment process. Please do not change any information already in the system.**

# 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

## Welcome to Acumen's Electronic Enrollment System!

Click Next to begin creating your account with your information as the Employer or Authorized Representative. In a future step, we will ask if you are also the Client or if you wish to enroll another individual as the Client.

Next

# 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 \*

Last Name \*

Date of Birth \* MM/DD/YYYY

Email \*

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

Next

**Veteran/Employer must enter their name as it is with the VA. 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 (optional)
- 13. Case Manager Name: (optional)
- 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 or period “.”
16. Password (**required**): Create 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 button to verify password requirements are met.**

The screenshot shows the 'Initial Registration Form' with a 'Login Credentials' section. It contains two input fields: 'Username' and 'Password'. The 'Username' field has a blue circle with the number 15 next to it. The 'Password' field has an orange circle with the number 16 next to it and a small information icon (i) to its left. At the bottom right of the form is a blue 'Submit' button with a checkmark icon and a dark blue circle with the number 17 next to it. A grey 'Cancel' button is at the bottom left.

This screenshot shows the 'Initial Registration Form' with the 'Login Credentials' section. The 'Username' field contains the text 'livia.norman'. The 'Password' field has an information icon (i) to its left. A red box highlights the information icon and a pop-up window titled 'Password Requirements'. The pop-up lists the following requirements, each with a green checkmark icon: 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, and Does not contain first or last name. A blue 'Submit' button is visible to the right of the pop-up.

# 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.

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## 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\*

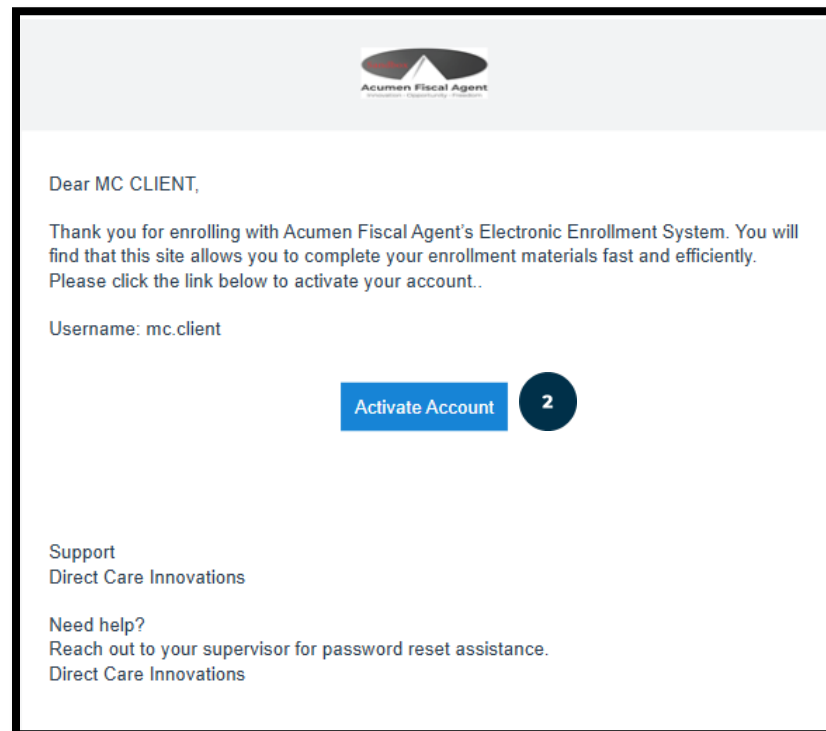
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\*Employer completes this process by using a desktop or laptop computer.



# Activate Enrollee Profile

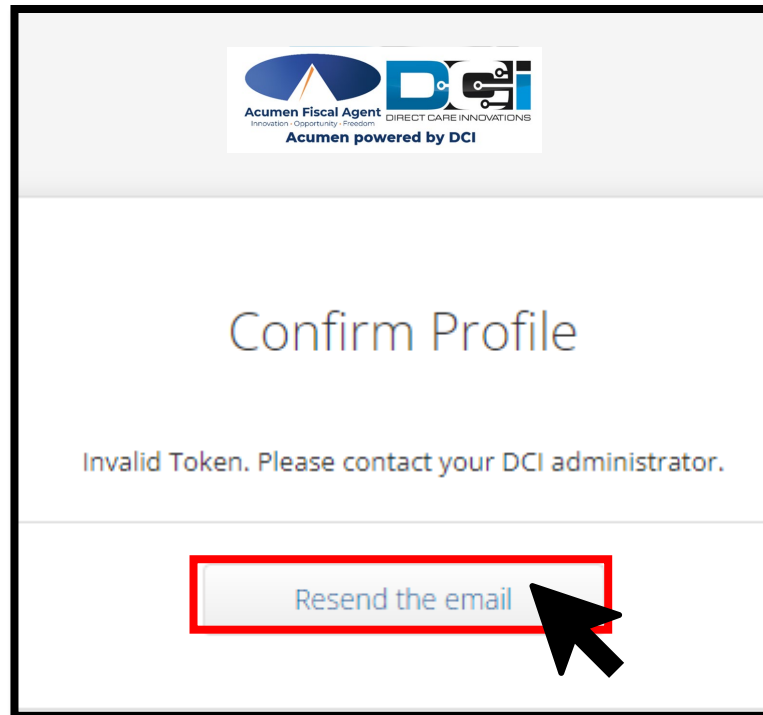
1. Upon completing Initial Registration, an email is sent to the Enrollee for account activation.
  - ✓ **Title:** Welcome to Acumen's Electronic Enrollment System
  - ✓ **Sender:**  
[no-reply@acumen2.net](mailto:no-reply@acumen2.net)
  - ✓ Check the spam folder if necessary
2. Click the blue **Activate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



# Activate Employer Profile

## Note:

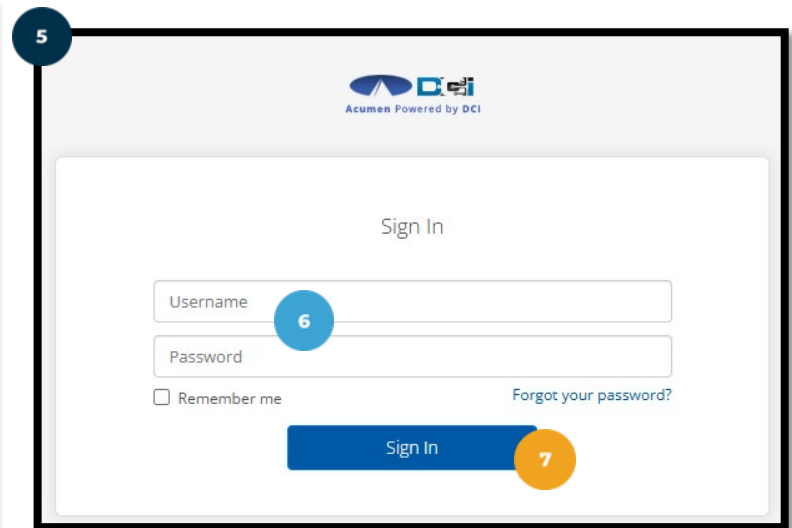
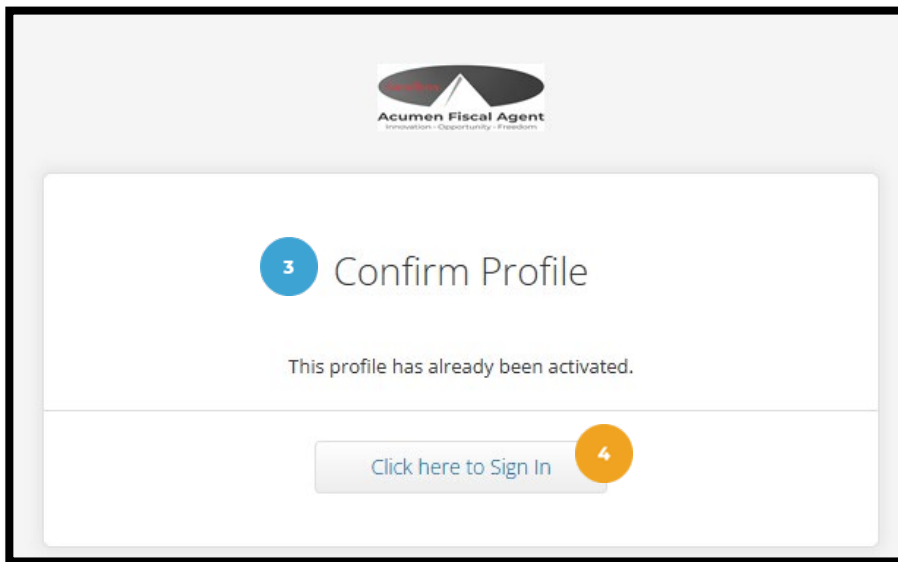
- If after clicking the Activate Account button, the link is inactive, an alert stating Invalid Token - Please contact your DCI administrator populates.
- Click the **Resend the email** button and return to [step 2](#)



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



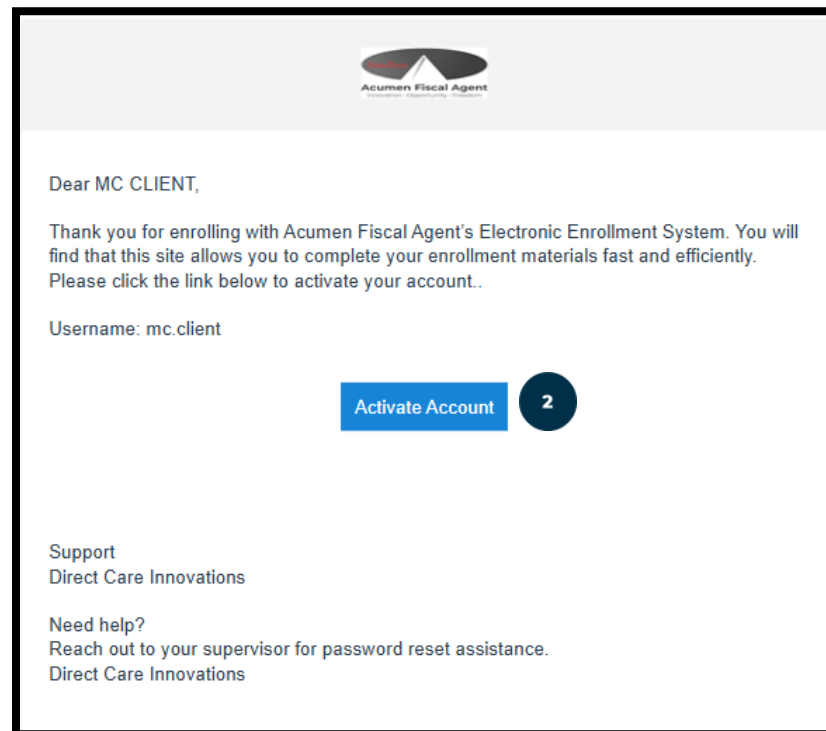
# Activate Employer Profile & Log into EES via DCI Mobile Full Site

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

# Activate Profile –DCI Mobile Full Site

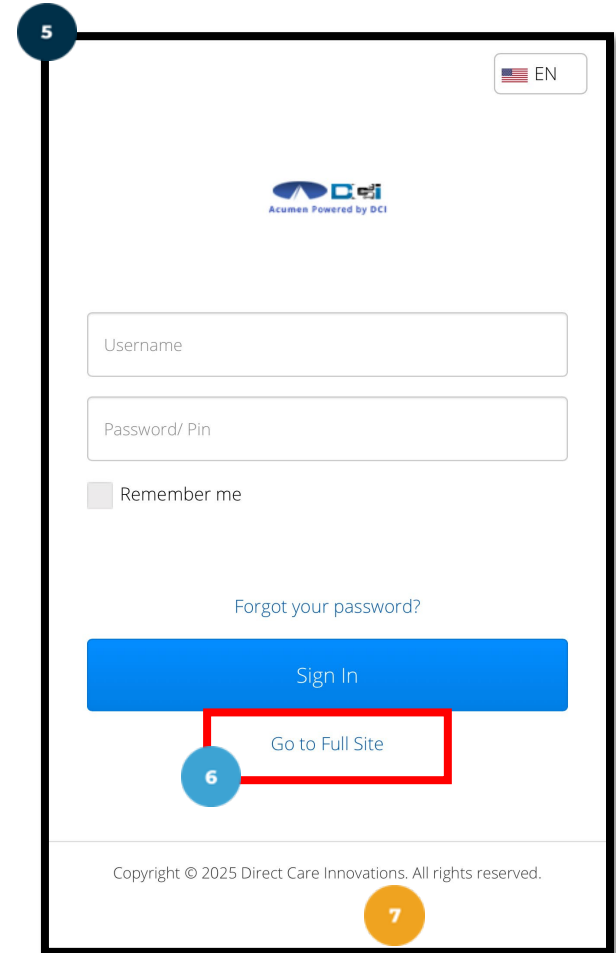
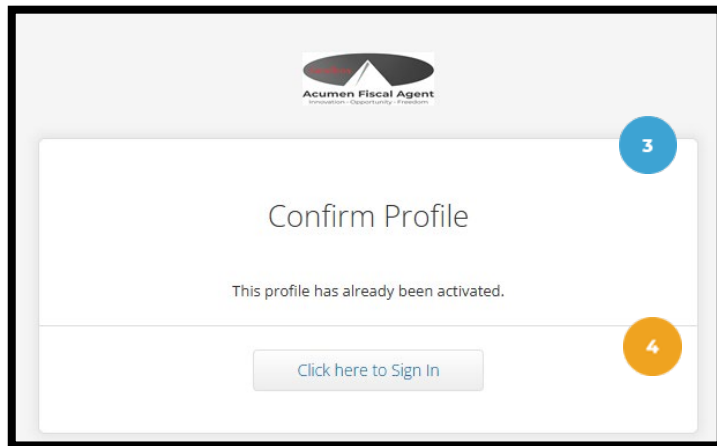
1. Upon completing Initial Registration, an email is sent to the Enrollee for account activation.
  - ✓ **Title:** Welcome to Acumen's Electronic Enrollment System
  - ✓ **Sender:** [no-reply@acumen2.net](mailto:no-reply@acumen2.net)
  - ✓ Check the spam folder if necessary
2. Click the blue **Activate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





# Activate Profile –DCI Mobile Full Site

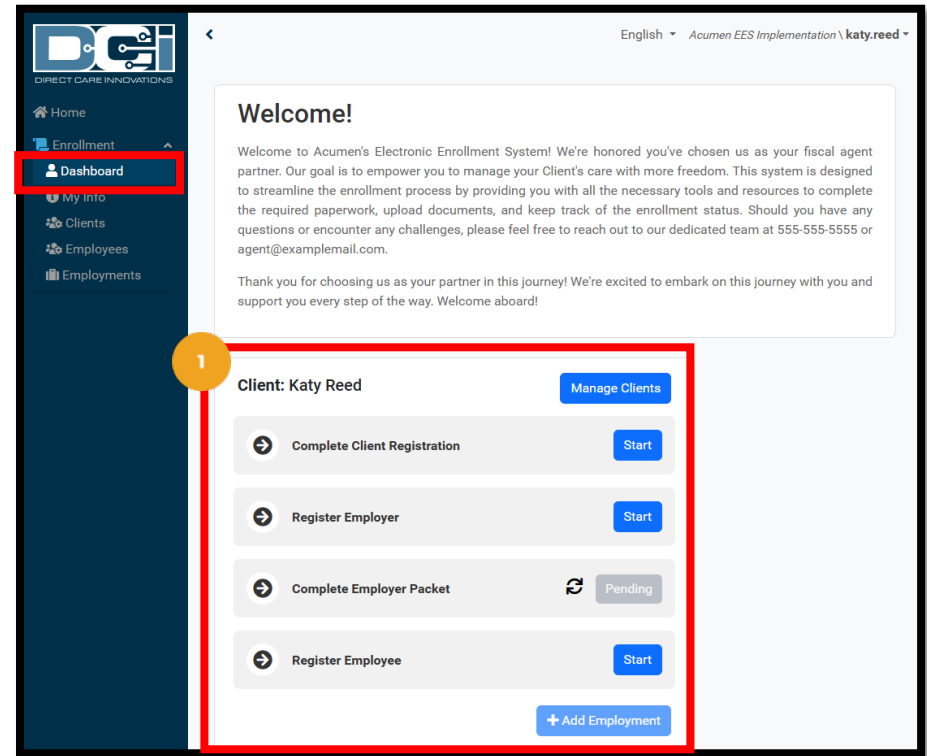
3. The Activate Account button opens a web page that states **Confirm Profile: This Profile has already been activated**
4. Tap the **Click here to Sign In** button
5. The Enrollee is redirected to the **DCI Mobile Web** login screen.
6. **\*Important!** Tap **Go to Full Site** to access the **DCI Mobile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



# Authorization Preloaded – Next Action

If the information on the Spending Plan/Authorization matches the Client:

1. Upon login, the Enrollee is redirected to the Dashboard on the user management 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 additional Clients



# 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.

English ▾ Acumen EES Implementation \ katy.reed ▾

## 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 555-555-5555 or agent@exampleemail.com.

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: Katy Reed** [Manage Clients](#)

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

[+ Add Employment](#)

# 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	<div>1</div> <input type="text"/>
Medicaid #	<div>2</div> <input type="text" value="123456"/>
Gender *	<div>3</div> <div><input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other <input type="radio"/> Prefer Not to Say</div>
Phone	<div>4</div> <input type="text" value="(###) ###-####"/>
Mobile Number	<div>5</div> <input type="text" value="(###) ###-####"/>
Email	<div>6</div> <input type="text"/>

# Complete Client Registration

## Complete the Physical Address:

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

### Physical Address

Address Line 1 *	7	<input type="text" value="1776 Freedom Lane"/>
City *	8	<input type="text" value="Rapid City"/>
State *	9	<input type="text" value="SD"/>
Zip Code *	10	<input type="text" value="57701"/>
Country *	11	<input type="text" value="United States of America"/>

## Complete the Case Manager Details:

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

### Case Manager Details

Case Manager Name	<input type="text" value="Michael Chavez"/>	12
Case Manager Phone	<input type="text" value="(###) ###-####"/>	13
Case Manager Email	<input type="text"/>	14

15

# Complete Client Registration

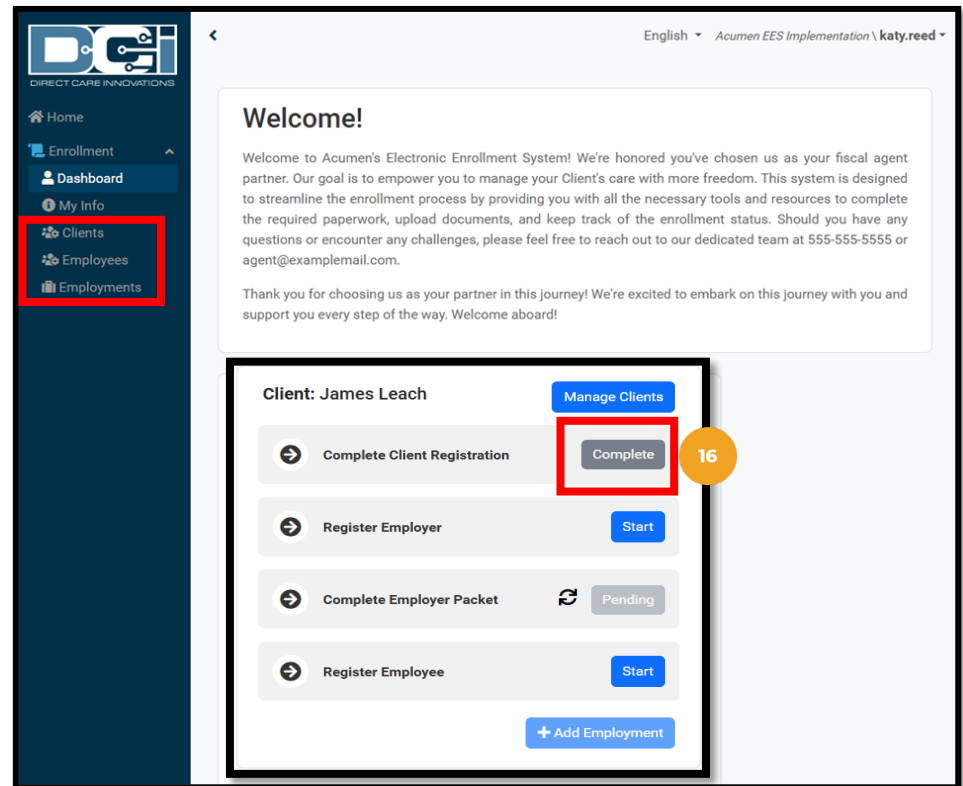
From the user management menu:

- Click **Clients** to add, view, or edit clients.
- Click **Employees** to view or edit employees
- Click **Employment** to view or edit employments

From the Dashboard page:

- Alternatively, click the blue **Manage Clients** button to add, view, or edit clients.
- Click the blue **+Add Employment** button to add employment and employees for the client

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





# Register Employer

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Employer completes this process

# Register Employer

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

The screenshot displays the Acumen EES Enrollment Dashboard. On the left is a dark blue sidebar with the DCI logo and navigation links: Home, Enrollment, **Dashboard** (highlighted with a red box), My Info, Clients, Employees, and Employments. The main content area has a top bar with 'English' and 'Acumen EES Implementation \ Katy.reed'. Below this is a 'Welcome!' message. The 'Client: Katy Reed' section contains a list of tasks: 'Complete Client Registration' (Start), 'Register Employer' (Start, highlighted with a red box), 'Complete Employer Packet' (Pending), and 'Register Employee' (Start). A '+ Add Employment' button is at the bottom.

# 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 *	7	123 Main
City *	8	Rapid City
State *	9	SD
Zip Code *	10	57701
Country *	11	United States of America

# 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:
  - Address Line 1 (required)
  - City (required)
  - State (required)
  - Zip Code (required)
  - 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

## ❖ Options:

1. Yes – Complete all required additional fields
2. No – No other information required
3. N/A – Not Applicable (No other information required)
  - Select N/A for TX AACOG

## 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.

Has the Employer ever received an Employer Identification Number (EIN) for any Sole Proprietor business you currently or have previously owned? \*

☐ Yes ☐ No ☒ N/A

Has the Employer ever previously been enrolled with another Fiscal/Employer Agent (F/EA), sometimes known as a Financial Management Service Agency? \*

☐ Yes ☐ No ☒ N/A

Was a business account ever established on the Employer's behalf for state unemployment insurance (SUTA) by your state's Department of Labor/Employment? \*

☐ Yes ☐ No ☒ N/A

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

☐ Yes ☐ No ☒ N/A

# Register Employer

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

Client: James Leach

Manage Clients

→ Complete Client Registration

Complete

→ Register Employer

Complete

→ Complete Employer Packet

↺ Start

→ Register Employee

Start

+ Add Employment

# 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

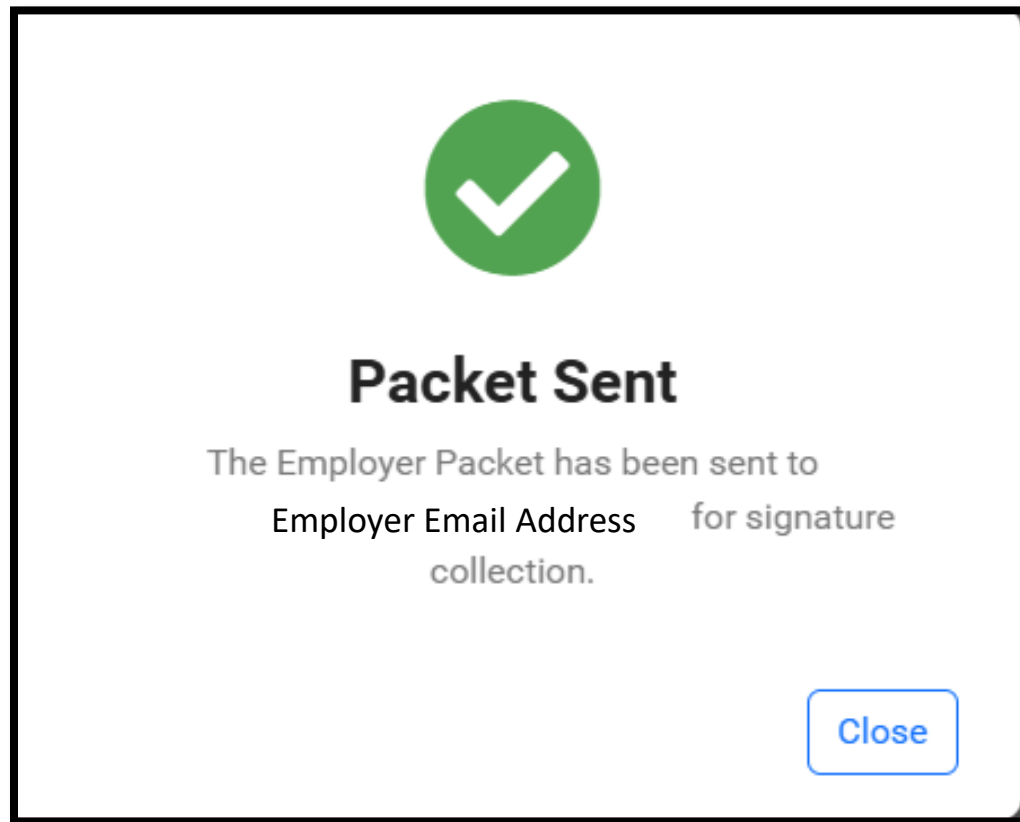
Client: James Leach [Manage Clients](#)

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

[+ Add Employment](#)

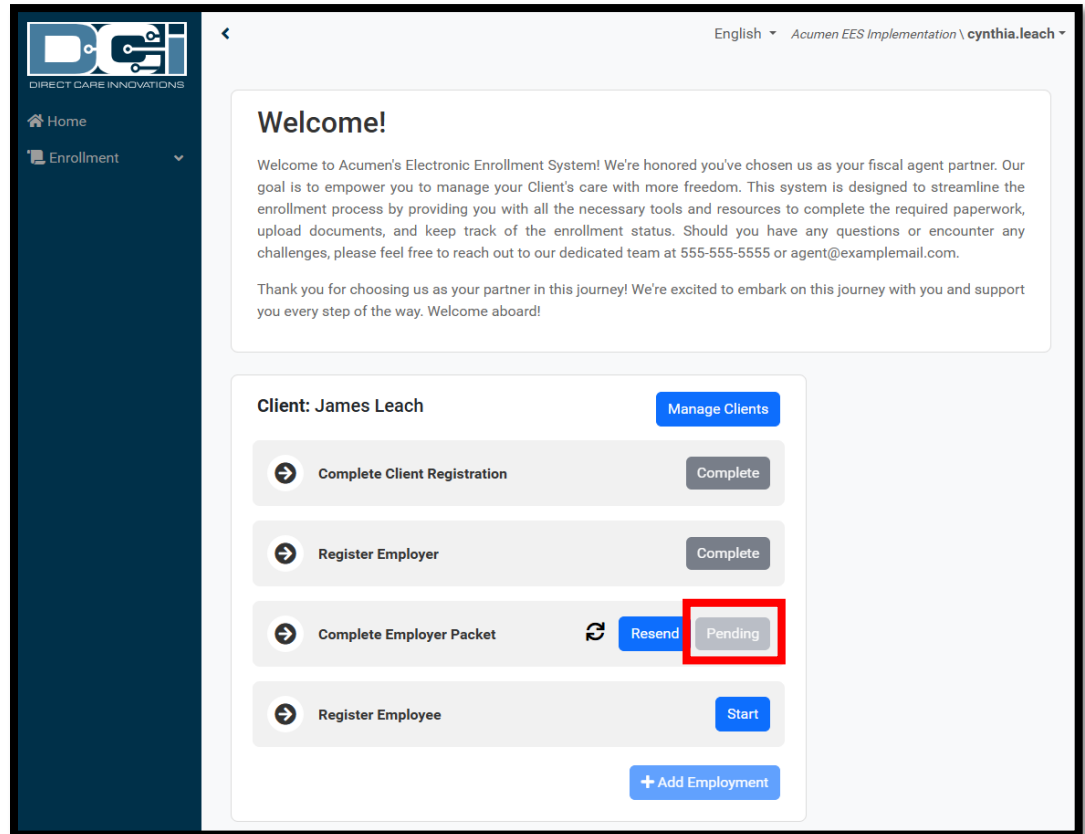
# Complete Employer Packet

- The pop-up message **The Employer Packet has been sent to [employer's email address] for signature collection** displays.
- Click **Close**



# Complete Employer Packet

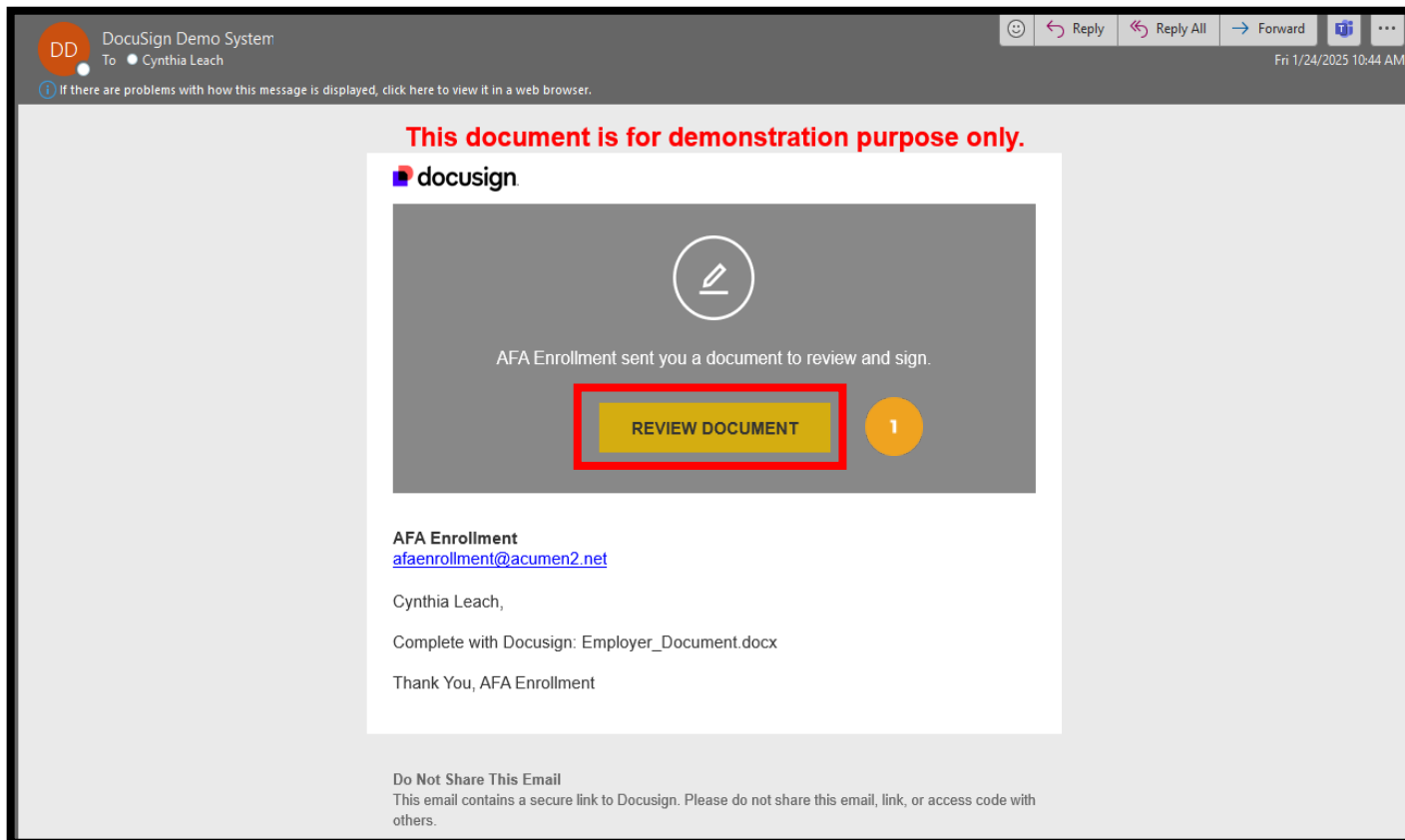
- The Complete Employer Packet button displays **Pending**
- **Please Note:** When clicking the **Resend** button, the packet is not being resent, only the email for signing is resent.
- If date is altered after initial send, that will not be captured in the document.
- Use the Refresh button to update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



# Complete Employer Packet - DocuSign

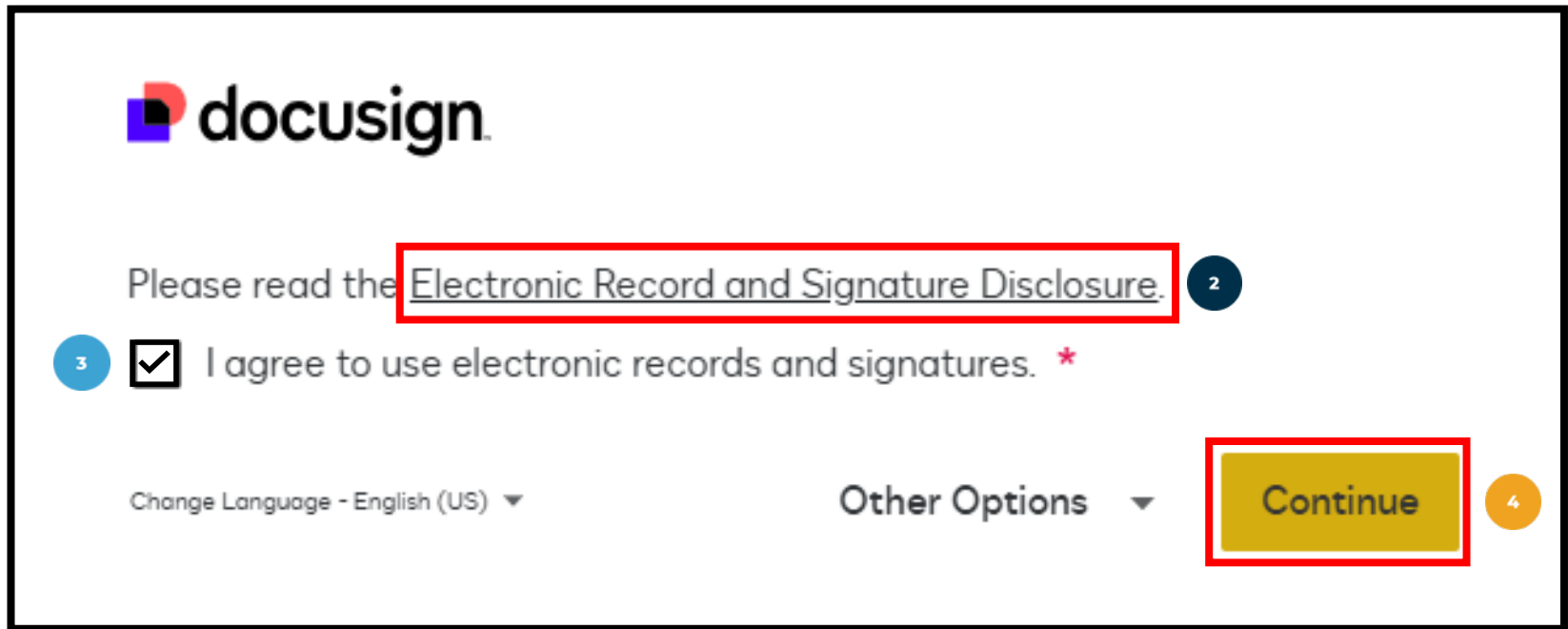
The packet arrives via an email from sender DocuSign. Check junk or spam folders if needed.

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



# Complete Employer Packet - DocuSign

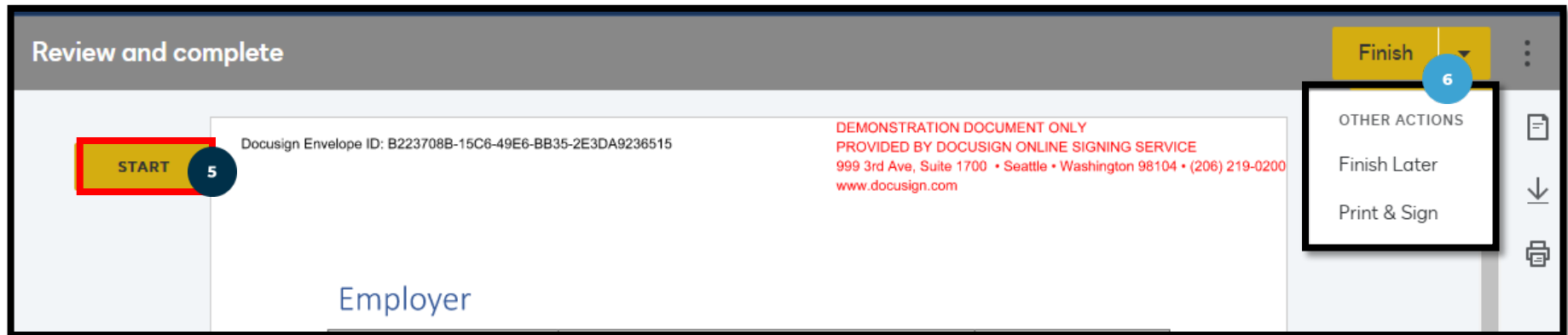
2. Click the **Electronic Record and Signature Disclosure** link to view the disclosure
3. **Check the box** to agree to using electronic records and signatures
4. Click the yellow **Continue** button



The screenshot 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.". A blue circle with the number "2" is to the right of this link. Below this, a blue circle with the number "3" is to the left of a checked checkbox, followed by the text "I agree to use electronic records and signatures." with a red asterisk. At the bottom left, there is a "Change Language - English (US)" dropdown menu. In the center bottom is an "Other Options" dropdown menu. On the bottom right is a yellow "Continue" button, which is highlighted with a red border. A blue circle with the number "4" is to the right of the "Continue" button.

# Complete Employer Packet - DocuSign

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

<b>NEXT</b>	My signature below confirms my understanding and agreement to abide by the terms and conditions as stated above.	
	Name of Participant:	<input type="text" value="Amy Jo Smith"/>
	Name of Employer/ Representative (if applicable):	<input type="text" value="Charles Lee Burns"/>
	Phone:	<input type="text" value="(222) 222-2222"/>
	Email Address:	<input type="text" value="reynaldaa+01@acumen2.net"/>
	<div><div>Sign ↓</div><div>Participant or Employer/ Representative Signature</div></div>	<div><div>10/31/2024</div><div>Date</div></div>

# 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

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

Date 7/31/2024

Print your name here ER Full

Print your title here HCSR EMPLOYER

Best daytime phone (222) 222-2223

Now give this form to the agent to complete.



# Complete Employer Packet - DocuSign

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

FILL IN

	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 Employer Packet - DocuSign

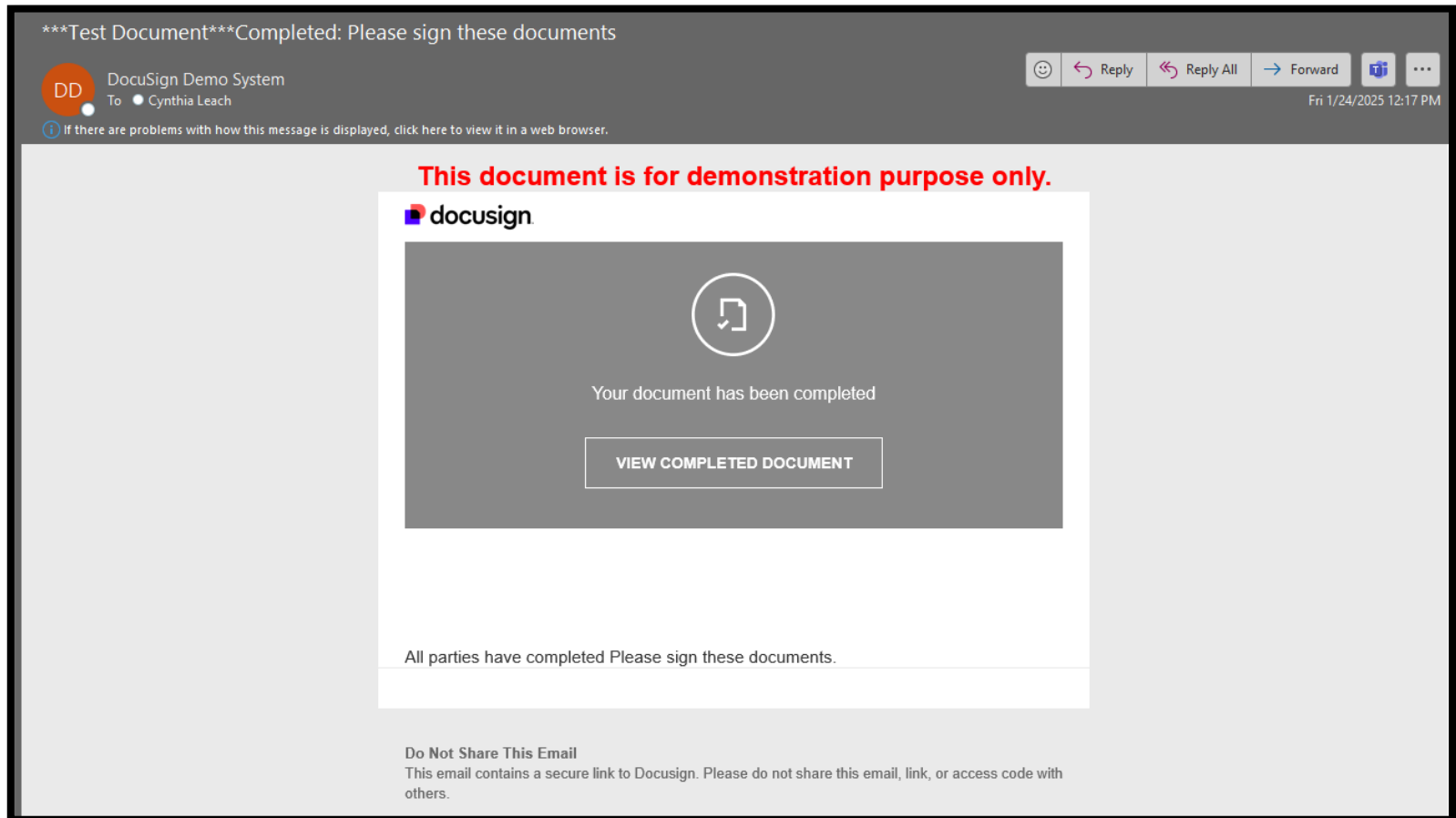
**Congratulations!**  
The Employer packet is complete.



- 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

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.

Client: James Leach [Manage Clients](#)

→ Complete Client Registration	<a href="#">Complete</a>
→ Register Employer	<a href="#">Complete</a>
→ Complete Employer Packet	<a href="#">Complete</a> <a href="#">Refresh</a>
→ Register Employee	<a href="#">Start</a>

[+ Add Employment](#)

# Register Employee

---

Employer completes this process

# Register Employee

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

Client: James Leach

Manage Clients

➔ Complete Client Registration

Complete

➔ Register Employer

Complete

➔ Complete Employer Packet

↺ Complete

➔ Register Employee

Start

+ Add Employment

# Register Employee

## Complete the Register Employee fields:

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

## Register Employee

First Name *	1	<input type="text"/>
Middle Name	2	<input type="text"/>
Last Name *	3	<input type="text"/>
Other Last Names Used	4	<input type="text"/>
Date of Birth *	5	<input type="text" value="MM/DD/YYYY"/>
SSN *	6	<input type="text" value="###-##-####"/>
Gender *	7	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other <input type="radio"/> Prefer Not to Say
Phone *	8	<input type="text" value="(###) ###-####"/>
Alternative Phone	9	<input type="text" value="(###) ###-####"/>
Mobile Number	10	<input type="text" value="(###) ###-####"/>
Email *	11	<input type="text"/>
Citizenship Status *	12	<input type="text" value="Select Citizenship Status"/>

# Register Employee

## Complete the Physical Address fields:

- 13. Address line 1 (required)
- 14. City (required)
- 15. State (required)
- 16. Zip Code (required)
- 17. Country (required)

### Physical Address

Address Line 1 \*

13

City \*

14

State \*

15

Select State ▼

Zip Code \*

16

Country \*

17

Select Country



# Register Employee

## Complete Mailing Address details:

### 18. 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)

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

### Mailing Address

Mailing Address Matches Physical Address

☐

18

Address Line 1 \*

City \*

State \*

Select State

▼

Zip Code \*

#####

Country \*

Select Country

### Mailing Address

Mailing Address Matches Physical Address

☒

19

# Register Employee

## Complete Relationships details:

20. 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 20

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  
and is optional.

# Register Employee – Payment Information

## Completely Optional

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 web form for adding a new account. It includes the following fields and elements:

- 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.
- Remove Account**: A blue link with a minus sign icon.
- + Add Account**: A blue link with a plus sign icon.



# Register Employee

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

Client: James Leach

Manage Clients

→ Complete Client Registration

Complete

→ Register Employer

Complete

→ Complete Employer Packet

↺ Complete

→ Register Employee

Complete

+ Add Employment

# 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.**

# Add Employment

On the Enrollment Dashboard, click the **+Add Employment** button.

Client: James Leach [Manage Clients](#)

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

[+ Add Employment](#)

# 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 (required): **See next slides**

### Create Employment

#### Employment Details

Client Name *	1	James Leach
Program *	2	Select Program ▼
Employer *	3	Cynthia Leach
Employee *	4	Select Employee ▼
Expected Start Date *	5	MM/DD/YYYY

# 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
  - b. **Search** for a registered employee
  - c. **Register a new Employee**

**Create Employment**

**Employment Details**

Client Name \*

Program \*

Employer \*

Employee \* Select Employee 6 ▼

Expected Start Date \*

*Note: A mouse cursor is pointing at the dropdown arrow of the Employee field.*

**Select an Employee** ×

Q b

c

Register a new Employee

Employer Name	Employee Name	Actions
Cynthia Leach	Kevin Leach	<div style="border: 2px solid red; padding: 2px 10px; background-color: #007bff; color: white; font-weight: bold;">a</div> <span style="background-color: #007bff; color: white; border-radius: 4px; padding: 5px 10px; font-weight: bold;">Select</span>
Cynthia Leach	Monica Leach	<span style="background-color: #007bff; color: white; border-radius: 4px; padding: 5px 10px; font-weight: bold;">Select</span>
Cynthia Leach	Kristen Leach	<span style="background-color: #007bff; color: white; border-radius: 4px; padding: 5px 10px; font-weight: bold;">Select</span>

3 total

Cancel

# Add Employment

Finish completing the Create Employment 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 Employment

### Employment Details

Client Name \*

James Leach

Program \*

Select Program ▼

Employer \*

Cynthia Leach

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

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.**

6. Federal Filing Status (required): (If an Independent Contractor select 1099)

Select one

- Single or Married filing separately
- Married or filing jointly or Qualified widow(er)
- Head of household
- 1099

7. Multiple Jobs (optional): Select Yes or No

8. Claim Dependents or Other Credits (optional)

9. Other Income (Not From Jobs) (optional)

10. Deductions (optional)

11. 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.

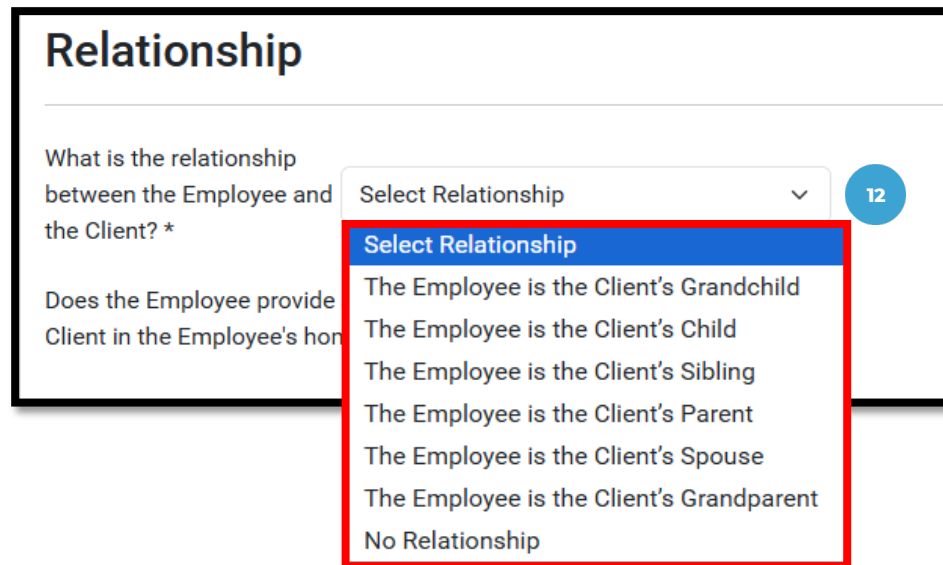
Federal Filing Status (If an Independent Contractor select 1099) *	6	Select Filing Status	▼
Multiple Jobs	7	<input type="radio"/> Yes <input type="radio"/> No	
Claim Dependents Or Other Credits	8		
Other Income (Not From Jobs)	9		
Deductions	10		
Extra Withholding	11		

# Add Employment

## Complete Relationship details:

12. 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 first question is "What is the relationship between the Employee and the Client? \*". To the right of this question is a dropdown menu labeled "Select Relationship" with a downward arrow. The dropdown menu is open, displaying a list of relationship 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 rectangular box highlights the dropdown menu and its list of options. To the right of the dropdown menu is a blue circular button with the number "12". Below the first question, there is a second question: "Does the Employee provide Client in the Employee's hon".

**Relationship**

What is the relationship between the Employee and the Client? \*

Does the Employee provide Client in the Employee's hon

Select Relationship

Select Relationship

- 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



# Add Employment

13. 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

13

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:

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

15. 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 \* **14**  
Service Code

Pay Rate \* **15**  
Enter Pay Rate

+ Add Service

- Remove Service

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

17. Optionally, click **Cancel** to discard changes.

**16** Save

**17** 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

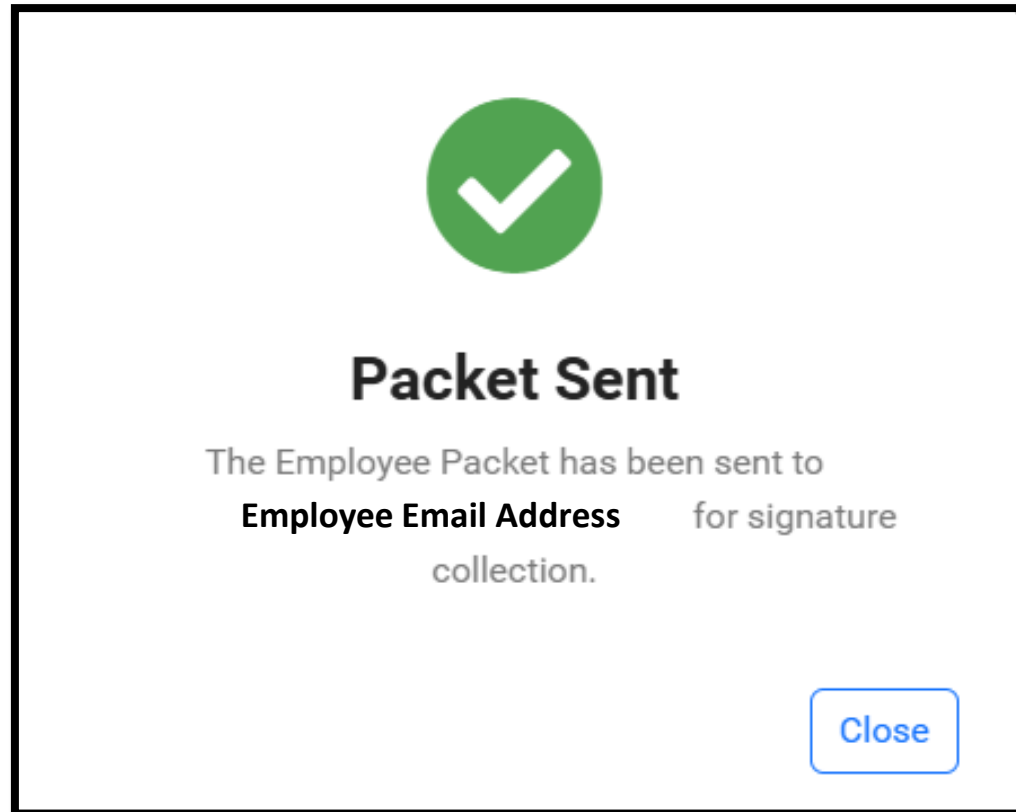
Client: James Leach Manage Clients

SD FS 360	Kristen Leach		Employer Packet Completed	Employee Packet Pending	<span>1</span> <span>Send</span>	
-----------	---------------	--	------------------------------	----------------------------	-------------------------------------	--

+ Add Employment

# 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		<b>Employer Packet</b> Completed	<b>Employee Packet</b> <b>In Progress</b> <a href="#">Resend</a>	
-----------	---------------	---	-------------------------------------	---	---

Please wait 15 minutes between refresh & resend.

[+ Add Employment](#)

# Complete Employee Packet

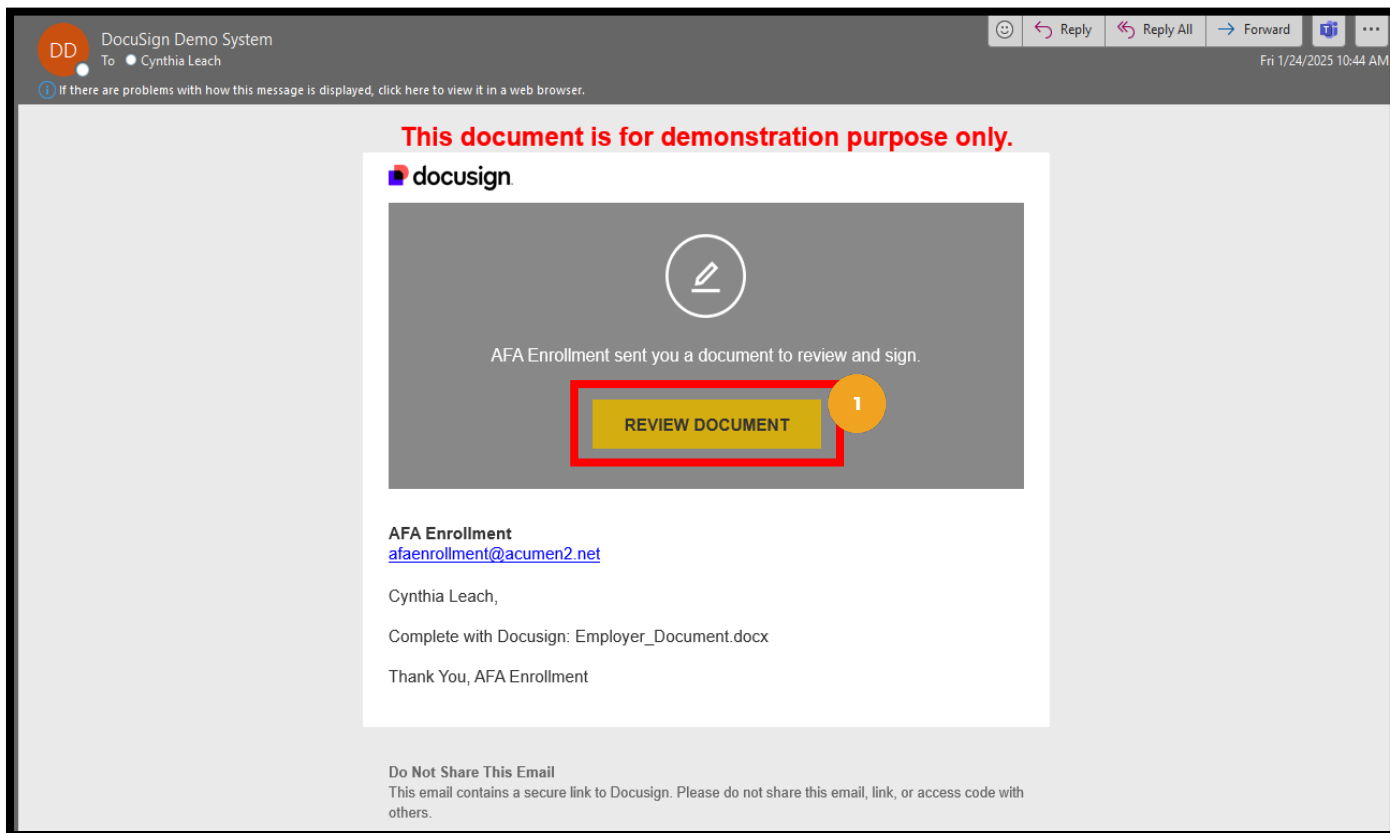
---

Employee completes

# Complete Employee Packet – DocuSign

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

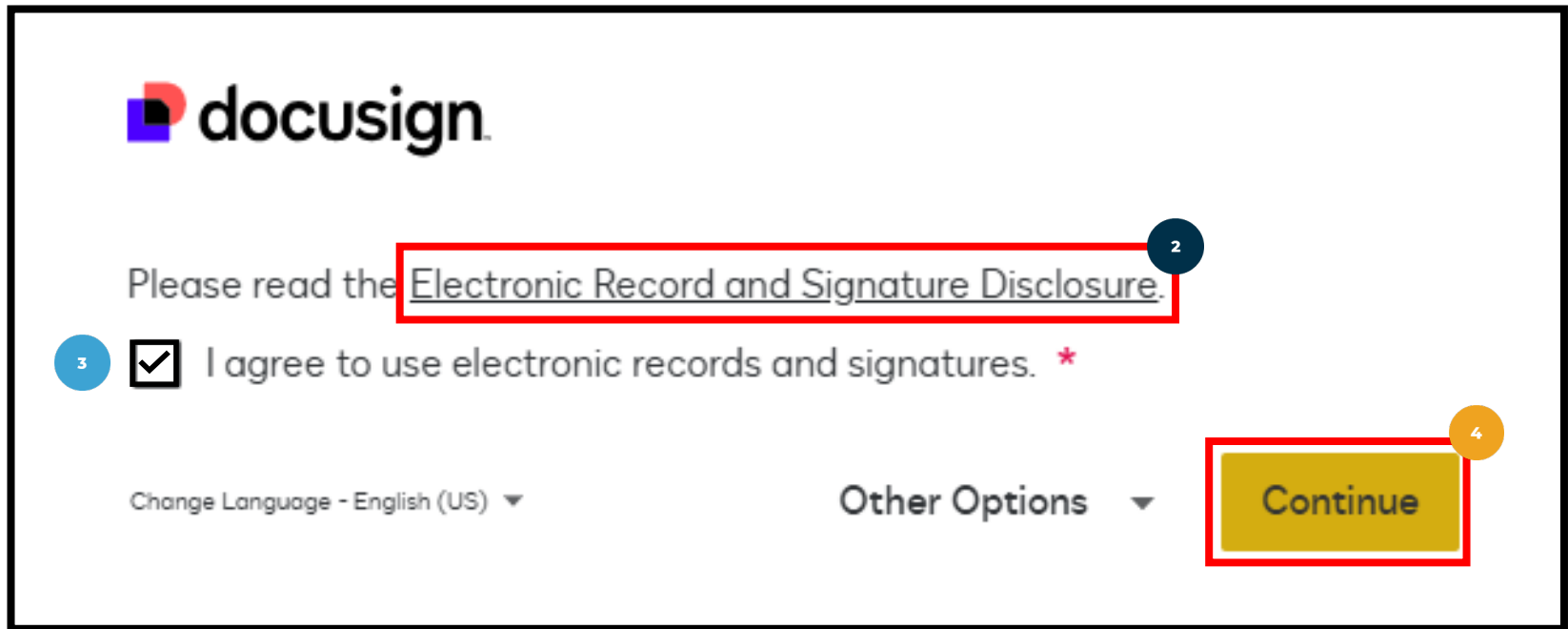
1. Click the yellow **Review Document** button in the email to complete the forms





# Complete Employee Packet - DocuSign

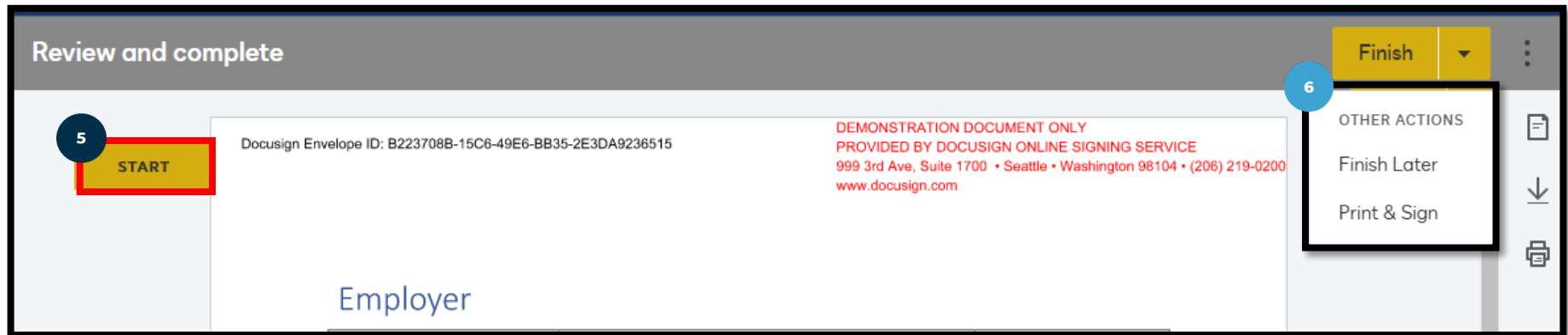
2. Click the **Electronic Record and Signature Disclosure** link to view the disclosure
3. **Check the box** to agree to using electronic records and signatures
4. Click the yellow **Continue** button



The screenshot shows the DocuSign interface. At the top left is the DocuSign logo. Below it, the text "Please read the" is followed by a red rectangular box containing the link "Electronic Record and Signature Disclosure." A blue circle with the number "2" is positioned above the right side of this red box. Below the link, there is a blue circle with the number "3" next to a checked checkbox and the text "I agree to use electronic records and signatures." followed by 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 with the text "Continue" inside it. A red rectangular box surrounds this button, and a yellow circle with the number "4" is positioned above its top right corner.

# 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 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:

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

# 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?

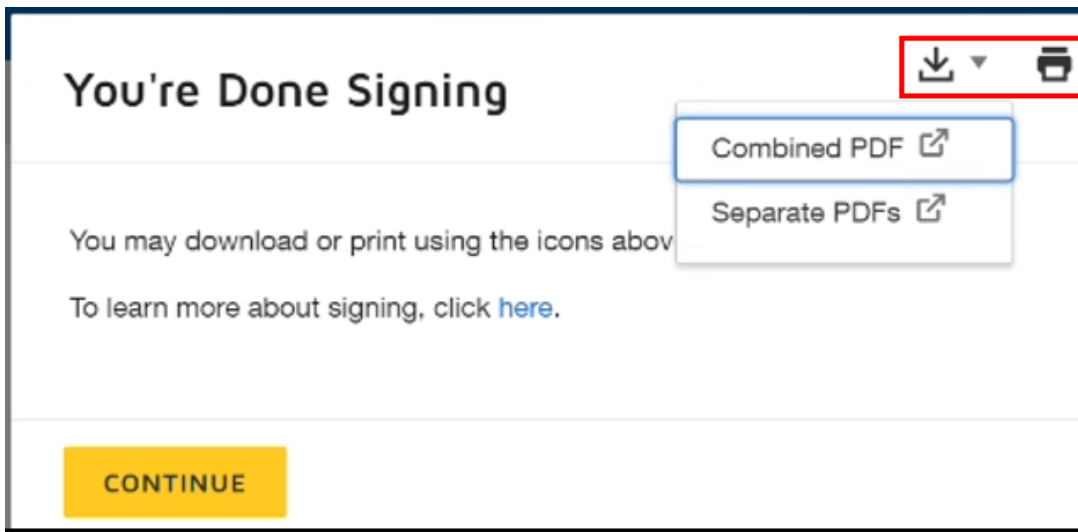
You've completed the required fields. Review your work, then select Finish.

Finish

# Complete Employee Packet - DocuSign

**Congratulations!**

The Employee packet is complete.

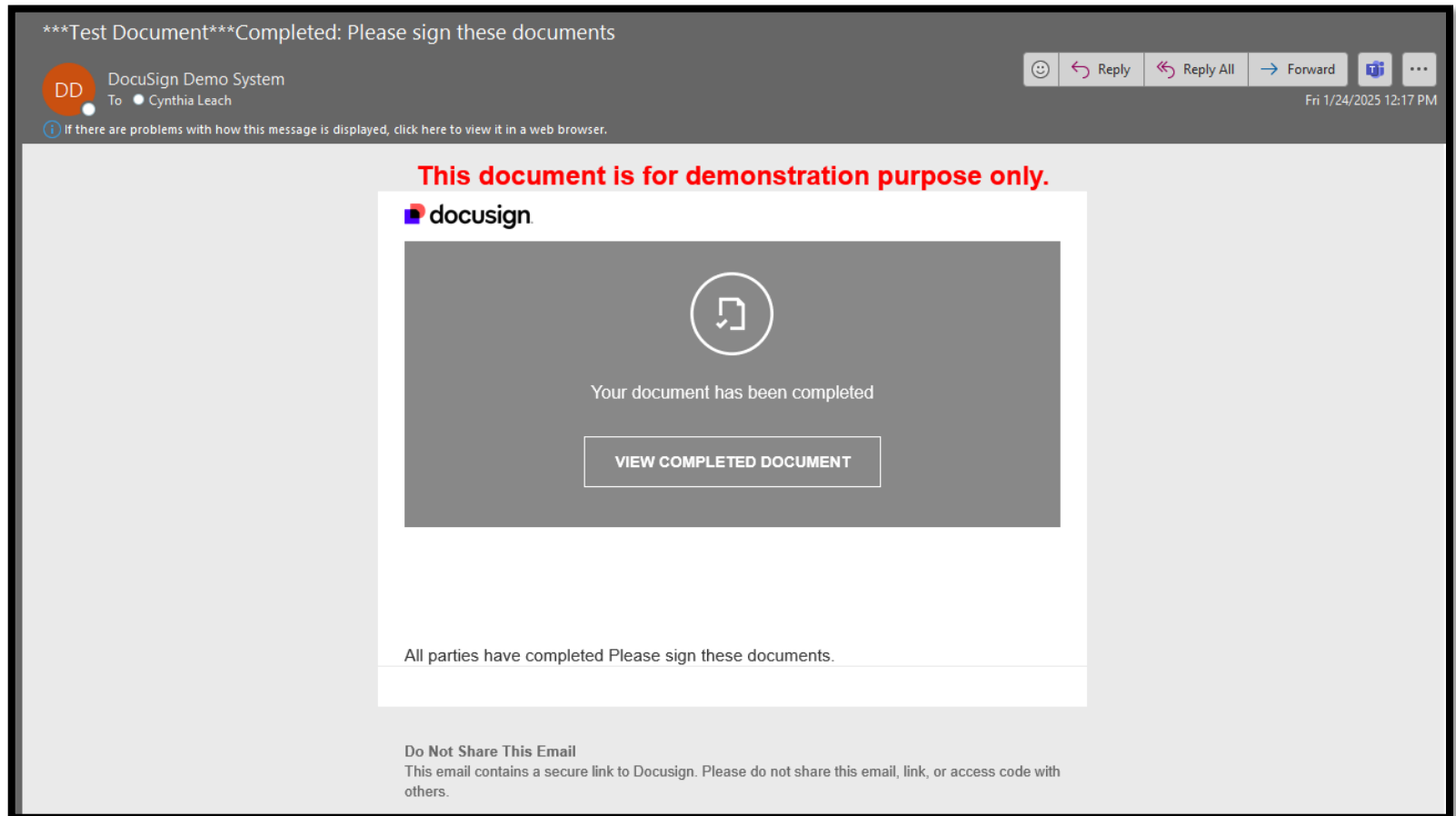


- Optionally, click the **download icon** to download as a combined PDF or as separate PDFs, or click the **printer icon** to print.
- Click the yellow **Continue** button to proceed

**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\*

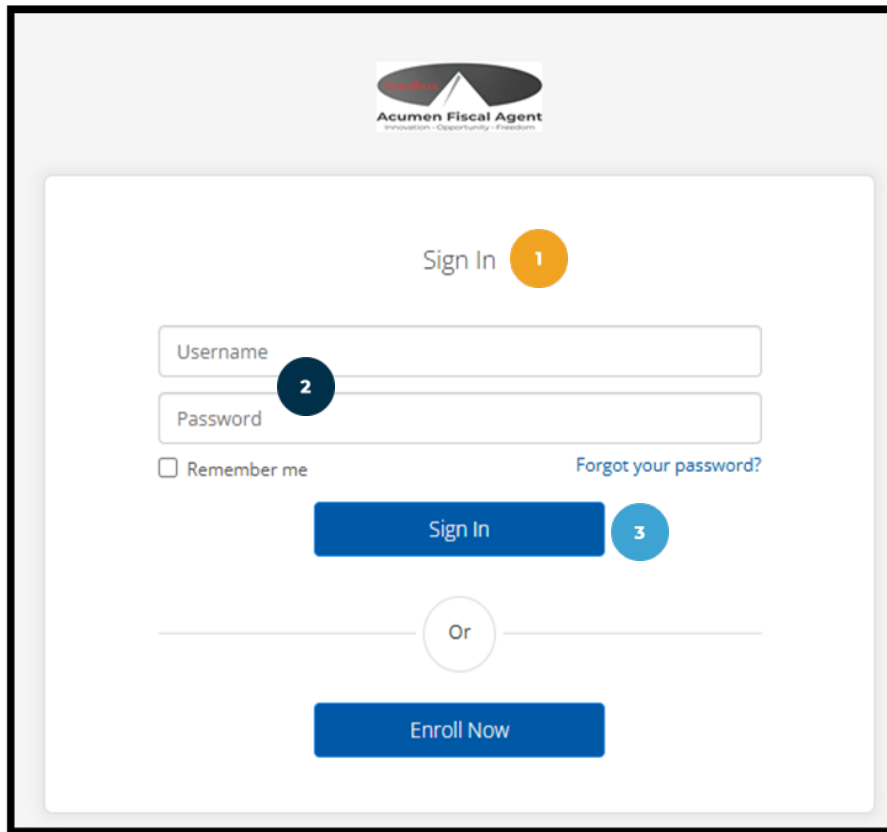
---

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



# Logging into EES

1. After the Employee completes the packet, the Employer **navigates to the DCI login screen.**
2. Enter the **username** and **password** created in the Initial Registration form
3. Click **Sign In**



The screenshot shows the login interface for Acumen Fiscal Agent. At the top is the logo with the tagline "Innovation - Opportunity - Freedom". Below it, the text "Sign In" is followed by a yellow circle with the number "1". There are two input fields: "Username" and "Password". A dark 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?". A blue "Sign In" button is followed by a light blue circle with the number "3". Below this is a horizontal line with a circle containing the word "Or" in the center. At the bottom is a blue "Enroll Now" button.

# Enrollment Completed

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

The screenshot displays the DCI Enrollment Dashboard. On the left is a dark blue sidebar with the DCI logo and navigation links: Home, Enrollment, Dashboard, My Info, Clients, Employees, and Employments. The 'Clients', 'Employees', and 'Employments' links are highlighted with a red box. Three blue arrows point from a text box to these links. The main content area shows a client profile for 'James Leach' with a 'Manage Clients' button highlighted by a red box. Below this, a table lists employee packets for 'SD FS 360' and 'Kristen Leach', both marked 'Completed' and highlighted with green boxes. A blue '+ Add Employment' button is also highlighted with a red box. A yellow text box at the bottom instructs to click this button to add employment and employees for the client. A white text box on the left side of the dashboard states: '\*Please wait 15 minutes between refresh & resend.'

From the user management menu:

- Click **Clients** to add, view, or edit clients.
- Click **Employees** to view or edit employees
- Click **Employments** to view or edit employments
- **Please Note:** After completing the employment, edits must be done in the DCI Portal.

Alternatively, click the blue **Manage Clients** button to add, view, or edit clients.

\*Please wait 15 minutes between refresh & resend.

Click the blue **+Add Employment** button to add employment and employees for the client