Acumen Fiscal Agent
Innovation · Opportunity · Freedom
DIRECT CARE INNOVATIONS
Acumen powered by DCI

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**
  - **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

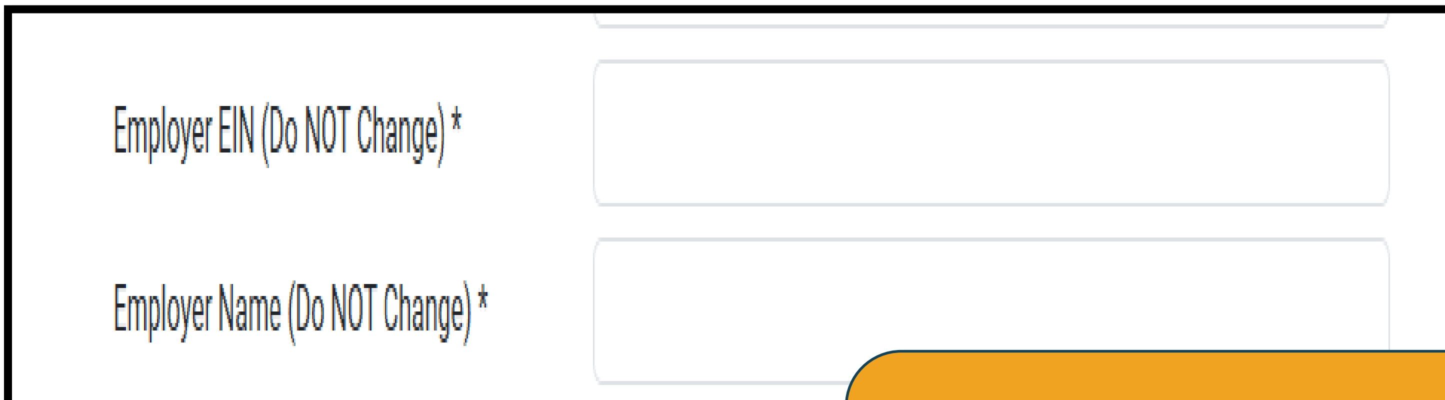
Here is a list of items you will need for your enrollment. Please review the list and be sure to have this information readily available when completing your enrollment documents:

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.


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.

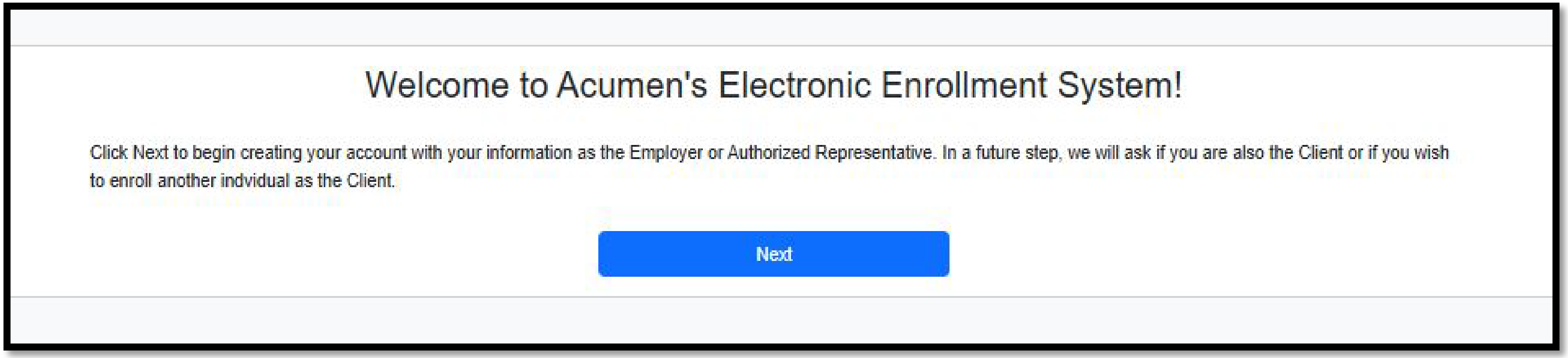
Initial Registration:

Employer is the Client

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



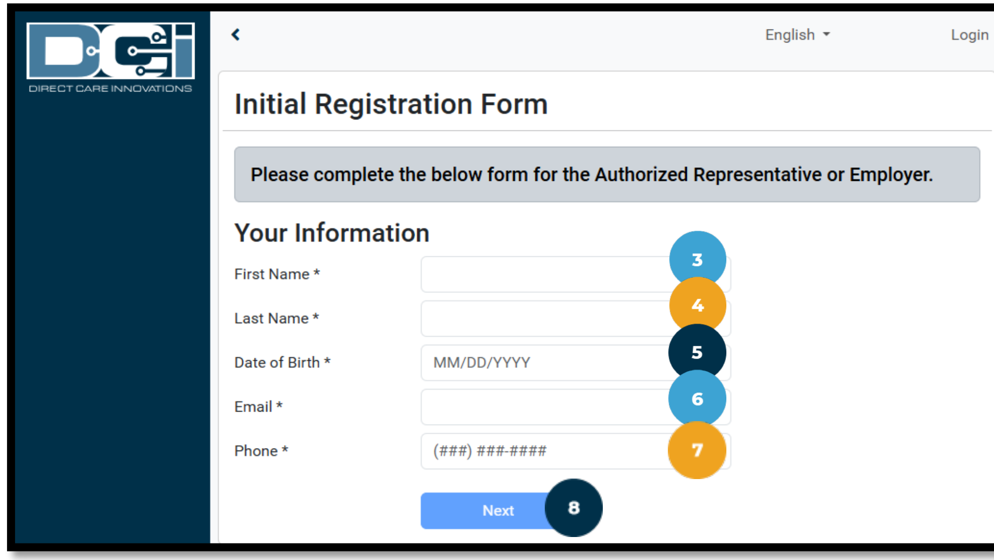
Employer is the Client

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**



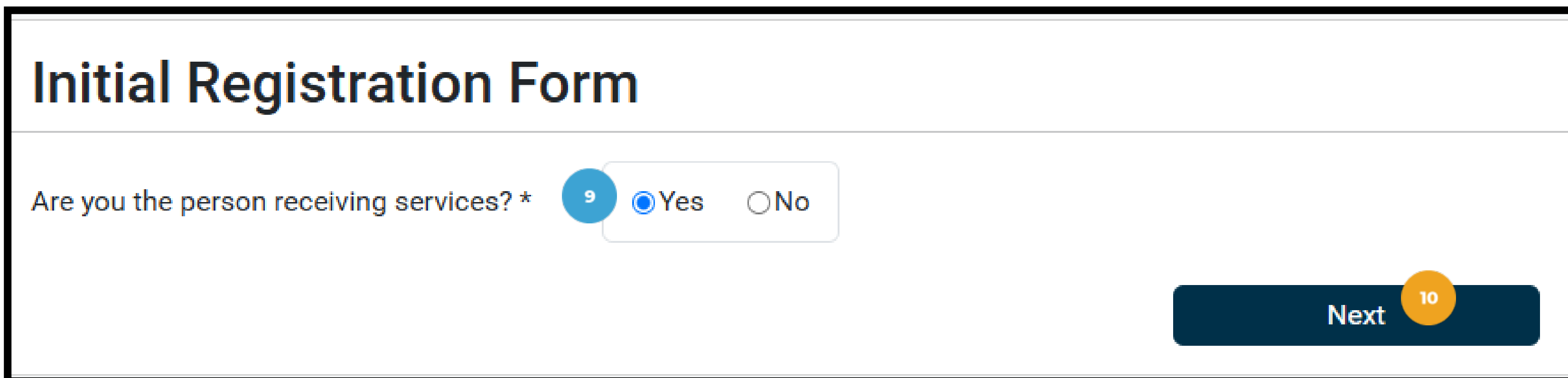
Veteran/Employer must enter their name as it is with the VA. ONLY enter your First Name and Last Name. If you are a SR, JR, III etc., please put that after your last name.

Employer is the Client

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

9. Click **Yes**
10. Click **Next** to continue

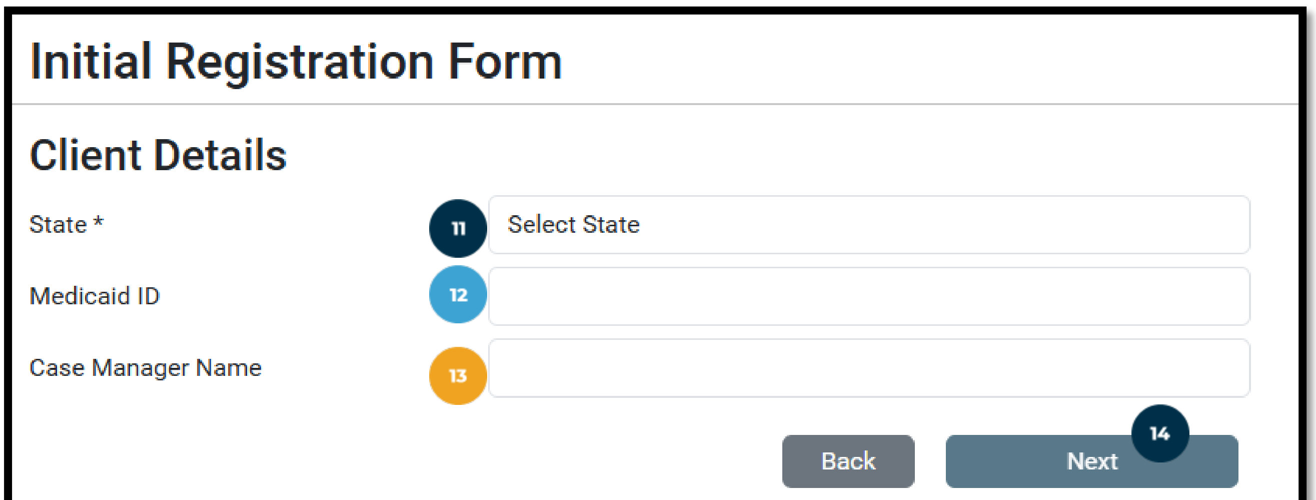
✓ Assigned both the Client & Employer roles



Initial Registration (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

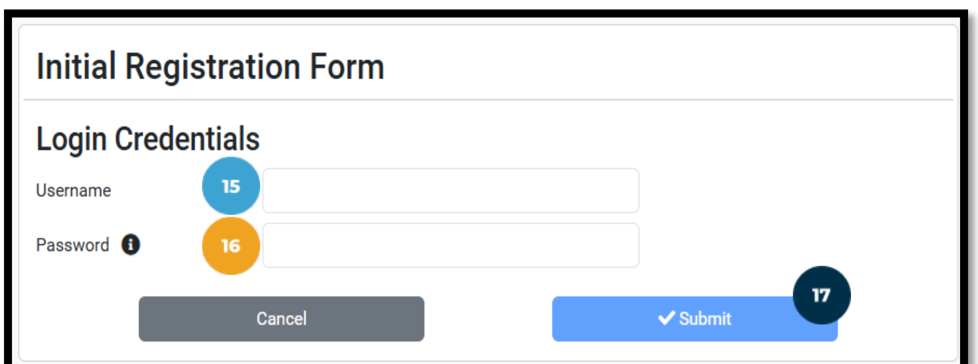
Back | Next — 14

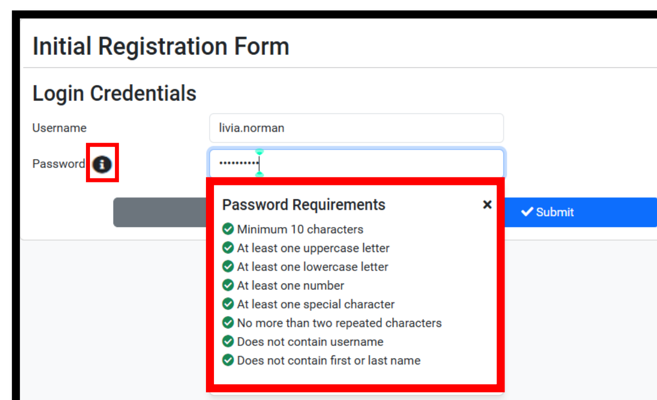
Initial Registration (Employer / Client)

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**

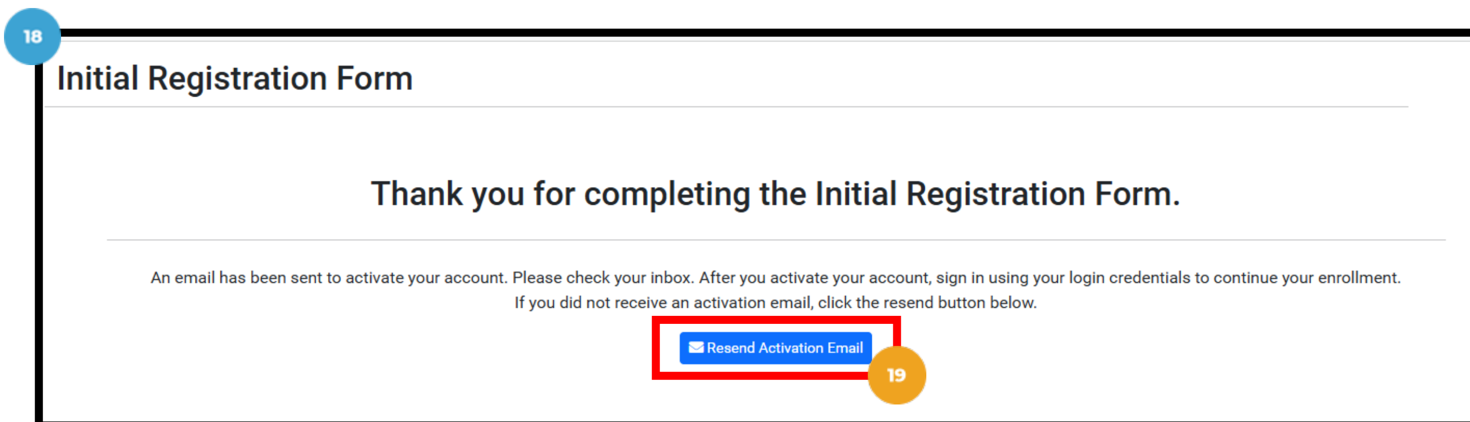
Tip: Click the information button to verify password requirements are met.





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.

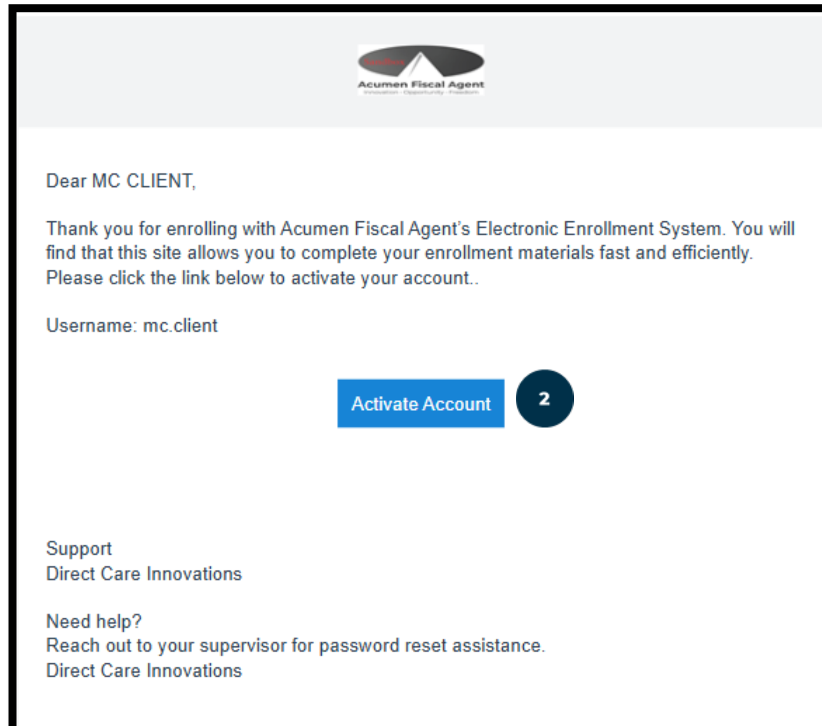


Activate Employer Profile
&
Log into EES via DCI Web Portal*

*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
   - ✓ 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)

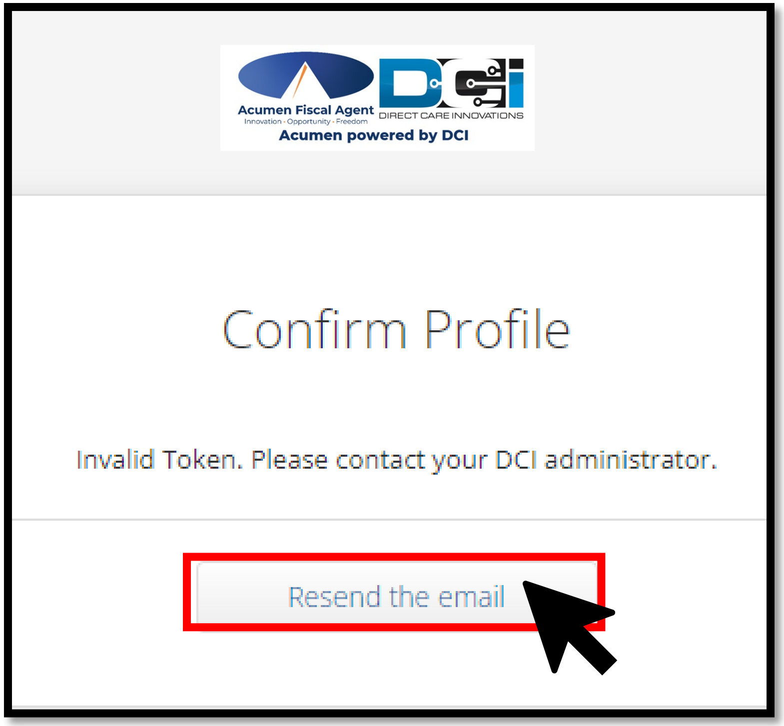


Activate Employer Profile

Note:

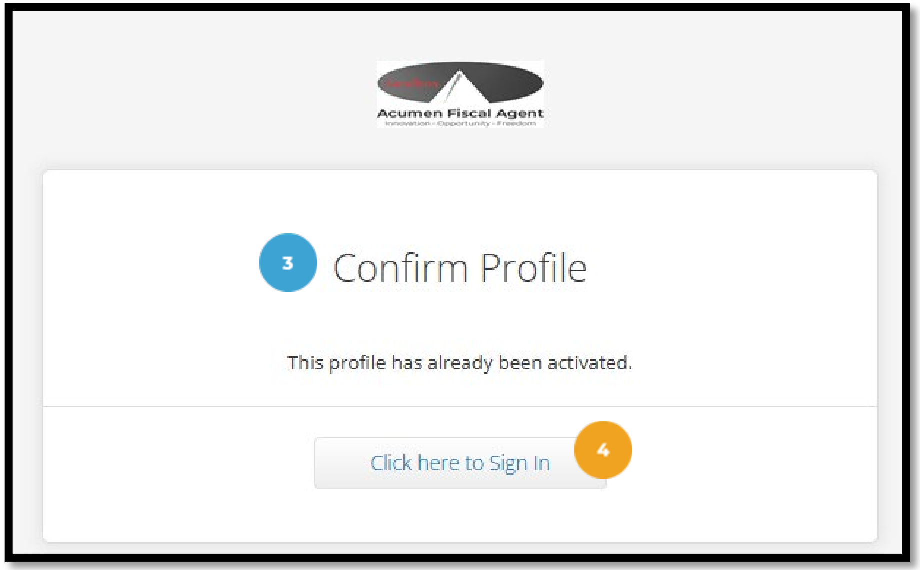
- If after clicking the Activate Account button, **<u>the link is inactive</u>**, an alert stating Invalid Token - Please contact your DCI administrator populates.

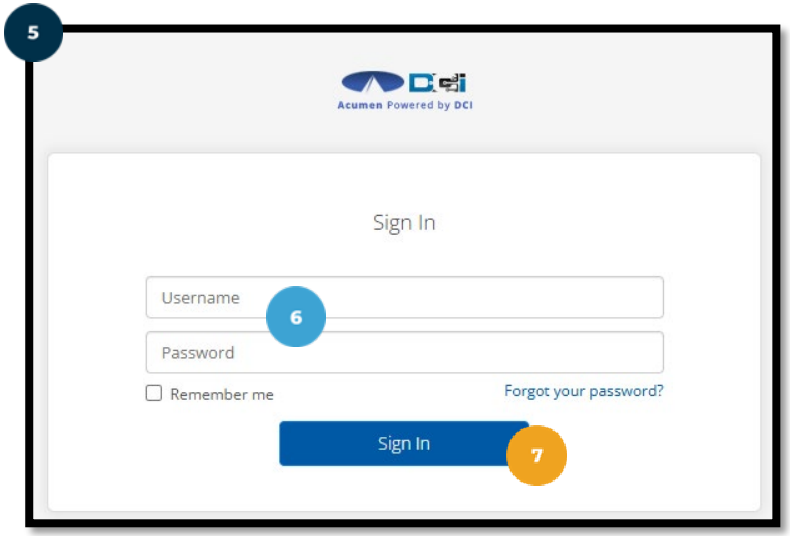
- Click the **Resend the email** button and return to **<u>step 2</u>**



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



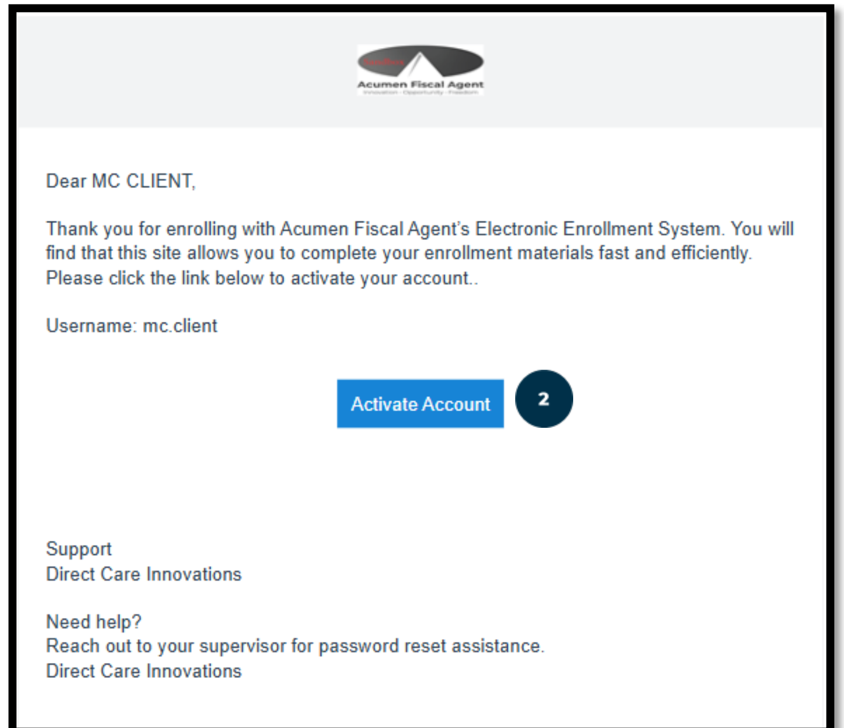


Activate Employer Profile
&
Log into EES via DCI Mobile Full Site

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

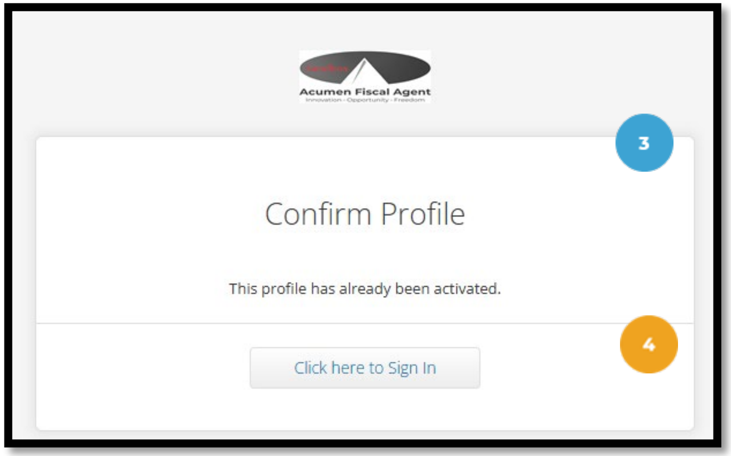
Activate Profile –DCI Mobile Full Site

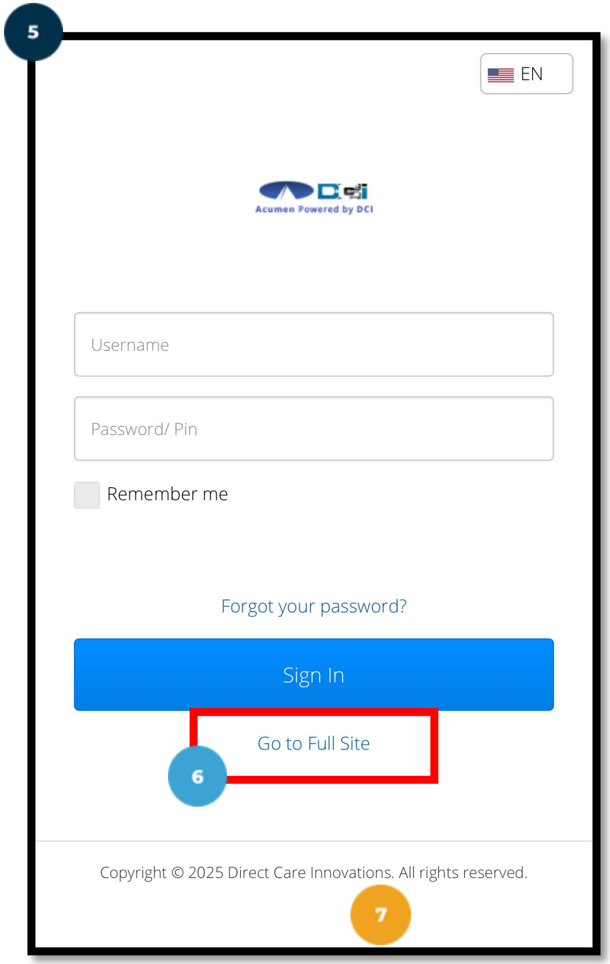
1. Upon completing Initial Registration, an email is sent to the Enrollee for account activation.
   - ✓ **Title:** Welcome to Acumen's Electronic Enrollment System
   - ✓ **Sender:** no-reply@acumen2.net
   - ✓ Check the spam folder if necessary
2. Click the blue **Activate Account** button in the email
   - ❖ 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.**

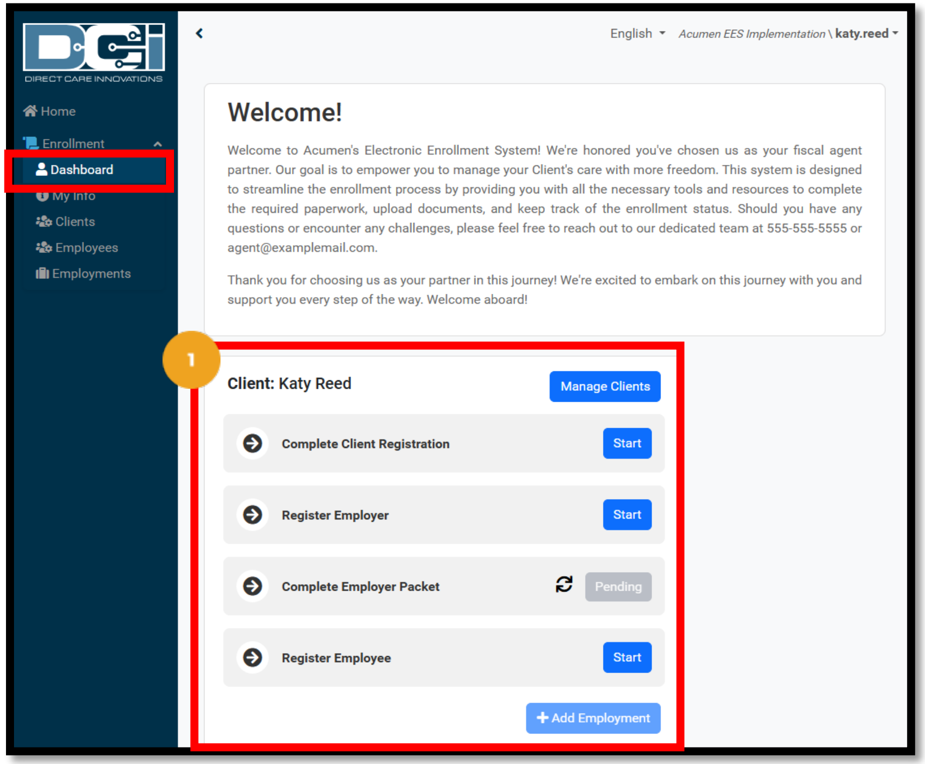




Authorization Preloaded – Next Action

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.

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.

Thank you,

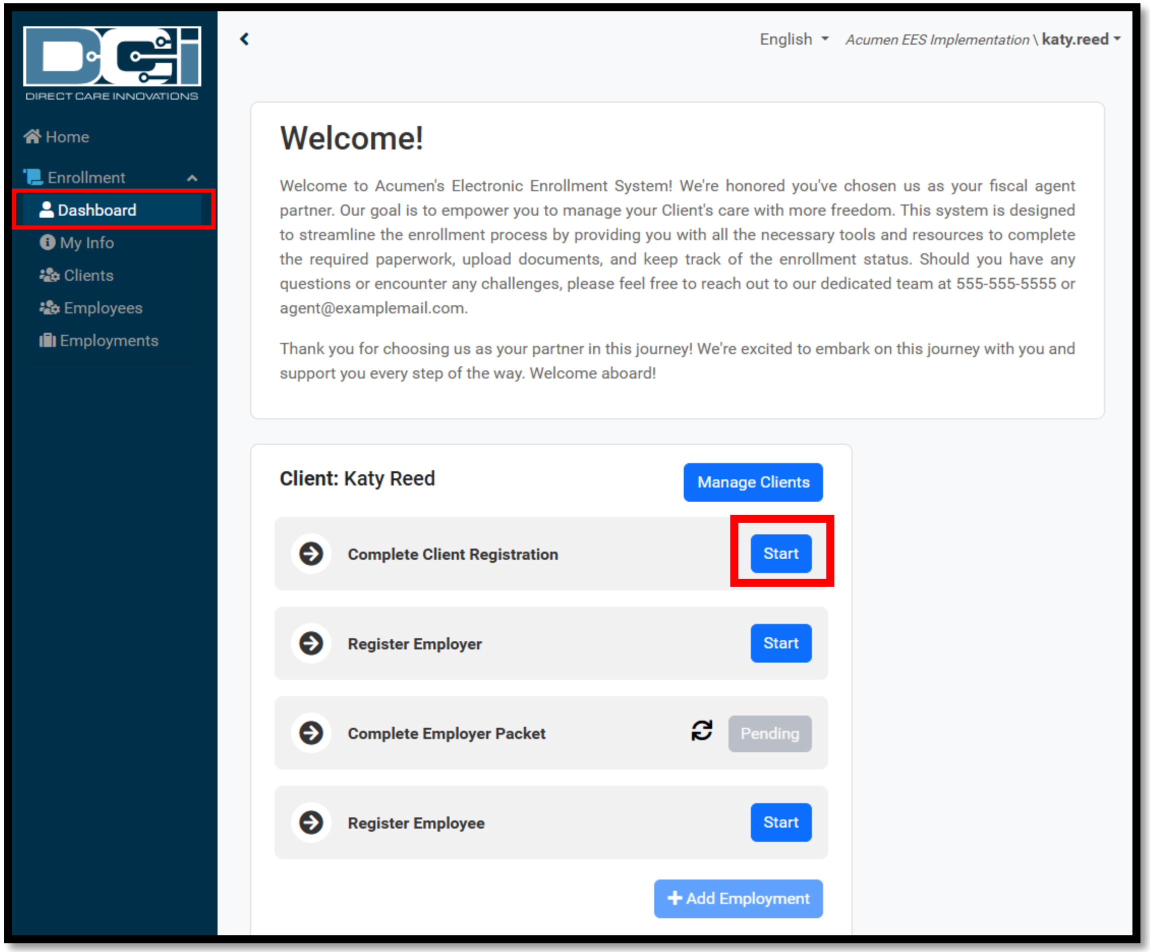
Acumen Fiscal Agent

Complete Client Registration

Employer completes this process

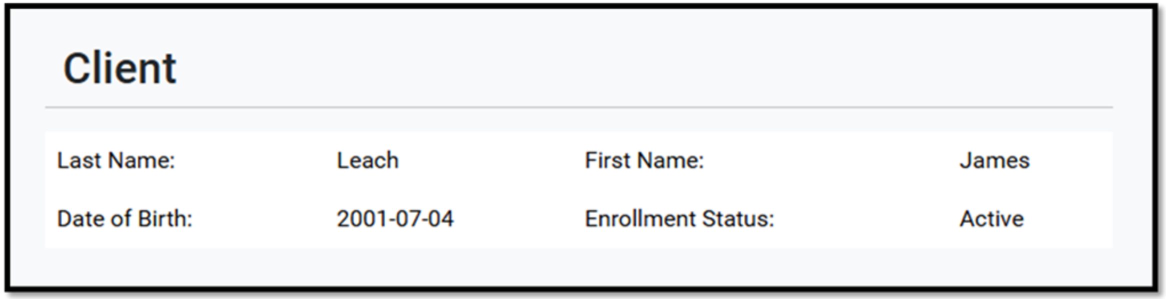
Complete Client Registration

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



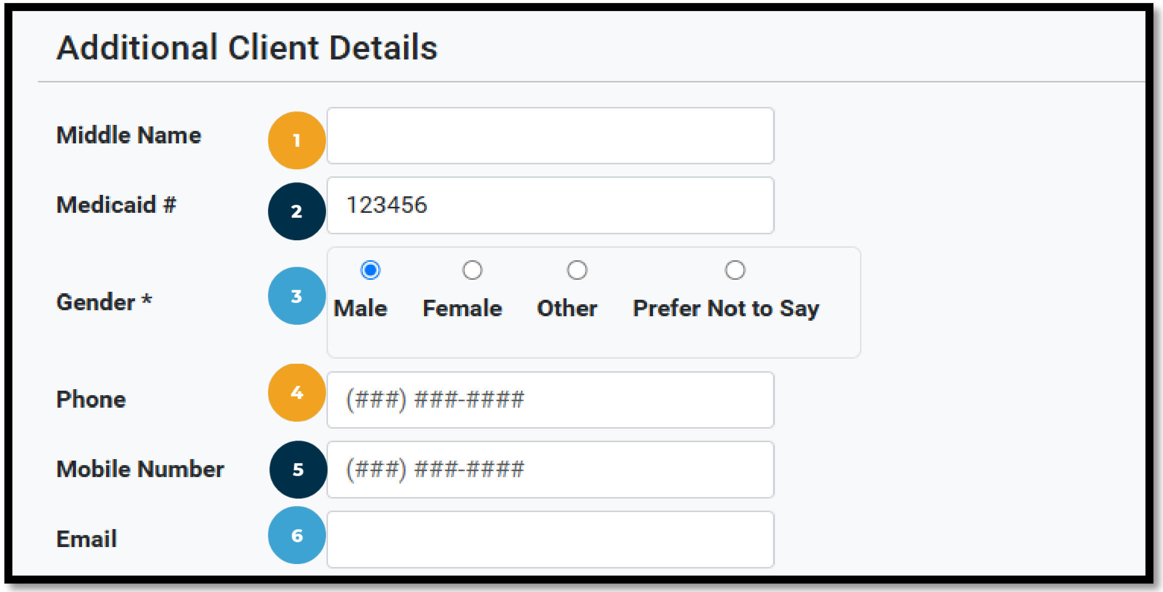
Complete Client Registration

Client information auto-populates at the top of the page with the information provided during the initial registration



Complete Additional Client Details:

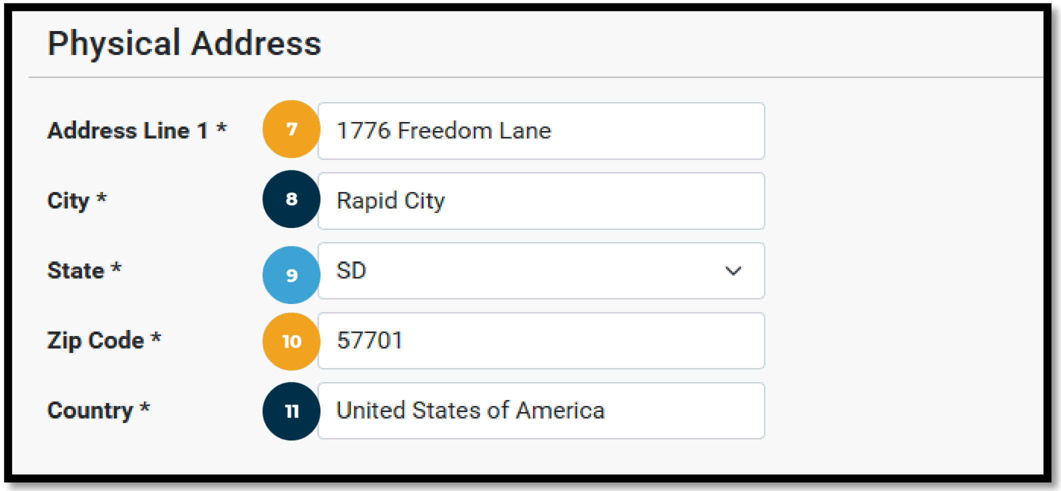
1. Middle Name (optional)
2. Medicaid # (optional)
3. Gender (required): Select one
   - Male
   - Female
   - Other
   - Prefer Not to Say
4. Phone (**required**):
5. Mobile Number (optional):
6. Email (required):



Complete Client Registration

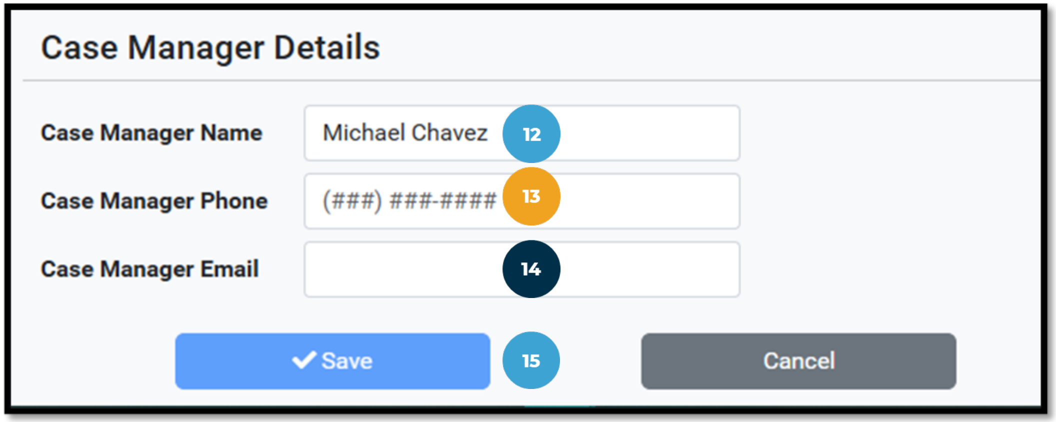
Complete the Physical Address:

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



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



Complete Client Registration

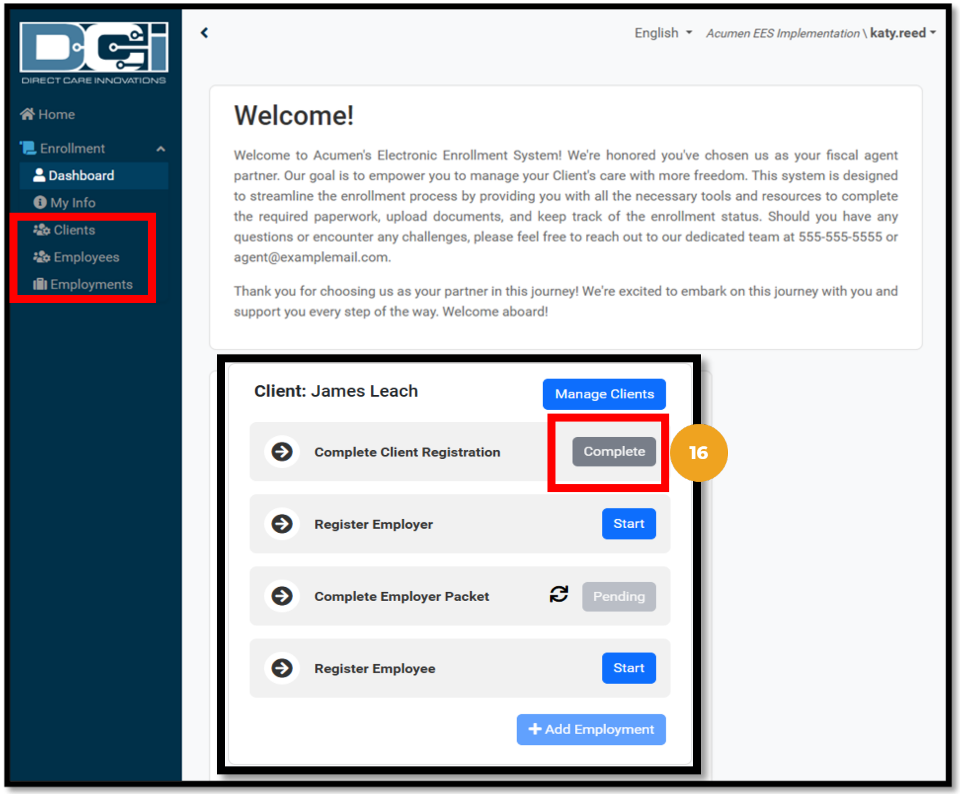
From the user management menu:

- 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

Employer completes this process

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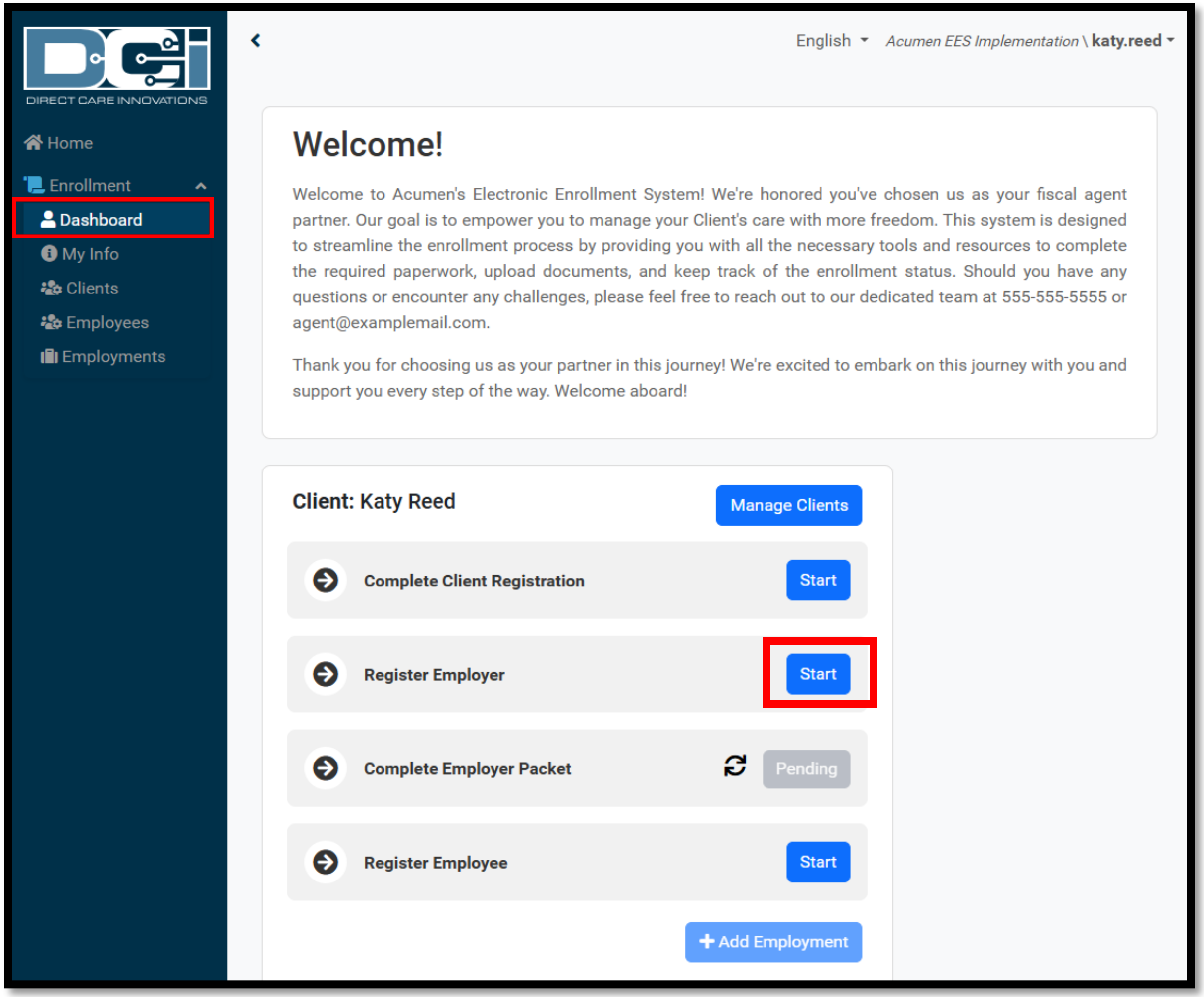
Register Employer

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



Register Employer

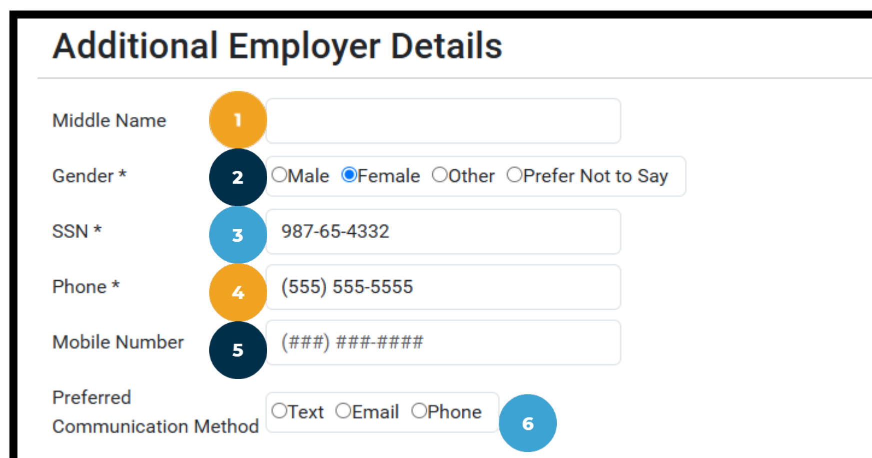
Complete the Additional Employer Details section:

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



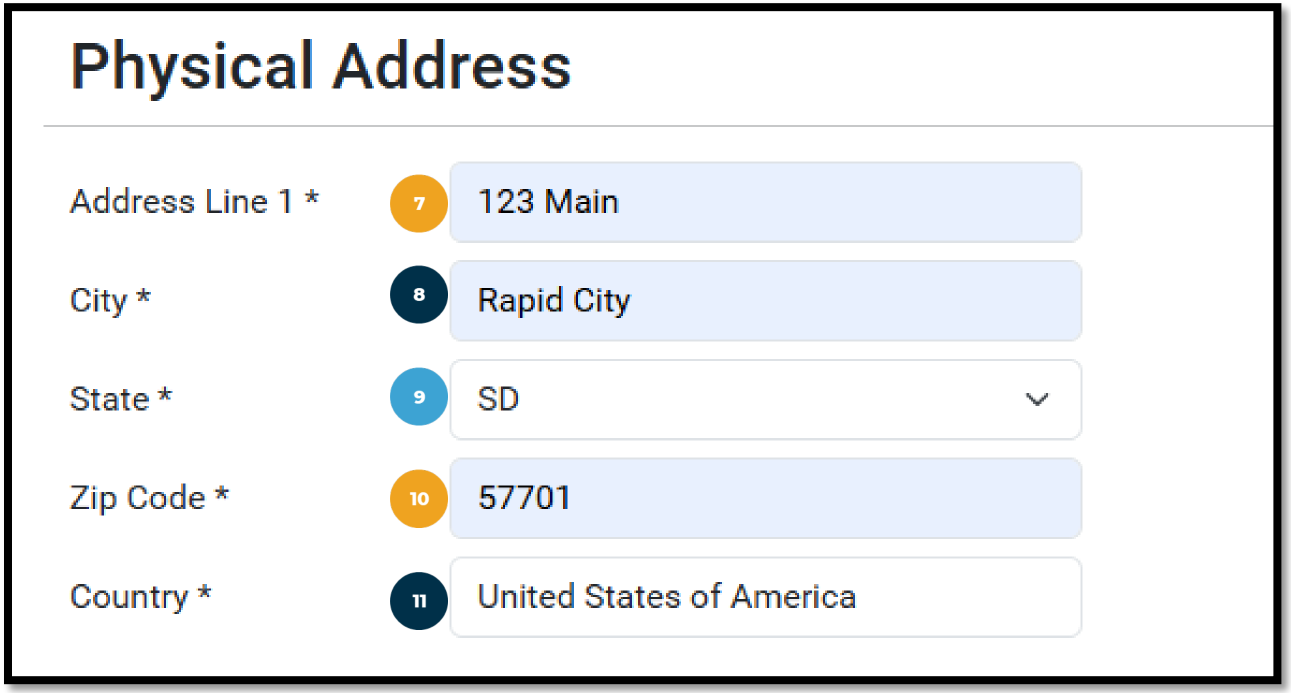
Additional Employer Details

Middle Name 1
Gender * 2 Male Female Other Prefer Not to Say
SSN * 3 987-65-4332
Phone * 4 (555) 555-5555
Mobile Number 5 (###) ###-####
Preferred Communication Method Text Email Phone 6

Register Employer

Complete Physical Address details:

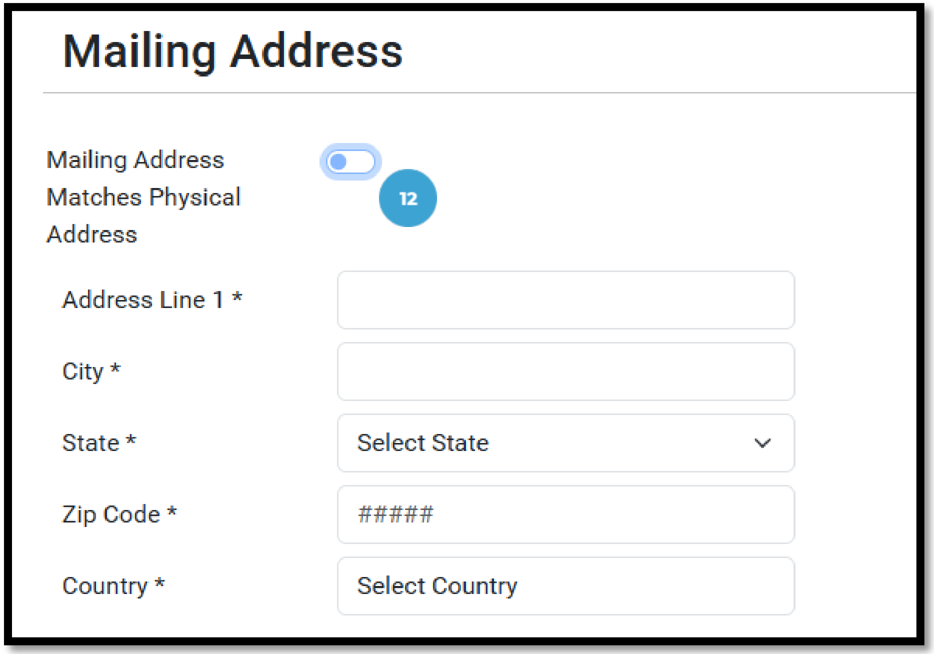
7. Address Line 1 (required)
8. City (required)
9. State (required)
10. Zip Code (required)
11. Country (required)

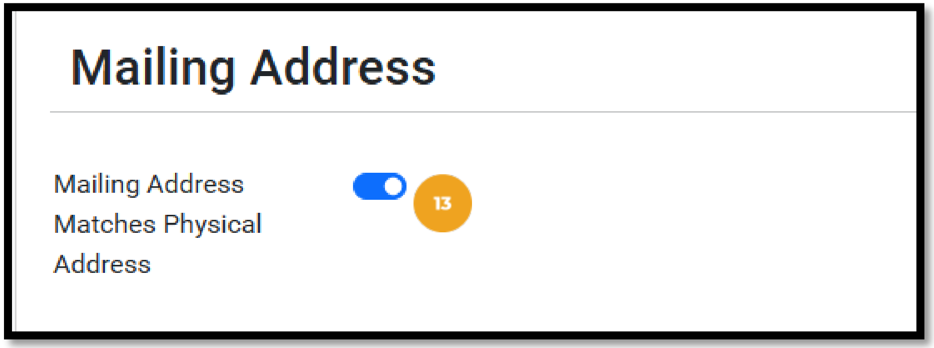


Register Employer

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:
      a. Address Line 1 (required)
      b. City (required)
      c. State (required)
      d. Zip Code (required)
      e. Country (required)
13. Toggle to **ON** position if the mailing address is the same as the physical address





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

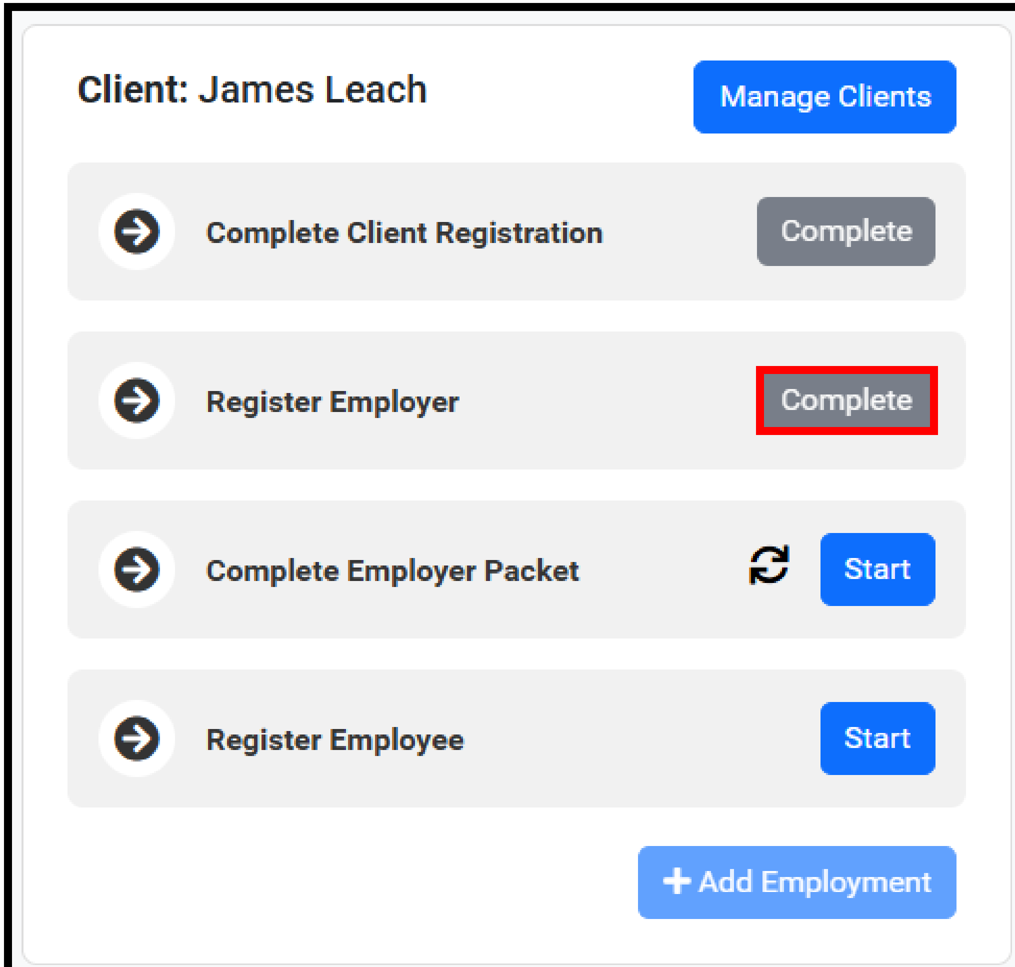
Has the Employer ever previously been enrolled with another Fiscal/Employer Agent (F/EA), sometimes known as a Financial Management Service Agency? * ○ Yes ○ No ● N/A

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**



Complete Employer Packet

Employer completes this process

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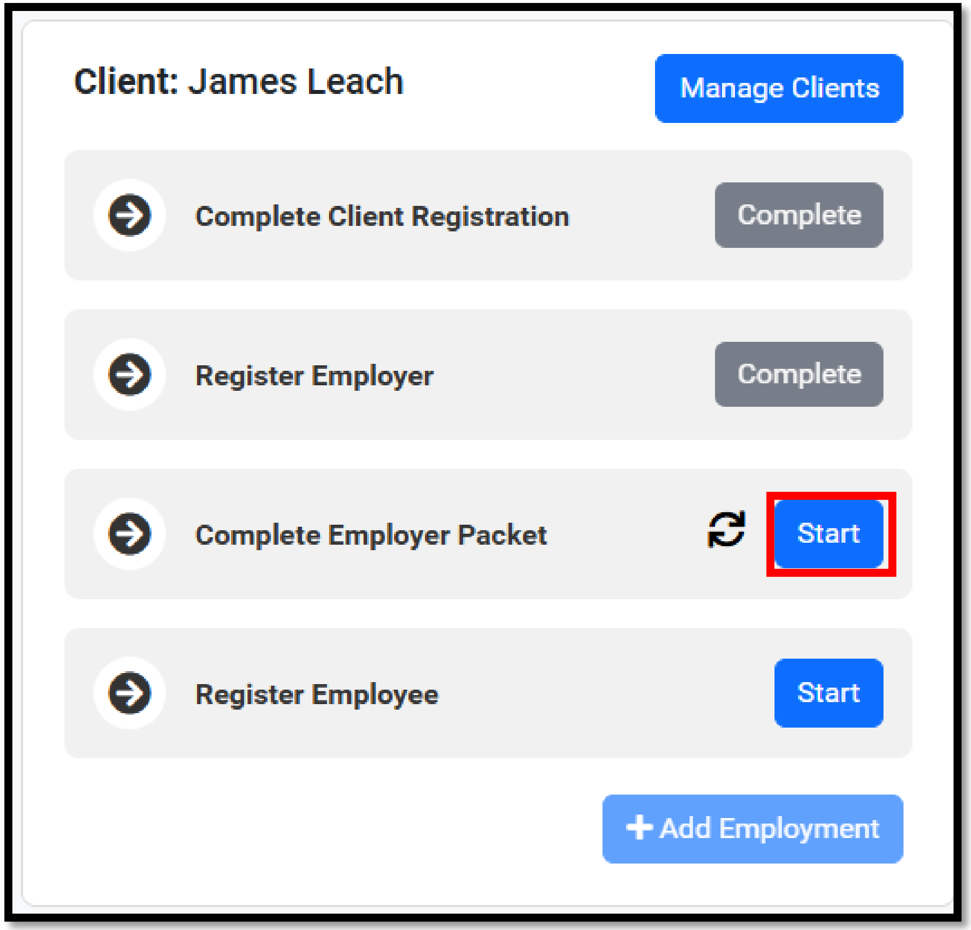
Complete Employer Packet

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

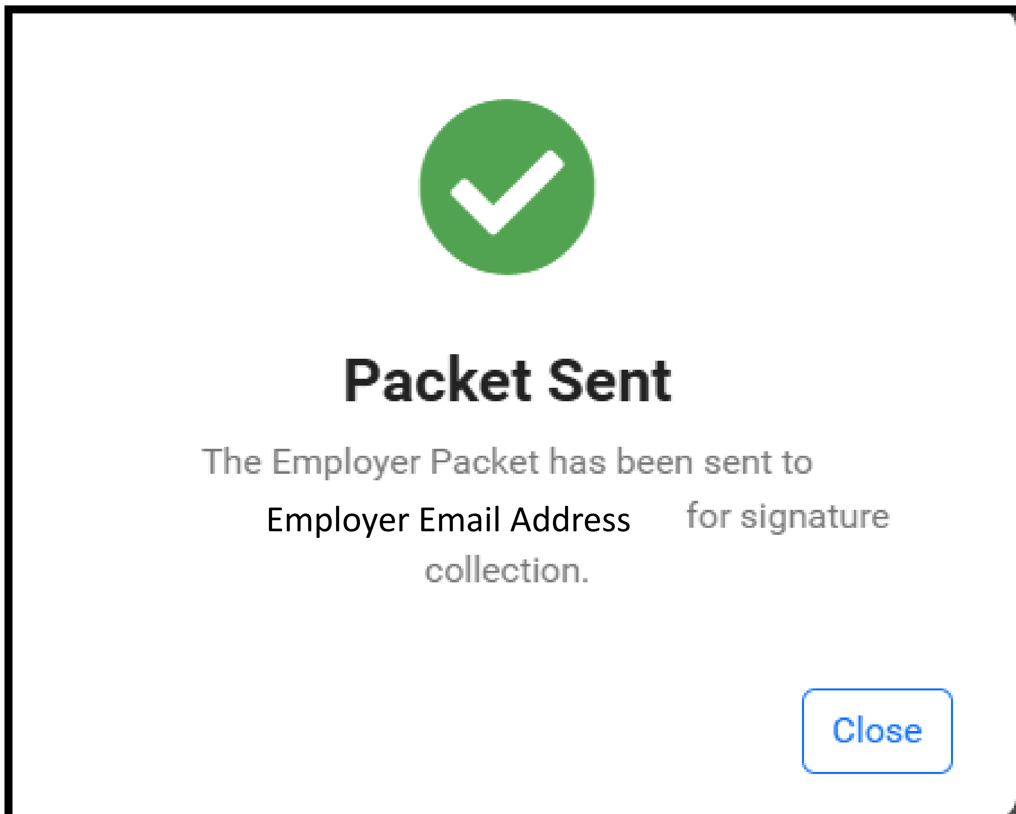
Important! Prior to completing the Employer Packet, the following must be completed:

1. **Client Registration**
2. **Register Employer**



Complete Employer Packet

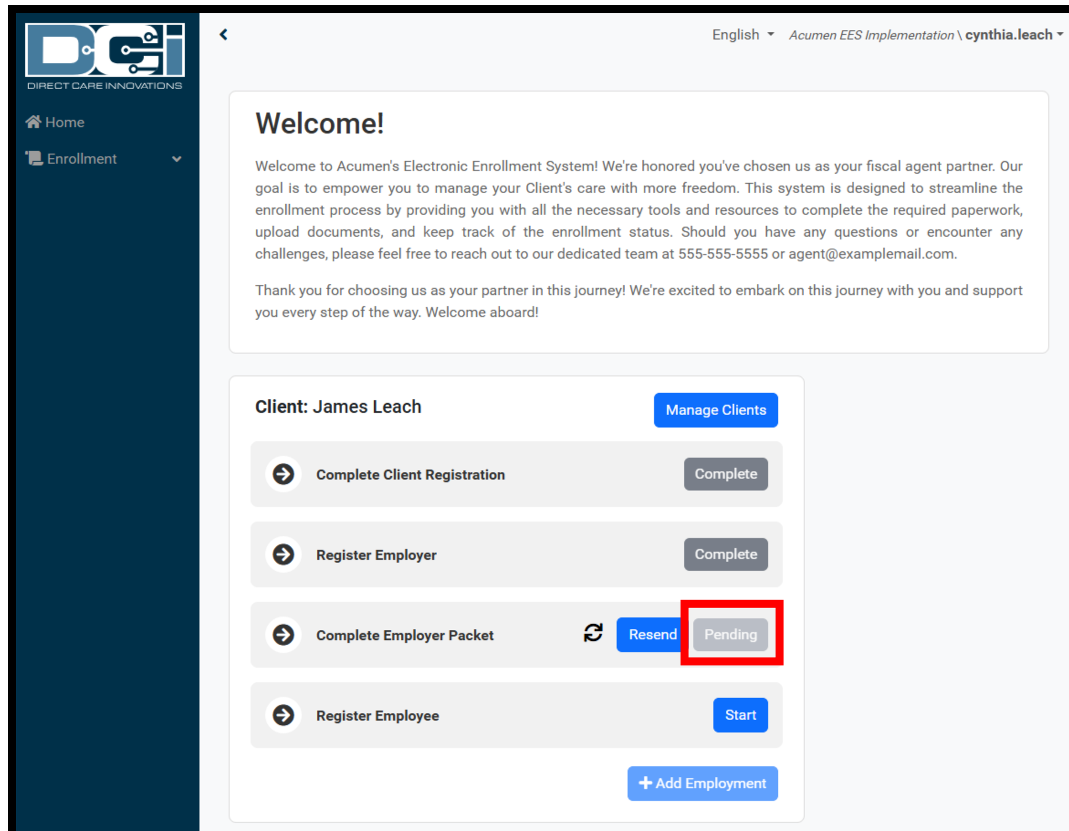
- The pop-up message **The Employer Packet has been sent to [employer's email address] for signature collection** displays.
- Click **Close**



Complete Employer Packet

- The Complete Employer Packet button displays **Pending**

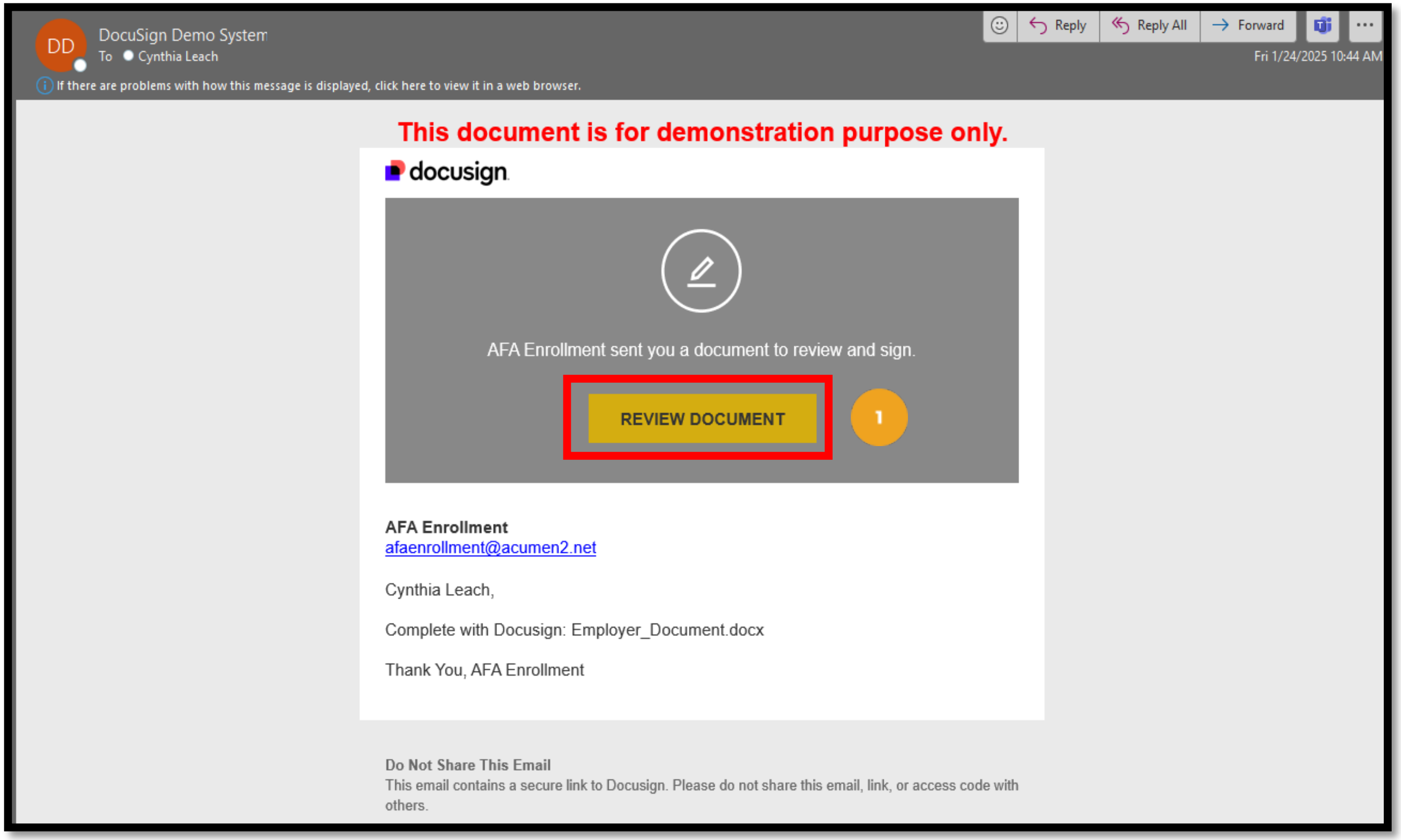
- **Please Note**: When clicking the **Resend button**, the packet is not being resent, only the email for signing is resent.
- If date is altered after initial send, that will not be captured in the document.
- Use the Refresh button to update the status to Complete.



Complete Employer Packet – DocuSign

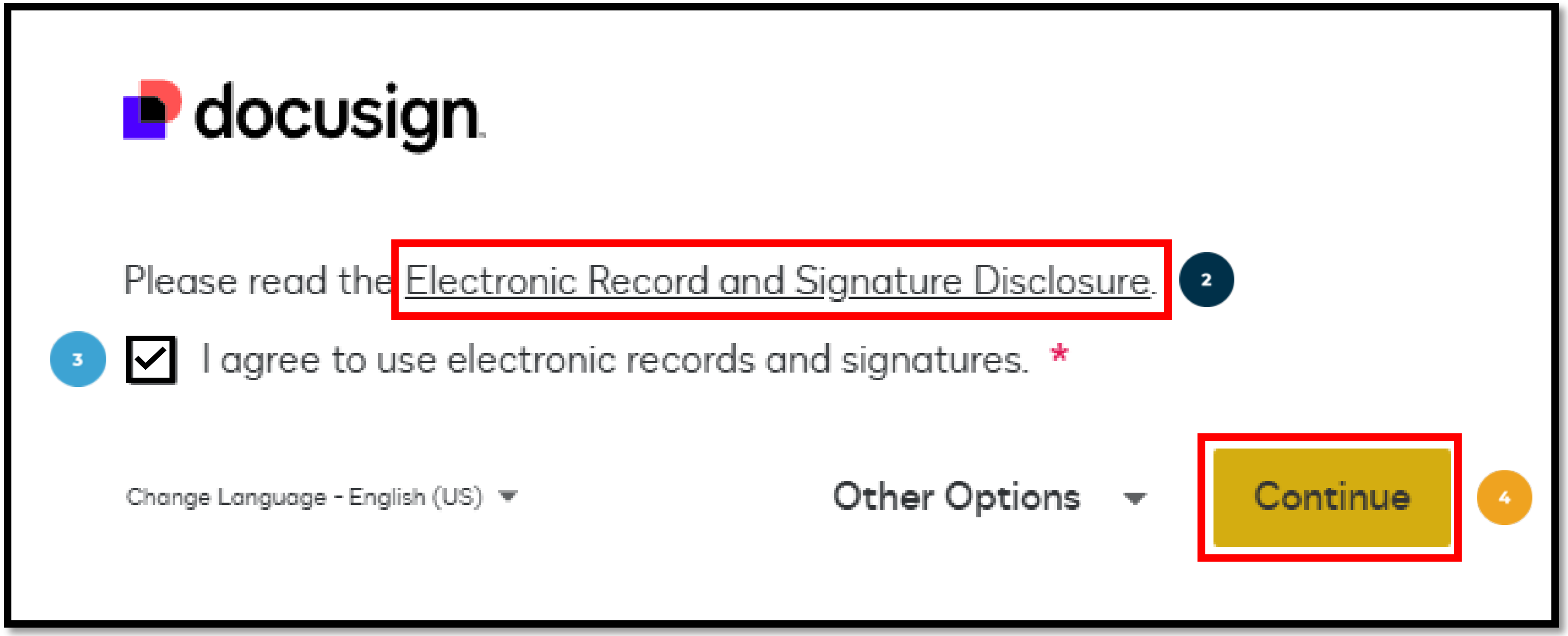
The packet arrives via an email from sender DocuSign. Check junk or spam folders if needed.

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



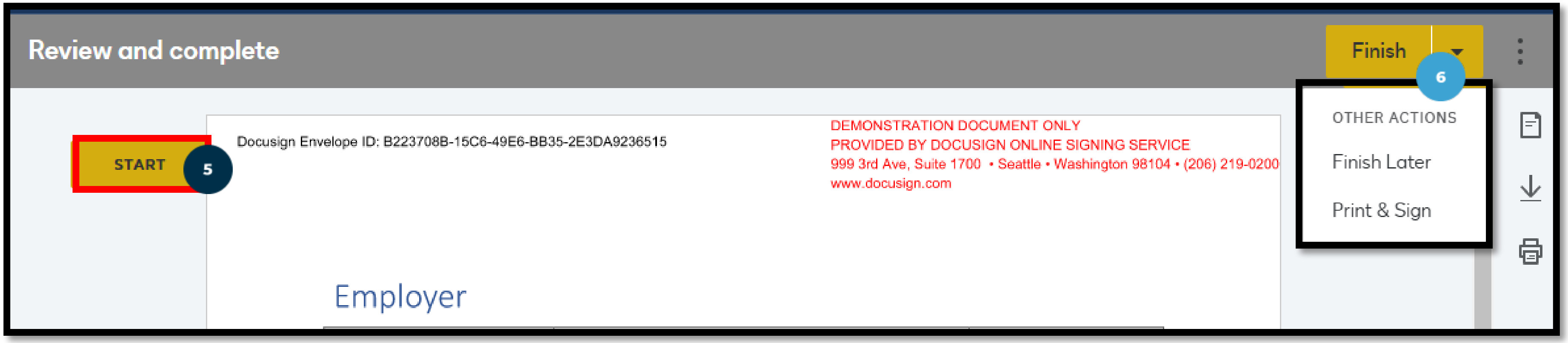
Complete Employer Packet – DocuSign

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



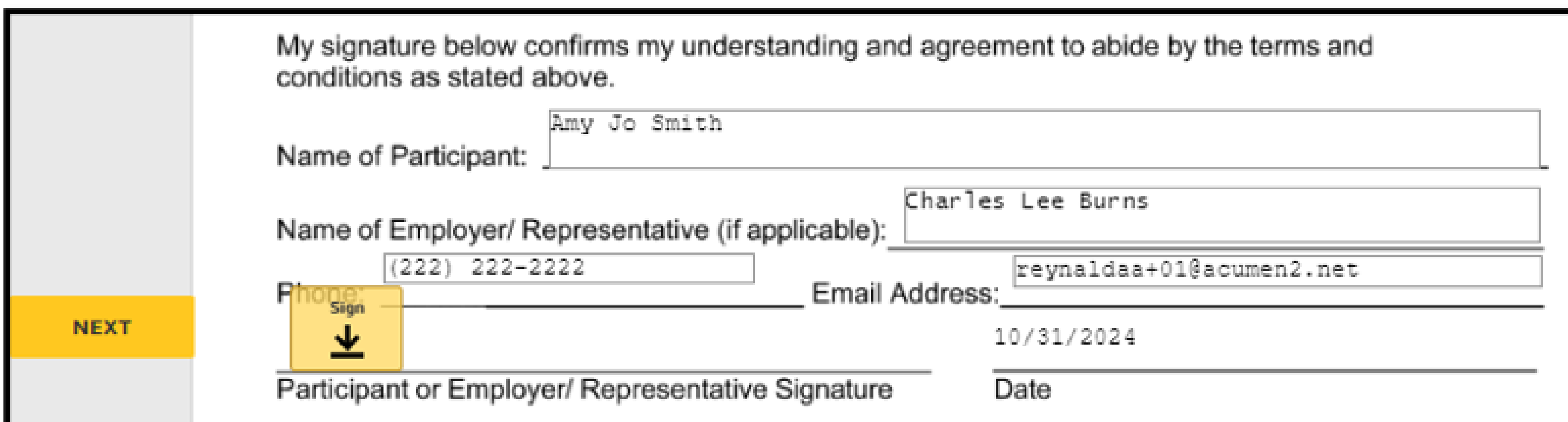
Complete Employer Packet – DocuSign

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


NEXT

My signature below confirms my understanding and agreement to abide by the terms and conditions as stated above.

Name of Participant: Amy Jo Smith

Name of Employer/ Representative (if applicable): Charles Lee Burns

Phone: (222) 222-2222 Email Address: reynaldaa+01@acumen2.net

Sign

Participant or Employer/ Representative Signature

10/31/2024

Date

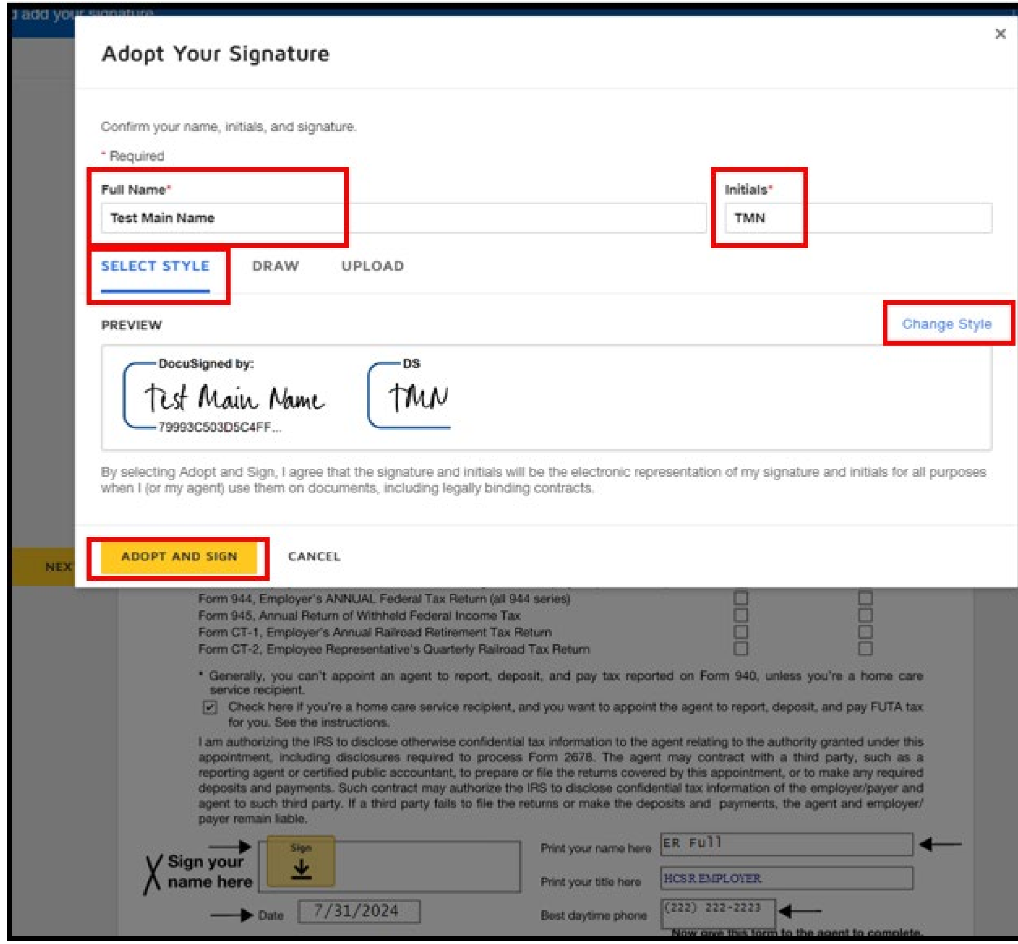
Complete Employer Packet – DocuSign

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

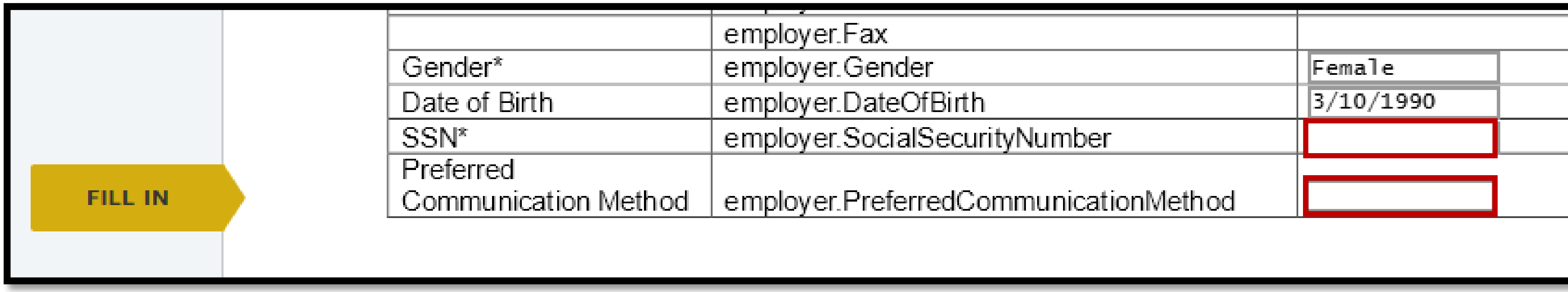
To select a signature style provided by DocuSign (option 1):

- ✓ 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



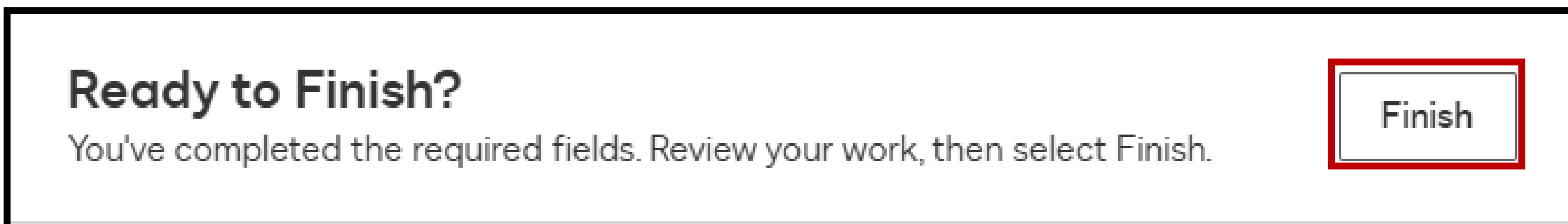
Complete Employer Packet – DocuSign

*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



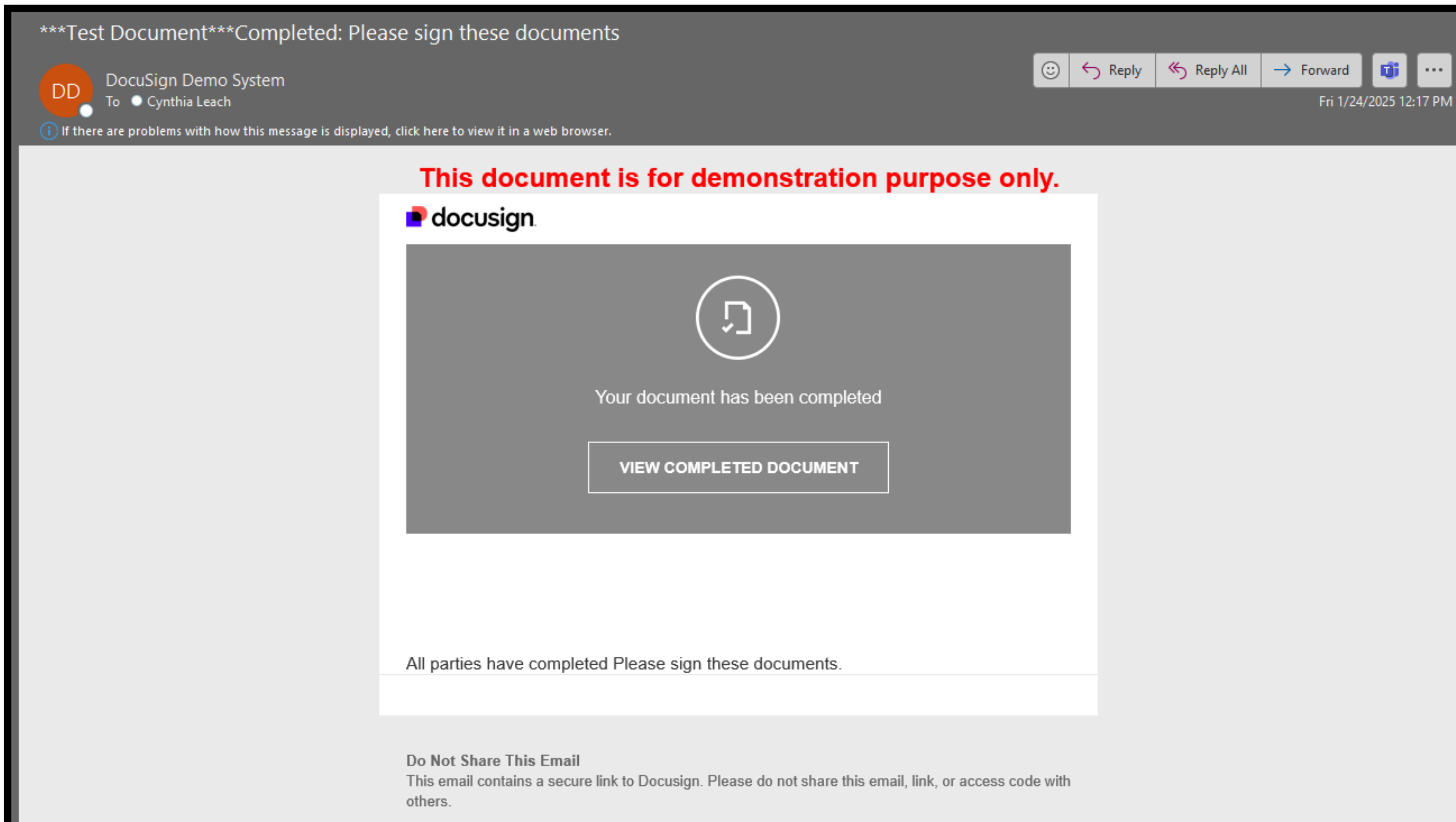
Complete Employer Packet – DocuSign

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

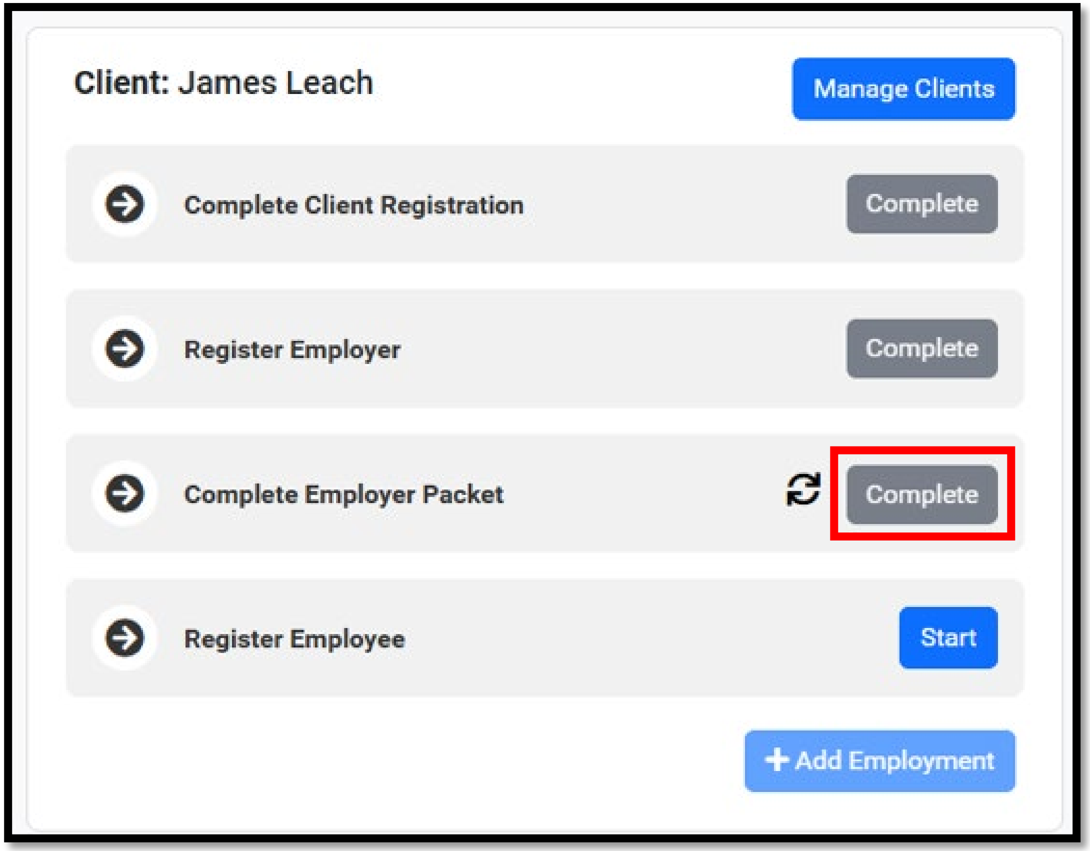


Complete Employer Packet

Please Note:

- The Employer Packet is marked **Pending** until it has been completed
- 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**

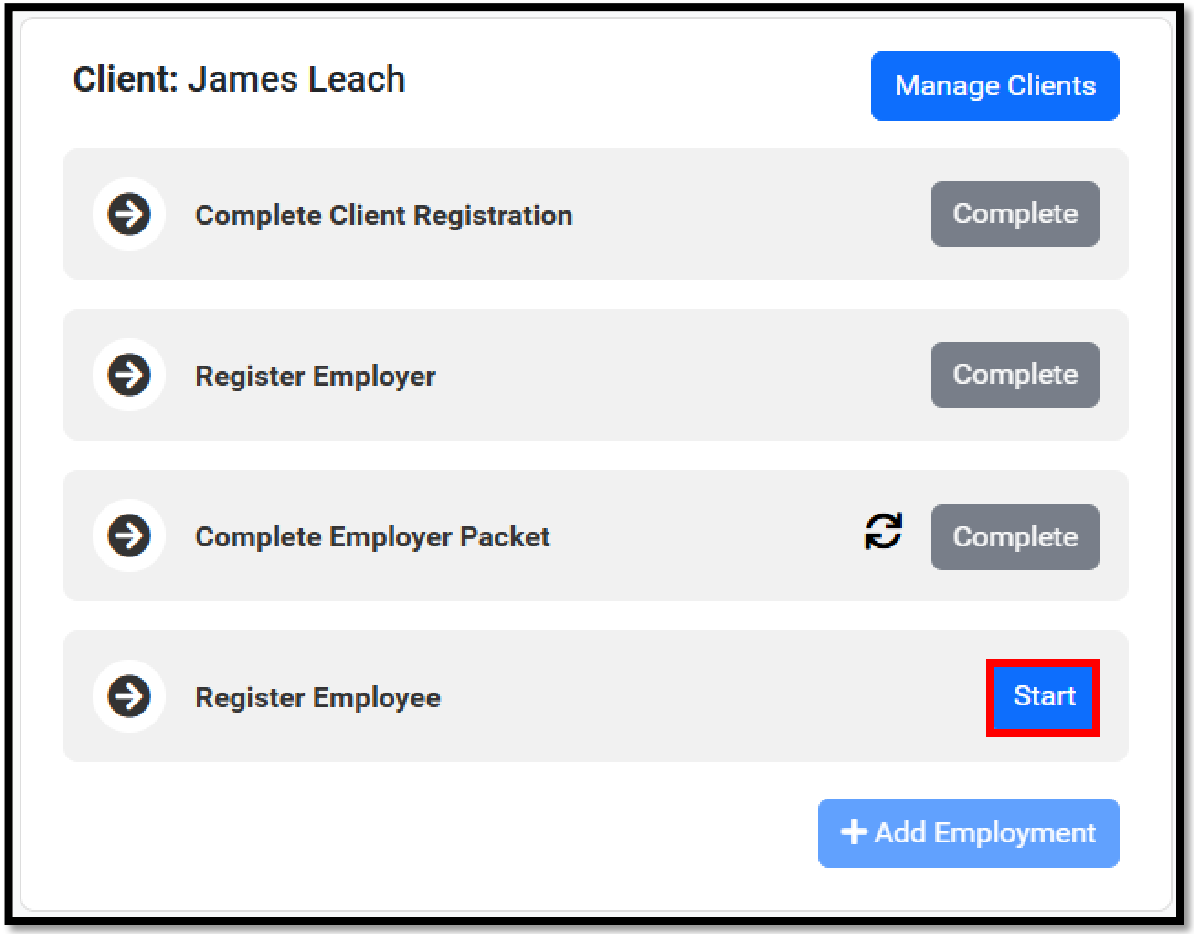


Register Employee

Employer completes this process

Register Employee

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



Register Employee

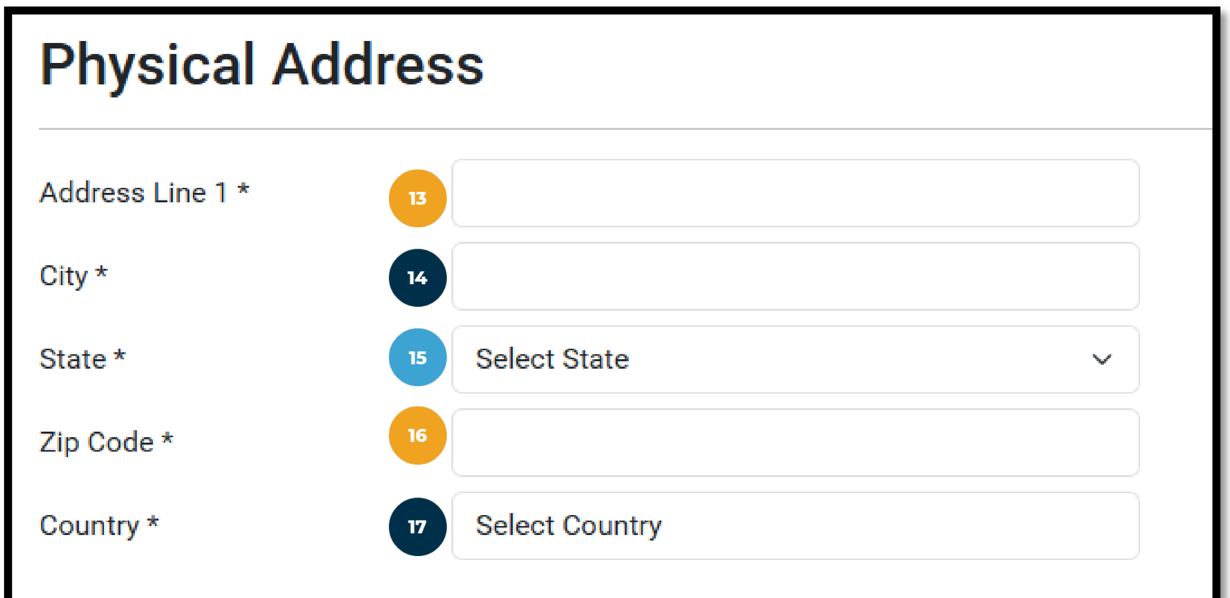
Complete the Register Employee fields:

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

Complete the Physical Address fields:

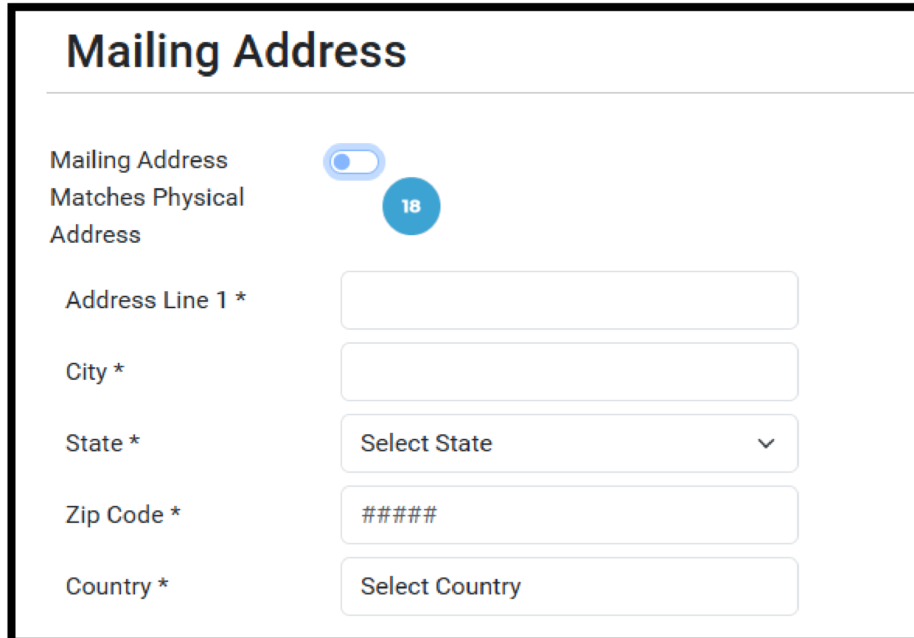
13. Address line 1 (required)
14. City (required)
15. State (required)
16. Zip Code (required)
17. Country (required)

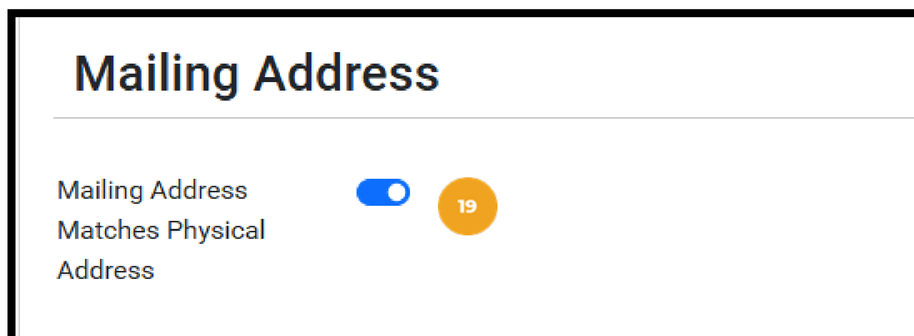


Register Employee

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



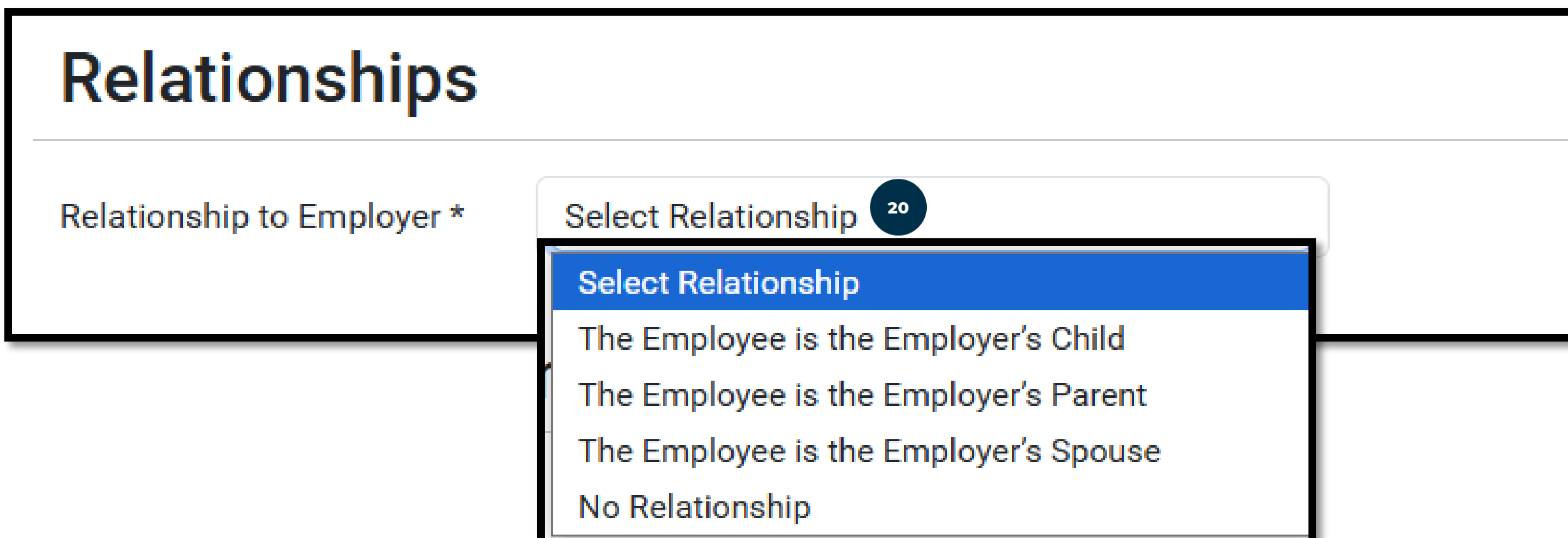


Register Employee

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.



Register Employee – Payment Information

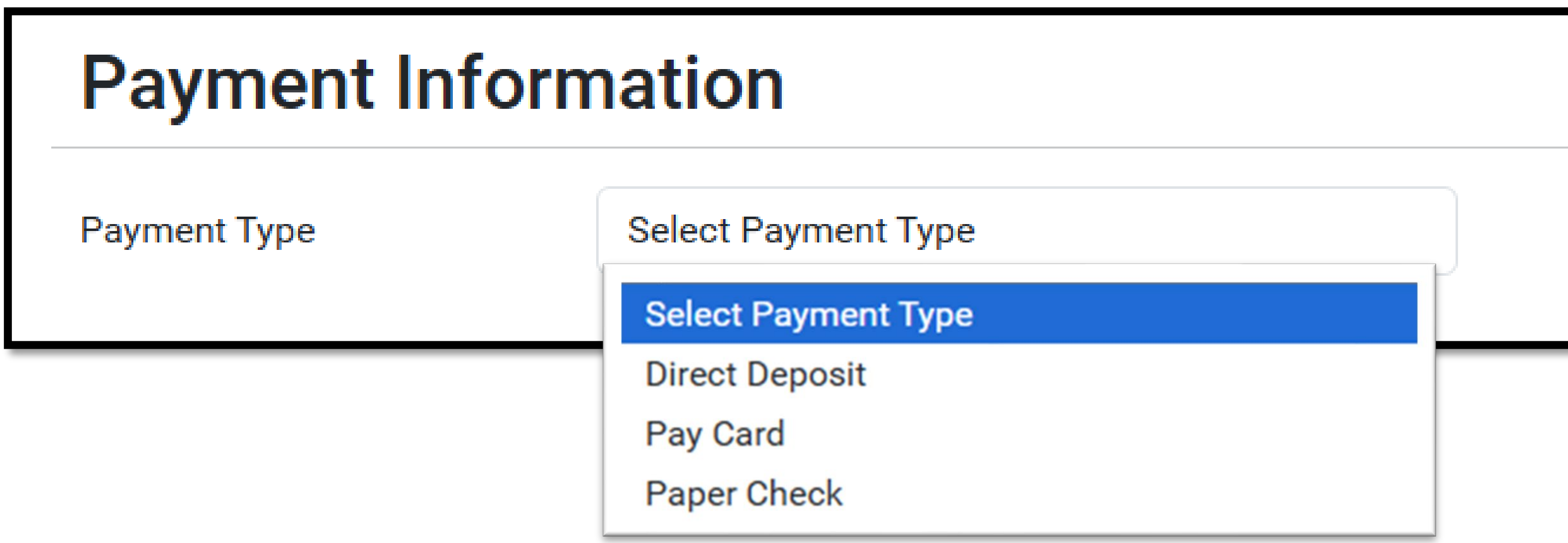
Employer completes this process and is optional.

Register Employee – Payment Information

Completely Optional

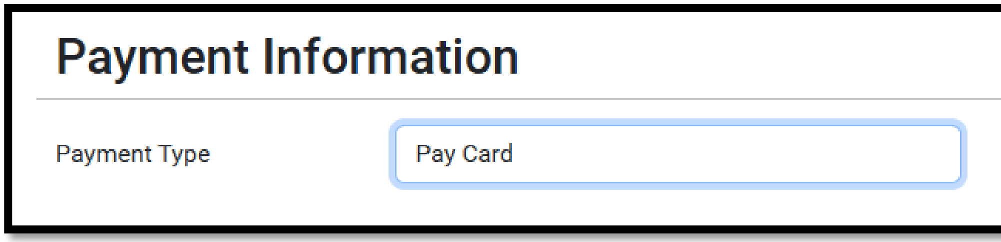
Payment Type options: Select one

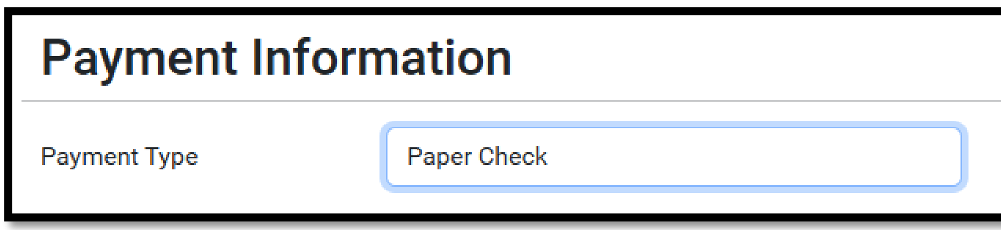
- Direct Deposit
- Pay Card
- Paper Check



Register Employee – Payment Information

If Pay Card or Paper Check is selected, no further information is needed.



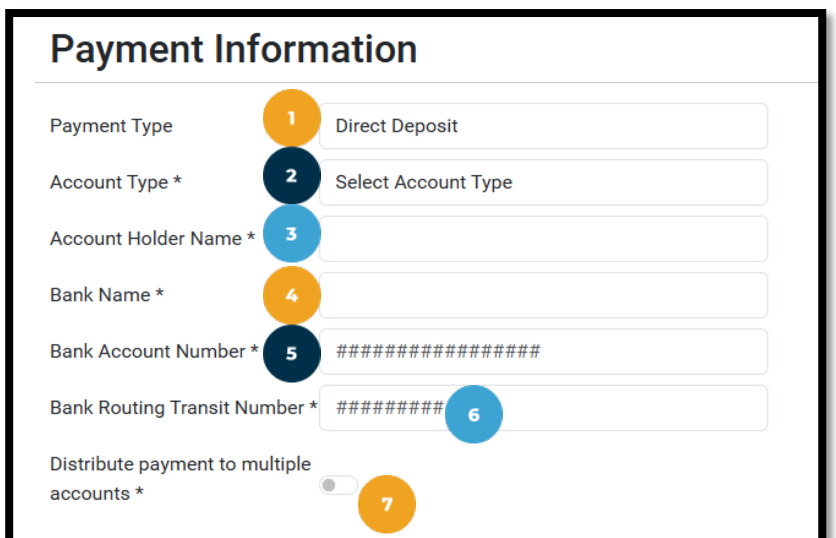


Click **Save** to finish registering the employee

Register Employee – Payment Information

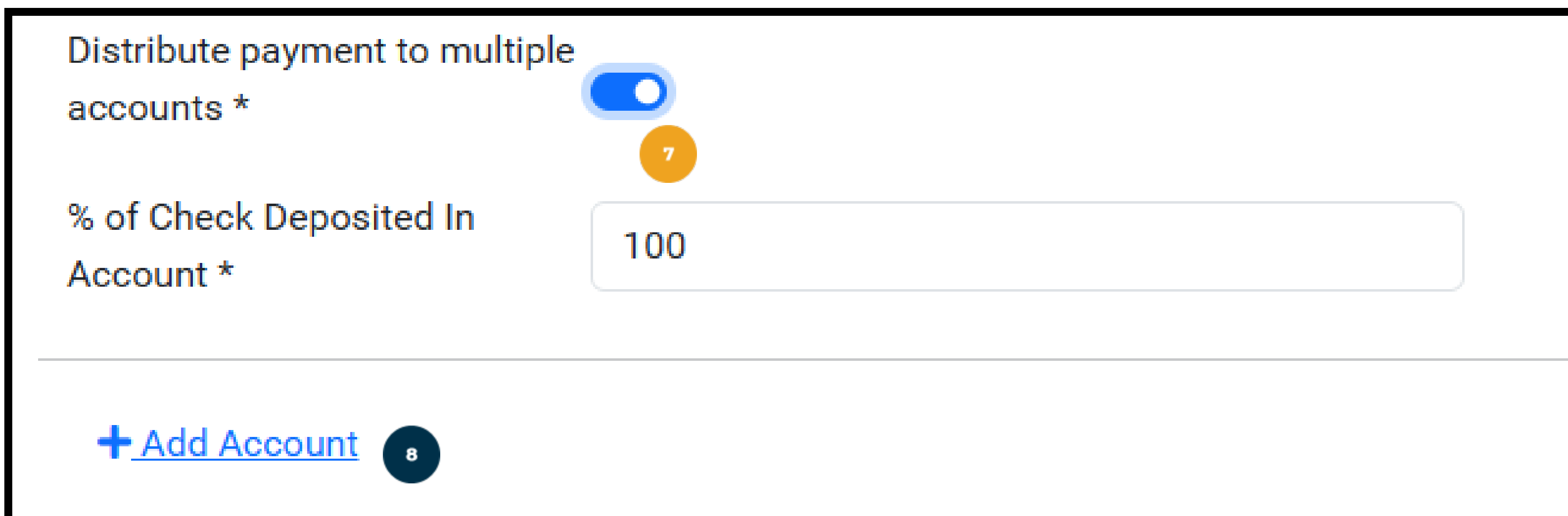
If Direct Deposit is selected, provide the following information:

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



Register Employee – Payment Information

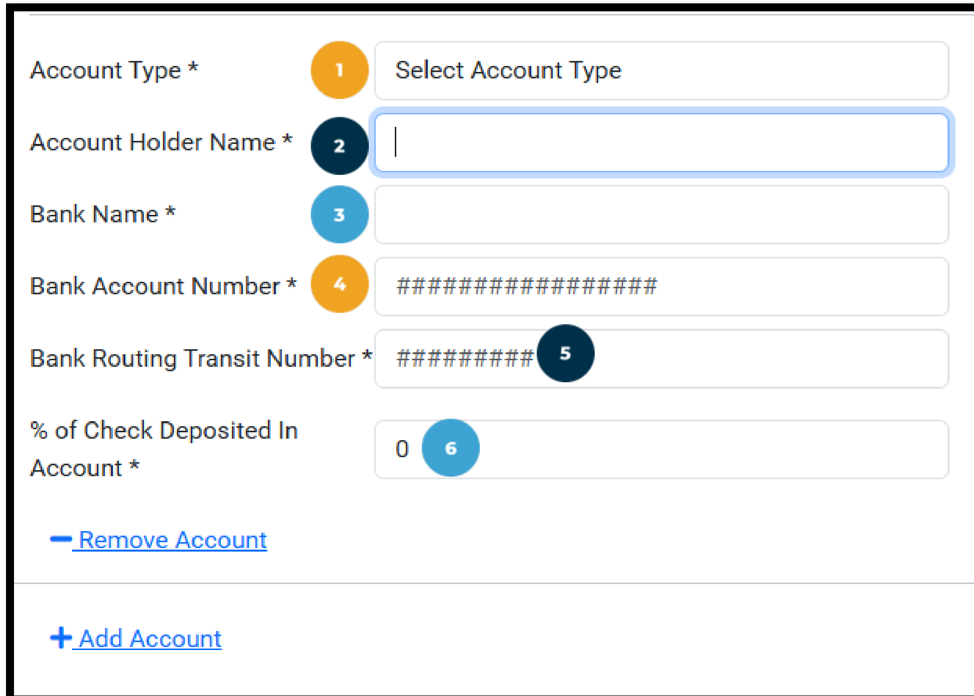
7. Distribute payment to multiple accounts (required):
    a. Toggle switch defaults to OFF, indicating all funds are deposited in one account.
    b. Optionally, turn the toggle switch ON to disperse funds to multiple accounts.
        i. % of Check Deposited in Account (required): Enter the percentage for this account
8. +Add Account (optional): See next slide



Register Employee – Payment Information

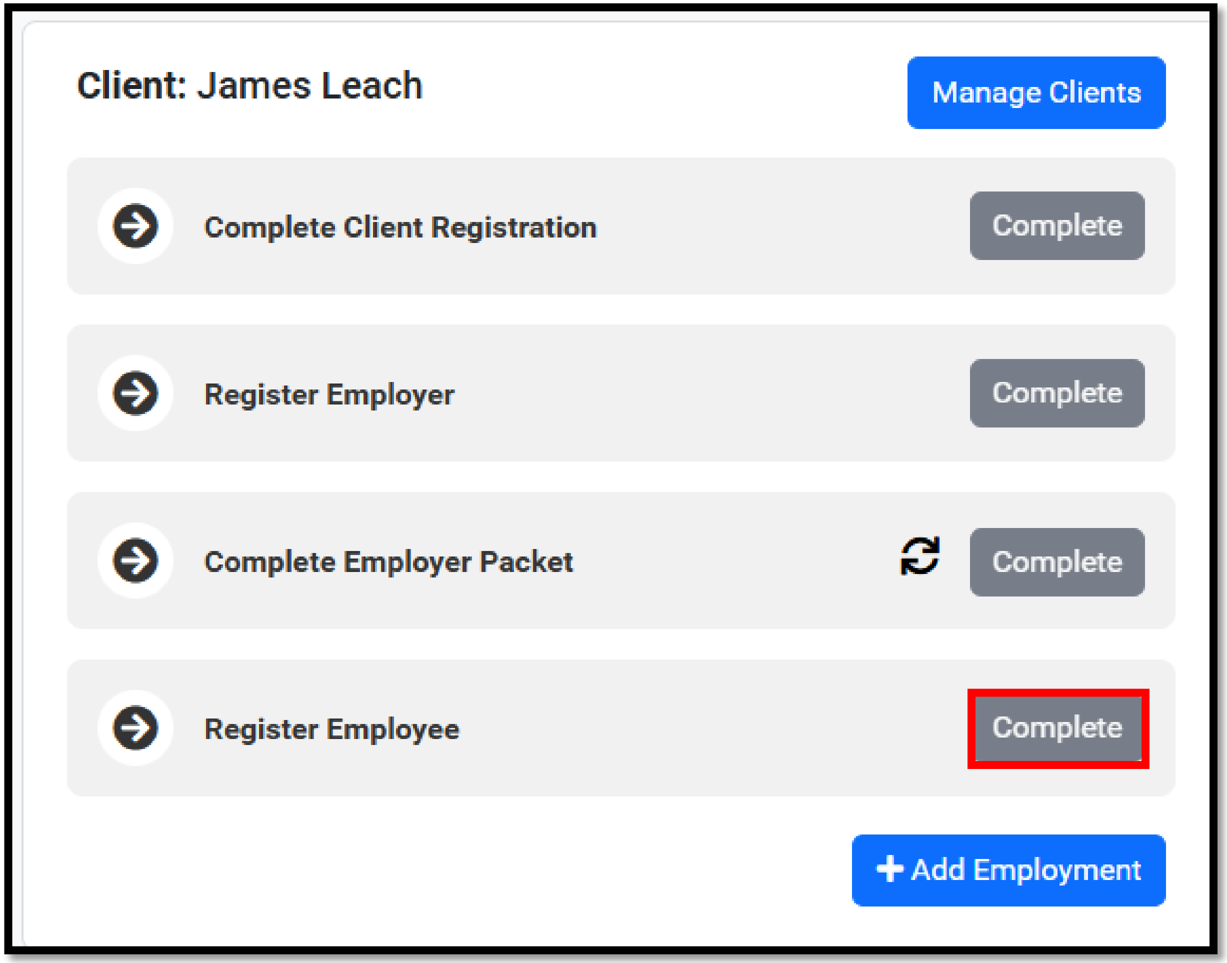
+ Add Account (optional):

- 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.



Register Employee

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

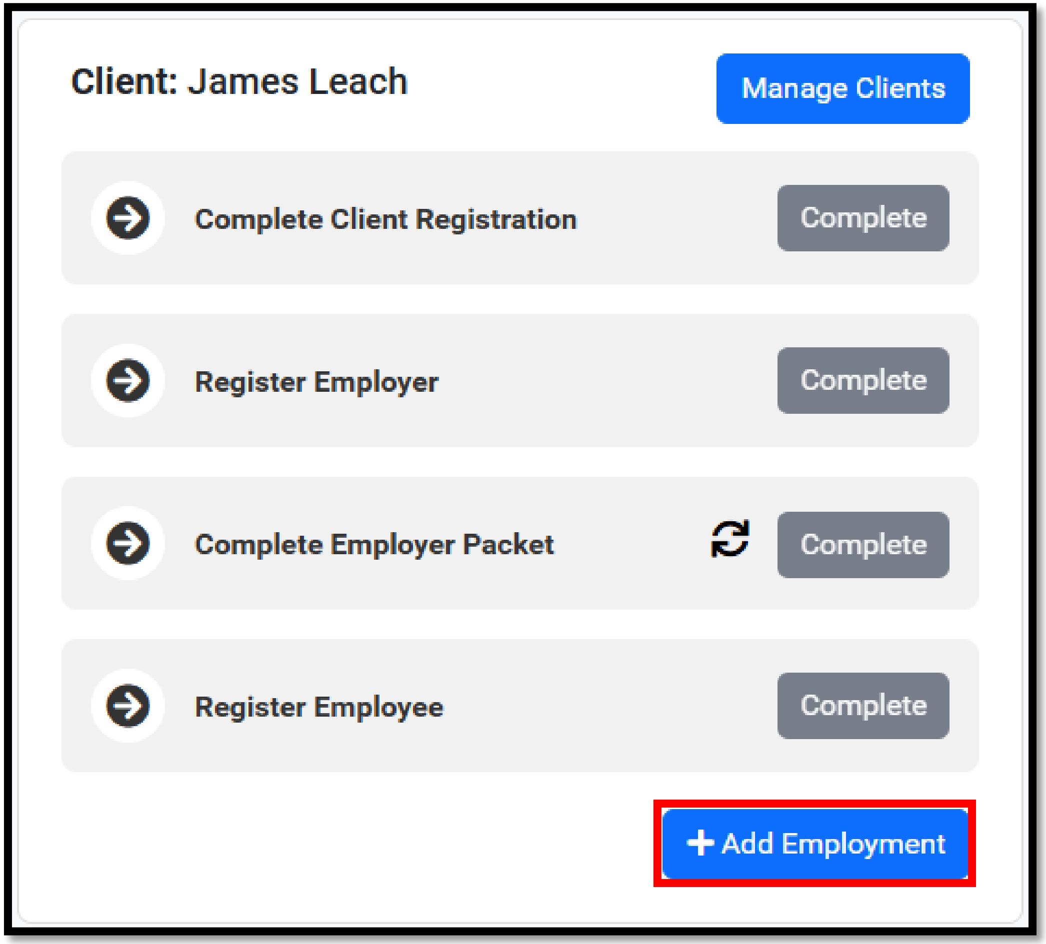


Add Employment

- 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

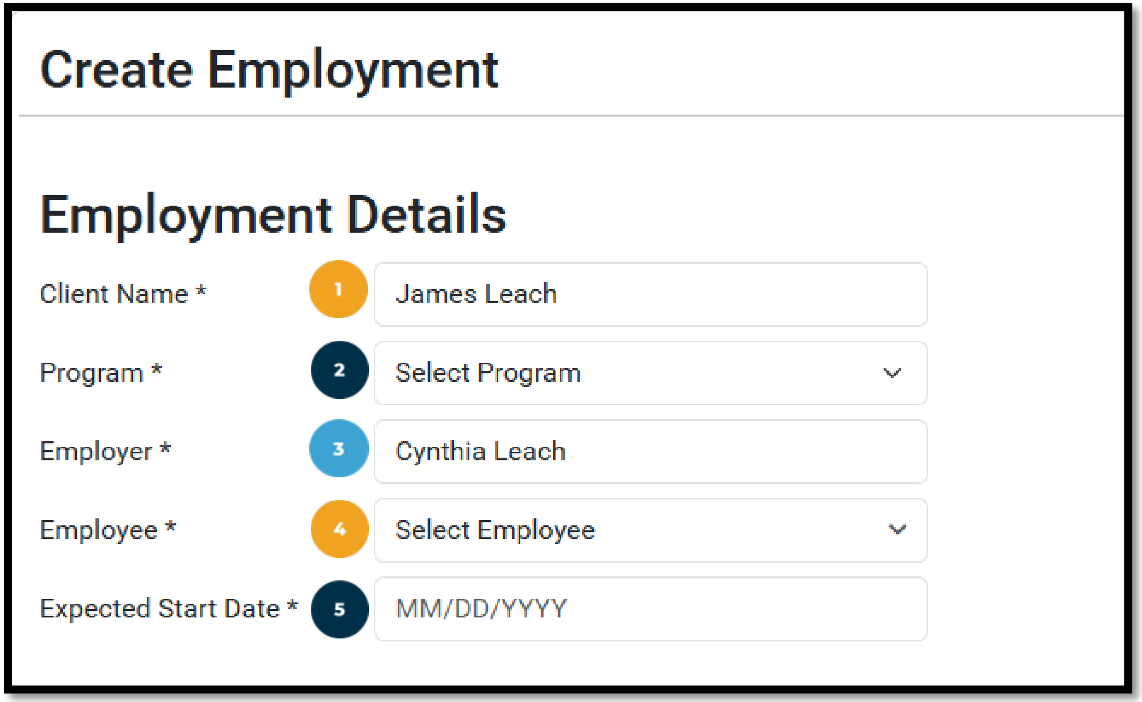
On the Enrollment Dashboard, click the **+Add Employment** button.



Add Employment

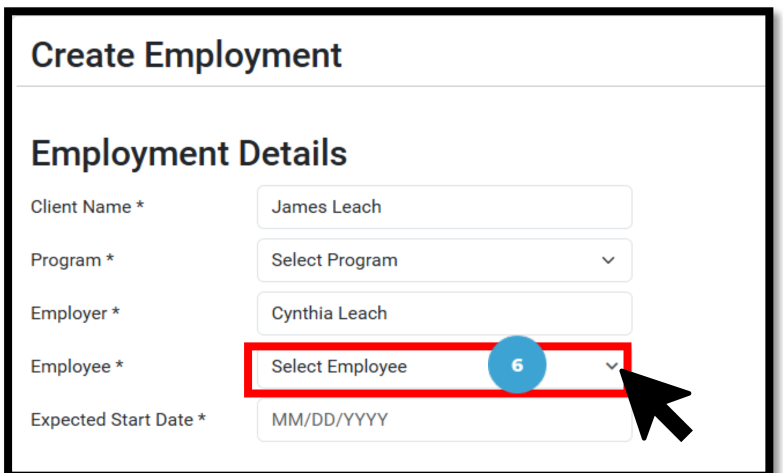
Complete Create Employment details:

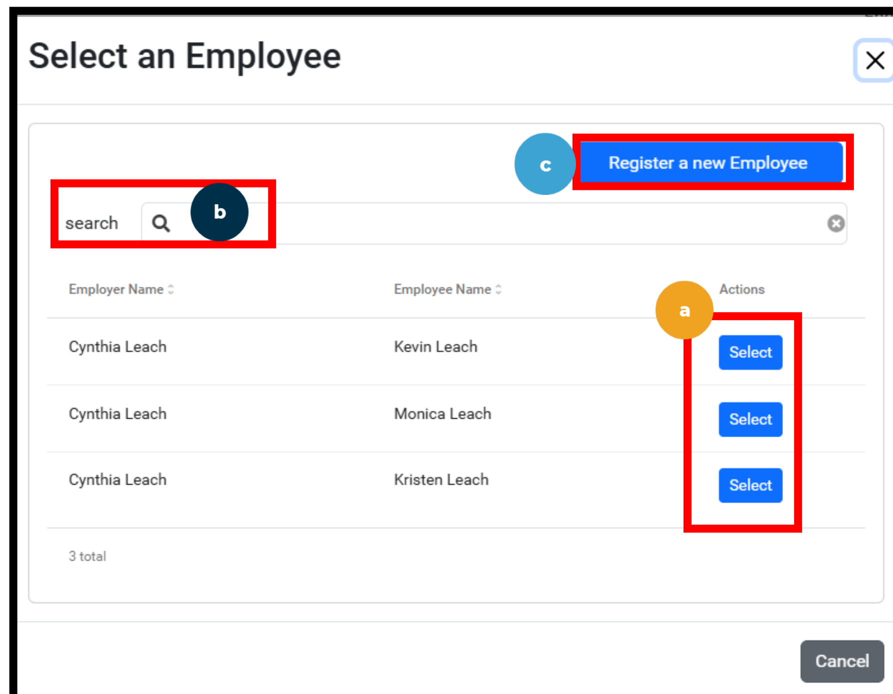
- Employment Details:
    1. Client Name (required): Auto-populates
    2. Program (required): Select the program in which the client participates
    3. Employer (required): Auto-populates
    4. Employee (required): **See next slide**
    5. Expected Start Date (required): **See next slides**



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





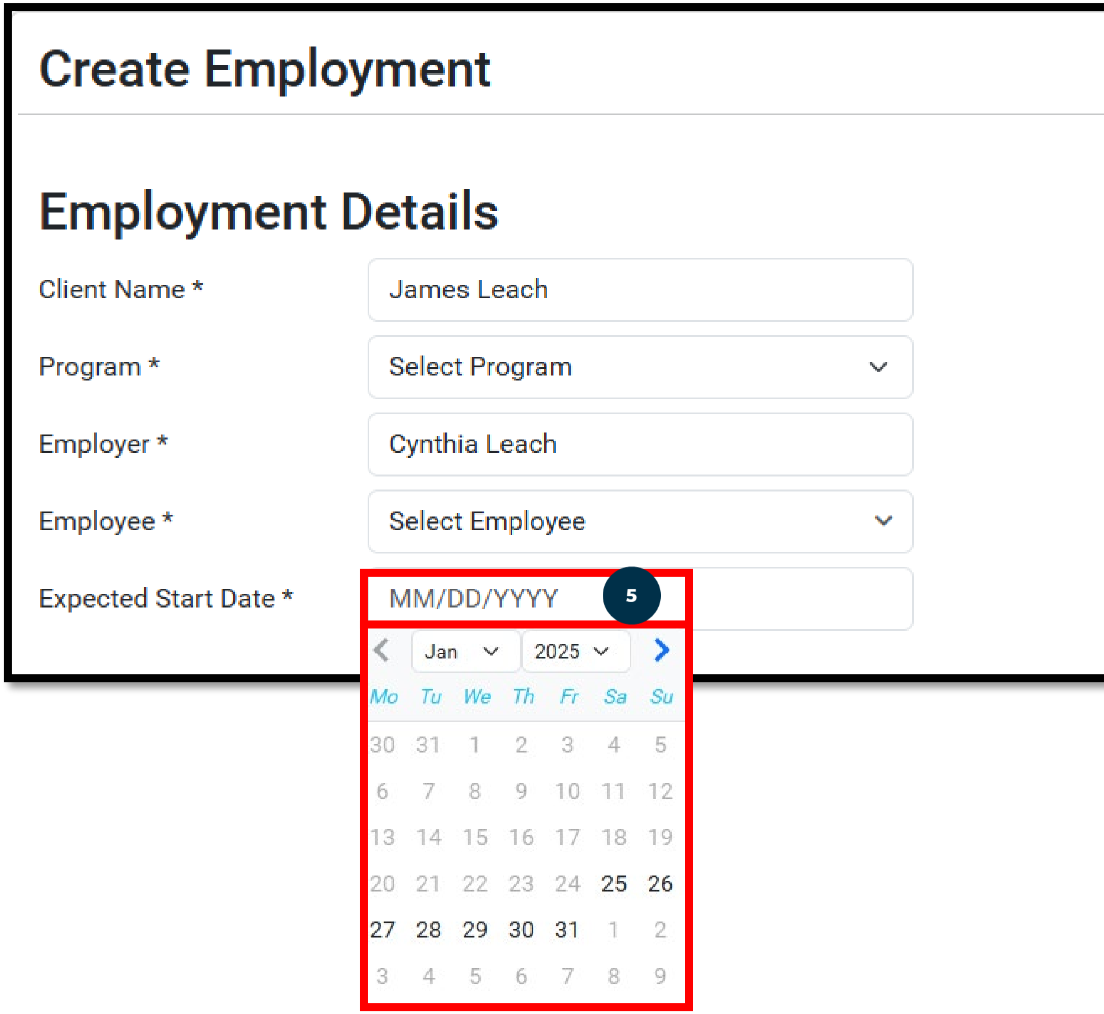
Add Employment

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



Add Employment

Complete the Tax Information details:

***Please note! Visit 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

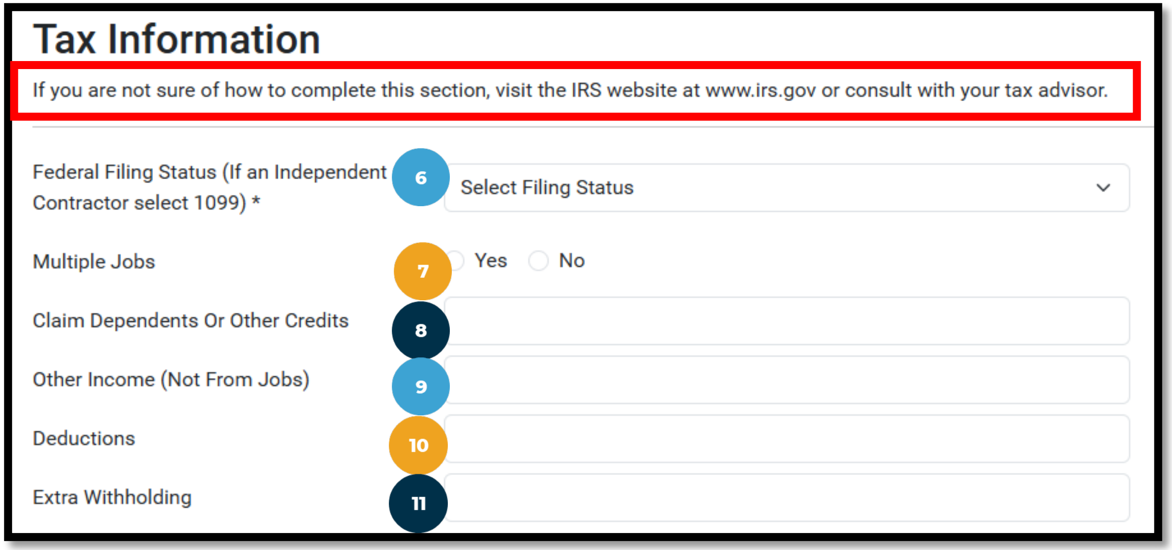
7. Multiple Jobs (optional): Select Yes or No

8. Claim Dependents or Other Credits (optional)

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

10. Deductions (optional)

11. Extra Withholding (optional)

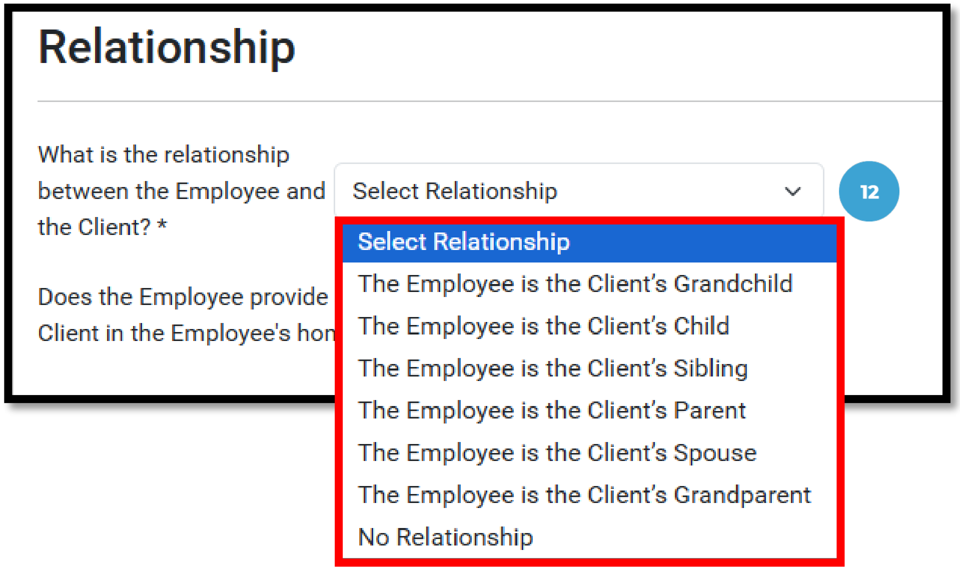


Add Employment

Complete Relationship details:

12. What is the relationship between the Employee and the Client? (required): Select one

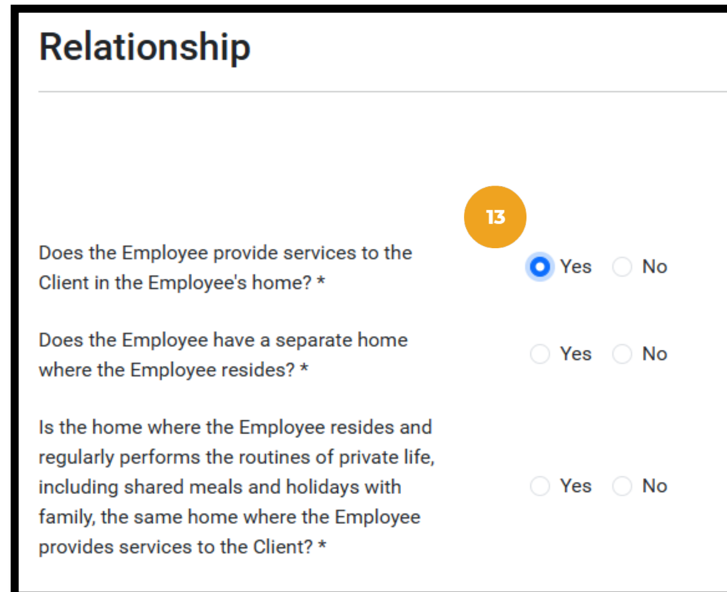
- The Employee is the Client’s Grandchild
- The Employee is the Client’s Child
- The Employee is the Client’s Sibling
- The Employee is the Client’s Parent
- The Employee is the Client’s Spouse
- The Employee is the Client’s Grandparent
- No Relationship



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.



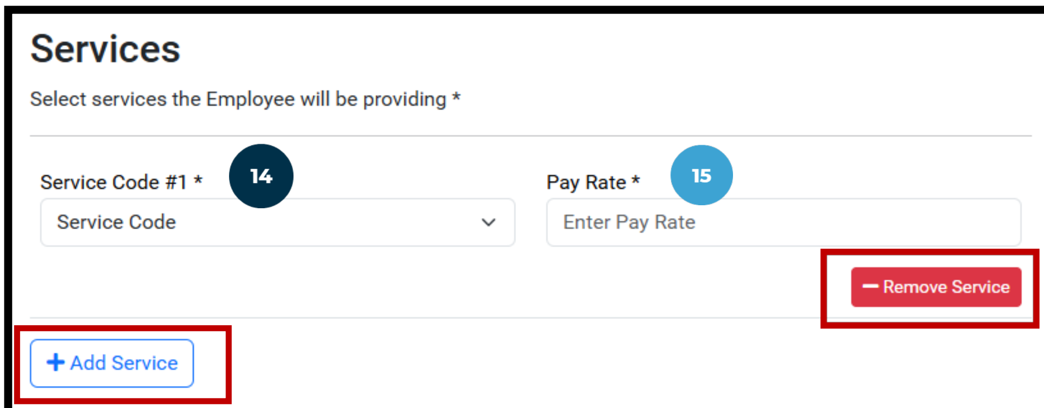
Add Employment

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



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

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

Send Employee Packet

Employer completes this process.

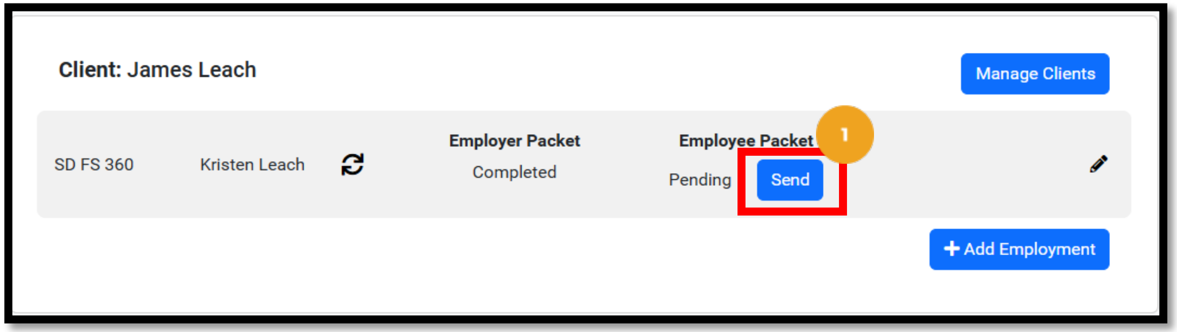
Send Employee Packet

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

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

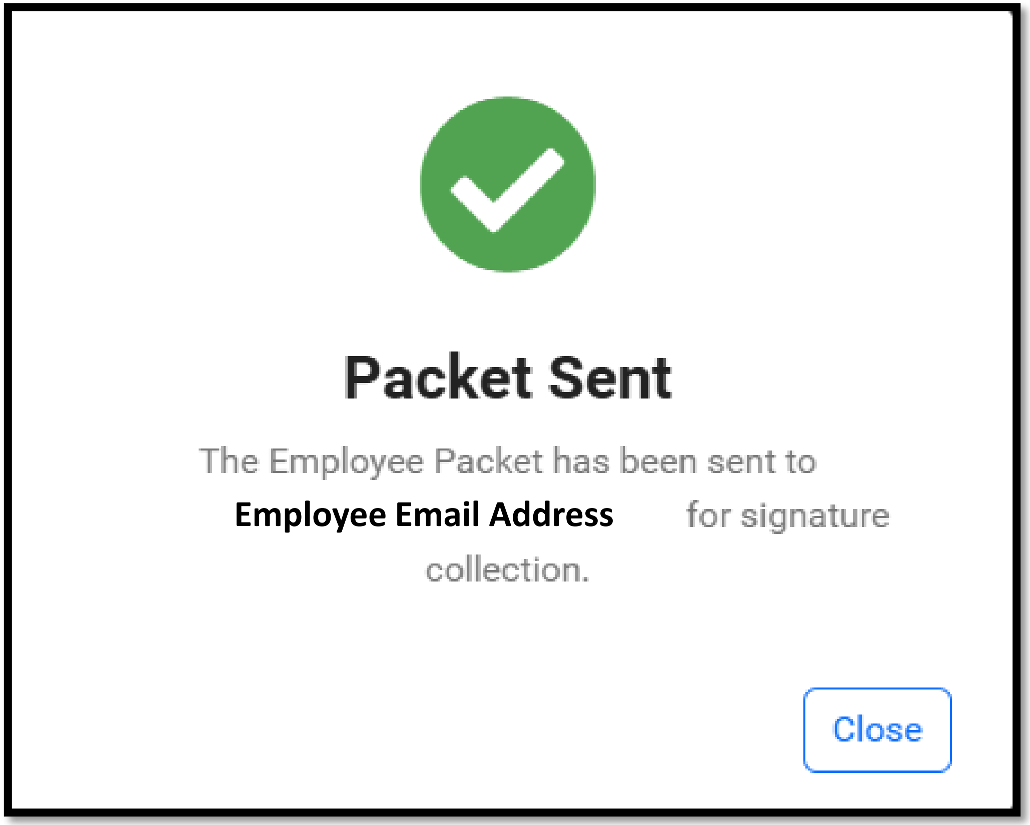
- **Employee Registration**
- **Add the Employment**

1. Click **Send** to send the packet to the employee



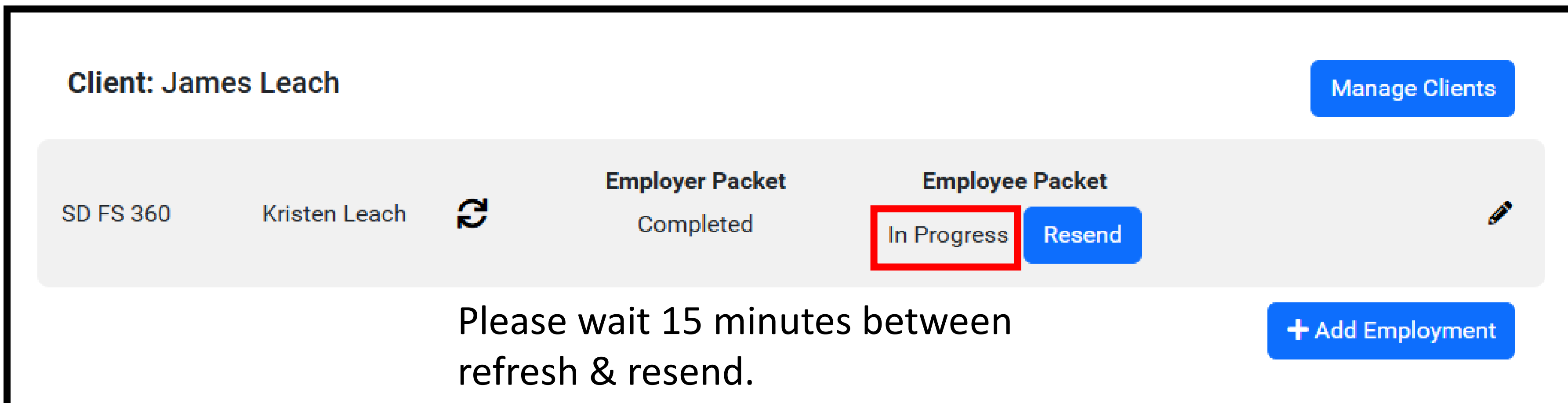
Send Employee Packet

- 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



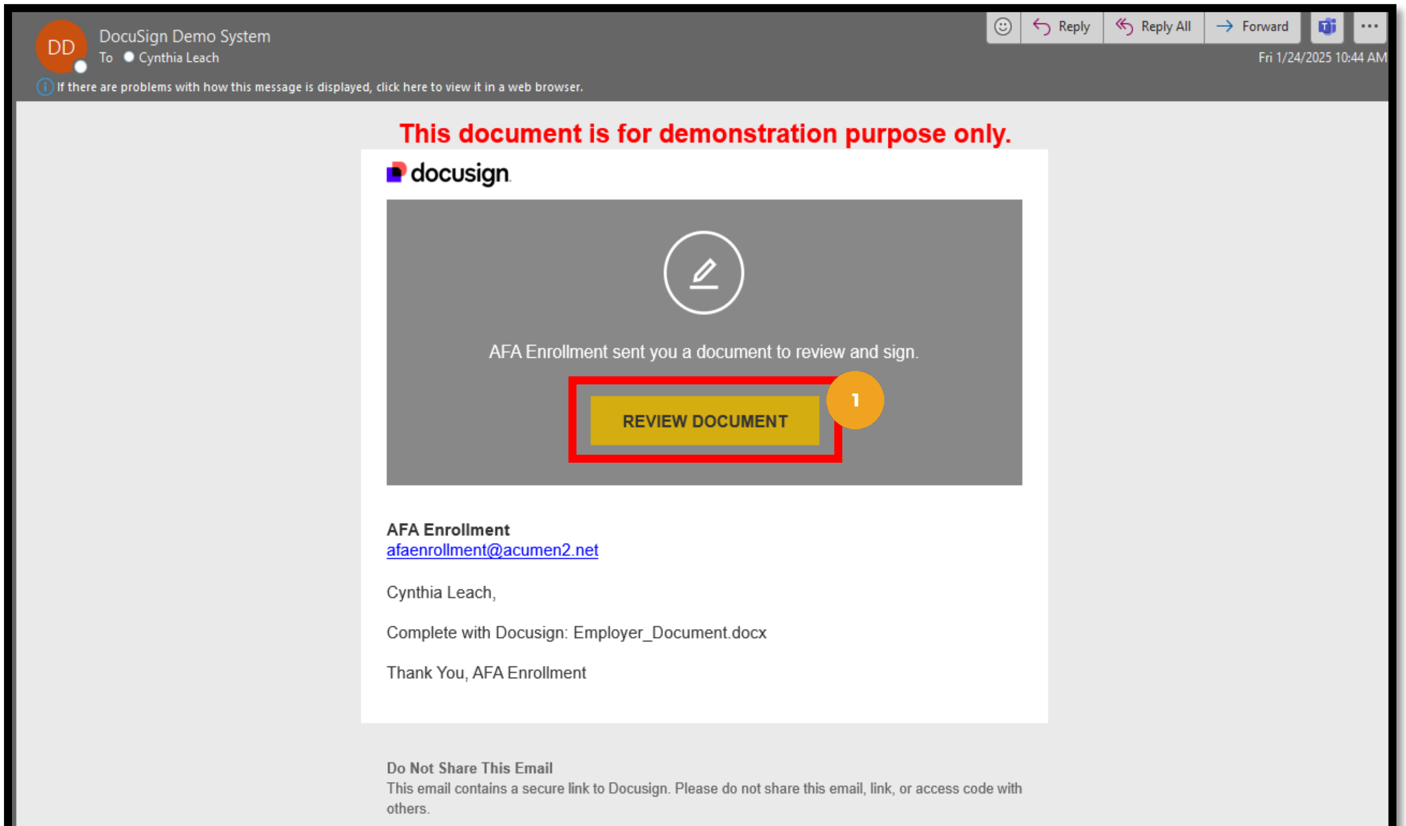
Complete Employee Packet

Employee completes

Complete Employee Packet – DocuSign

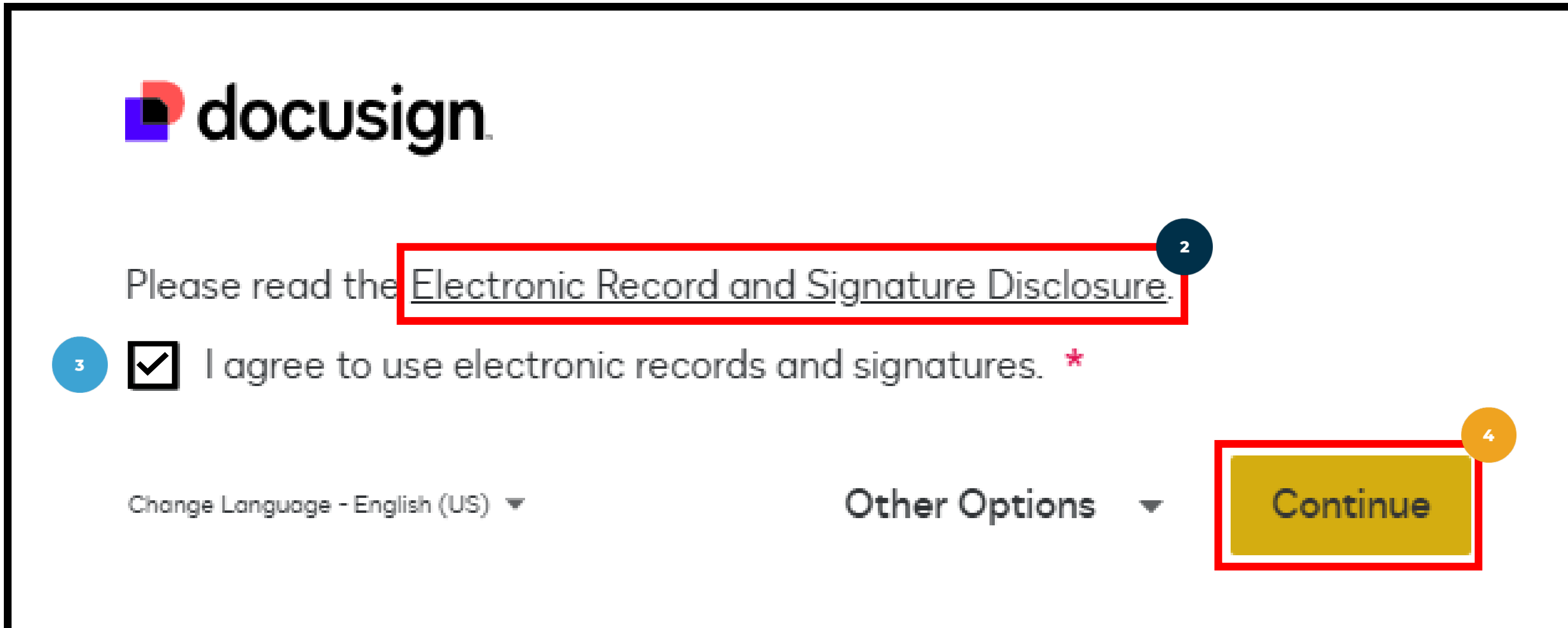
The packet arrives via an email from sender DocuSign. Check junk or spam folders if needed.

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



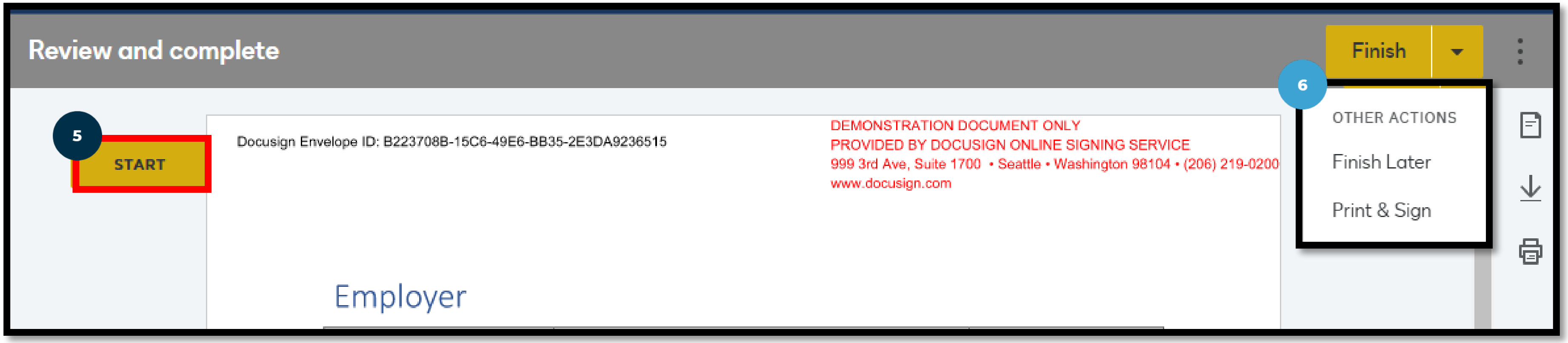
Complete Employee Packet – DocuSign

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



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: Amy Jo Smith

Name of Employer/ Representative (if applicable): Charles Lee Burns

Phone: (222) 222-2222 Email Address: reynaldaa+01@acumen2.net

Sign 10/31/2024

Participant or Employer/ Representative Signature Date

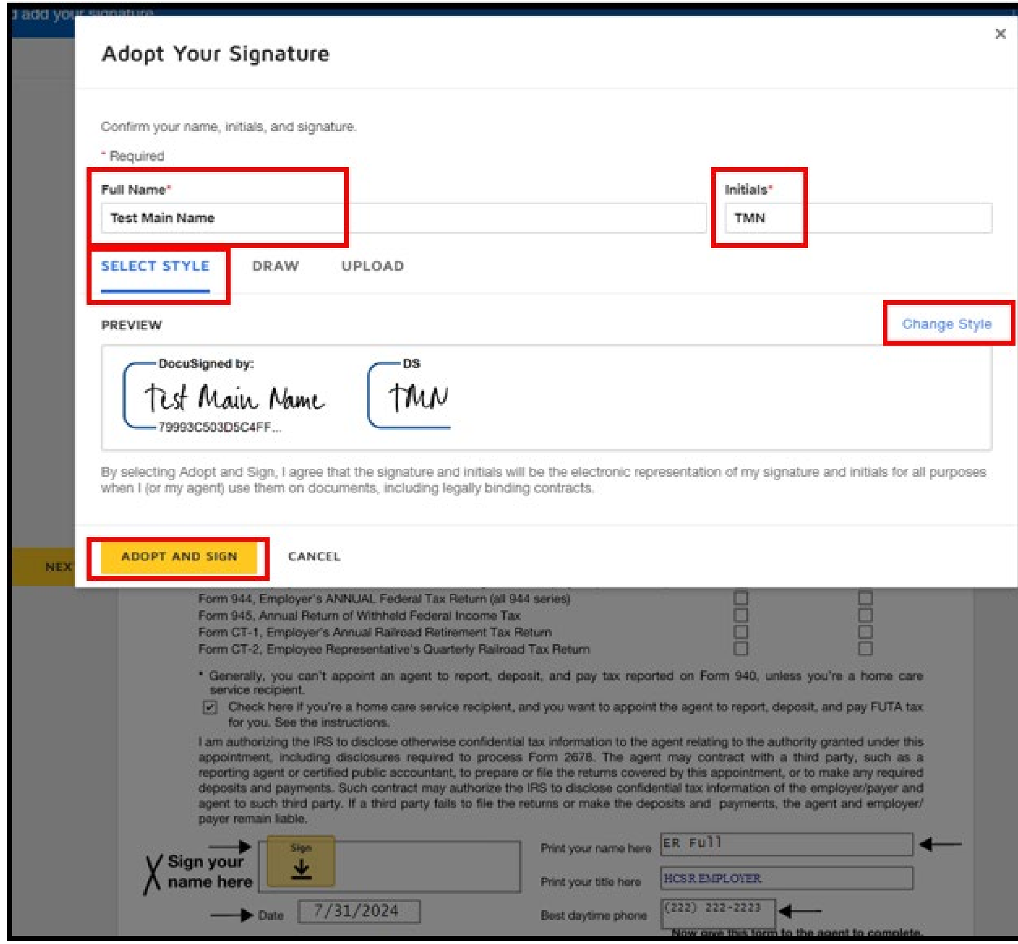
Complete Employee Packet – DocuSign

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

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 Employee Packet – DocuSign

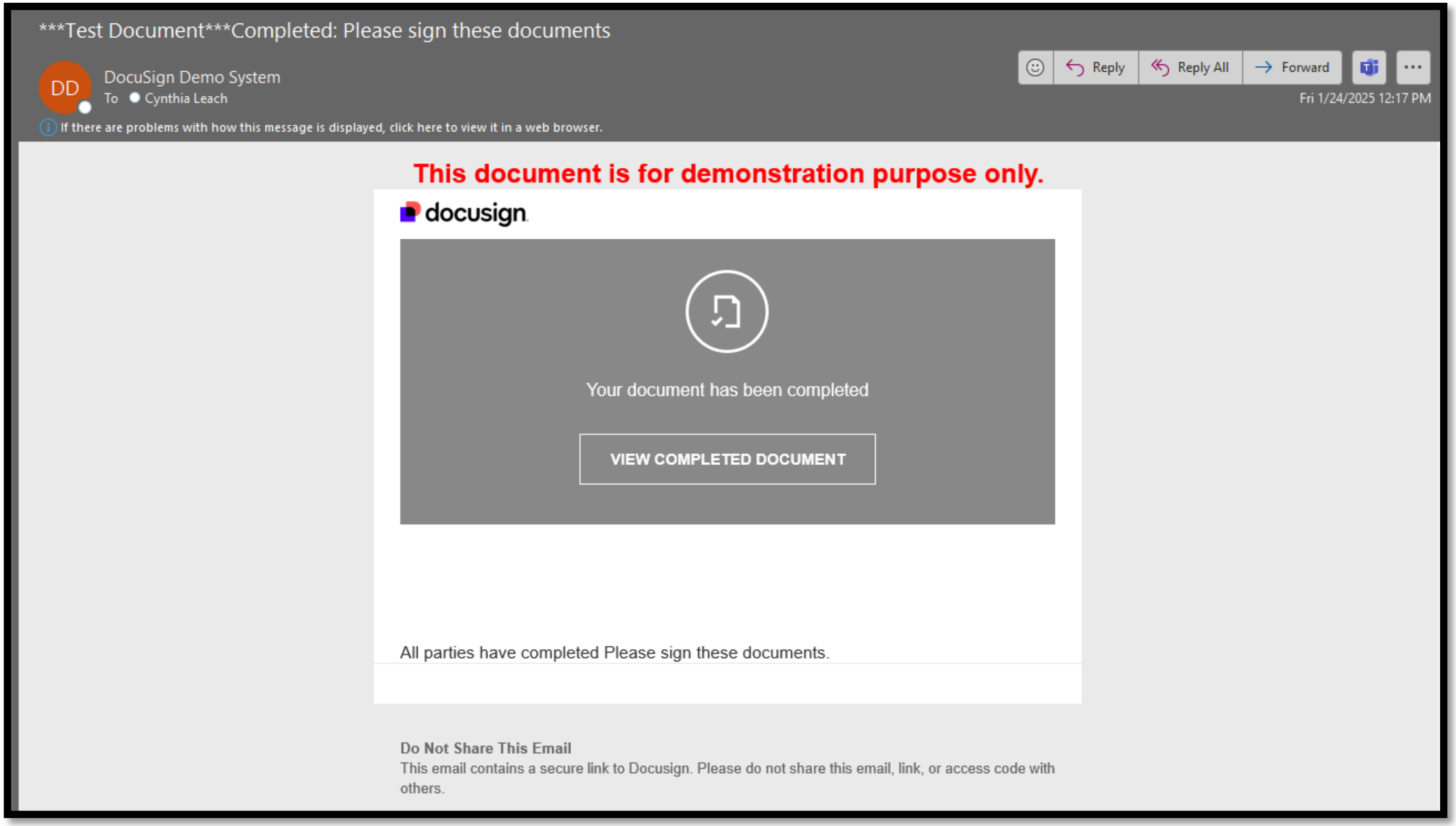
Congratulations!
The Employee packet is complete.

- 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 <u>after all required individuals have signed,</u> 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

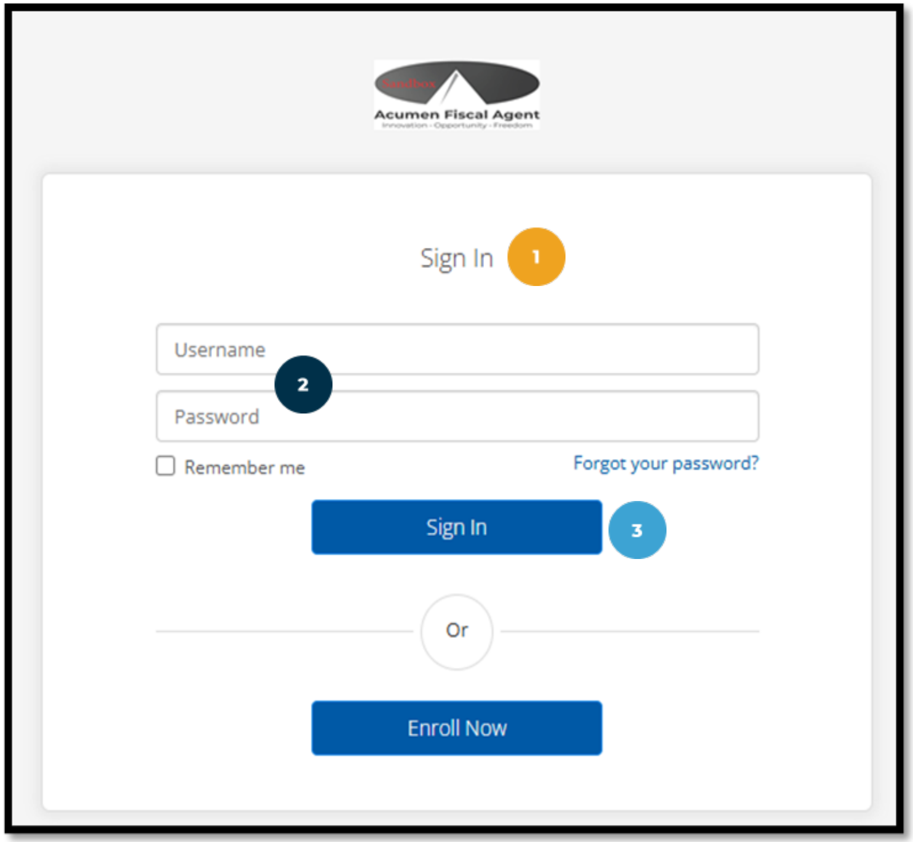


Enrollment Completed*

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

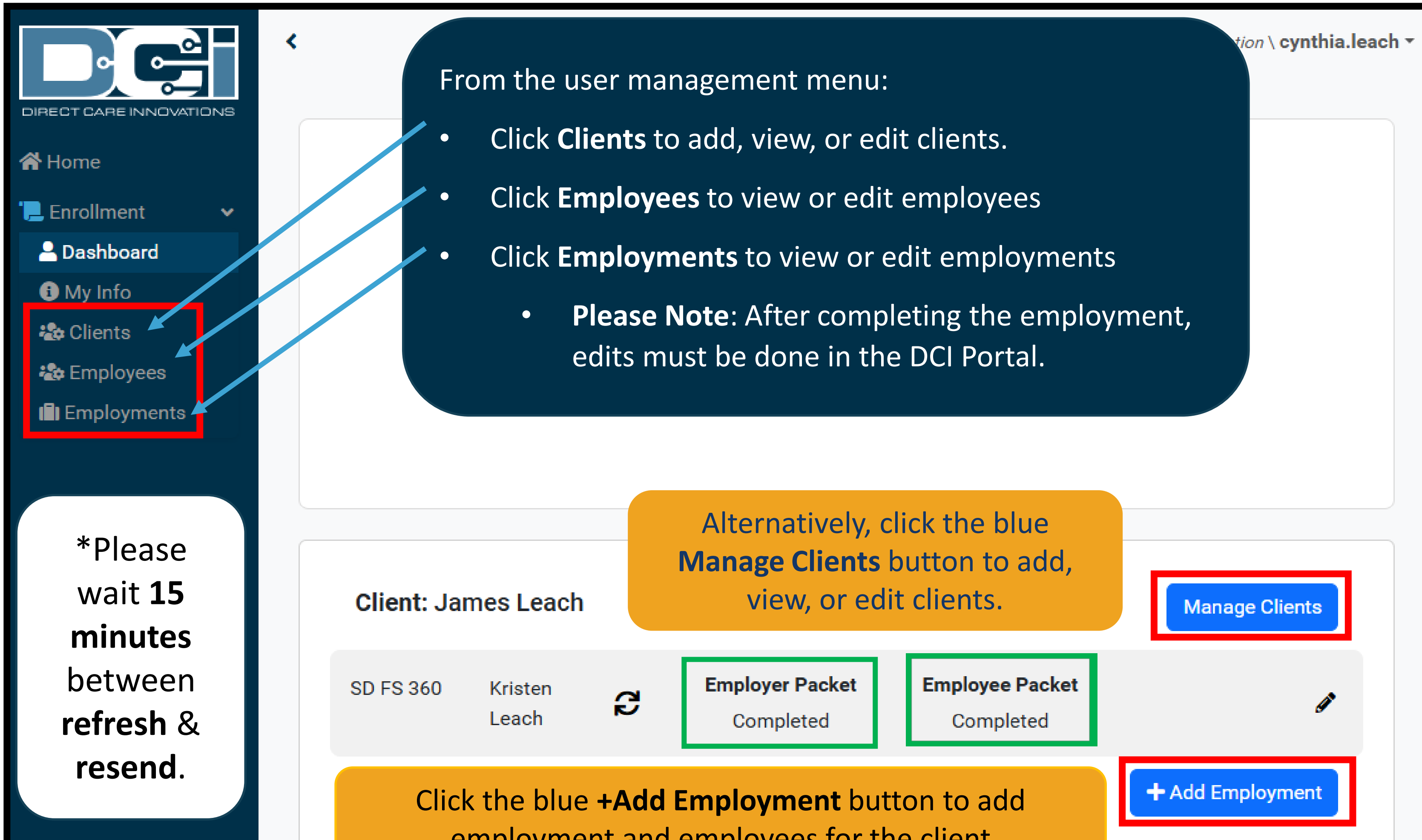
Logging into EES

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**



Enrollment Completed

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



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.

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

*Please wait **15 minutes** between **refresh** & **resend**.