

# Welcome!

## Acumen and AACOG VDC Veteran/Authorized Representative Town Hall



**Acumen Fiscal Agent**

Innovation • Opportunity • Freedom

# Introducing FMS & Acumen Services

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Development- VDC

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Midwest



## **Acumen Fiscal Agent**

Innovation • Opportunity • Freedom



# Why are we here today?

## Topics:

- Who is Acumen? (Intro to Acumen)
- Key Dates
- Roles and Responsibilities
- FAQ's
- What is EES
- What is DCI
- Questions and Answers

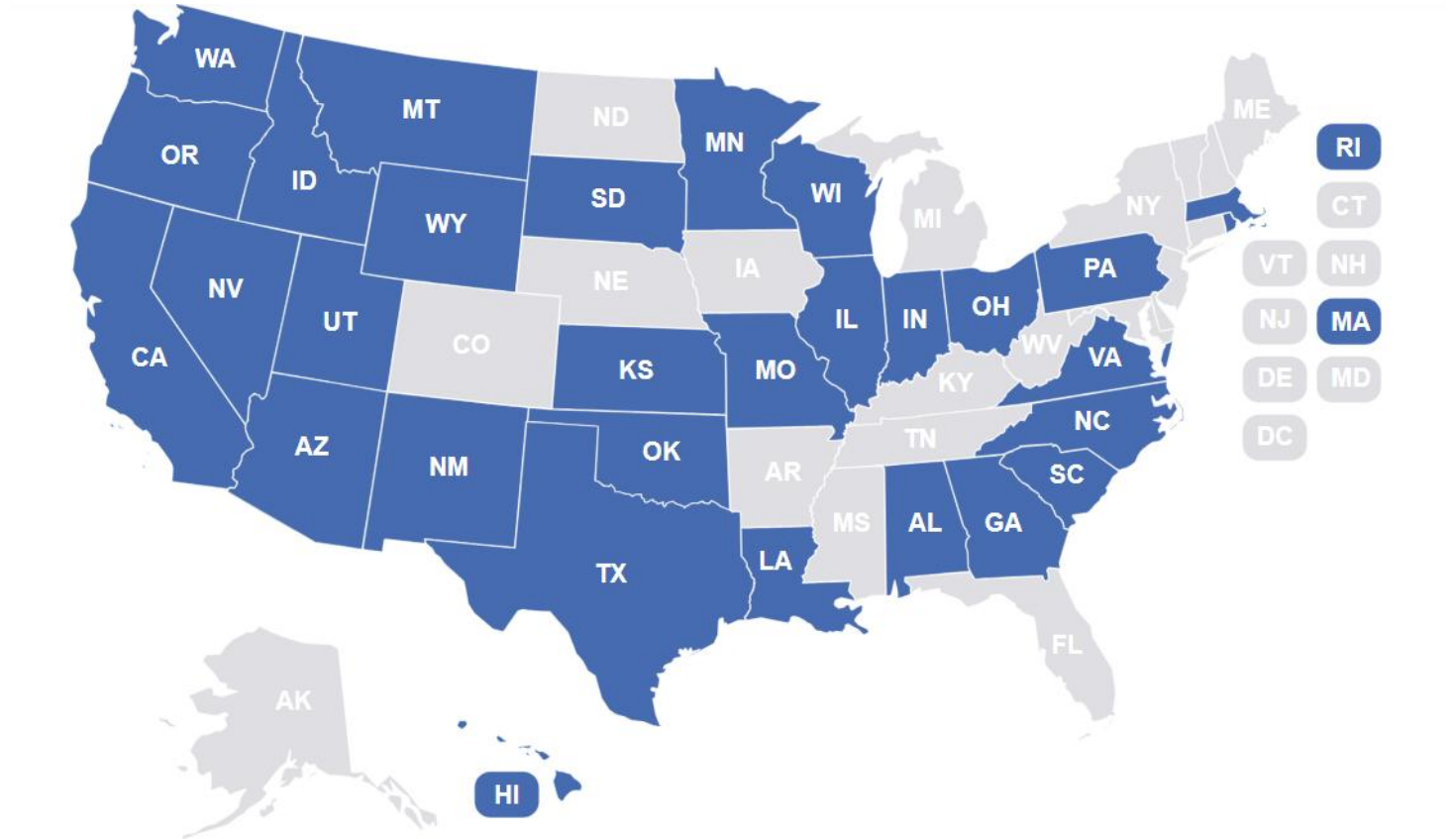
# What Is FMS?

- **Partners** in the self-direction service delivery model
  - **Experts** in tax laws governing employers and employees
  - **Trainers** to help self-directed employers to understand and fully utilize their service budget
  - **Payroll processors** for the hours worked and reported by self-directed employees
  - **Service agents** to answer questions and help resolve problems
  - **Data managers** for E.V.V. and any other program requirement
  - **Comrades** for case managers to lean on for support with self-direction
- FMS agencies are an intermediary resource to make self-direction easier and less intimidating!

# Intro to Acumen

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- Acumen was founded in 1995 and has supported thousands of families with FMS in self-direction.
- Currently serving programs in 30 states.
- In the beginning of self-direction, things were simple and not a lot of oversight.
- Over time, various rules have well-respected and new requirements have been added.
- Acumen has adapted to all changes and has become a seasoned and well-respected FMS nationwide.





## OUR MISSION

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





## The Five Critical Links

1. The VA (The funding source)
2. Case managers (AACOG)
3. Employers (Veterans and Authorized Reps)
4. Self-directed employees (Hired to serve recipients)
5. The FMS/Acumen (US)

# Roles and Responsibilities



## Case Manager

Prepares the Spending Plan > VA Approval  
> Monitors Services

## Participant Employer

Enrolls as an ER > Hires EEs > Approves Time > Monitors Budget

## Acumen Fiscal Agent

Onboards ER > Onboards EEs > Processes Payroll > Invoices AACOG > Pays Taxes



## Case Manager's Role

- Conducts assessments to establish needs
- Assesses appropriateness for self-directed services
- Explains services available to an eligible person
- Supports creation of spending plan for approval by the VA
- Monitors and follows up on services received by the Veteran

\*Participates in Quarterly meetings with participants/ERs and Acumen

## Participant Employer's Role

- Completes all necessary forms for enrollment
- Hires and fires employees
- Schedules and sets wages for employees within program guidelines and budget
- Trains employees to provide approved services
- Provides a safe work environment
- Ensures that all time submissions are complete, accurate and approved by both employer and employee
- Keeps important records on each employee and keeps them confidential
- Reviews account statements from Acumen Fiscal Agent and ensures they are accurate and complete
- Manages the budget/authorization
- Follows all relevant laws and rules on employment

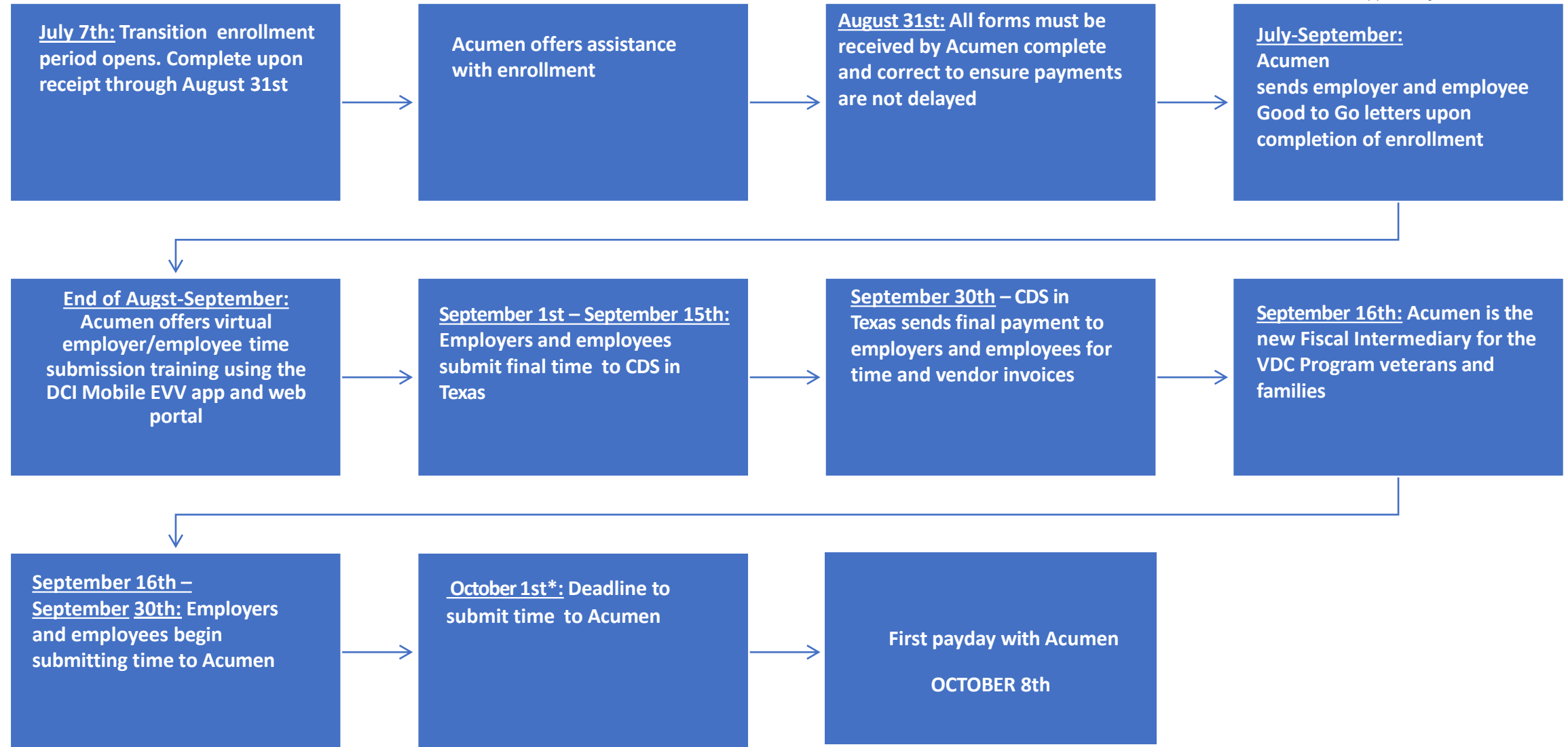
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# Acumen's Role

- Sets up employer in the payroll system
- Processes all employee paperwork
- Sets up all employees in the payroll system and provides training and resources
- Processes time submissions in accordance with the available Spending Plan
- Withholds and pays all required taxes
- Provides reports to the employer, CM and program staff as requested
- Answers questions about payroll processes
- Ensures compliance with other program rules

\*Participates in Quarterly meetings with participants/ERs and Acumen

# Enrollment & Transition Timeline





## TEXAS AACOG VDC PAYMENT SCHEDULE Effective September 16, 2025

Please share this schedule with your employees, and keep a copy in a safe place for easy reference. To ensure that your employees and/or service providers are always paid on time, please approve all time and payment requests by the due date, **even if it falls on a weekend or holiday**. These dates are strictly enforced and time or payment requests received after that date will be processed in the following payment period.

To help ensure that your submission gets to our offices by the due date, please enter and approve all time entry through DCI. Be sure to have all hours entered and approved by the "Submissions Due NO Later Than" date. To access DCI go to:

<https://acumen.dcisoftware.com/>

"Payment Period Start/End Date" is the first/last day of services in the pay period.

Payment Period Start Date	Payment Period End Date	Submissions Due NO Later Than	Direct Deposit/Check Date
9/16/2025	9/30/2025	Wed, 10/01/25	Wed, 10/08/25
10/1/2025	10/15/2025	Thu, 10/16/25	Thu, 10/23/25
10/16/2025	10/31/2025	Sat, 11/01/25	Fri, 11/07/25
11/1/2025	11/15/2025	Sun, 11/16/25	Fri, 11/21/25
11/16/2025	11/30/2025	Mon, 12/01/25	Mon, 12/08/25
12/1/2025	12/15/2025	Tue, 12/16/25	Tue, 12/23/25
12/16/2025	12/31/2025	Thu, 01/01/26	Thu, 01/08/26
1/1/2026	1/15/2026	Fri, 01/16/26	Fri, 01/23/26
1/16/2026	1/31/2026	Sun, 02/01/26	Fri, 02/06/26
2/1/2026	2/15/2026	Mon, 02/16/26	Mon, 02/23/26
2/16/2026	2/28/2026	Sun, 03/01/26	Fri, 03/06/26
3/1/2026	3/15/2026	Mon, 03/16/26	Mon, 03/23/26
3/16/2026	3/31/2026	Wed, 04/01/26	Wed, 04/08/26
4/1/2026	4/15/2026	Thu, 04/16/26	Thu, 04/23/26
4/16/2026	4/30/2026	Fri, 05/01/26	Fri, 05/08/26

"Direct Deposit/Check Date" shows the date that payment will be issued. For those payees that have selected direct deposit, this is also the date that funds will be available in their accounts.

"Submissions Due NO Later Than" is the last date that your DCI approvals can be entered, for the pay period.



## "WHERE'S MY PAYCHECK??"

When a participant employer or one of their employees is under the impression that a paycheck is missing or shorted hours, it's important to walk through a series of questions to determine if a phone call to their Acumen Agent is in order.

### 1. Check the status of the employee's shift reports (entries) in DCI.

- "Open" means the employee used the DCI mobile app to clock in, but has not yet clocked out to end the shift. Open entries cannot be paid until closed, corrected (if applicable) and approved.
- "Pending" means the entry has been created but it has not yet been system-approved by DCI (or manually approved by the employer). **Only "Approved" entries can be processed for payment.**
- "Approved" means the DCI system has auto-approved the E.V.V.-compliant shift entry OR the employer has manually approved the non-compliant entry for payment, but the Acumen Payroll Department has not processed the entry yet.
  - If the entry required manual employer approval but the approval occurred later than the normal time submission deadline, the entry will not be processed until the following pay period.
- "Processed" means the entry is still moving through payroll and has not yet been paid.
- "Paid" means a paycheck was (or will be) issued on the payday that corresponds with the date the employer approved the entries.
- "Rejected" means either the employer, the employee or the DCI system rejected the entry and it will not be paid.
- Any other status, please contact the assigned Acumen Agent for more information.

### 2. The shift entries are showing "Paid" but the paycheck has not been received/deposited. Review the Payment Schedule and ask: Has the payday occurred yet?

- If yes, the expected payday has occurred:
  - For paper paychecks, allow at least 5 business days for USPS mail delivery.
    - If more than 5 business days have passed, please contact the assigned Acumen Agent to discuss Stop Pay and Reissue options.
  - For direct deposit or pay card, if funds are not showing in the account please contact the assigned Acumen Agent as soon as possible.
- If no, the expected payday has NOT occurred yet.
  - Sit tight – the paycheck will be deposited or mailed on payday.

### 3. An employee receives their paycheck but it's for fewer hours than they were expecting:

- Check DCI to see if any of the entries did not get approved.
  - The employer should review and approve the missed entry, if appropriate, for payment in the next pay period.
- If entries are approved, check the approval date within the Punch Detail in DCI to determine if they were approved on or before the time submission deadline.
  - If not, the entries will be processed in the next pay period.

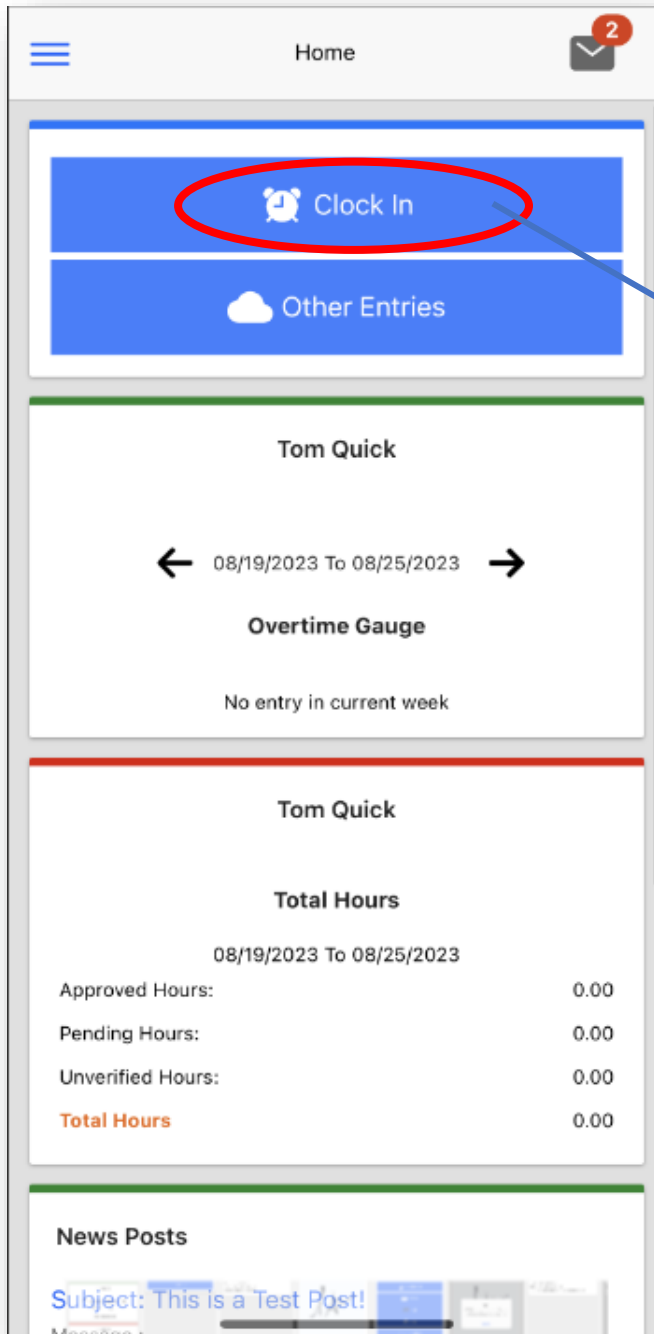
If this guide did not answer your questions, the assigned Acumen Agent is standing by ready to assist during regular business hours. Just give them a call, or email [enrollment@acumen2.net](mailto:enrollment@acumen2.net) for support. Or you can reach Customer Service toll free by calling (833) 892-0412.





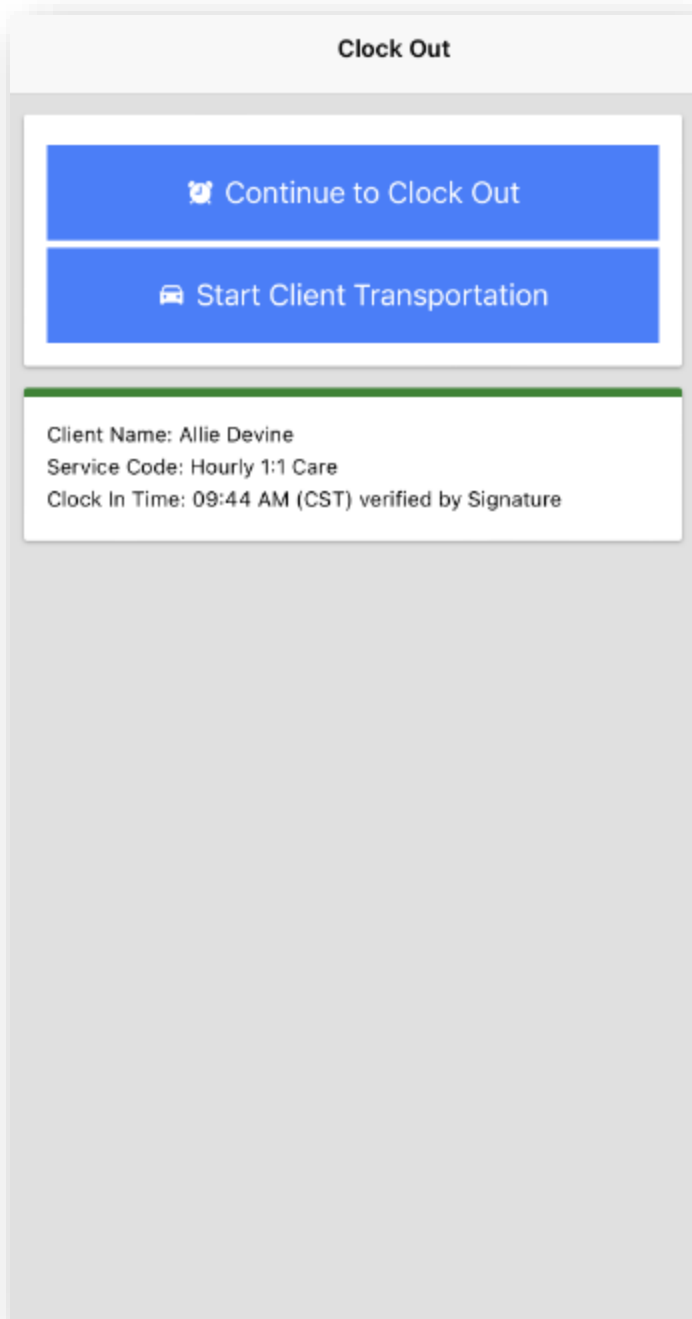
Caregiver opens Direct Care Innovations (DCI) Mobile App from their smartphone/tablet.







Caregiver touches “Clock In” button from the home screen of the mobile app to begin the process.





Clock Out

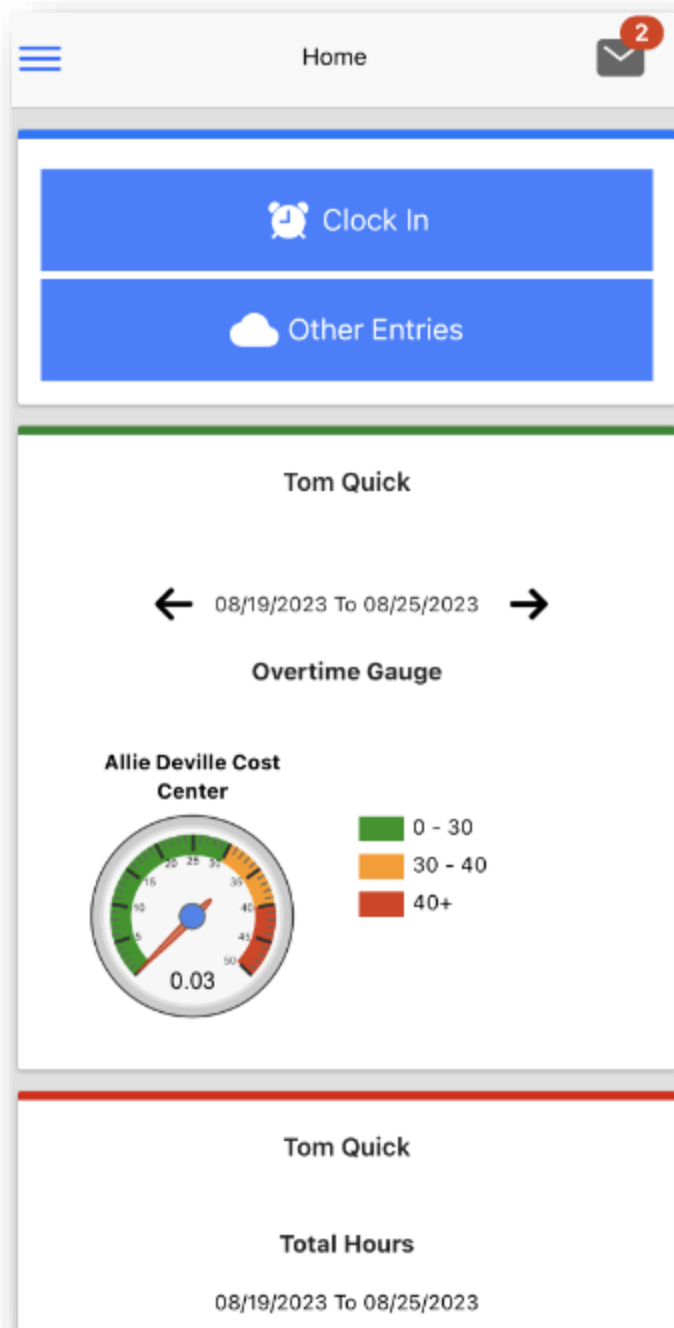
 Continue to Clock Out

 Start Client Transportation

Client Name: Allie Devine  
Service Code: Hourly 1:1 Care  
Clock In Time: 09:44 AM (CST) verified by Signature

Once the caregiver is “on the clock”, they have two options for actions within the app. They may:

- Continue to Clock Out
- Start Client Transportation (if relevant/program allow for mileage payment)



The mobile app home screen for Tom Quick displays a summary of total hours for the date range 08/19/2023 To 08/25/2023. The screen features a top navigation bar with a hamburger menu, the word "Home", and a notification icon with a red badge showing "2". Below the navigation bar is a red header bar. The main content area is titled "Tom Quick" and "Total Hours" for the date range "08/19/2023 To 08/25/2023".

Total Hours	
08/19/2023 To 08/25/2023	
Approved Hours:	0.00
Pending Hours:	0.03
Unverified Hours:	0.00
<b>Total Hours</b>	<b>0.03</b>

Caregiver has instant visibility of hours worked during any given week, as well as their status, providing a well-liked level of transparency unique to DCI.



## General FAQ's – Texas Transition (VDC program)

1. Q: Why is our program changing fiscal intermediaries (FI)?
2. Q: Who is Acumen?
3. Q: Where do I send my employees' timesheet?
4. Q: What is DCI?
5. Q: Will my pay schedule change with Acumen?
6. Q: When is the last date CDS in Texas will accept my hours/vendor requests?
7. Q: What date do I begin to submit to Acumen?
8. Q: What enrollment forms are needed?
9. Q: How will I initiate enrollment?
10. Q: When will I receive my packet (or transition forms)?
11. Q: Who do I contact if I have a question or concern during the transition?
12. Q: Will my employee's payrate change?
13. Q: Will my employees continue to get paid through direct deposit, paycard?
14. Q: Will I receive training on DCI?
15. Q: What is the deadline for submitting my paperwork?
16. Q: Will Acumen hold back my employee's pay if I do not submit my paperwork by the due date?
17. Q: What is Acumen's phone number/fax number/email address/website/address?
  - Fax: (855) 264-3287
  - Email: enrollment-txvets@acumen2.net
  - Phone: (866) 759-9524
  - Website: <https://www.acumenfiscalagent.com>
  - Mail: Acumen Fiscal Agent, 1130 E. Arapaho Rd. Ste 525 Richardson, TX. 75081
18. Q: What are Acumen's fees?
19. Q: Will my program rules be changing? (budget amount, etc)
20. Q: Will employees need to complete a new W4 for tax withholding preferences?
21. Q: Will my employees have to complete all new paperwork to transition to Acumen?



# EES – Electronic Enrollment System Overview

# 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

# Complete Client Registration

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

The screenshot displays the Acumen EES Implementation dashboard. On the left sidebar, the 'Dashboard' menu item is highlighted with a red box. The main content area features a 'Welcome!' message and a list of tasks for 'Client: Katy Reed'. The 'Complete Client Registration' task is highlighted with a red box, and its 'Start' button is also highlighted with a red box. Other tasks include 'Register Employer', 'Complete Employer Packet' (marked as Pending), and 'Register Employee'. A 'Manage Clients' button is located at the top right of the task list, and an '+ Add Employment' button is at the bottom.

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](#)

# Enrollment Completed

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

**DCI**  
DIRECT CARE INNOVATIONS

Home  
Enrollment  
Dashboard  
My Info  
Clients  
Employees  
Employments

\*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.

Client: James Leach

SD FS 360 Kristen Leach

**Employer Packet**  
Completed

**Employee Packet**  
Completed

**Manage Clients**

**+ Add Employment**

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



# Questions & Answers

