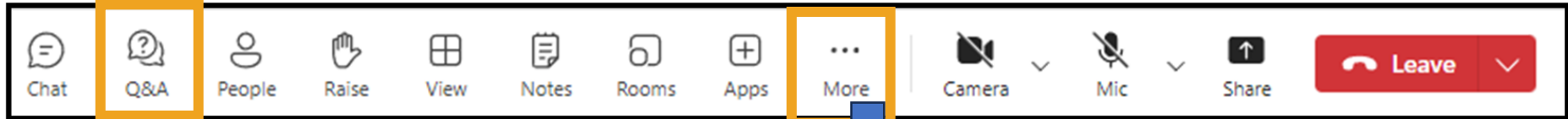




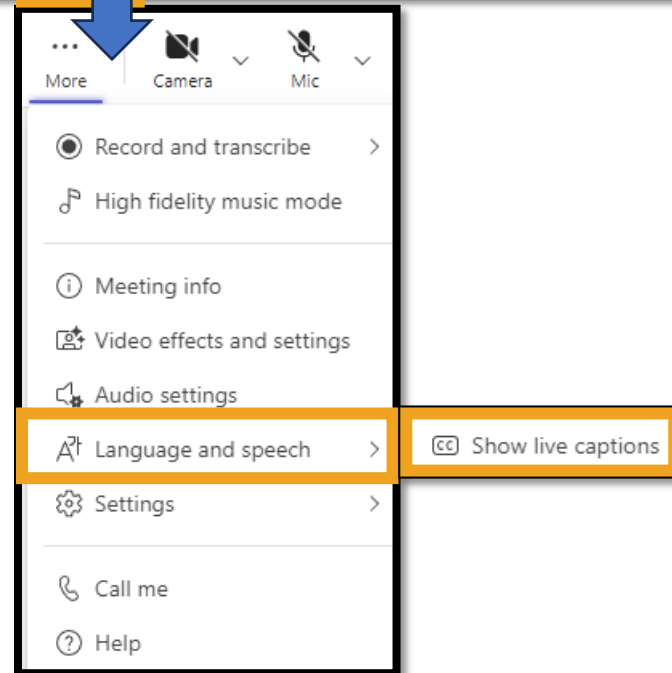
EES – Electronic Enrollment System

Self-Enrollment Training for Employers with Employees & Vendors

Using Microsoft Teams



- Ensure both the Camera & Mic are disabled (as pictured above with a line through them)
- Today we will not be using the Chat (disabled) or Raise hand features.
- Click the **Q&A** button to type & send your question during the meeting.
- To enable closed captioning:
 - ✓ Click the **More** button (three dots)
 - ✓ Select **Language and speech**
 - ✓ Click **Show live captions**
 - ✓ OR press **ALT+Shift+C** on your keyboard.



Welcome to Acumen!

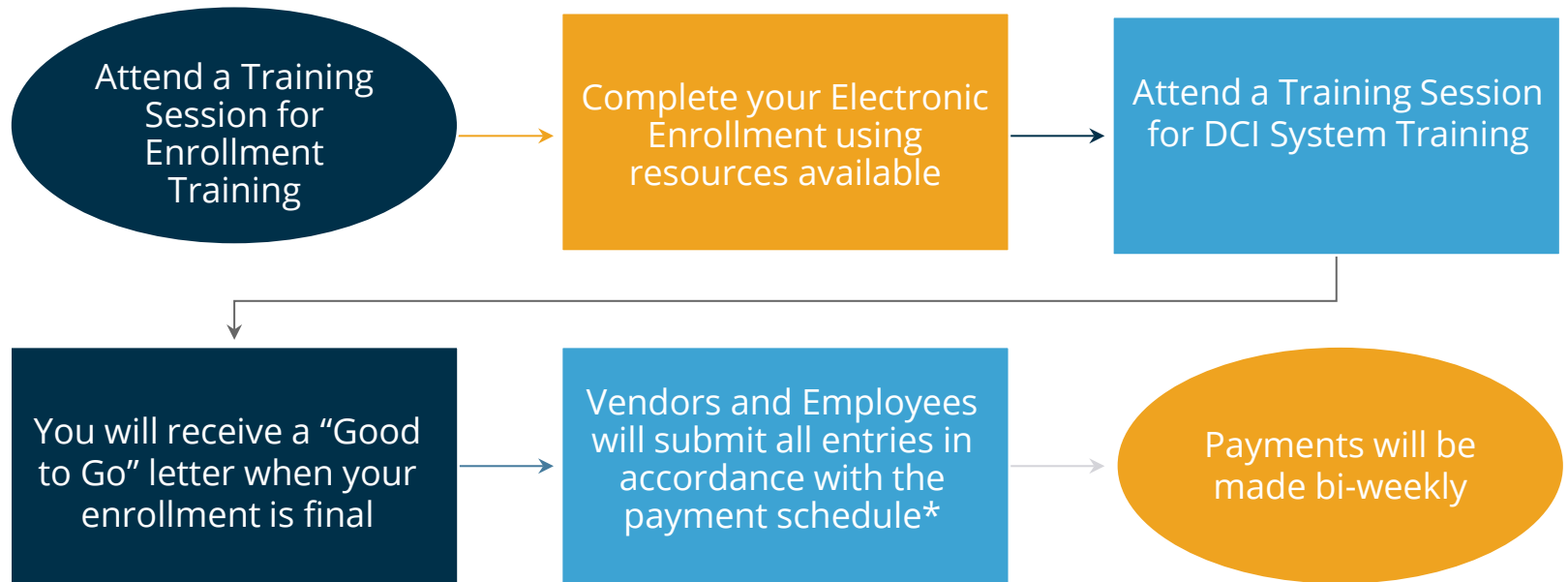
As you may know, the Division of Developmental Disabilities (**DDD**) Vendor Fiscal/Employer Agent Model will be transitioning Fiscal Intermediary (**FI**) services from Public Partnerships, LLC (**PPL**) to Acumen Fiscal Agent (**Acumen**) starting in **early June**. Acumen will help manage both **Community Vendor Services** and **Self-Directed Employee (SDE)** Services in this model.

Transition enrollments with Acumen will happen at staggered intervals over the next four months with groups of participants called **cohorts** assigned to enroll within a specific window of time. Using this approach will help ensure a smooth and organized transition for everyone.

In this training, we will review the specific details about our training sessions for the **New Jersey DDD program** as well as several critical dates you may need to be aware of. We will also review the process flow, so you have a good comprehension of what comes next.



Overview of NJ DDD Enrollment Process



Note: *Submit and approve all time entries and vendor/reimbursement requests by 9pm EST of the due date, **even if it falls on a weekend or holiday**. Those received *after* 9pm EST of that date will be processed in the following payment period.

Training Sessions

Enrollment

In **Enrollment training**, you'll learn how to create an account in Acumen's electronic enrollment system, complete all required enrollment information, and electronically sign enrollment packets. These sessions will include a live demonstration, and you'll have the chance to ask questions along the way. By the end of these trainings, you'll feel confident navigating the system and completing the enrollment process smoothly.

DCI System

In **DCI System training**, you'll learn how to navigate the DCI system using both the web and mobile versions to complete the essential tasks required for your role. These sessions will include a live demonstration, and you'll have the opportunity to ask questions in real time. By the end of these trainings, you'll be comfortable using DCI to manage your responsibilities efficiently.



NJ DDD VF/EA Services



1. **Self-Directed Employee:** A person hired to provide services and supports to the clients under the Vendor Fiscal/ Employer Agent Self-Direction model under the Division of Developmental Disabilities. An **SDE** will be managed by the Employer who holds the EIN for services to be rendered under. SDEs provide the below services:
 - Community Based Supports
 - Individual Supports-Hourly
 - Interpreter Services
 - Respite
 - Supports Brokerage
 - Transportation - Self-Directed Employee

2. **Vendor/Vendor ONLY services are provided by a third-party provider.** A **client (CLT)** will receive services from a third-party provider (i.e., gym membership, music lessons, etc.) and will not have an employee. A **vendor** is the third-party organization who has agreed to be hired to provide service(s) to the client and be paid by the Fiscal Intermediary. Vendors provide the below services:
 - Assistive Technology
 - Environmental Modification
 - Goods and Services
 - Natural Supports Training
 - Transportation – Single Passenger
 - Vehicle Modification

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)
- Support Coordinator Name
- Support Coordinator Email
- Support Coordinator Phone

Employer Information:

- First Name
- Last Name
- Date of Birth
- Social Security Number
- Gender
- Physical Address (No P.O. Box)
- Mailing Address (if different)
- Email
- Relationship to the Individual receiving services

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
- Driver's license number (if transporting the participant)
- Payment preference (check, direct deposit, or Paycard)
- If using direct deposit: bank name, routing/account numbers, and account type

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:

Employment Information:

- Employment details including:
 - services provided
 - hourly wage
 - expected start date
- Whether the employee lives with the client or will administer medication or behavior support
- Number of clients served and any required specialized training
- Optional: Race/ethnicity, veteran status, disability status

Vendor(s) Agreement:

- Vendor(s) Name
- Service vendor(s) will be providing
- Expected Start Date

Overview & Getting Started

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

EES Terms

1. **Client:** The individual receiving services
2. **Employer:** An individual who is allowed to represent a Client, manage the Client's care, and manage the Client's enrollment. **Note:** The Employer & Client can be 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.
6. **Add Vendor Agreement:** The Individual or Employer enters the information about the services the vendor will provide into EES. Information includes the vendor(s) name, the service the vendor will be providing and the Expected Start Date.

EES Roles

The Electronic Enrollment System (EES) is designed to facilitate the self-enrollment process for the following roles:



- ✓ **Employer** is the Client (the same person)
- ✓ **Employer** (not the Client)

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 (authorization)
- ✓ Verifying documentation is completed accurately
- ✓ Granting a Good to Go/Welcome letter to the Employer and Client

Employer is NOT the Client

Complete this process if the client and employer are two different people

Initial Registration (Employer is NOT the Client)

1. Navigate to the **NJ Programs Electronic Enrollment** page:
2. Click the **Go to Electronic Enrollment** button

1

<https://www.acumenfiscalagent.com/nj/ees/>



2

Initial Registration (Employer is NOT the Client)

Complete the Initial Registration Form:

Enter the **Employer's** information here, **NOT** the Client's information:

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**

The screenshot shows the 'Initial Registration Form' for Direct Care Innovations (DCI). The form is titled 'Initial Registration Form' and 'Your Information'. It contains fields for First Name, Last Name, Date of Birth, Email, and Phone, each with a numbered circle (3-7) next to it. A 'Next' button with a numbered circle (8) is at the bottom. The DCI logo is on the left, and 'English' and 'Login' links are at the top right.

EES will look for the Client based on the information we received on your Authorization. Please be sure to enter the Client's data exactly as it is on your Authorization.

Initial Registration (Employer is NOT the Client)

Are you the person receiving services?

9. Click **No**

10. Click **Next** to continue

Initial Registration Form

Are you the person receiving services? *

☐ Yes ☒ No 9

Next

10

Initial Registration (Employer is NOT the Client)

Proceed to complete the Client Details:

11. First Name (required)
12. Last Name (required)
13. Date of Birth (required)
14. State (required)
15. Medicaid ID (optional)
16. Case Manager Name (Leave Blank)
17. Click **Next**

EES will look for the Client based on the information we received on your Authorization. Please be sure to enter the Client's data exactly as it is on your Authorization.

Initial Registration Form

Client Details

First Name *	11	<input type="text"/>
Last Name *	12	<input type="text"/>
Date of Birth *	13	<input type="text" value="MM/DD/YYYY"/>
State *	14	<input type="text" value="Select State"/>
Medicaid ID	15	<input type="text"/>
Case Manager Name	16	<input type="text"/>

Initial Registration (Employer is NOT the Client)

Create login credentials:

18. 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 and the only special character is the period “.”

19. Password (**required**): Create a password to log into the EES portal.

- ✓ Must contain 10 characters (1 uppercase and lowercase letter, number, and special character)
- ✓ No more than two repeated characters in a row
- ✓ Does not contain three consecutive characters of the first or last name
- ✓ Does not contain three consecutive characters of username

20. Click **Submit**

Initial Registration Form

Create Your Login Credentials

Username ⓘ sasha4.client 18

Password ⓘ 19

Cancel Submit 20

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

Initial Registration Form

Create Your Login Credentials

Username ⓘ sasha4.client 18

Password ⓘ 19

Cancel Password Requirements x Submit 20

- ✓ 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
- ✓ Does not contain first or last name

Initial Registration (Employer is NOT the Client)

21. The confirmation message populates. An email is sent to the email address entered. See [Activate Profile](#) section to continue.
22. Optionally, click the **Resend Activation Email** button if you did not receive an activation email.

21

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

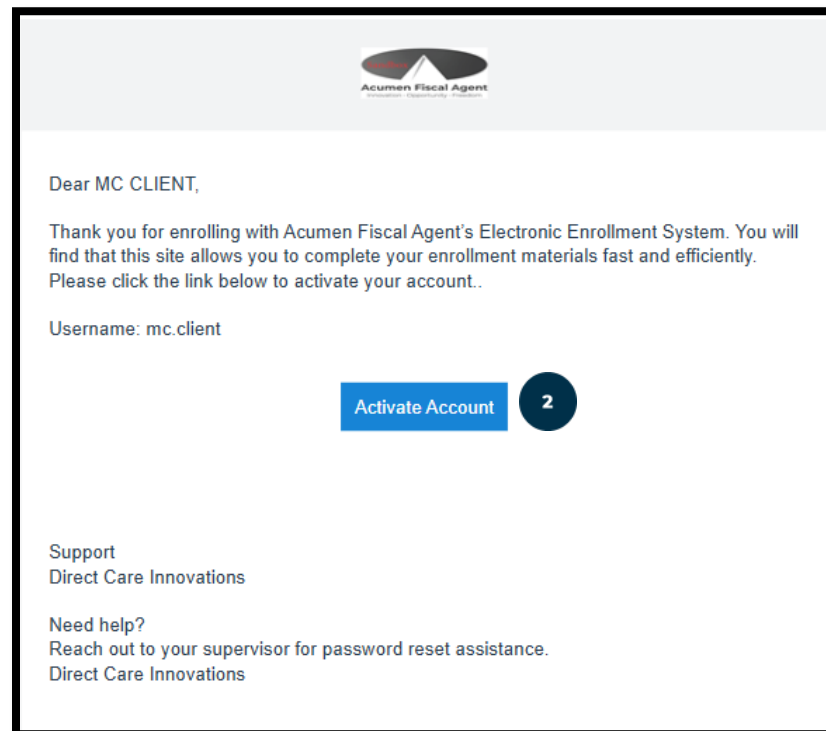
22

Instructions for logging into EES using a tablet or mobile device

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

Activate Profile –DCI Mobile Full Site

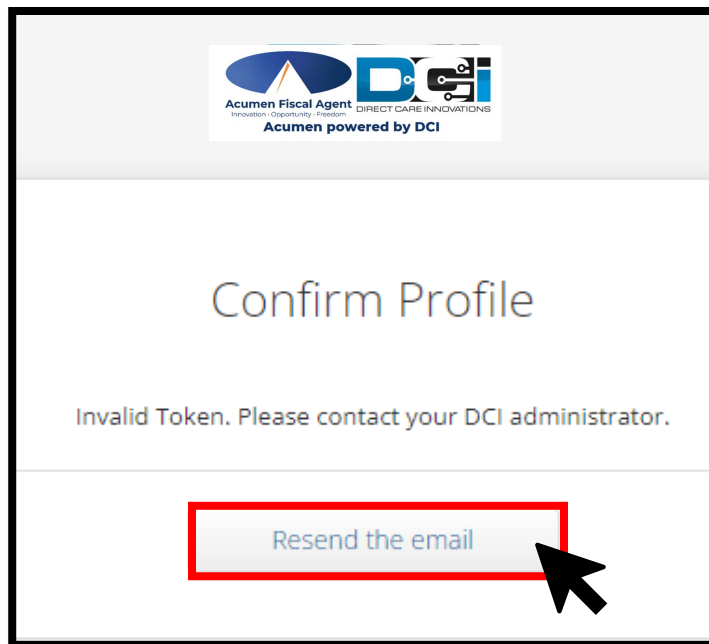
1. Upon completing Initial Registration, an email is sent to the Employer for account activation.
 - ✓ **Title:** Welcome to Acumen's Electronic Enrollment System
 - ✓ **Sender:** no-reply@acumen2.net
 - ✓ Check the spam folder if necessary
2. Click the blue **Activate Account** button in the email
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



Activate Profile

Note:

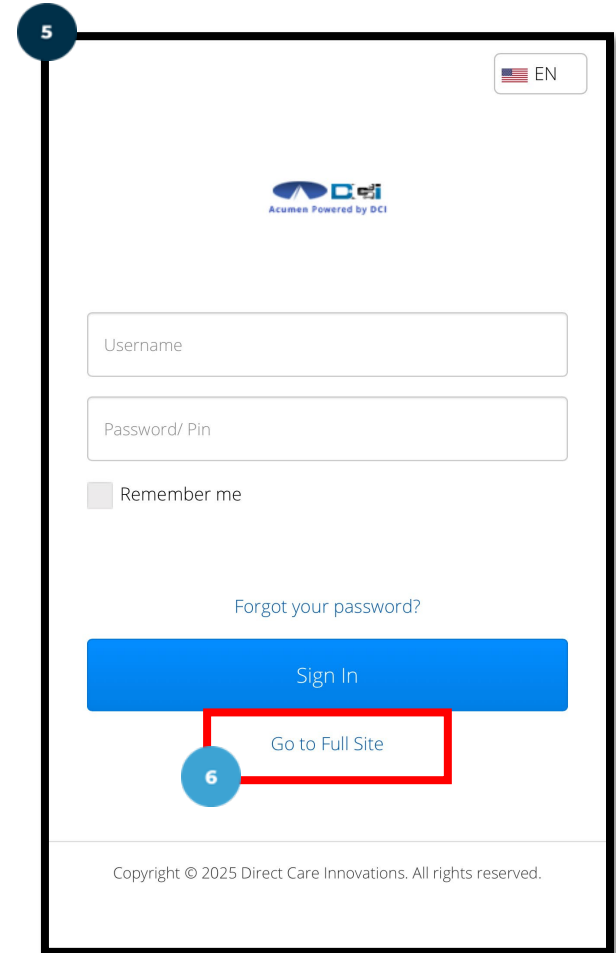
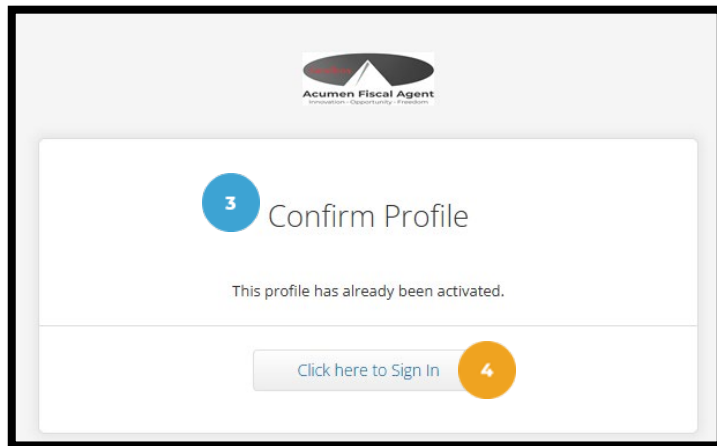
- If you clicked on the activate profile link after 24 hours of receiving it, you may receive an error message saying “Invalid Token - Please contact your DCI administrator”
- Simply click the **Resend the email** button below and check your email for a new link to activate your profile (see step 2).



Proprietary: For Acumen and Customer Use Only

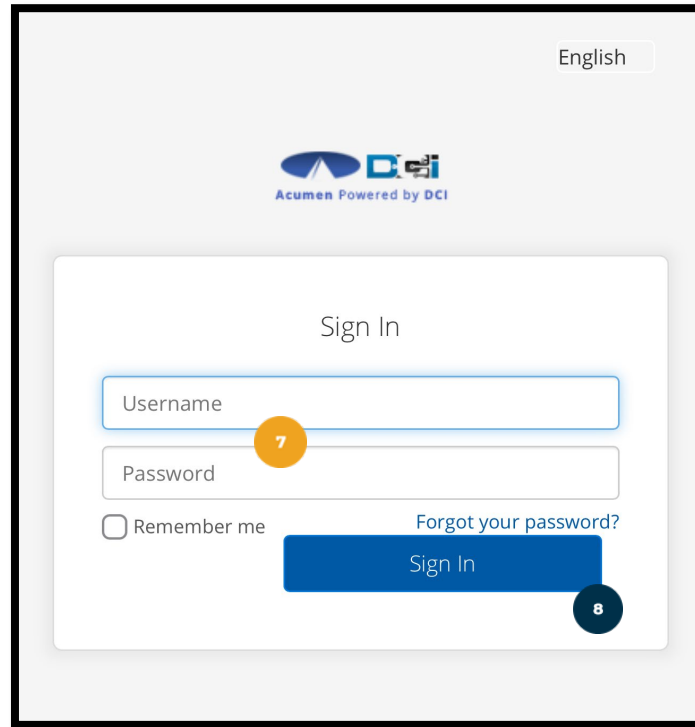
Activate Profile –DCI Mobile Full Site

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. You will be redirected to the **DCI Mobile Web** login screen.
6. ***Important!** Tap **Go to Full Site** to access the **DCI Mobile Full Site**.



Activate Profile –DCI Mobile Full Site

7. Enter the **username** and **password** created in the Initial Registration form
8. Click **Sign In** to begin the registration process



The screenshot shows the 'Sign In' page of the DCI Mobile Full Site. At the top right, there is a language selector set to 'English'. Below this is the DCI logo with the text 'Acumen Powered by DCI'. The main content area is titled 'Sign In' and contains a 'Username' input field, a 'Password' input field, and a 'Remember me' checkbox. A blue button labeled 'Sign In' is positioned below the password field. A link for 'Forgot your password?' is located to the right of the 'Remember me' checkbox. An orange circle with the number '7' is placed over the password field, and a blue circle with the number '8' is placed over the 'Sign In' button.

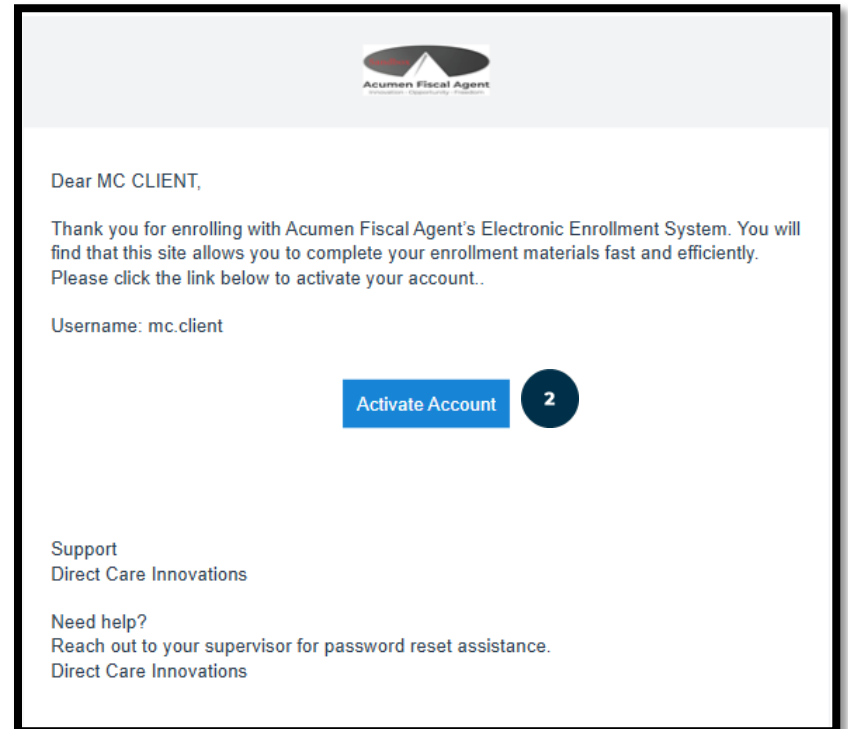
Instructions for logging into EES using a desktop or laptop computer

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

Important! If using a tablet or mobile device, see [Log into EES via DCI Mobile Full Site](#) section.

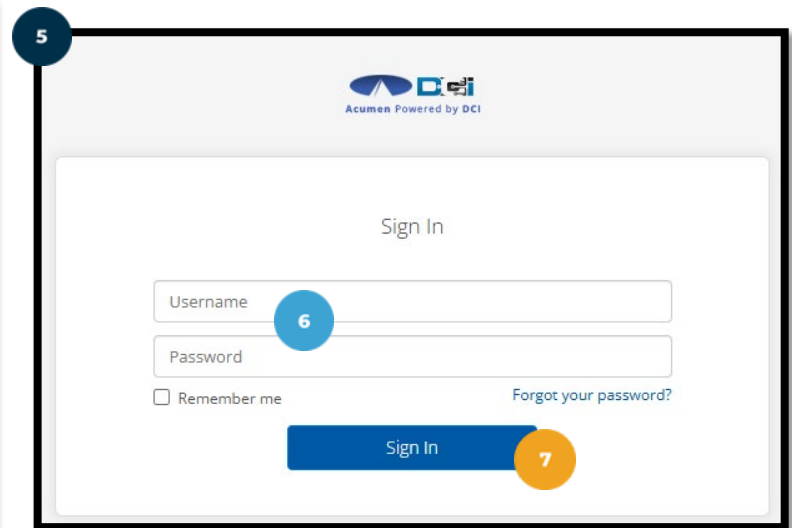
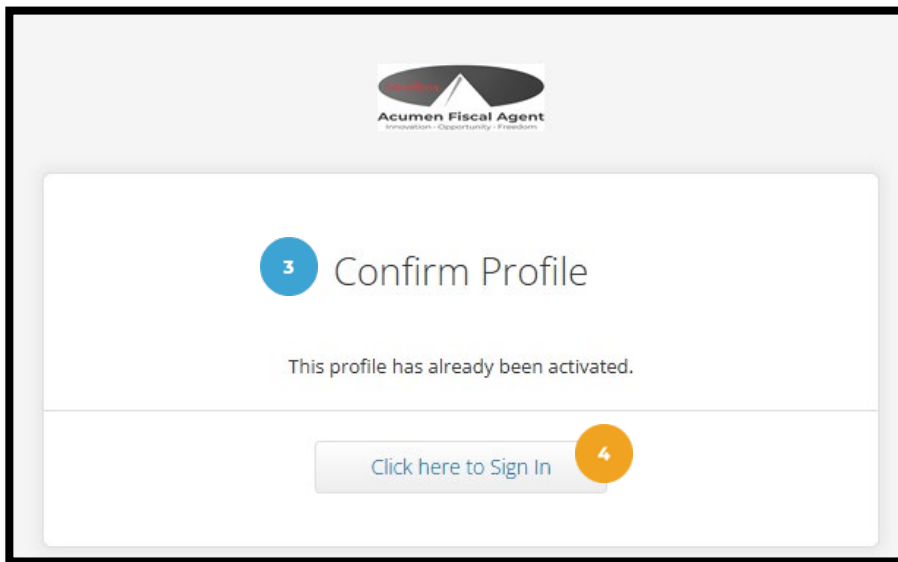
Activate Profile

1. Upon completing Initial Registration, an email is sent to the Employer 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

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



Complete Client Registration

Employer completes this process

Complete Client Registration

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

The screenshot displays the Acumen EES Implementation dashboard for a client named 'max1.client'. The interface includes a sidebar with 'Home' and 'Enrollment' links. The main content area features a 'Welcome!' message and a list of tasks for the client. The tasks are:

- Complete Client Registration**: A blue 'Start' button is highlighted with a red box.
- Register Employer**: A blue 'Start' button.
- Complete Employer Packet**: A 'Pending' status with a refresh icon.
- Register Employee**: A blue 'Start' button.

At the bottom of the task list, there are two buttons: '+ Add Employment' and '+ Add Vendor Agreement'.

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

1

Medicaid #

2

Gender *

3

☐ Male ☐ Female ☐ Other ☐ Prefer Not to Say

Phone *

4

(###) ###-####

Enter your own phone number if one is not available for the Client.

Mobile Number

5

(###) ###-####

Email *

6

Enter your own email address if one is not available for the Client.

Complete Client Registration

Complete Additional Client Details:

7. Agent Email (Agent Use Only)
8. Agent Full Name (Agent Use Only)
9. Agent Phone (Agent use only)
10. Authorized Rep. City (optional)
11. Authorized Rep. Email (optional)
12. Authorized Rep. First name (optional)
13. Authorized Rep. Last name (optional)
14. Authorized Rep. Phone (optional)
15. Authorized Rep. Physical Address (optional)
16. Authorized Rep. State (optional)
17. Authorized Rep. Zip Code (optional):

Agent Email (Agent Use Only)	7	
Agent Full Name (Agent Use Only)	8	
Agent Phone (Agent Use Only)	9	
Authorized Representative City	10	
Authorized Representative Email	11	
Authorized Representative First Name	12	
Authorized Representative Last Name	13	
Authorized Representative Phone	14	
Authorized Representative Physical Address	15	
Authorized Representative State	16	
Authorized Representative Zip Code	17	

Type answers in each associated field.

Complete Client Registration

Complete Additional Client Details:

- 18. Cohort Assignment (Agent Use Only)
- 19. Enrollment Start Date (Agent Use Only)
- 20. Primary Language (optional)
- 21. Referral Choice (Agent Use Only)
- 22. State ID – DDD ID (**required**)
- 23. Support Broker Email (optional)
- 24. Support Broker Name (optional)

Cohort Assignment (Agent Use Only)	18
Enrollment Start Date (Agent Use Only)	19
Primary Language	20
Referral Choice (Agent Use Only)	21
State ID *	22
Support Broker Email	23
Support Broker Name	24

Type answers
in each
associated
field.

Complete Client Registration

Complete Additional Client Details:

- 25. Support Broker Phone (optional)
- 26. Support Coordinator Agency Name **(required)**
- 27. Support Coordinator Email Address **(required)**
- 28. Support Coordinator Name **(required)**
- 29. Support Coordinator Phone Number **(required)**
- 30. What is the Client's relationship to the Authorized Representative? **(required)**

Support Broker Phone	<input type="text"/>
Support Coordinator Agency Name *	<input type="text"/>
Support Coordinator Email Address *	<input type="text"/>
Support Coordinator Name *	<input type="text"/>
Support Coordinator Phone Number *	<input type="text"/>
What is the Client's relationship to the Authorized Representative? *	<input type="text"/>

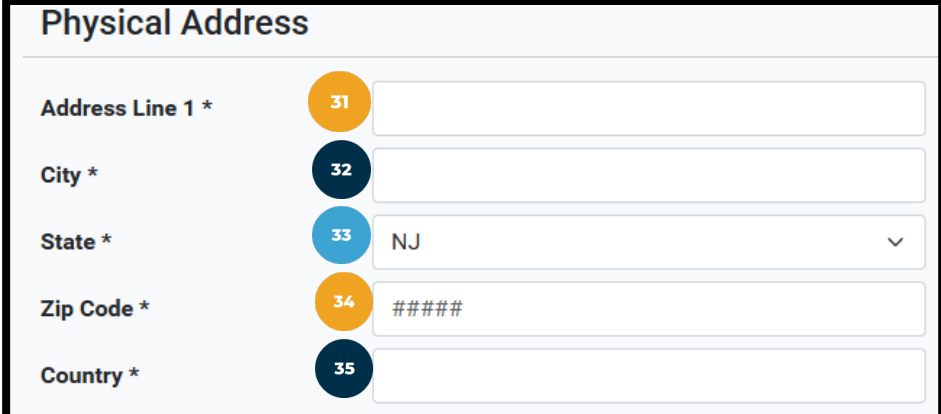
Type answers
in each
associated
field.

Important! If Support Coordinator Agency Name, Email, or Phone Number is incorrect, please update to the correct information.

Complete Client Registration

Complete the Physical Address:

- 31. Address Line 1 (**required**)
- 32. City (**required**)
- 33. State (**required**)
- 34. Zip Code (**required**)
- 35. Country (**required**)



Physical Address

Address Line 1 * 31

City * 32

State * 33 NJ

Zip Code * 34 #####

Country * 35

Complete the Case Manager Details:

- 36. Case Manager Name (Leave Blank)
- 37. Case Manager Phone (Leave Blank)
- 38. Case Manager Email (Leave Blank)
- 39. Click **Save** to complete the Client Registration process



Case Manager Details

Case Manager Name 36

Case Manager Phone 37 (###) ###-####

Case Manager Email 38

39

Important! To save the information you have entered, ensure all required fields have been completed. Otherwise, the Save button will not be enabled.

Complete Client Registration

Client: Max1 Client Manage Clients

→ Complete Client Registration	Complete
→ Register Employer	Start
→ Complete Employer Packet	↻ Pending
→ Register Employee	Start

+ Add Employment + Add Vendor Agreement

**Complete Client
Registration is
marked Complete**

Register Employer

Employer completes this process

Register Employer

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

Client: Max1 Client [Manage Clients](#)

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

[+ Add Employment](#) [+ Add Vendor Agreement](#)

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 *	125 West State Street	7
City *	Trenton	8
State *	NJ	9
Zip Code *	08625	10
Country *	United States of America	11

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

14. Complete Business Details section (**required**)
- Answer all four questions accurately

Business Details 14

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.

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)

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

☒ Yes ☐ No ☐ N/A

Federal EIN *

##-####

What was the nature of the business? *

Is the business still active (including any requirements for filling income tax, payroll tax, or information returns) still in Business? *

☐ Yes ☐ No

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)

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

☒ Yes ☐ No ☐ N/A

Please provide the name of the F/EA *

Start Date

End Date

Please provide the dates of when you were with the F/EA *

MM/DD/YYYY

MM/DD/YYYY

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)

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

☒ Yes ☐ No ☐ N/A

Please provide the account number if known *

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)

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

☒ Yes ☐ No ☐ N/A

Please provide the account number if known *

15. Click **Save** after completing all four questions

15

Register Employer

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

Client: Max1 Client

Manage Clients

→ Complete Client Registration

Complete

→ Register Employer

Complete

→ Complete Employer Packet

↺ Start

→ Register Employee

Start

+ Add Employment

+ Add Vendor Agreement

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

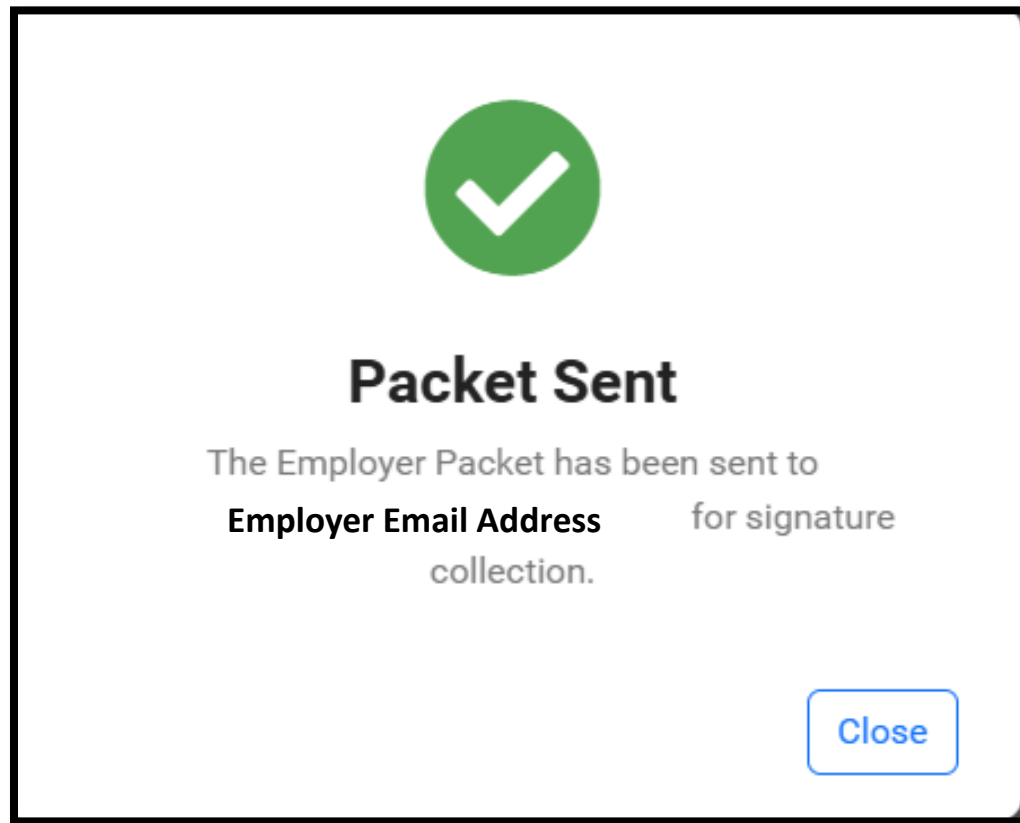
Client: Max1 Client [Manage Clients](#)

→ Complete Client Registration	Complete
→ Register Employer	Complete
→ Complete Employer Packet	Start
→ Register Employee	Start

[+ Add Employment](#) [+ Add Vendor Agreement](#)

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 **Resend** button will resend the DocuSign email so that you can sign the packet.
- **Please note:**
 - ✓ If you changed any information in EES, the changes will not be reflected in the packet you will be receiving through DocuSign.
 - ✓ You will need to contact our agent team to have them send you a new packet with the updated information

Complete Employer Packet displays Pending

Client: Max1 Client [Manage Clients](#)

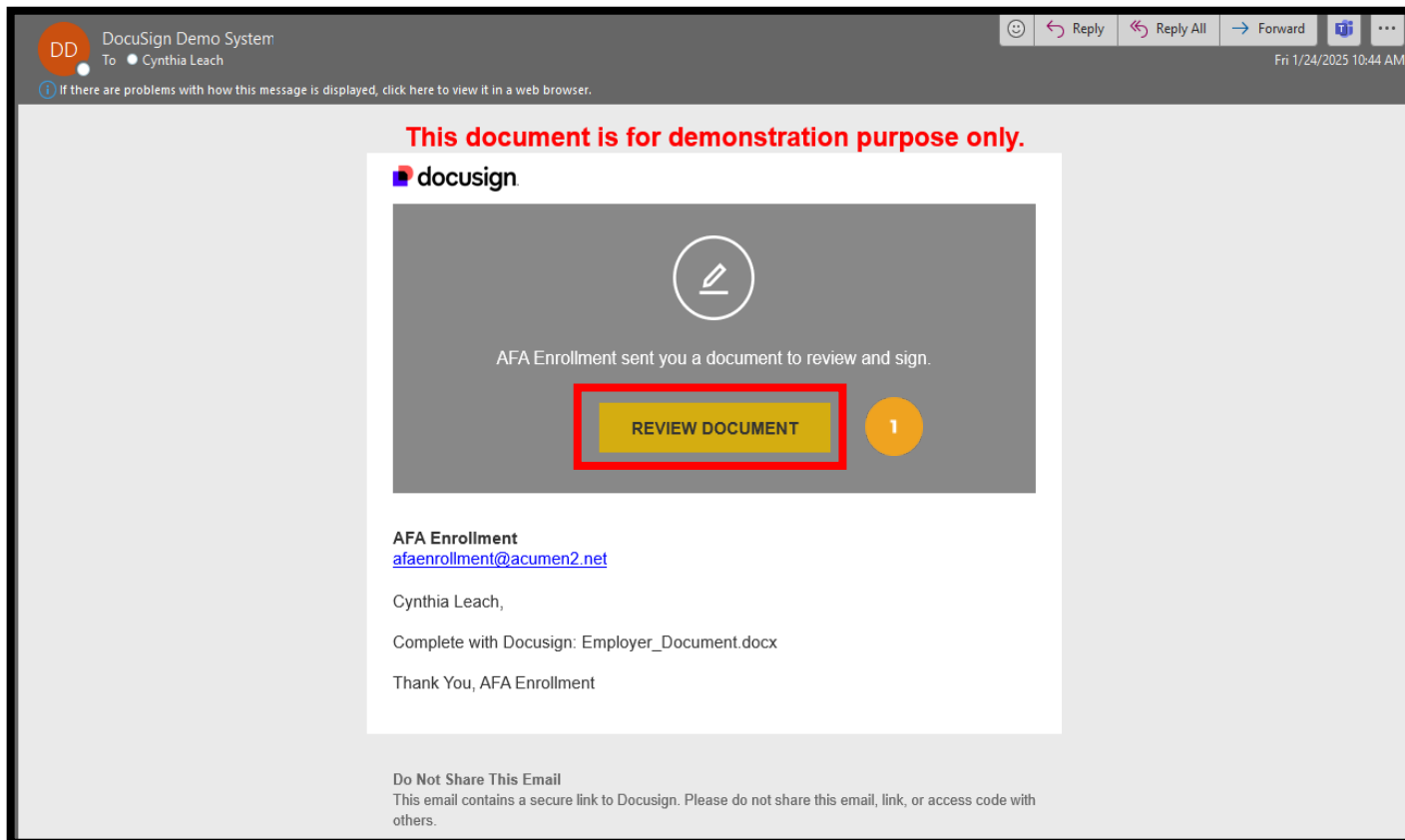
➔ Complete Client Registration	Complete
➔ Register Employer	Complete
➔ Complete Employer Packet Resend	Pending
➔ Register Employee	Start

[+ Add Employment](#) [+ Add Vendor Agreement](#)

Complete Employer Packet

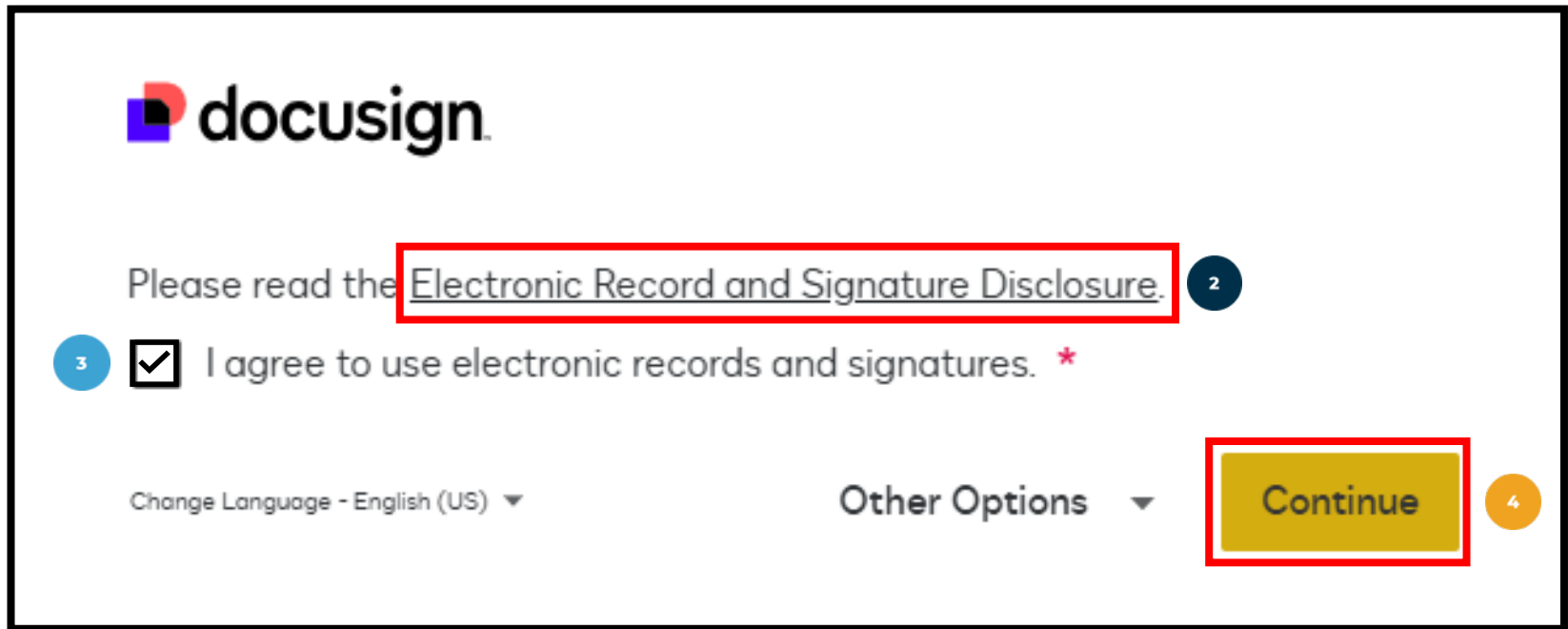
The packet arrives via an email from sender DocuSign. Check junk or spam folders if needed.

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



Complete Employer Packet

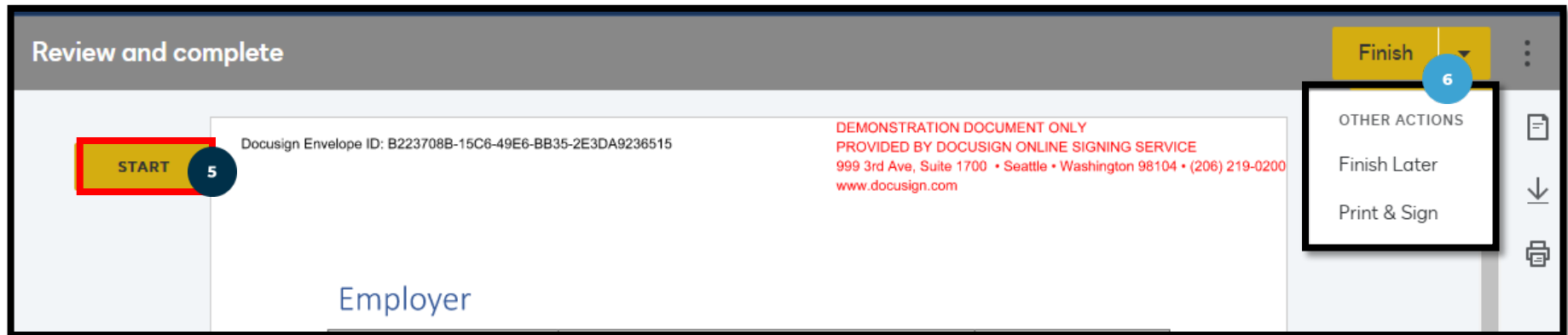
2. Click the **Electronic Record and Signature Disclosure** link to view the disclosure
3. **Check the box** to agree to using electronic records and signatures
4. Click the yellow **Continue** button



The screenshot displays the DocuSign interface. At the top left is the DocuSign logo. Below it, the text "Please read the" is followed by a link "Electronic Record and Signature Disclosure." which is highlighted with a red rectangular box and a blue circle containing the number 2. Below this, there is a checkbox with a checkmark inside, preceded by a blue circle containing the number 3. To the right of the checkbox is the text "I agree to use electronic records and signatures." followed by a red asterisk. At the bottom left, there is a dropdown menu labeled "Change Language - English (US)". To its right is another dropdown menu labeled "Other Options". On the bottom right, there is a yellow button labeled "Continue" which is highlighted with a red rectangular box and an orange circle containing the number 4.


Complete Employer Packet

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



Complete Employer Packet

- The Employer packet is prefilled based on the information provided in EES
- Use the tab key on the keyboard to move through each line
- **Important!** Review documents for accuracy.
- 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
		10/31/2024
	Participant or Employer/ Representative Signature	Date

Complete Employer Packet

To select a signature style provided by DocuSign:

- ✓ 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

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

Congratulations!

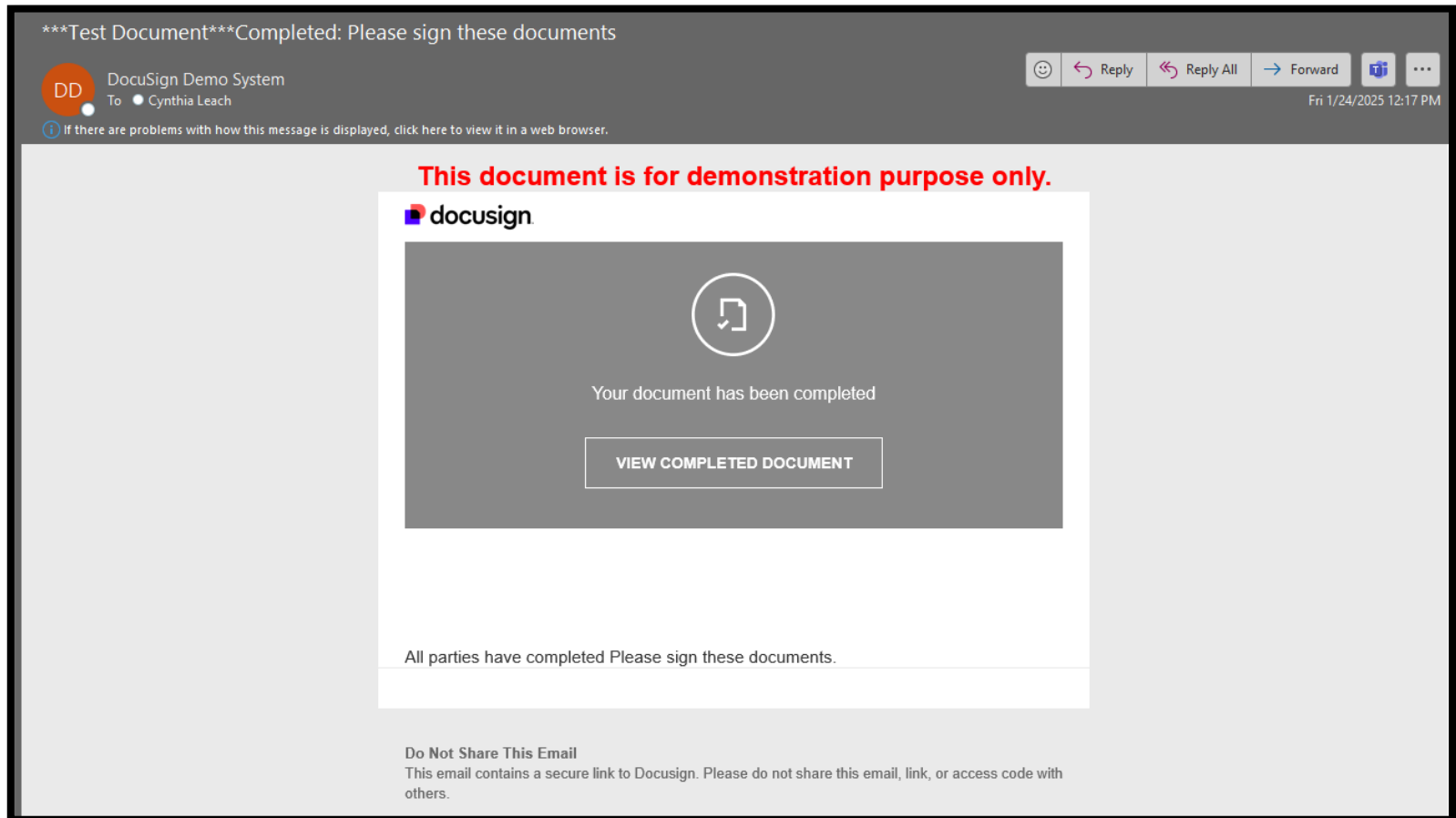
The Employer packet is complete.



- 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

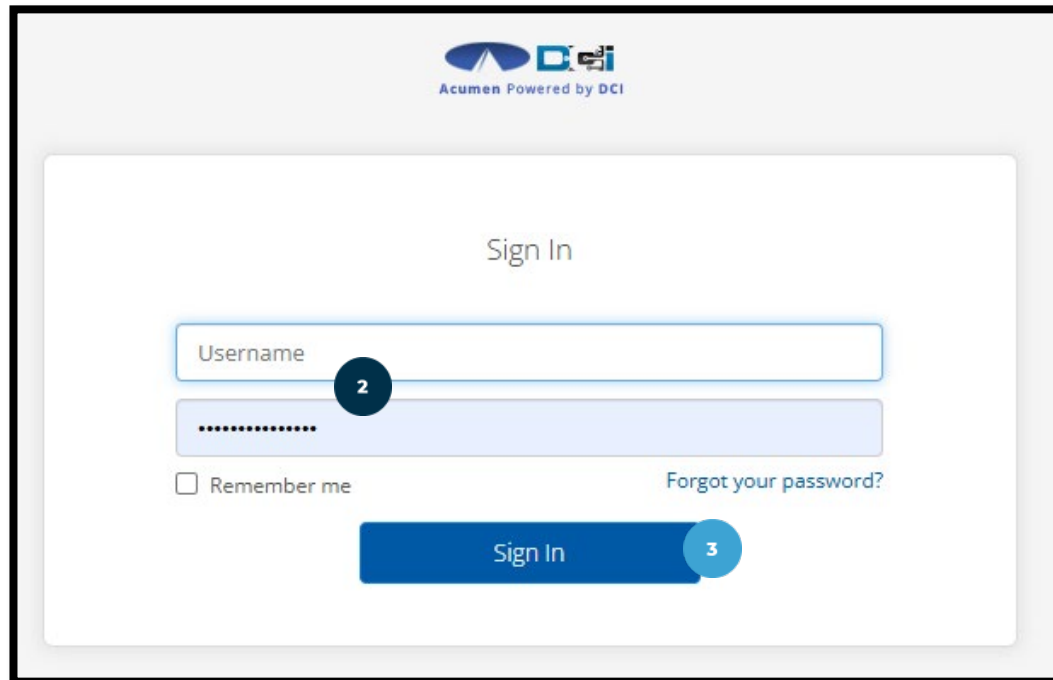
The Employer receives a confirmation email with a link to view the completed document



Logging into EES

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

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




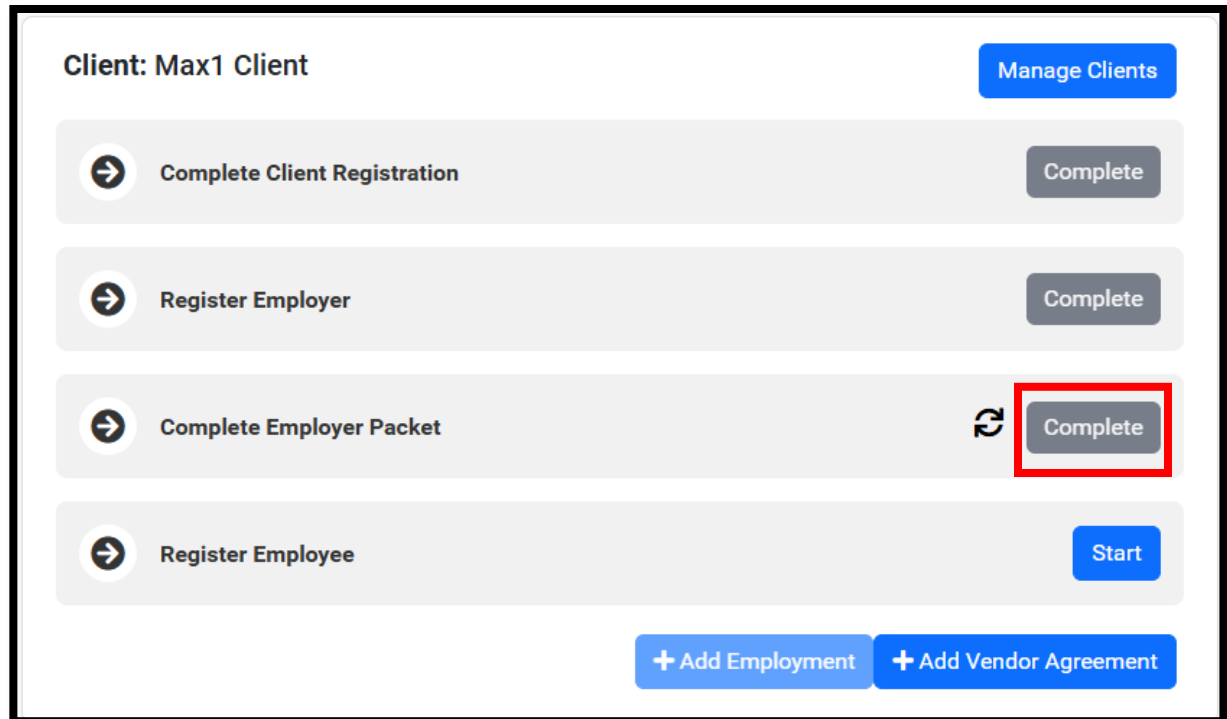
The screenshot shows the login interface for Acumen, powered by DCI. At the top, the DCI logo and the text "Acumen Powered by DCI" are displayed. Below this, the heading "Sign In" is centered. There are two input fields: the first is labeled "Username" and the second is a password field with masked characters. A "Remember me" checkbox is located below the password field, and a "Forgot your password?" link is to its right. At the bottom, there is a blue "Sign In" button. Numbered callouts 1, 2, and 3 are placed over the URL bar, the password field, and the "Sign In" button respectively.

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: Max1 Client [Manage Clients](#)

➔ Complete Client Registration	Complete
➔ Register Employer	Complete
➔ Complete Employer Packet	 Complete
➔ Register Employee	Start

[+ Add Employment](#) [+ Add Vendor Agreement](#)

Register Employee

Employer completes this process

Register Employee

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

Client: Max1 Client [Manage Clients](#)

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

[+ Add Employment](#) [+ Add Vendor Agreement](#)

Register Employee

Complete the Register Employee fields:

1. First Name (**required**)
2. Last Name (**required**)
3. Date of Birth (**required**)
4. SSN (**required**)
5. State (**required**)

Register Employee

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Date of Birth *	<input type="text" value="MM/DD/YYYY"/>
SSN *	<input type="text" value="###-##-####"/>
State *	<input type="text" value="Select State"/>

✓ Next

Cancel

Add Employee to Employer

- ❖ If the Employee is found, or the name matches a similar profile, an alert stating **Existing Enrollees Found** displays.
 - ✓ Verify if the name, DOB and Last four of SSN match.
 - If **Yes**, click the **This is my Employee** button to avoid creating a duplicate Employee profile
 - ✓ The Employee information populates in the Employee Details fields
 - ✓ Continue to complete Employee Details information by completing **the next required field**.
 - If **No**, click **Cancel**.
 - ✓ Continue to complete Employee Details information by completing the **SSN**

Existing Enrollees Found

First Name	Last Name	Date of Birth	Last 4 SSN	State	City	Email	Actions
Angel	Employee	05/13/1995	4402	CA	Sacramento	michael.chavez+76@acumen2.net	This is my Employee

If this is not the Employee you are looking for, please reach out to an Agent for assistance.

Cancel

Register New Employee

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
13. Drivers License Number (optional)
14. How was the Employee's address verified? (Agent Use Only)

Complete the Register Employee fields:

Register Employee

First Name *	1	Emma1
Middle Name	2	
Last Name *	3	Employee
Other Last Names Used	4	
Date of Birth *	5	5/30/1990
SSN *	6	987-65-4412
Gender *	7	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other <input type="radio"/> Prefer Not to Say
Phone *	8	(###) ###-####
Alternative Phone	9	(###) ###-####
Mobile Number	10	(###) ###-####
Email *	11	
Citizenship Status *	12	Select Citizenship Status
Drivers License Number	13	
How was the Employee's address verified? (Agent Use Only)	14	

Register Employee

Complete the Physical Address fields:

- 15. Address line 1 (**required**)
- 16. City (**required**)
- 17. State (**required**)
- 18. Zip Code (**required**)
- 19. Country (**required**)

Physical Address

Address Line 1 *

15

City *

16

State *

17

Select State ▼

Zip Code *

18

Country *

19

Select Country

Register Employee

Complete Mailing Address details:

20. 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**)

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

20

Mailing Address

Mailing Address Matches Physical Address ☐

Address Line 1 *

City *

State *

Zip Code *

Country *

21

Mailing Address

Mailing Address Matches Physical Address ☒

Register Employee

Complete Relationships details:

22. 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 22

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

Register Employee – Payment Information

Complete Payment Information

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 form for adding a new direct deposit account. It includes the following fields and callouts:

- 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.

At the bottom of the form, there are two links: [- Remove Account](#) and [+ Add Account](#).

Register Employee

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

Client: Max1 Client

Manage Clients

→

Complete Client Registration

Complete

→

Register Employer

Complete

→

Complete Employer Packet

↺

Complete

→

Register Employee

Complete

+ Add Employment

+ Add Vendor Agreement

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.**
- **The Employer packet is not required to be completed to add an Employment**

Add Employment

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

Client: Max1 Client

Manage Clients

➔ Complete Client Registration

Complete

➔ Register Employer

Complete

➔ Complete Employer Packet

↺ Complete

➔ Register Employee

Complete

+ Add Employment

+ Add Vendor Agreement

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. Click the **Select** button to select a registered employee.
 - b. **Search** for a registered employee.
 - c. **Register** a new Employee. Click the **Register a new Employee** button. See [Register New Employee](#) instructions.

Create Employment

Employment Details

Client Name * James Leach

Program * Select Program ▼

Employer * Cynthia Leach

Employee * **Select Employee** 4 ▼

Expected Start Date * MM/DD/YYYY

Select an Employee

search Q b

Register a new Employee c

Employer Name	Employee Name	Actions
Cynthia Leach	Kevin Leach	a Select
Cynthia Leach	Monica Leach	Select
Cynthia Leach	Kristen Leach	Select

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

Finish completing the Create Employment details section:

6. Does the employee live with the Client? **(required)**
7. How does your Employee know your Client if “No Relationship” was selected above? **(required)**
8. Live in Caregiver (Agent Use Only)
9. Will your employee be administering medication? **(required)**
10. Will your employee be implementing a behavior supports plan? **(required)**
11. Will your employee need specialized training? **(required)**

Does the Employee Live with the Client? *

How does your Employee know your Client if "No Relationship" was selected above? *

Live In Caregiver (Agent Use Only)

Will your employee be administering medication? *

Will your employee be implementing a behavior supports plan? *

Will your employee need specialized training? *

Enter free-form
text for questions
6-11

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.**

12. Federal Filing Status (**required**):

Select one

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

13. Multiple Jobs (**required**): Select Yes or No

14. Claim Dependents or Other Credits (optional)

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

16. Deductions (optional)

17. Extra Withholding (optional)

Tax Information

If you are not sure of how to complete this section, visit the IRS website at www.irs.gov or consult with your tax advisor.

Federal Filing Status (If an Independent Contractor select 1099) *	12	Select Filing Status	▼
Multiple Jobs	13	<input type="radio"/> Yes <input type="radio"/> No	
Claim Dependents Or Other Credits	14		
Other Income (Not From Jobs)	15		
Deductions	16		
Extra Withholding	17		

Add Employment

Complete Relationship details:

18. 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 software interface for adding employment. A dropdown menu titled 'Relationship' is open, displaying a list of relationship options. The options are: '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'. The dropdown is highlighted with a red border. A blue circle with the number '18' is visible in the top right corner of the dropdown menu.

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

19. 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

19 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:

20. Service Code #1 (**required**): Click the drop-down to select the service code for services the employee is providing
21. 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

The screenshot shows a form titled "Services" with the instruction "Select services the Employee will be providing *". It contains two main input fields: "Service Code #1 *" and "Pay Rate *". The "Service Code #1 *" field is a dropdown menu with a circular callout "20" and the text "Service Code" inside. The "Pay Rate *" field is a text input with a circular callout "21" and the text "Enter Pay Rate" inside. Below the "Pay Rate *" field is a red button labeled "- Remove Service". At the bottom left of the form is a blue button labeled "+ Add Service".

22. Click **Save** to complete the process
23. Optionally, click **Cancel** to discard changes.

The screenshot shows the bottom of the form with two buttons: a blue "Save" button with a circular callout "22" and a grey "Cancel" button with a circular callout "23".

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

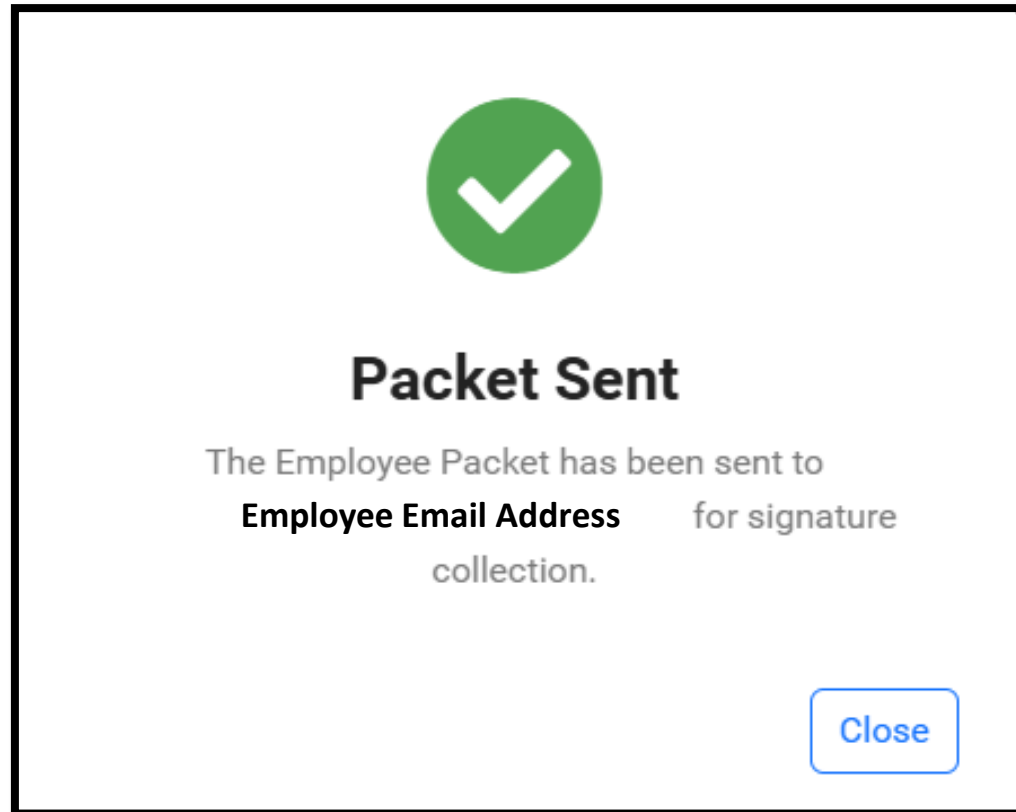
Client: Max1 Client Manage Clients

	Employee		Employer Packet	Employee Packet	
NJ DDD - SDE (Transition)	Emma1 Employee	↻	Completed	Pending	Send

+ Add Employment + Add Vendor Agreement

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

Please wait 15 minutes between refresh & resend.

Client: Max1 Client [Manage Clients](#)

NJ DDD - SDE (Transition)	Employee Emma1 Employee		Employer Packet Completed	Employee Packet In Progress	Resend	
------------------------------	--------------------------------------	---	-------------------------------------	--	------------------------	---

[+ Add Employment](#) [+ Add Vendor Agreement](#)

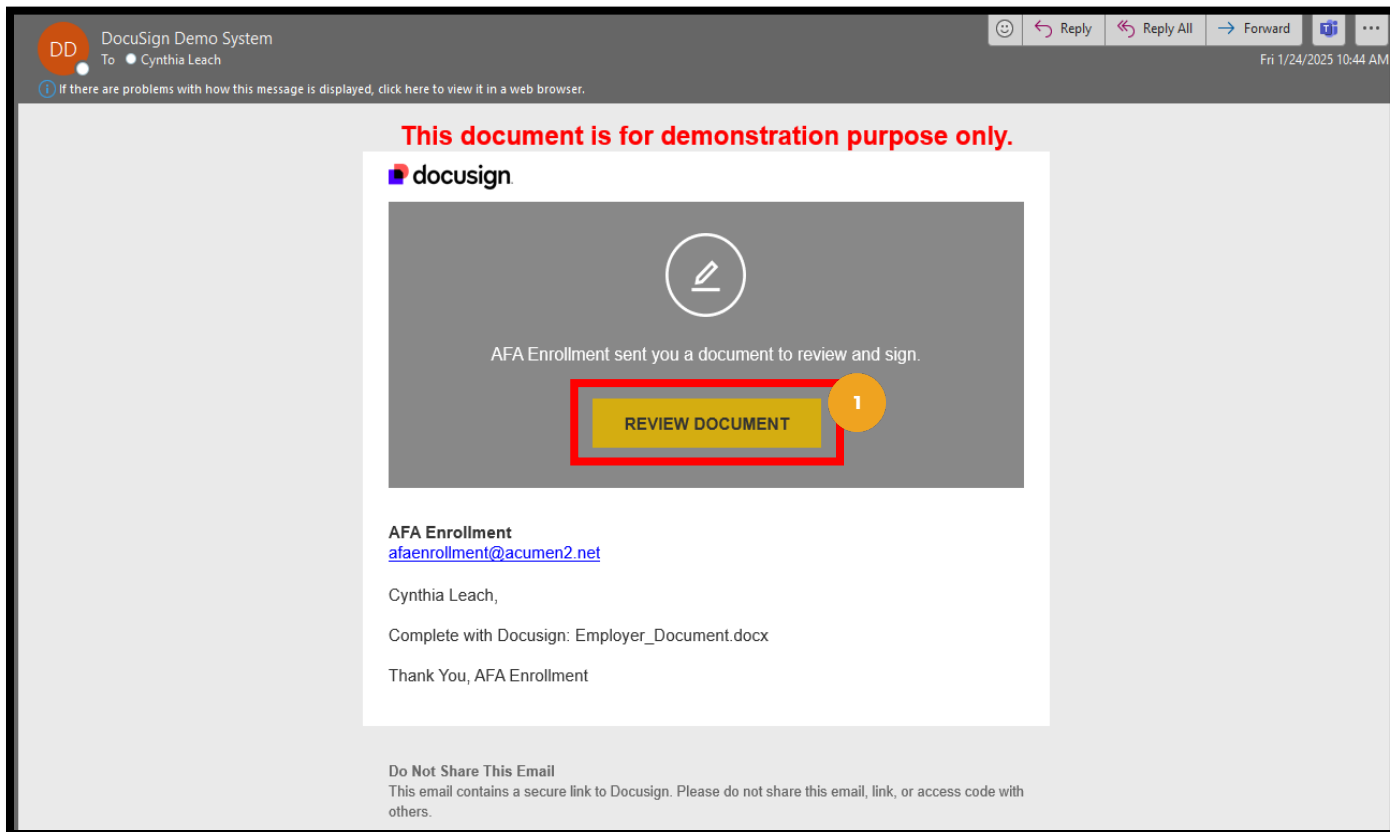
Complete Employee Packet

Employee completes

Complete Employee Packet – DocuSign

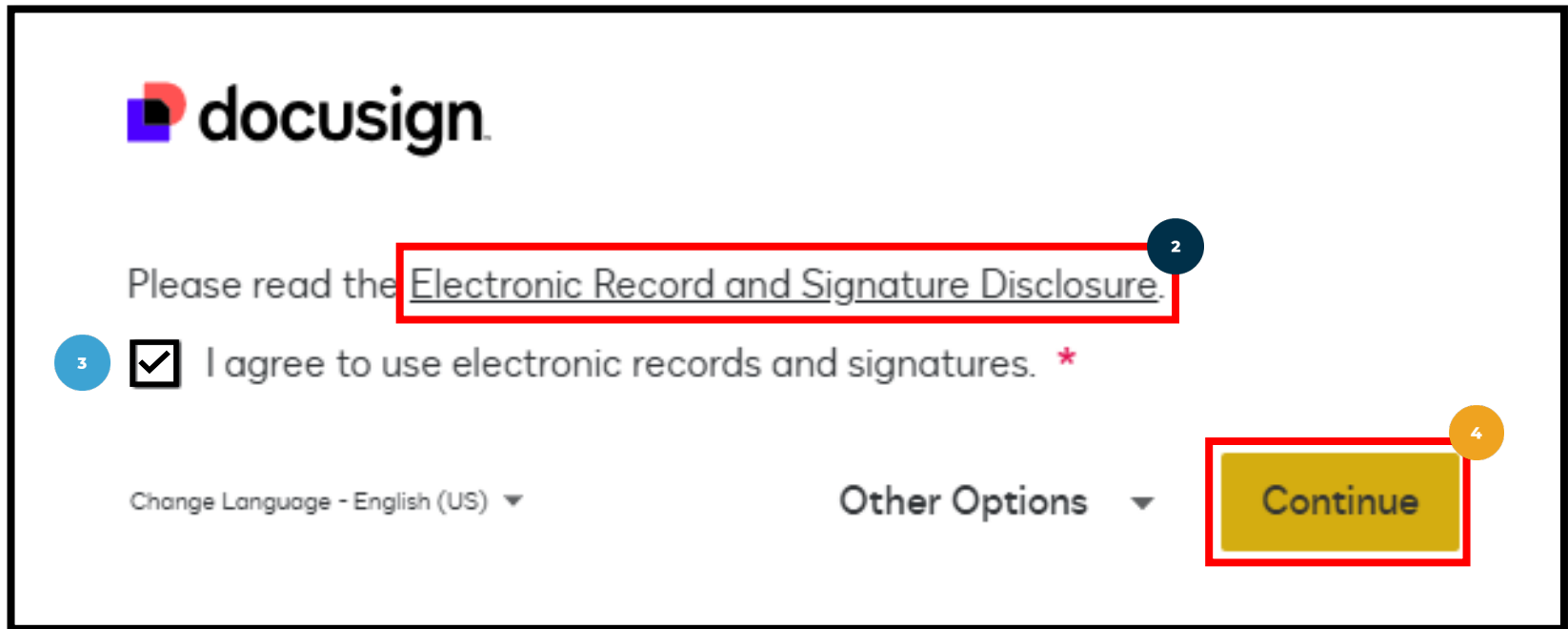
The packet arrives via an email from sender DocuSign. Check junk or spam folders if needed.

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 to the right of this box. Below the link, there is a blue circle with the number "3" 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 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". A red rectangular box surrounds this button, and an orange circle with the number "4" is positioned to its top right.

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 Employee 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 **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:

8 NEXT

7 Sign
↓

Participant or Employer/ Representative Signature _____ Date

Complete Employee Packet - DocuSign

To select a signature style provided by DocuSign:

- ✓ 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 [Signature] Date 7/31/2024

Print your name here ER Full
Print your title here HCSR EMPLOYER
Best daytime phone (222) 222-2223

Now print this form to the agent to complete.

Complete Employee Packet – DocuSign

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

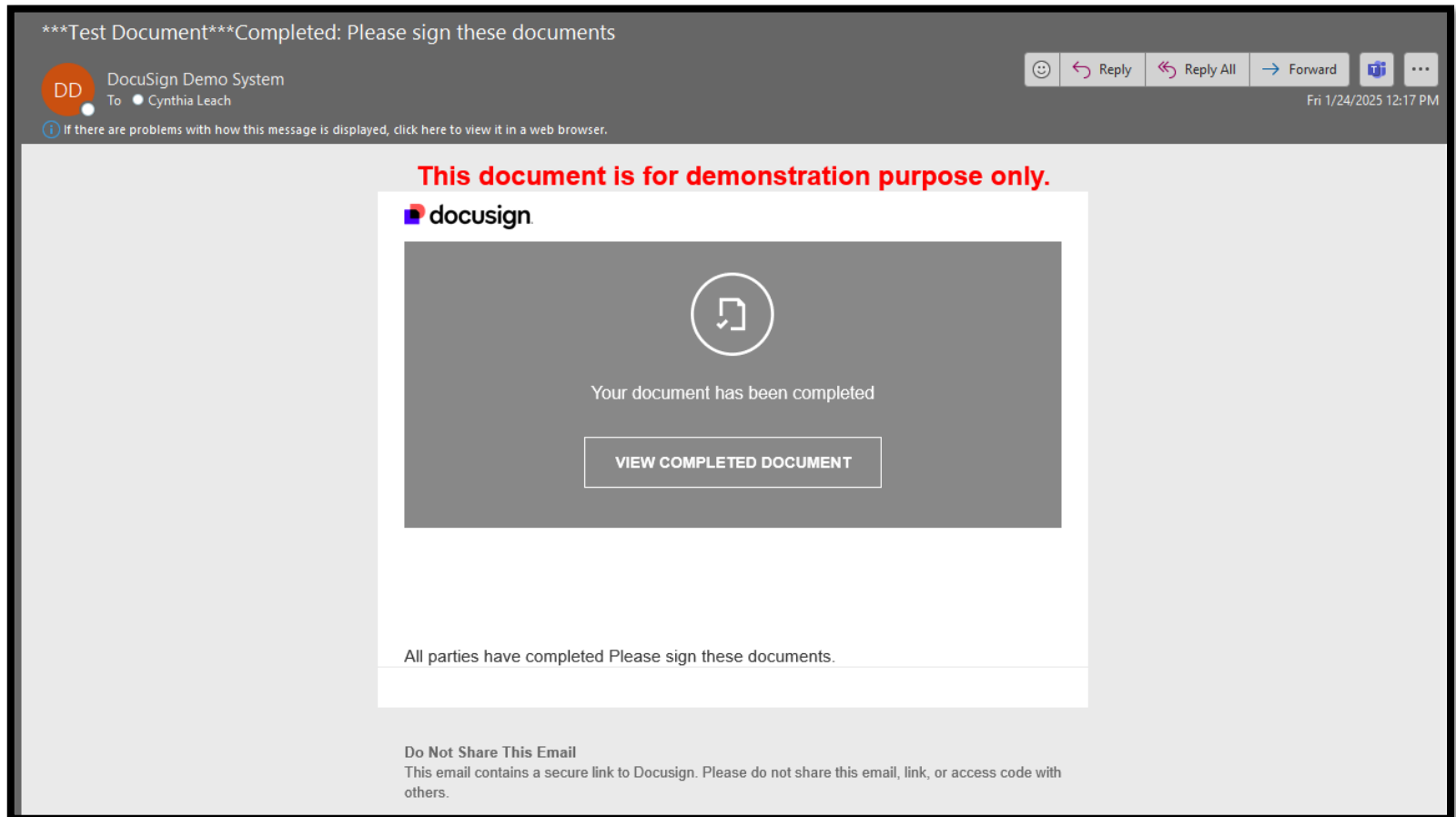
Congratulations!
The Employee packet is complete.



- 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

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**

Enrollment Completed

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

- If you will be receiving vendor services, continue your enrollment by clicking the **+Add Vendor Agreement** button. See [Add Vendor Agreement](#) section.
- If you will not be receiving vendor services, continue to the slide titled "[Next Steps](#)"

The screenshot displays the 'Client: Max1 Client' dashboard. At the top right is a 'Manage Clients' button. Below this, a horizontal bar contains several elements: on the left, 'NJ DDD - SDE (Transition)' and 'Employee Emma1 Employee' with a refresh icon; in the center, two boxes labeled 'Employer Packet Completed' and 'Employee Packet Completed', both highlighted with green borders; and on the right, a pencil icon. At the bottom of the dashboard are two blue buttons: '+ Add Employment' and '+ Add Vendor Agreement'.

Add Vendor Agreement

- Employer completes this process
- **Important! Client and Employer registrations must be completed before adding the Vendor Agreement.**
- **The Employer packet is not required to be completed to add the Vendor Agreement.**

Add Vendor Agreement

On the Enrollment Dashboard, click the **+Add Vendor Agreement** button.

Client: Max1 Client

Manage Clients

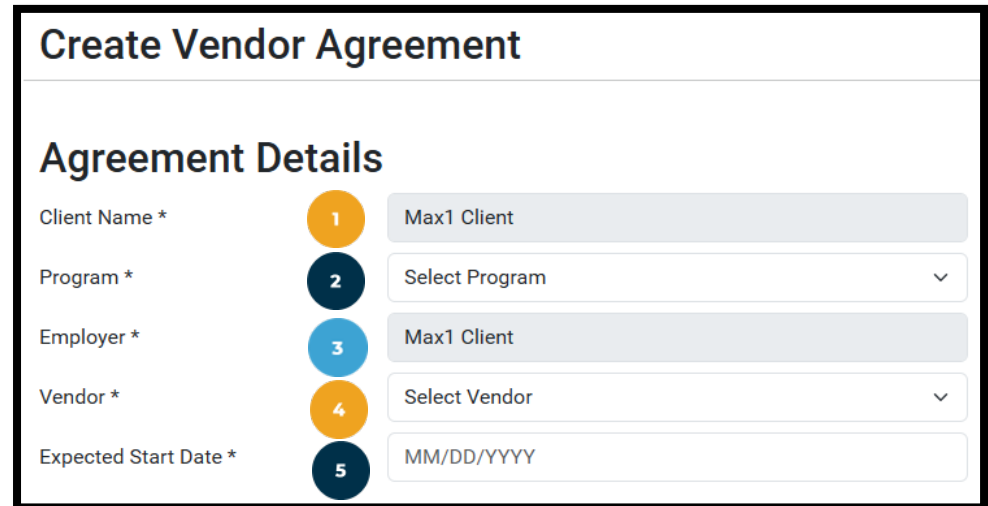
NJ DDD - SDE (Transition)	Employee Emma1 Employee	↻	Employer Packet Completed	Employee Packet Completed	✎
				+ Add Employment	+ Add Vendor Agreement

Add Vendor Agreement

Complete Create Vendor Agreement:

Employment Details:

1. Client Name (**required**): Auto-populates
2. Program (**required**): Auto-populates
3. Employer (**required**): Auto-populates
4. Vendor (**required**): Select from list of vendors **or** select “Other” if your vendor is not listed.
5. Expected Start Date (required):
See next slide



The screenshot displays a web form titled "Create Vendor Agreement". Under the "Agreement Details" section, there are five fields, each with a numbered circular icon to its left:

- Field 1: "Client Name *" with a light blue icon, containing the text "Max1 Client".
- Field 2: "Program *" with a dark blue icon, containing a dropdown menu with "Select Program" and a downward arrow.
- Field 3: "Employer *" with a light blue icon, containing the text "Max1 Client".
- Field 4: "Vendor *" with a dark blue icon, containing a dropdown menu with "Select Vendor" and a downward arrow.
- Field 5: "Expected Start Date *" with a light blue icon, containing the text "MM/DD/YYYY".

Add Vendor Agreement

Finish completing the Create Vendor Agreement 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 Vendor Agreement

Employment Details

Client Name *	Riley Johnson
Program *	NJ DDD (Vendor Only) ▼
Employer *	Riley Johnson
Vendor *	FASI Test Vendor - 12-3456456 ▼
Expected Start Date *	3/28/2025

< 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 Vendor Agreement

Complete the Services details:

6. Service Code #1 (required): Click the drop-down to select the services the Vendor will be providing.
7. Optionally:
 - ✓ Click **-Remove Service** to remove a service code
 - ✓ Click **+Add Service** to add another service code

Services

Select services the vendor will be providing *

Service Code #1 *

Service Code 6

+ Add Service

- Remove Service

8. Click **Save** to complete the process
9. Optionally, click **Cancel** to discard changes.

Save

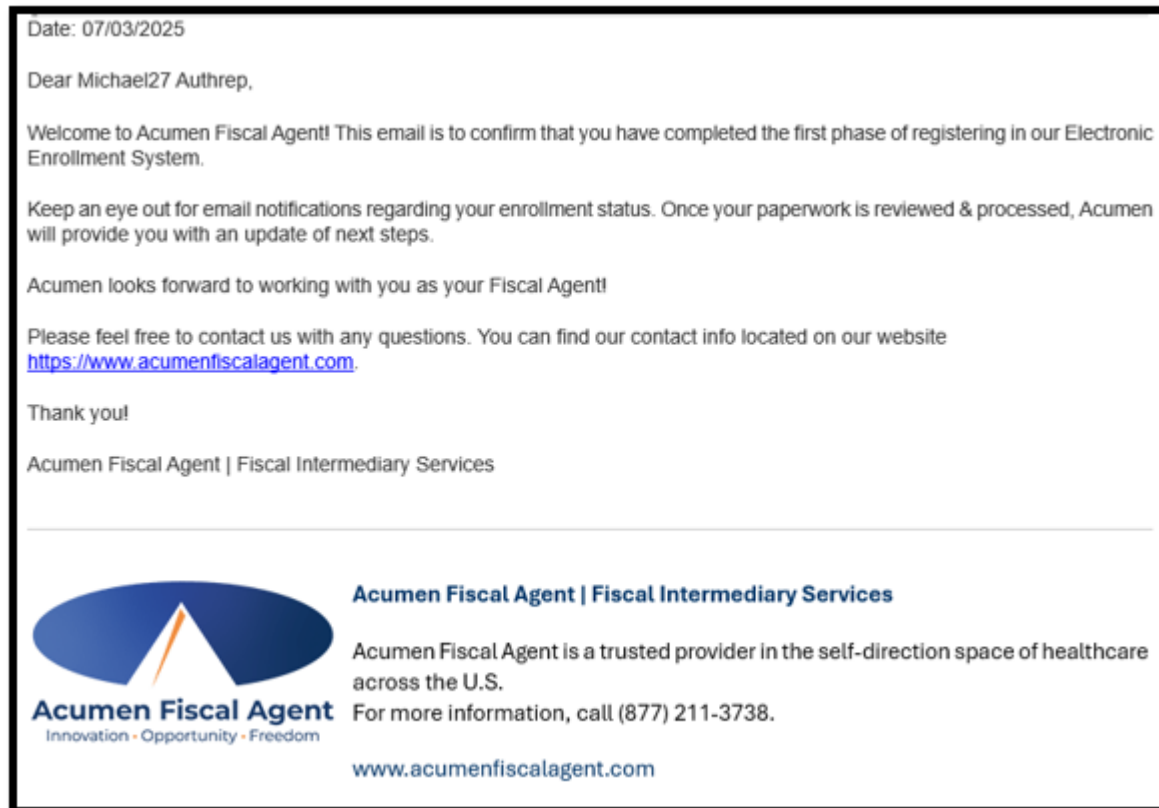
Cancel

Enrollment Phase Completion

After you Add the Employment and Vendor Agreement

After clicking **Save**, The Employer will receive an email:

- ✓ **Title:** Enrollment Phase Completion
- ✓ **Sender:** no-reply@acumen2.net
 - ❖ **Tip:** If the email doesn't appear in the inbox, be sure to check the spam or junk folder.



Enrollment Completed

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

- To add any additional vendor agreements, click the **+Add Vendor Agreement** button. See [Add Vendor Agreement](#) section.
- To add an additional employee, click the **+Add Employment** button. See [Add Employment](#) section.
- To enroll an additional client, click the **Manage Clients** button. See [Manage Clients](#) section.
- If you are finished with your enrollment, continue to the slide titled “[Next Steps](#)”

Client: Max1 Client Manage Clients

NJ DDD - SDE (Transition)	Employee Emma1 Employee	↻	Employer Packet Completed	Employee Packet Completed	✎
NJ DDD - Vendor	Vendor 7TH & MADISON EXTENSIONS OF EMPOWERMENT	↻	Employer Packet Completed		✎

+ Add Employment + Add Vendor Agreement

Next Steps

Congratulations! You have completed your portion of the enrollment process! Your enrollment information is now ready to be reviewed by an agent.

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



Click the logo to return to the Table of Contents.

Support & Resources

- You just learned how to complete your enrollment using Acumen's new **Electronic Enrollment System (EES)**.
- Acumen is committed to providing comprehensive support during the transition. Participants will have a number of ways to access this support:



- **In-Person Support** – [Schedule an appointment](#) with a Client Services Agent at our local office in Hamilton, NJ
- **Virtual Video Meetings** – Receive support from the comfort of your home.



- **Phone Assistance** – To reach Customer Service at our toll-free number: **833-892-0413**



- **Email support** – Email us at enrollment-nj@acumen2.net
- **Online Resources** - [New Jersey – Training Materials](#)
- **To update your contact information:** Use our [NJ DDD – Contact Information Update](#) form to update your contact details for Acumen.



Thank you!