

Initial Registration:

- For Clients receiving Vendor and Employee services
- Clients may be their own Employer if they do not have one designated and **must** complete the Employer sections of the enrollment with their information

To complete the **Initial Registration**:

1. Navigate to the **NJ Programs Electronic Enrollment page**:
<https://www.acumenfiscalagent.com/nj/ees/>
2. Click the **Go to Electronic Enrollment** button
3. Complete the **Initial Registration Form** (Required fields are marked with an asterisk (*))

Notes:

- Medicaid ID is Optional
 - Case Manager Name is Not Applicable
4. **Create Your Login Credentials**:
 - **Username** (required): Create a username to log into the EES portal
 - o Must be at least 6 characters
 - o Cannot be more than 50 characters
 - o Must be unique
 - o Characters must be alpha-numeric or period (.)

Tip: You can click on the "i" to view the username requirements. The requirements will be marked with a red "x", and once it meets the criteria, the "x" will turn into a green checkmark.
 - **Password** (required): Create a password to log into the EES portal
 - o Must contain 1 uppercase letter, lowercase letter, number, and special character
 - o No more than two repeated characters in a row
 - o Username and password cannot contain three consecutive characters of your first or last name
 - o Password cannot contain your username

Tip: You can click on the "i" to view the password requirements. The requirements will be marked with a red "x", and once it meets the criteria, the "x" will turn into a green checkmark.
 5. Click **Submit** to complete the Initial Registration Form
 6. A confirmation message populates. You will receive an email to confirm your account. See **Activate Authorized Representative / Employer Profile** section to continue.

Activate Employer Profile

1. Upon completing Initial Registration, an email is sent to you for account activation. (Check the email you provided during the Initial Registration).
 - **Title:** Welcome to Acumen's Electronic Enrollment System
 - **Sender:** no-reply@acumen2.net
 - Check the spam folder if necessary

2. Click the blue **Activate Account** button in the email (Link is active for a specific amount of time; typically, 24 hours)
 - *Note:* If after clicking the Activate Account button, **the link is inactive**, an alert stating Invalid Token - Please contact your DCI administrator appears
 - Click the **Resend the email** button and return to **step 2**
3. The **Activate Account** button opens a web page that states Confirm Profile: This Profile has already been activated
4. Click the **Click here to Sign In** button
5. You will be directed to the **DCI Web Portal** login screen
6. Enter the **username** and **password** created in the Initial Registration form
7. Click **Sign In** to begin the registration process
8. You are directed to the **Enrollment Dashboard**. See **Complete Client Registration** section for next steps.

Complete Client Registration

To complete Client Registration:

1. On the Enrollment Dashboard, click the **Start** button to Complete Client Registration
2. Complete **Additional Client Details**:
 - Required fields are marked with an asterisk (*)
 - **Important!** If **Support Coordinator Agency Name, Email, or Phone Number** is incorrect, please update to the correct information
3. Complete the **Physical Address**
 - Required fields are marked with an asterisk (*)
4. **Case Manager Details** (Not Applicable)
 - Leave blank
5. Click **Save** to complete the Client Registration process

Tip: To save the information you have entered, ensure all required fields have been completed. Otherwise, the **Save** button will not be enabled.
6. On the Enrollment Dashboard, Complete Client Registration is now marked **Complete**. See **Register Employer** section for next steps.

Register Employer

To register the Employer:

1. On the Enrollment Dashboard, click the **Start** button to Employer
2. Complete **Additional Employer Details** section:
 - Required fields are marked with an asterisk (*)
3. Complete **Physical Address**
 - Required fields are marked with an asterisk (*)
4. **Mailing Address**
 - Defaults to **OFF**, indicating the mailing address does not match the physical address
 - Add the mailing address

- Toggle to **ON** position if the mailing address is the same as the physical address
- 5. Complete **Business Details** section
 - For the first question, during transition the employer should already have an **EIN**
Tip: If you do not know your EIN, you can access it from the PPL website
 - For the second question, during transition the F/EA should be **PPL**
 - For the next question, (SUTA), select the appropriate answer, **YES** or **NO**
 - For the next question, (SIT), select the appropriate answer, **YES** or **NO**
- 6. Click **Save** to complete the Register Employer process
- 7. EES directs you back to the Enrollment Dashboard. Register Employer is now marked as Complete. See **Complete the Employer Packet** for next steps.

Complete the Employer Packet

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

Before the Employer starts registering the Employee, this is what you will need from the Employee(s) to complete the registration:

- Employee's full legal name (including any other names used or alias)
- Date of birth
- Social Security Number
- State where they reside
- Physical and mailing address
- The relationship to the employer and employee
- Payment preference, if they request Direct Deposit:
 - Bank's name
 - Account number
 - Routing number
 - Checking or Savings?
 - Flat dollar amount or percentage they would like to deposit into the account
 - Is the account under their name, if not the name on the account
 - Secondary account (optional)
- I9 documents for review and verification (a copy of the documents selected would need to be uploaded to the I9 form)
 - One item from List A (e.g. Citizenship, Birth Certificate, US Passport, etc.)
 - **OR**
 - One item from List B and one from List C (e.g. Driver's License, Social Security Card, etc.)
 - Driver's License if the Employee provides transportation to the Client

Register Employee

To register the Employee:

1. On the Enrollment Dashboard, click the **Start** button to Employee
2. Complete **Register Employee**:
 - Enter the First Name
 - Last Name
 - Date of Birth
 - Social Security Number
 - State
 - Required fields are marked with an asterisk (*)

Tip: when you press Next, it will search for existing Employees with the same name
3. Continue completing **Register Employee**:
 - Required fields are marked with an asterisk (*)
4. Complete **Physical Address**:
 - Required fields are marked with an asterisk (*)
5. **Mailing Address**:
 - Defaults to **OFF**, indicating the mailing address does not match the physical address.
 - Add the mailing address

- Toggle to **ON** position if the mailing address is the same as the physical address
- 6. Complete **Relationships**:
 - Employee's relationship to the Employer
- 7. Complete **Payment Information**:
 - Paper Check (No further information needed)
 - Payment Card (No further information needed)
 - Direct Deposit
 - Required fields are marked with an asterisk (*)
 - A **Voided Check** or **Bank Statement** is required
- 8. The Enrollment Dashboard displays and **Register Employee** is marked as **Complete**. See **+Add Employment** section for next steps.

+Add Employment

1. Once you are back in EES, on the Enrollment Dashboard, click the **+Add Employment** button
2. Complete **Employment Details** section:
 - Required fields are marked with an asterisk (*)
 - Some fields are pre-populated
 - When you click on the box for the **Employee**, a pop-up appears where you can select the Employee(s) you have already registered for the Client
Tip: You will also have the option to **Register a new Employee**. You can also use the search bar if you have multiple Employees.
3. Complete the **Tax Information** section:
Tip: 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
4. Complete the **Relationship** section:
 - Required fields are marked with an asterisk (*)
5. Complete the **Services** section:
 - Required fields are marked with an asterisk (*)
6. Click **Save** to complete the process

Send the Employee Packet

1. On the Enrollment Dashboard, click the **Send** button to send the Employee Packet
 - The pop-up message The Employee Packet has been sent to [**Employee's email address**] for signature collection displays
 - Click **Close**
 - EES will direct you back to the Enrollment Dashboard
2. On the Enrollment Dashboard, Employee Packet now displays **In Progress**
3. Check your email to find the packet to sign
 - The packet will come from a DocuSign sender
 - Check junk or spam folders if needed

4. Click the yellow **Review Document** button in the email to complete the forms
5. Click the **Electronic Record and Signature Disclosure** link to view the disclosure
6. Check the **box** to agree to using electronic records and signatures
7. Click the yellow **Continue** button
8. Click the yellow **Start** button
 - Use the **tab** key on the keyboard to move through each line
 - Review documents for accuracy!
 - Signature and date are required at the bottom of a page, click the **Sign** button to sign and date the form(s)
 - The Employer will need to review and attach the **19 Documents** provided by the Employee to verify citizenship
9. Click the yellow **Next** button or scroll down to proceed to the next form
10. Click the **Finish** button at the bottom of the last document
11. Click the yellow **Continue** button to proceed
 - The Employer receives a confirmation email with a link to view the completed document
12. Once you have signed the DocuSign packet, return to EES
 - To log back into EES later, navigate to: <https://acumen.dcisoftware.com/>
 - Enter the **username** and **password** created in the Initial Registration form
 - Click **Sign In**
13. Now the Employee will receive an email to find the packet to sign
 - The packet will come from a DocuSign sender
 - They should check junk or spam folders if needed
 - The Employee will follow the same directions as the Employer to **review** and **sign** the Employee Packet (follow steps 4-11)
14. The Enrollment Dashboard displays and Employee Packet is marked as **Completed**
 - If the Employee Packet shows **In Progress**, you can press the circle arrows to refresh the page

Add Vendor Agreement

1. Once you are back in EES, on the Enrollment Dashboard, click the **+Add Vendor Agreement** button
2. Complete **Create Vendor Agreement** section:
 - Required fields are marked with an asterisk (*)
 - **Vendor**: If the vendor list only shows **Other** OR if the vendor is not listed, select **Other**
3. Complete the **Services** section:
 - Click the drop-down to select the services the vendor will be providing
4. Click **Save** to complete the process.

Enrollment Completed

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

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

Next Steps:

1. An Agent will contact you with the next steps after they have reviewed the information received
2. An Agent will email your Support Coordinator to request a plan revision

Logging into EES after Enrollment Completed

1. To log back into EES later, navigate to: <https://acumen.dcisoftware.com/>
2. Enter the **username** and **password** created in the Initial Registration Form
3. Click **Sign In**
4. Optionally, click **Forgot your password** to reset your password (see **Reset Password**)

Reset Password

1. Navigate to: <https://acumen.dcisoftware.com/>
2. Click the **Forgot your Password** link to begin the process of resetting your password
3. In the **Forgot Password** screen, enter the email used during the Initial Registration
4. Click the **Send Reset Email** button.
5. The **Forgot Password Confirmation** screen displays:
 - A password reset link has been sent. Please check your email.
6. Click the **Back to Sign in** button
7. Check your email to find the Reset Password email
 - **Title:** Reset Password
 - **Sender:** no-reply@acumen2.net
 - Check the spam folder if necessary
8. Click the **Reset Password** button within the email. You will be directed to the Reset Password screen
9. On the Reset Password screen, enter your **new** password in the Please enter password field
 - *Password Criteria:*
 - o Must contain 1 uppercase letter, lowercase letter, number, and special character
 - o No more than two repeated characters in a row
 - o Username and password cannot contain three consecutive characters of the Enrollee first or last name
 - o Password cannot contain username
10. Re-enter the new password in the Please confirm password field
11. Click **Reset**
12. An alert displays "Are you sure you want to reset the password?"
13. Click the **Yes** button

14. EES will direct you to the DCI login screen. Enter the **username** and **new password**
15. Click **Sign In**