

Welcome to Acumen!

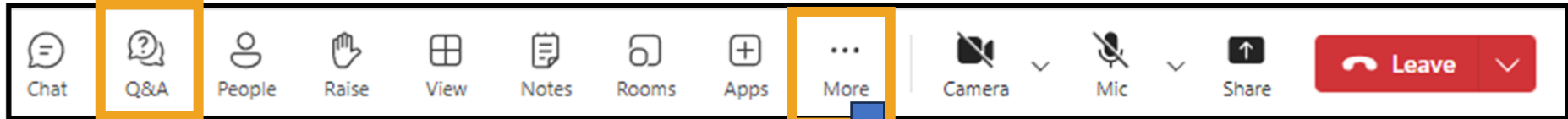
Thank you for joining the Acumen Family!

Helping create a positive, long-lasting
impact on people's lives.

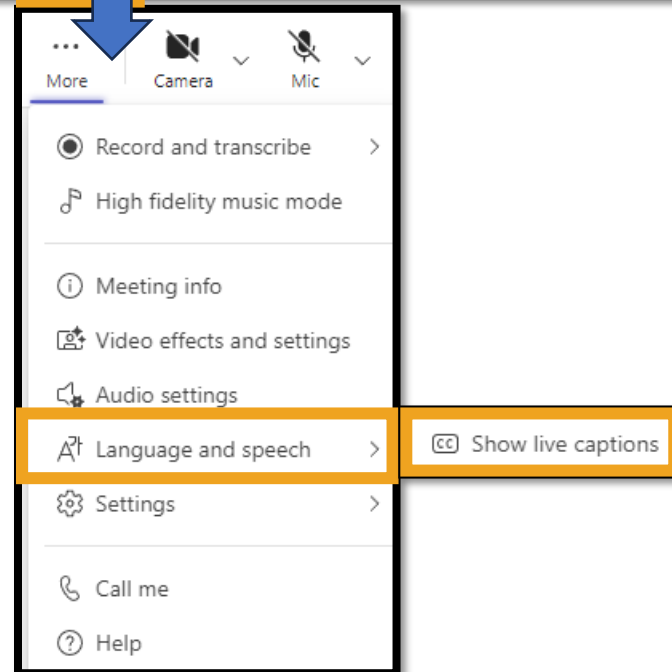


EES – Electronic Enrollment System Self-Enrollment Training (Vendor Only Program)

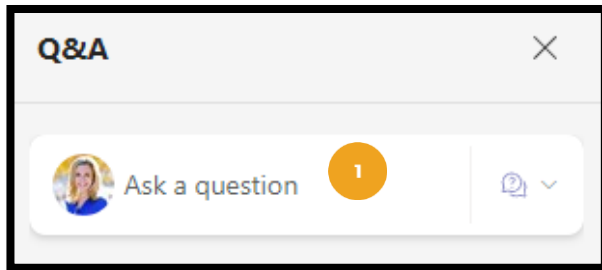
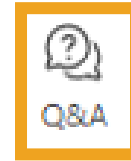
Using Microsoft Teams



- 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.



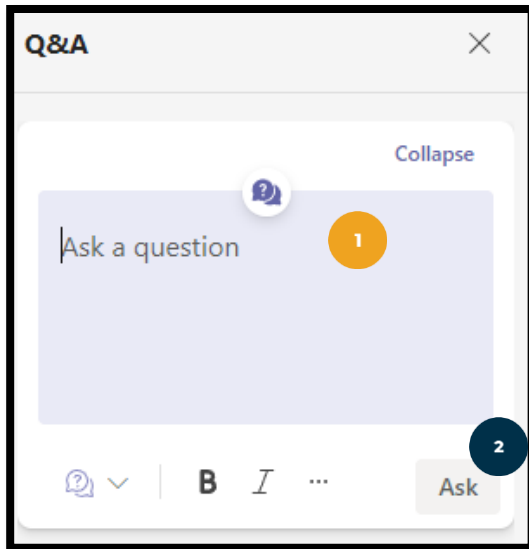
Using the Q&A button



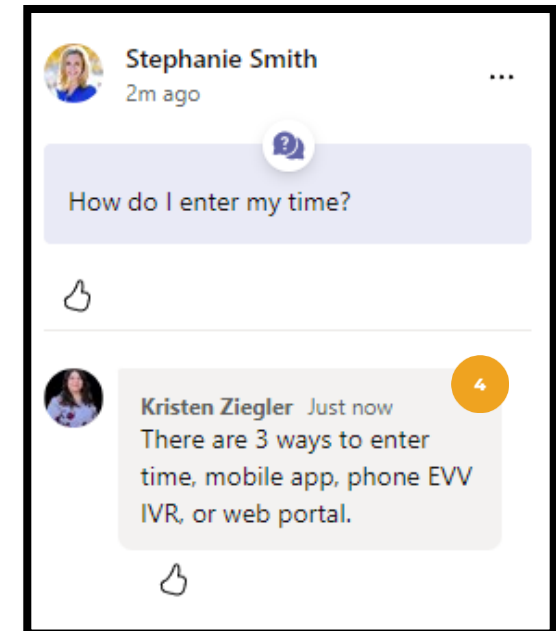
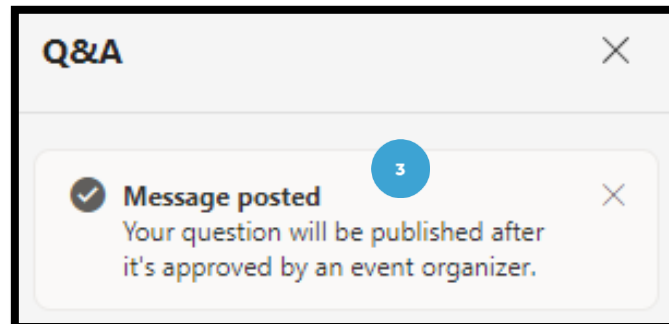
1. After clicking the Q&A button, **type your question** in the Ask a question field.

- Please do not include any confidential information or the question cannot be published & answered.

4. Moderators review, approve & post your question.



2. Click the Ask button
3. Message posted displays



Welcome to Acumen!

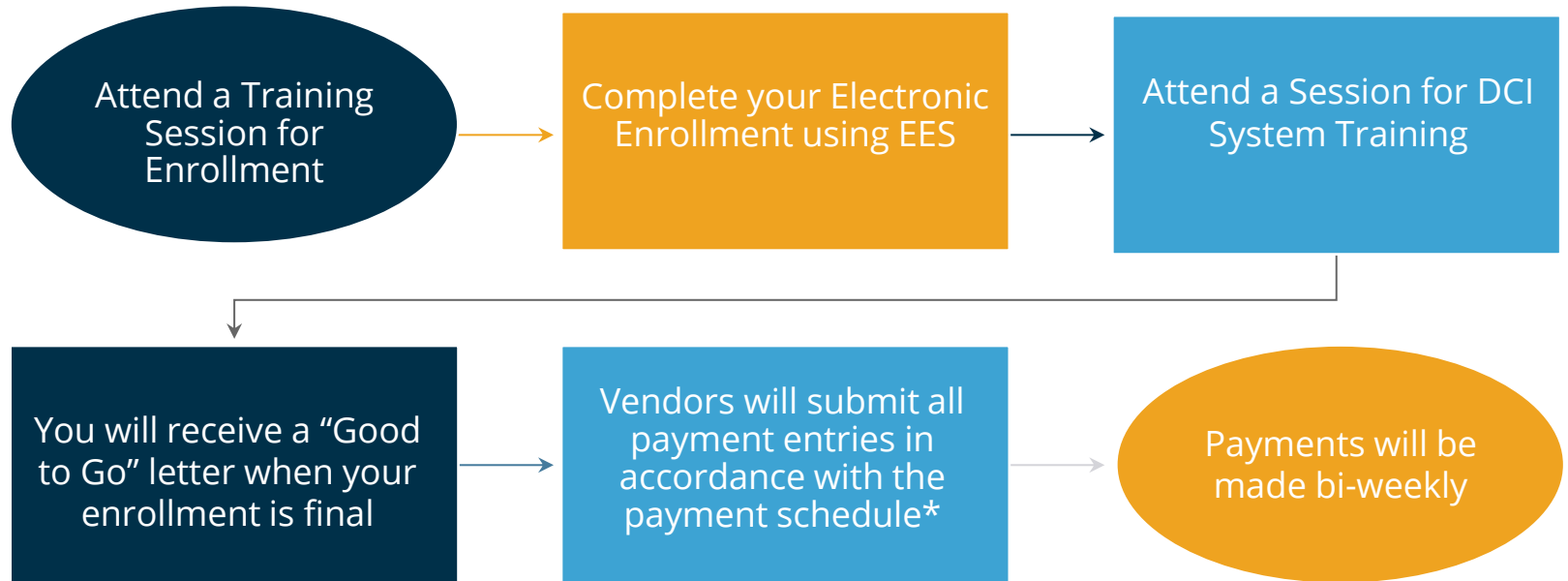
As you may know, the Division of Developmental Disabilities (**DDD**) Vendor Fiscal/Employer Agent Model is transitioning Fiscal Intermediary (**FI**) services from Public Partnerships, LLC (**PPL**) to Acumen Fiscal Agent (**Acumen**), this transition started in *early June*. Acumen will help manage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

Transition enrollments with Acumen will happen at staggered intervals over the summer of 2025, 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 to our training sessions for the **New Jersey DDD program**. 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 vendor entries/reimbursement requests by 9pm EST of the due date, **even if it falls on a weekend or holiday.** Those received *after* 9pm EST of the due 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

Authorized Rep. Info:

- 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

Vendor(s) Agreement:

- Vendor(s) Name
- Service vendor(s) will be providing

Agenda

1. Overview & Getting Started
2. Initial Registration
3. Activate Profile
4. Logging In
5. Complete Client Registration
6. Register Employer
7. Complete Employer Packet
8. Add Vendor Agreement
9. Enrollment Completed

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. For participants receiving vendor only services, an employer is *NOT* required. Authorized Representatives completing the enrollment will be referred to as Employers in EES.
3. **Authorized Representative:** Any person appointed by the Client to manage services on their behalf. May be entered in EES as the Employer in Vendor Only or Vendor with Employee(s) programs.
4. **Agent:** An Acumen employee who assists the enrollee through the enrollment process
5. **Add Vendor Agreement:** The Individual or Authorized Representative enters the information about the services the vendor will provide into EES. Information includes the vendor(s) name and the service the vendor will be providing.

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)
- ✓ **Authorized Representative** (if acting as the Employer)

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

Initial Registration: Authorized Representative or Employer with Vendor ONLY

For Clients receiving **vendor only services**, an employer is **NOT** required. Authorized Representatives completing the enrollment will be referred to as **Employers** in EES.

Clients may be their own Authorized Representative if they do not have one designated and must complete the Employer sections of the enrollment with their information.

Authorized Representative/Employer/Client are the same person

Complete this process if both receiving and managing the care

Initial Registration (Auth. Rep. / Employer = Client)

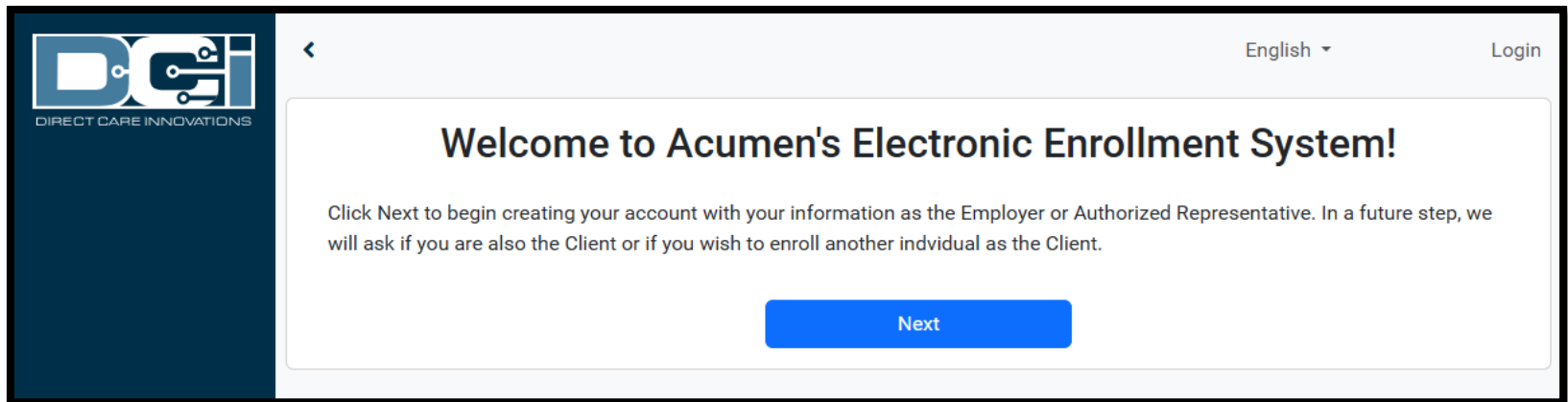
1. Navigate to the **NJ Programs Electronic Enrollment** page:
2. Click the **Go to Electronic Enrollment** button

1

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



Initial Registration (Auth. Rep. / Employer = Client)



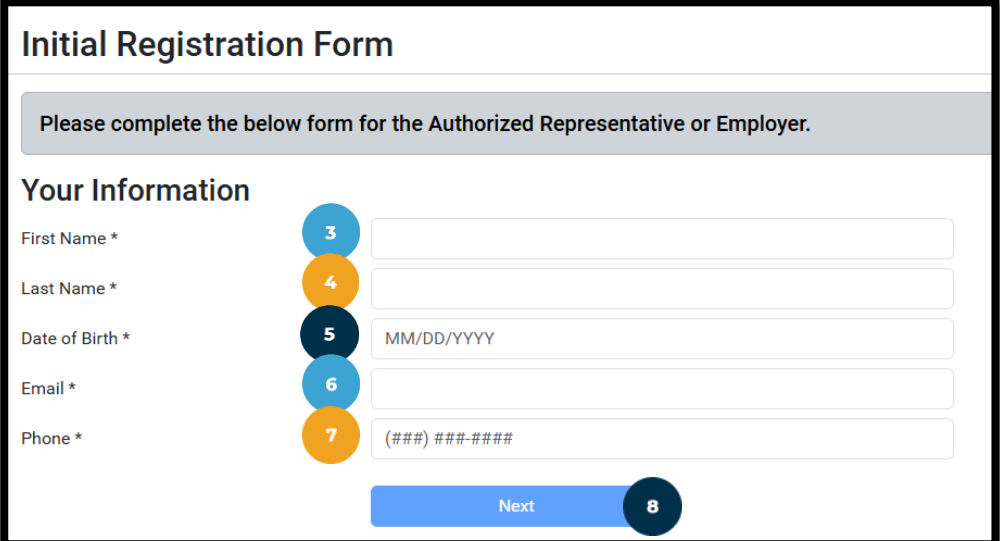
The screenshot shows a web interface for 'Acumen's Electronic Enrollment System'. On the left is a dark blue sidebar with the 'DCI DIRECT CARE INNOVATIONS' logo. The main content area has a light gray header with a back arrow, 'English' dropdown, and 'Login' link. The main text reads 'Welcome to Acumen's Electronic Enrollment System!' followed by instructions: 'Click Next to begin creating your account with your information as the Employer or Authorized Representative. In a future step, we will ask if you are also the Client or if you wish to enroll another individual as the Client.' A blue 'Next' button is centered below the text.

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

Initial Registration (Auth. Rep. / Employer = Client)

Complete the Initial Registration Form:

3. First Name **(required)**
4. Last Name **(required)**
5. Date of Birth **(required)**:
 - Enter the date in **MM/DD/YYYY** formatOR
 - Click in the field to select a date from the calendar
6. Email **(required)**
7. Phone **(required)**
8. Click **Next**



The screenshot shows a web form titled "Initial Registration Form". Below the title is a grey instruction bar: "Please complete the below form for the Authorized Representative or Employer." The form section is titled "Your Information" and contains five input fields, each with a numbered circular icon to its left: 3 (First Name *), 4 (Last Name *), 5 (Date of Birth *), 6 (Email *), and 7 (Phone *). The Date of Birth field has a placeholder "MM/DD/YYYY" and the Phone field has a placeholder "(###) ###-####". At the bottom right is a blue "Next" button with a dark blue circle containing the number 8 next to it.

EES searches for existing enrollees with an exact match to First Name, Last Name, and DOB. Use legal information found on the Authorization (budget) to complete Initial Registration.

Initial Registration (Auth. Rep. / Employer = Client)

Are you the person receiving services?

- 9. Click **Yes**
- 10. Click **Next** to continue
- ✓ Assigned both the Client & Employer roles

Initial Registration Form

Are you the person receiving services? *

9

☒ Yes

☐ No

Next

10

Initial Registration (Auth. Rep. / Employer = Client)

Complete the Client Details:

11. State: Select State (**required**)
12. Medicaid ID: Enter Medicaid ID (optional)
13. Case Manager Name: (leave blank)
14. Click **Next**

The screenshot displays the 'Initial Registration Form' with a section titled 'Client Details'. It contains three input fields: 'State *' with a dropdown menu, 'Medicaid ID', and 'Case Manager Name'. Each field is preceded by a numbered circle: 11 (dark blue), 12 (light blue), and 13 (orange). At the bottom right, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a dark blue circle containing the number 14.

Initial Registration Form

Client Details

State * 11 Select State

Medicaid ID 12

Case Manager Name 13

Back Next 14

Initial Registration (Auth. Rep. / Employer = Client)

Create login credentials:

15. Username (**required**): Create a username to log into the EES portal.

- ✓ Must be at least 6 characters
- ✓ Cannot be more than 50 characters
- ✓ Must be unique
- ✓ Characters must be alpha-numeric and the only special character is the period “.”

16. 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

17. Click **Submit**

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

Initial Registration Form

Create Your Login Credentials

Username ⓘ sasha4.client 15

Password ⓘ 16

Cancel ✓ Submit 17

Initial Registration Form

Create Your Login Credentials

Username ⓘ sasha4.client

Password ⓘ

Cancel ✓ Submit

Password Requirements

- ✓ 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

(Auth. Rep. / Employer = Client)


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

18

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

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Authorized Representative / Employer is NOT the Client

- ✓ Complete this process if the client and employer are two different people
- ✓ Note: During this process, the Authorized Representative may assume the role of the Employer as noted in the directions that follow.

Initial Registration

(Auth. Rep. / Employer is NOT the Client)

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

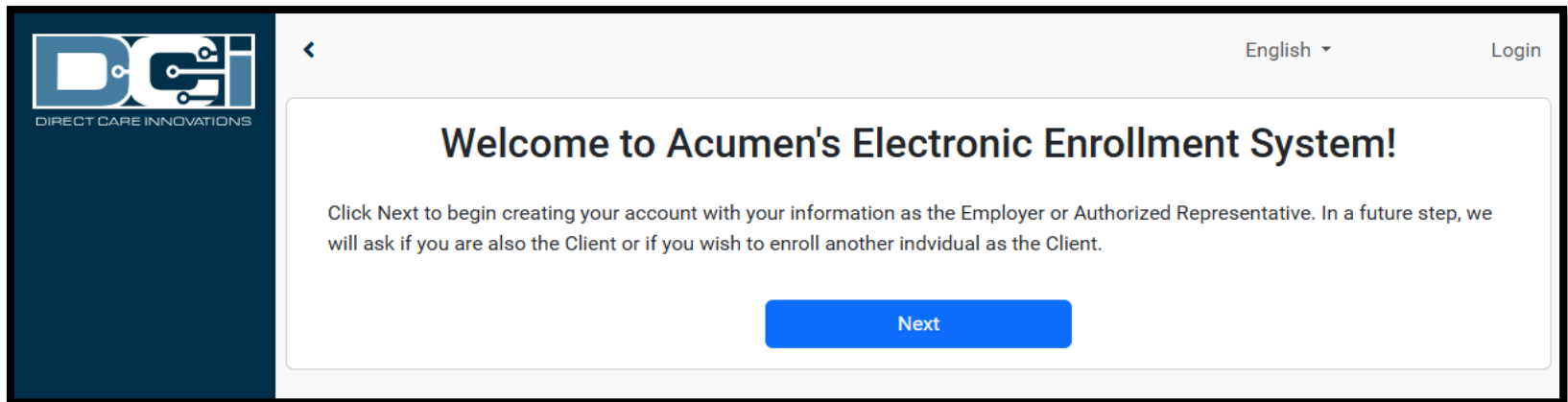
1

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



Initial Registration

(Auth. Rep. / Employer is NOT the Client)



The screenshot shows a web interface for 'Acumen's Electronic Enrollment System'. On the left is a dark blue sidebar with the 'DCI DIRECT CARE INNOVATIONS' logo. The main content area has a light gray header with a back arrow, 'English' dropdown, and 'Login' link. The central message reads: 'Welcome to Acumen's Electronic Enrollment System! Click Next to begin creating your account with your information as the Employer or Authorized Representative. In a future step, we will ask if you are also the Client or if you wish to enroll another individual as the Client.' A prominent blue 'Next' button is centered below the text.

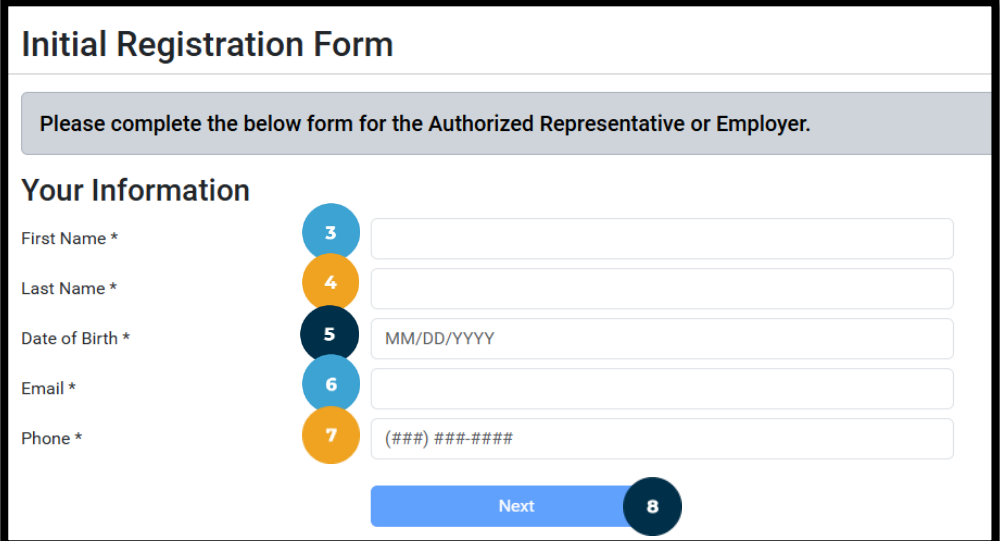
- ✓ Click **Next** to begin creating your account with your information as the Employer or Authorized Representative.
- ✓ In a future step, we will ask if you are also the Client or if you wish to enroll another individual as the Client.

Initial Registration

(Auth. Rep. / Employer is NOT the Client)

Complete the Initial Registration Form:

3. First Name (**required**)
4. Last Name (**required**)
5. Date of Birth (**required**):
 - Enter the date in **MM/DD/YYYY** format
- OR
- Click in the field to select a date from the calendar
6. Email (**required**)
7. Phone (**required**)
8. Click **Next**



The screenshot shows the 'Initial Registration Form' with a grey instruction bar at the top: 'Please complete the below form for the Authorized Representative or Employer.' Below this is the 'Your Information' section. It contains five input fields, each with a numbered circle to its left: 'First Name *' (3), 'Last Name *' (4), 'Date of Birth *' (5) with a placeholder 'MM/DD/YYYY', 'Email *' (6), and 'Phone *' (7) with a placeholder '###-###-####'. At the bottom right is a blue 'Next' button with a dark blue circle containing the number 8.

EES searches for existing enrollees with an exact match to First Name, Last Name, and DOB. Use legal information found on the Authorization (budget) to complete Initial Registration.

Initial Registration

(Auth. Rep. / Employer is NOT the Client)

Are you the person receiving services?

- 9. Click **No**
- 10. Click **Next** to continue
- ✓ Assigned Employer role

Initial Registration Form

Are you the person receiving services? *

☐ Yes ☒ No **9**

Next

10

Initial Registration

(Auth. Rep. / 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 searches for existing clients with an exact match of First Name, Last Name, and DOB to verify if the client is enrolled. Use legal information found on the Authorization (budget) to complete Initial Registration.

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

(Auth. Rep. / 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**

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 Submit 20

Initial Registration Form

Create Your Login Credentials

Username ⓘ sasha4.client 18

Password ⓘ ***** 19

Cancel Submit 20

Password Requirements x

- ✓ 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

(Auth. Rep. / Employer is NOT the Client)


21. The confirmation message populates. An email is sent to the Enrollee for account activation. See [Activate Enrollee 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

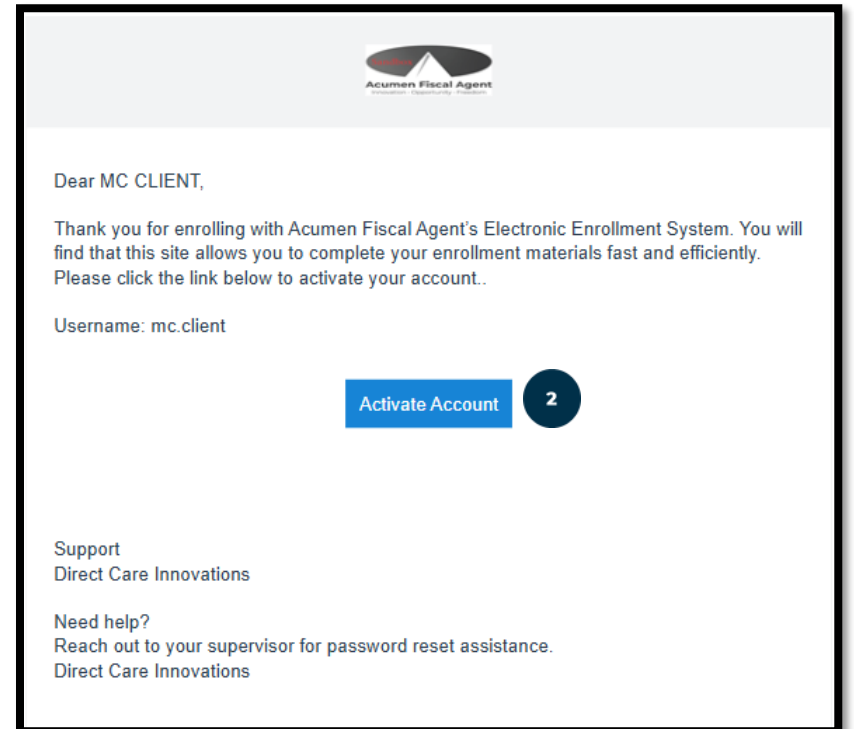
22

Instructions for logging into EES using a tablet or mobile device

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

Activate Profile –DCI Mobile Full Site

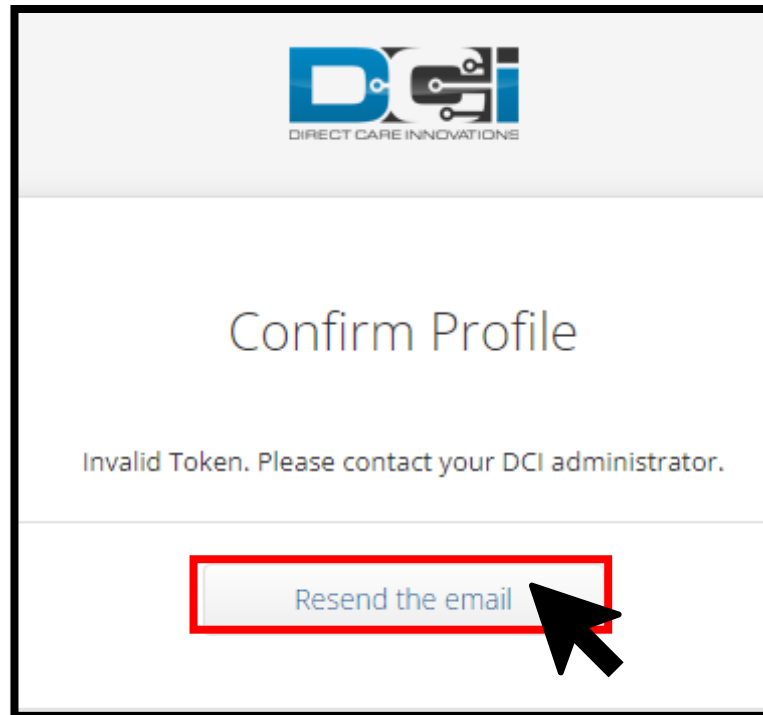
1. Upon completing Initial Registration, an email is sent to the Enrollee for account activation.
 - ✓ **Title:** Welcome to Acumen's Electronic Enrollment System
 - ✓ **Sender:** no-reply@acumen2.net
 - ✓ Check the spam folder if necessary
2. Click the blue **Activate Account** button in the email
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



Activate Profile –DCI Mobile Full Site

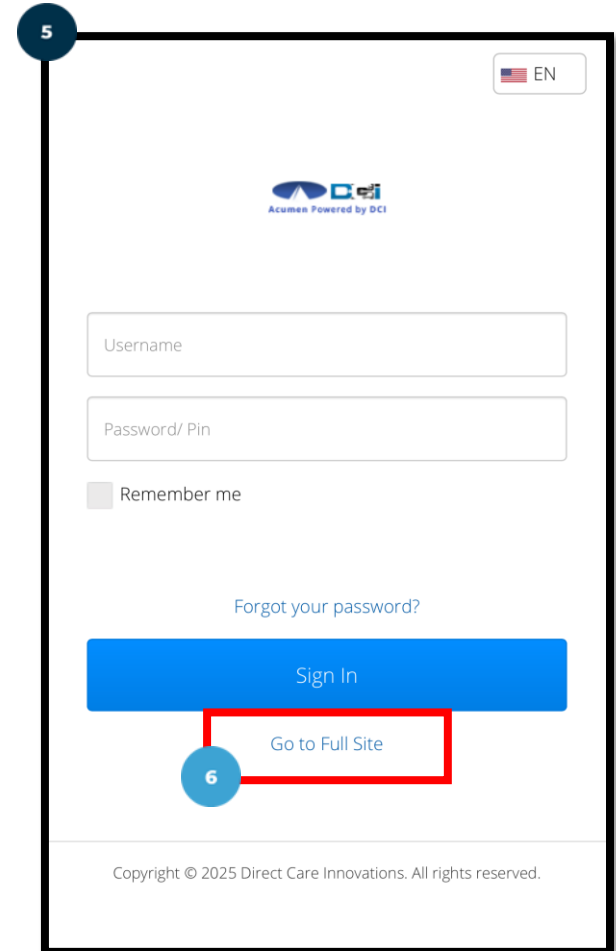
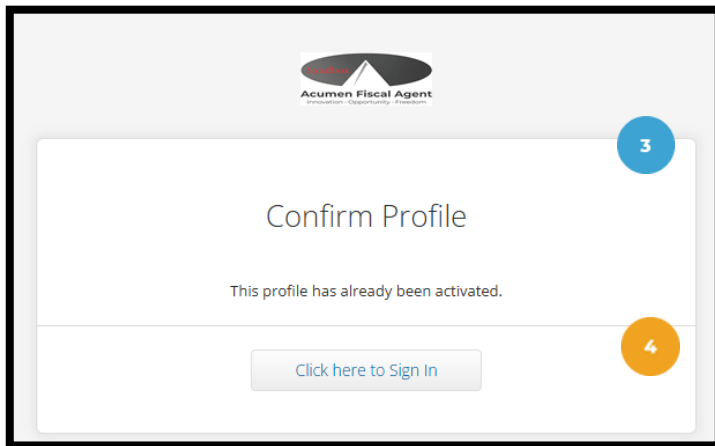
Note:

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



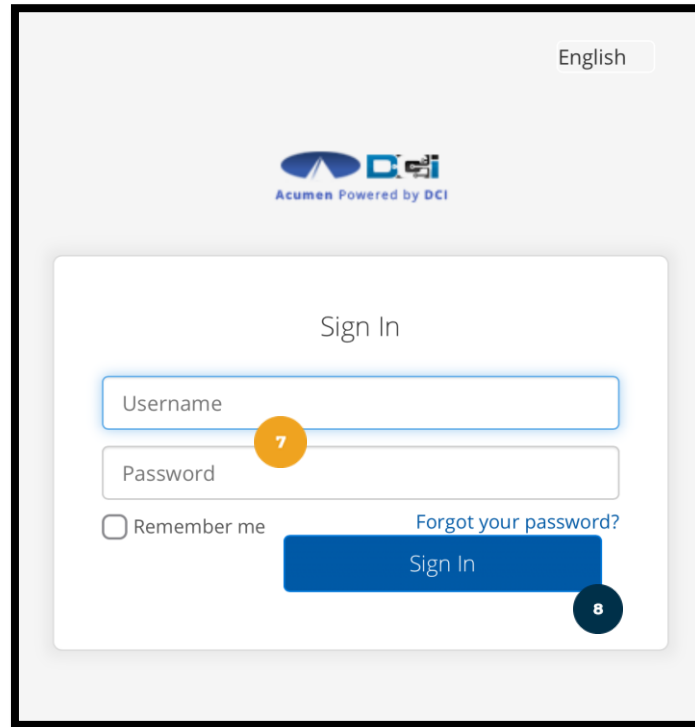
Activate Profile –DCI Mobile Full Site

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



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



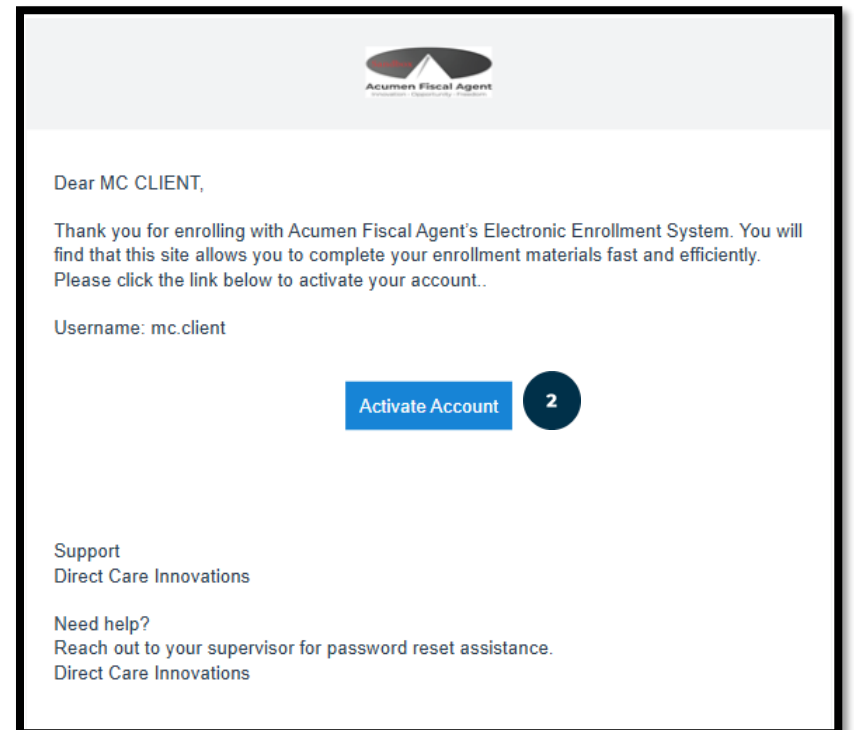
The screenshot shows the 'Sign In' page of the DCI Mobile application. At the top right, there is a language selector set to 'English'. Below the header is the DCI logo with the text 'Acumen Powered by DCI'. The main content area is titled 'Sign In' and contains a form with two input fields: 'Username' and 'Password'. A blue callout circle with the number '7' points to the 'Password' field. Below the 'Password' field is a checkbox labeled 'Remember me' and a link that says 'Forgot your password?'. At the bottom of the form is a blue 'Sign In' button. A blue callout circle with the number '8' points to the 'Sign In' button.

Instructions for logging into EES using a desktop or laptop computer

- ✓ Employer or Authorized Representative 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

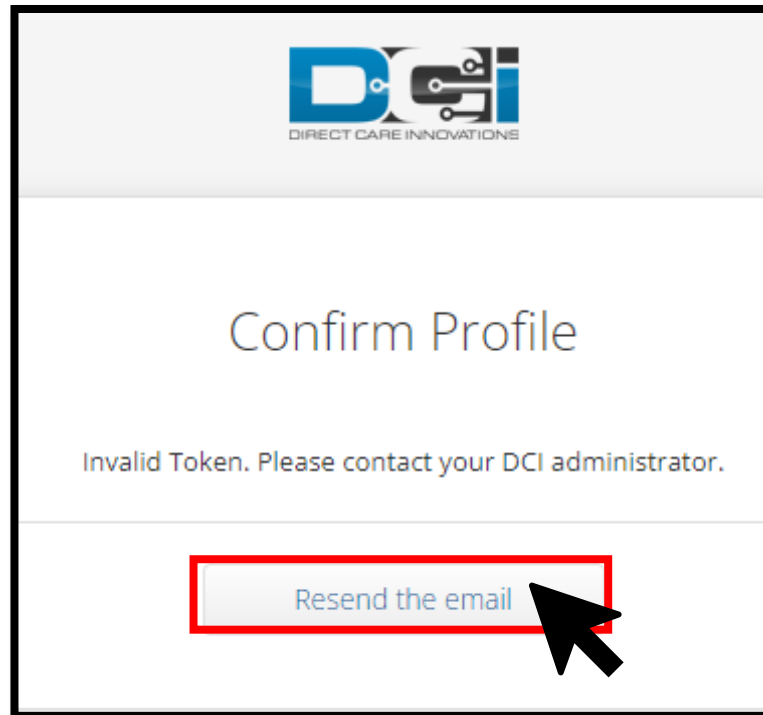
1. Upon completing Initial Registration, an email is sent to the Enrollee for account activation.
 - ✓ **Title:** Welcome to Acumen's Electronic Enrollment System
 - ✓ **Sender:** no-reply@acumen2.net
 - ✓ Check the spam folder if necessary
2. Click the blue **Activate Account** button in the email
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



Activate Profile

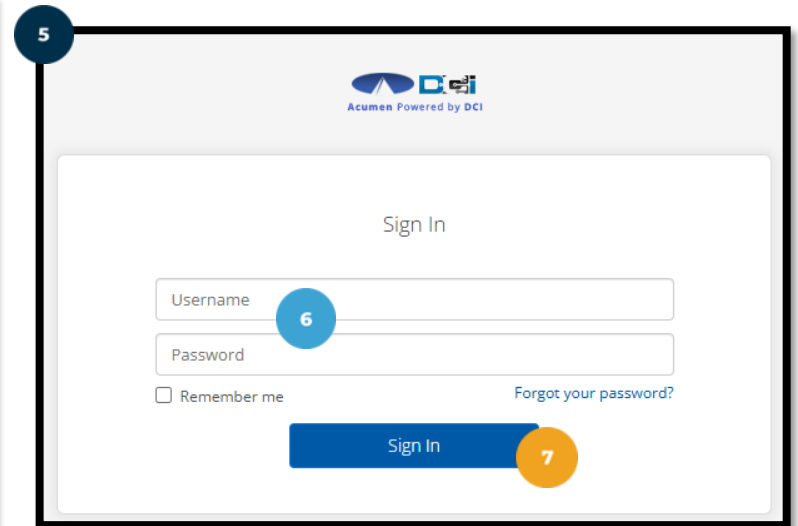
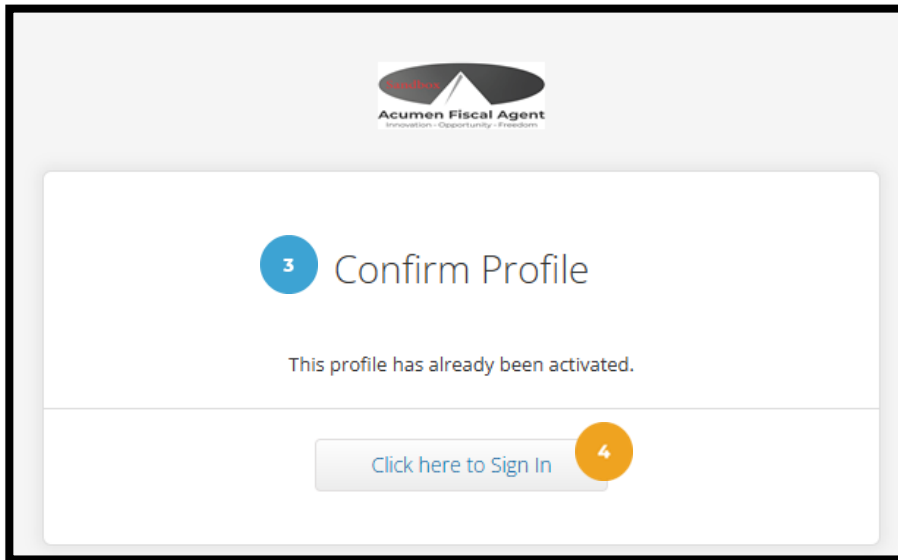
Note:

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



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 / Authorized Representative 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 user Riley Johnson. The sidebar on the left contains the following menu items: Home, Enrollment, **Dashboard** (highlighted with a red box), My Info, Clients, Employees, and Employments. The main content area features a 'Welcome!' message and a list of tasks for 'Client: Riley Johnson'. The tasks are: 'Complete Client Registration' (with a 'Start' button highlighted by a red box), 'Register Employer' (with a 'Start' button), and 'Complete Employer Packet' (with a 'Start' button). A 'Manage Clients' button is located at the top right of the task list. At the bottom of the task list is a '+ Add Vendor Agreement' button.

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 # (pre-populated)
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. Enrollment Start Date (Agent Use Only)
8. Relationship to Authorized Rep. (**required**)
9. Primary Language (optional)
10. Referral Choice (Agent use only)
11. State ID (**required**) – Enter DDD ID#
12. Support Coordinator Agency Name (**required**)
13. Support Coordinator Email Address (**required**)
14. Support Coordinator Name (**required**)
15. Support Coordinator Phone Number (**required**):

Enrollment Start Date (Agent Use Only)	7
How is the Client related to the Authorized Representative? For example, is the Client the Authorized Representative's parent, child, spouse, friend, or neighbor. *	8
Primary Language	9
Referral Choice (Agent Use Only)	10
State ID	11
Support Coordinator Agency Name *	12
Support Coordinator Email Address *	13
Support Coordinator Name	14
Support Coordinator Phone Number *	15

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:

- 18. Address Line 1 (**required**)
- 19. City (**required**)
- 20. State (**required**)
- 21. Zip Code (**required**)
- 22. Country (**required**)

Physical Address

Address Line 1 *	18	1776 Freedom Lane
City *	19	Rapid City
State *	20	SD
Zip Code *	21	57701
Country *	22	United States of America

Complete the Case Manager Details:

- 23. Case Manager Name (Not Applicable)
- 24. Case Manager Phone (Not Applicable)
- 25. Case Manager Email (Not Applicable)
- 26. Click **Save** to complete the Client Registration process

Case Manager Details

Case Manager Name	Michael Chavez	23
Case Manager Phone	(###) ###-####	24
Case Manager Email		25

✓ Save 26

Cancel

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

DCI
DIRECT CARE INNOVATIONS

English ▾ Acumen EES Implementation \riley.johnson ▾

Welcome!

Welcome to Acumen's Electronic Enrollment System! We're honored you've chosen us as your fiscal agent partner. Our goal is to empower you to manage your Client's care with more freedom. This system is designed to streamline the enrollment process by providing you with all the necessary tools and resources to complete the required paperwork, upload documents, and keep track of the enrollment status. Should you have any questions or encounter any challenges, please feel free to reach out to our dedicated team at (877) 211-3738 or enrollment@acumen2.net.

Thank you for choosing us as your partner in this journey! We're excited to embark on this journey with you and support you every step of the way. Welcome aboard!

Client: Riley Johnson [Manage Clients](#)

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

[+ Add Vendor Agreement](#)

Complete Client Registration is marked Complete

Register Authorized Rep. / Employer

Employer / Authorized Representative completes this process

Register Auth. Rep. / Employer

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

English ▾ Acumen EES Implementation \ **riley.johnson** ▾

Welcome!

Welcome to Acumen's Electronic Enrollment System! We're honored you've chosen us as your fiscal agent partner. Our goal is to empower you to manage your Client's care with more freedom. This system is designed to streamline the enrollment process by providing you with all the necessary tools and resources to complete the required paperwork, upload documents, and keep track of the enrollment status. Should you have any questions or encounter any challenges, please feel free to reach out to our dedicated team at (877) 211-3738 or enrollment@acumen2.net.

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Client: Riley Johnson [Manage Clients](#)

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

[+ Add Vendor Agreement](#)

Register Auth. Rep. / Employer

Complete the Additional Auth. Rep. / 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

Auth. Rep. / 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 Auth. Rep. / Employer

Complete Physical Address details:

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

Physical Address

Address Line 1 *	7	123 Main
City *	8	Rapid City
State *	9	SD
Zip Code *	10	57701
Country *	11	United States of America

Register Auth. Rep. / Employer


Complete Mailing Address details:

12. Mailing Address Matches Physical Address:

- Defaults to **OFF**, indicating the mailing address does not match the physical address. Add the mailing address:
 - a. Address Line 1 (**required**)
 - b. City (**required**)
 - c. State (**required**)
 - d. Zip Code (**required**)
 - e. Country (**required**)

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

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 Auth. Rep. / Employer

14. Complete **Business Details** section
 - Answer all four questions as **N/A** (Not Applicable)
15. Click **Save** after completing all four questions

Business Details

Please do not provide answers to the questions below based on a Partnership, Corporation, Limited Liability Company (LLC), Trust, Estate, Nonprofit or any other entity not considered a Sole Proprietor. Acumen Fiscal Agent, LLC can only accept an EIN and business information for a Sole Proprietor business. If you have ever owned a Sole Proprietor (currently or in the past), you must let us know. Failure to do so will also drastically increase the time it takes to enroll and receive services under this program.

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

☐ Yes ☐ No ☒ N/A

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

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

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

✓ Save

Cancel

Register Auth. Rep. / Employer

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

The screenshot shows the Acumen EES Implementation dashboard for user Riley Johnson. The dashboard includes a sidebar with navigation links: Home, Enrollment, Dashboard (selected), My Info, Clients, Employees, and Employments. The main content area features a 'Welcome!' message and a list of tasks for Client: Riley Johnson. The tasks are: Complete Client Registration (Complete), Register Employer (Complete, highlighted with a red box), and Complete Employer Packet (Start). There is also a '+ Add Vendor Agreement' button at the bottom.

English ▾ Acumen EES Implementation \ riley.johnson ▾

Welcome!

Welcome to Acumen's Electronic Enrollment System! We're honored you've chosen us as your fiscal agent partner. Our goal is to empower you to manage your Client's care with more freedom. This system is designed to streamline the enrollment process by providing you with all the necessary tools and resources to complete the required paperwork, upload documents, and keep track of the enrollment status. Should you have any questions or encounter any challenges, please feel free to reach out to our dedicated team at (877) 211-3738 or enrollment@acumen2.net.

Thank you for choosing us as your partner in this journey! We're excited to embark on this journey with you and support you every step of the way. Welcome aboard!

Client: Riley Johnson [Manage Clients](#)

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

[+ Add Vendor Agreement](#)

Complete Auth. Rep. / Employer Packet

Authorized Representative / Employer completes this process

Complete Auth. Rep./Employer Packet

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

Important! Prior to completing the Auth. Rep. / Employer Packet, the following must be completed:

1. Client Registration
2. Register Employer

*Optionally, if preferred, click the **+Add Vendor Agreement** button. See **Add Vendor Agreement** section for details.

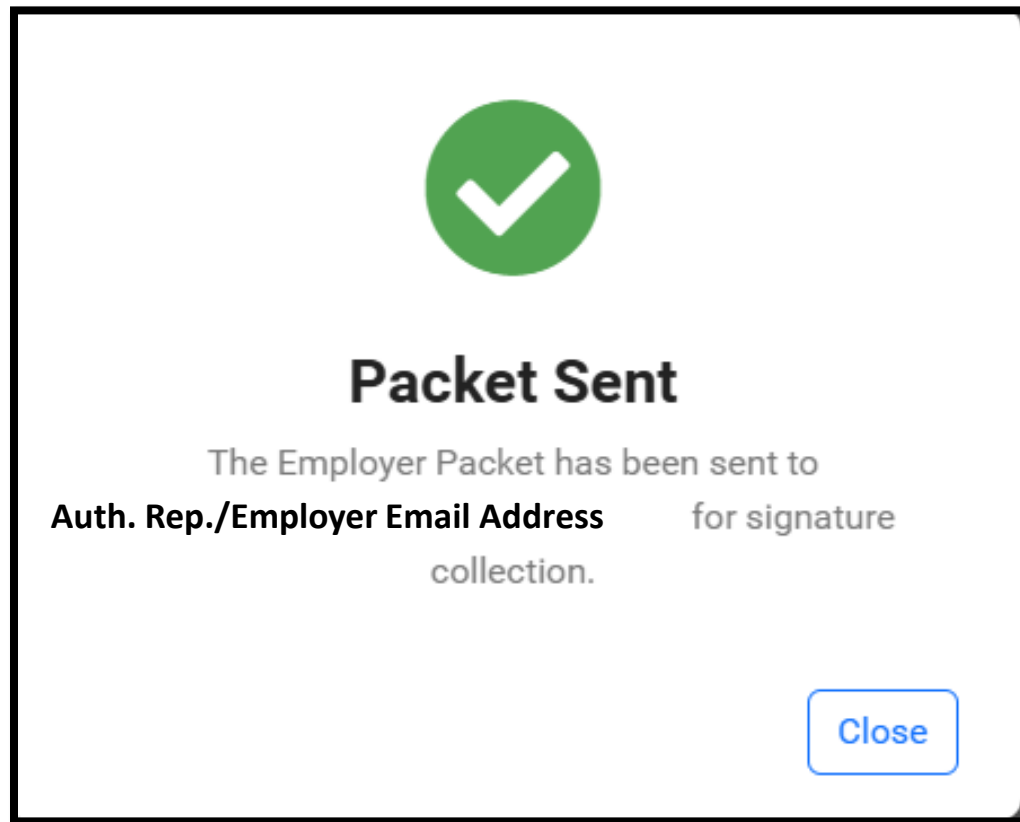
Client: Riley Johnson [Manage Clients](#)

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

[+ Add Vendor Agreement](#)

Complete Auth. Rep. / Employer Packet

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



Complete Auth. Rep. / Employer Packet

The Complete Employer Packet button displays **Pending**

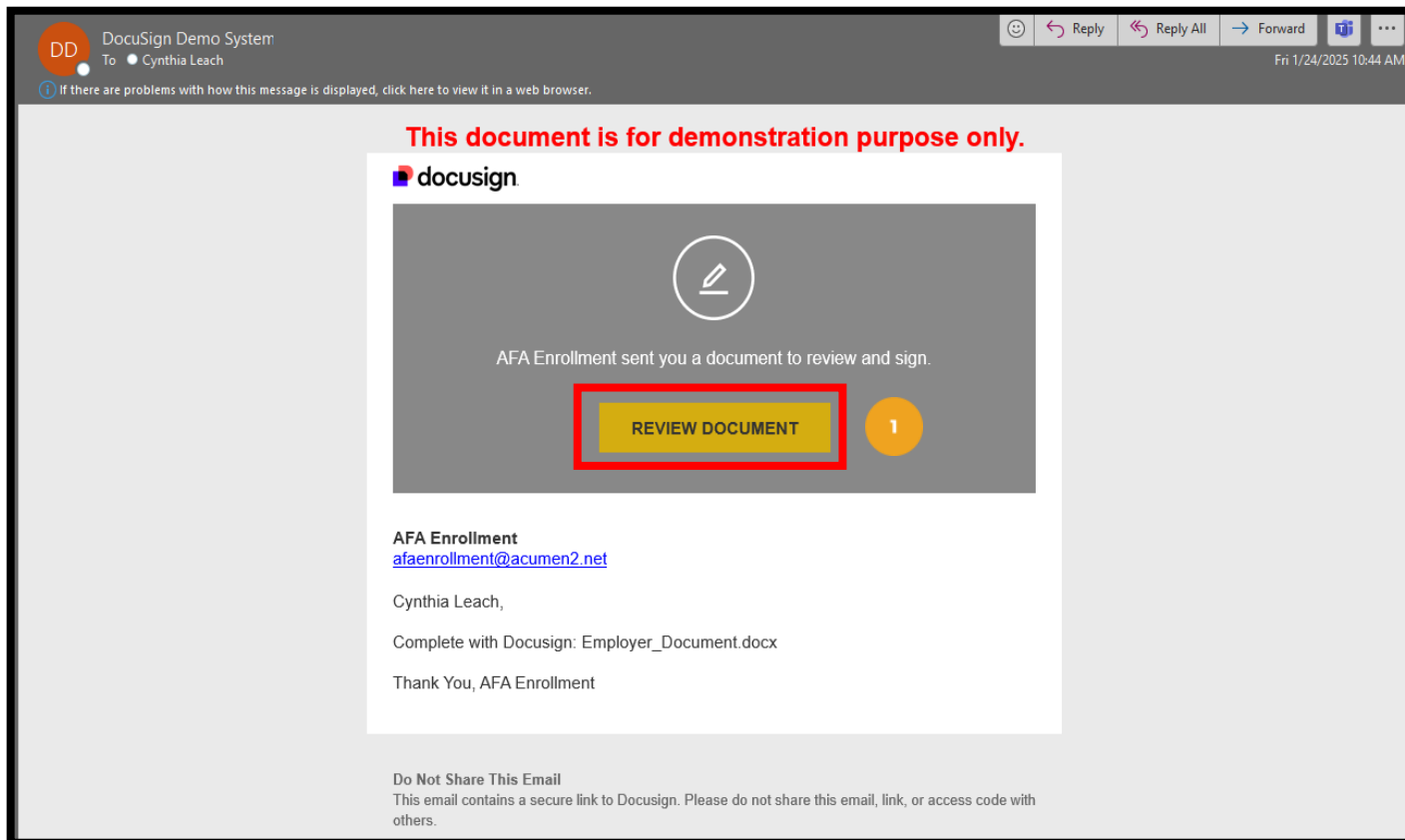
- **Please Note:** When clicking the **Resend** button, the packet is not being resent, only the email for signing is resent.
- If date is altered after initial send, that will not be captured in the document.
- Use the Refresh button to update the status to Complete after signing the documents.

The screenshot shows the Acumen EES Implementation dashboard for Riley Johnson. The dashboard includes a sidebar with navigation links: Home, Enrollment, Dashboard, My Info, Clients, Employees, and Employments. The main content area displays a 'Welcome!' message and a list of tasks. The 'Complete Employer Packet' task is highlighted with a red box, showing a 'Resend' button and a 'Pending' status. The 'Complete Client Registration' and 'Register Employer' tasks are marked as 'Complete'.

Complete Auth. Rep. / Employer Packet - DocuSign

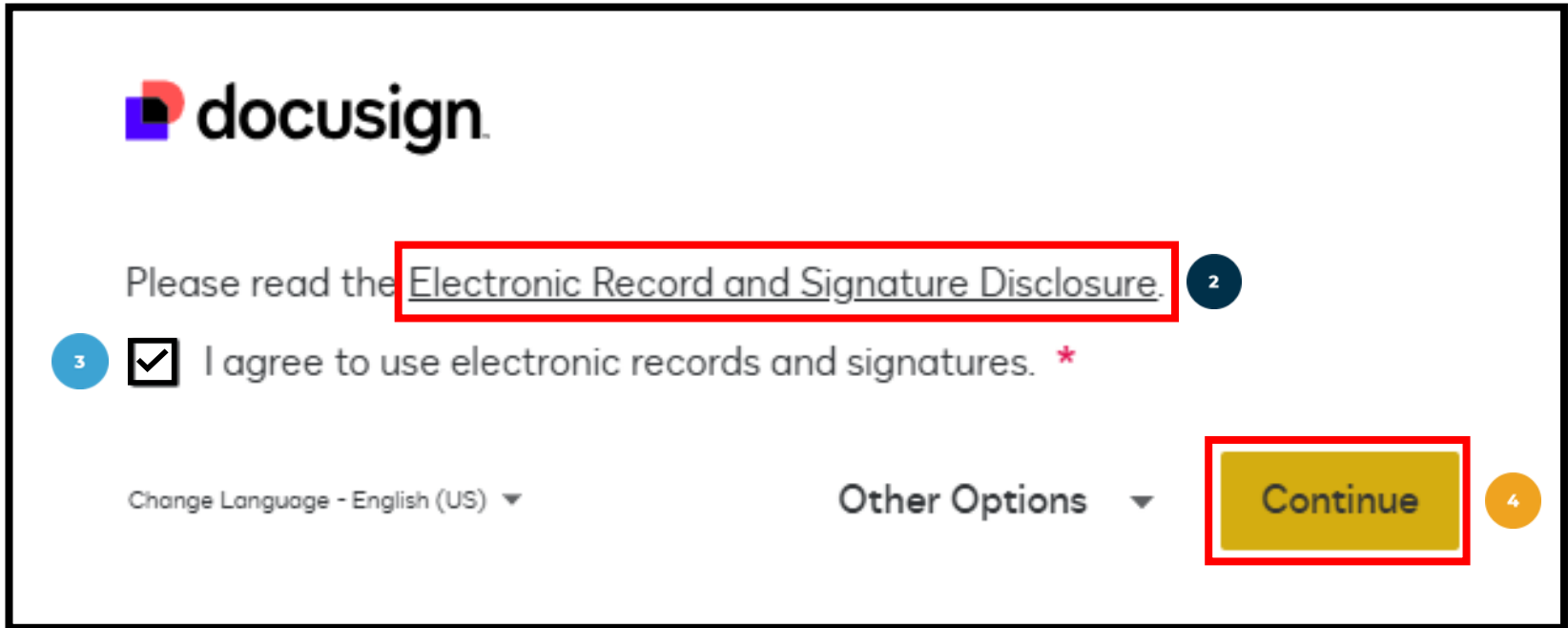
The packet arrives via an email from sender DocuSign. Check junk or spam folders if needed.

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



Complete Auth. Rep. / Employer Packet - DocuSign

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



docuSign

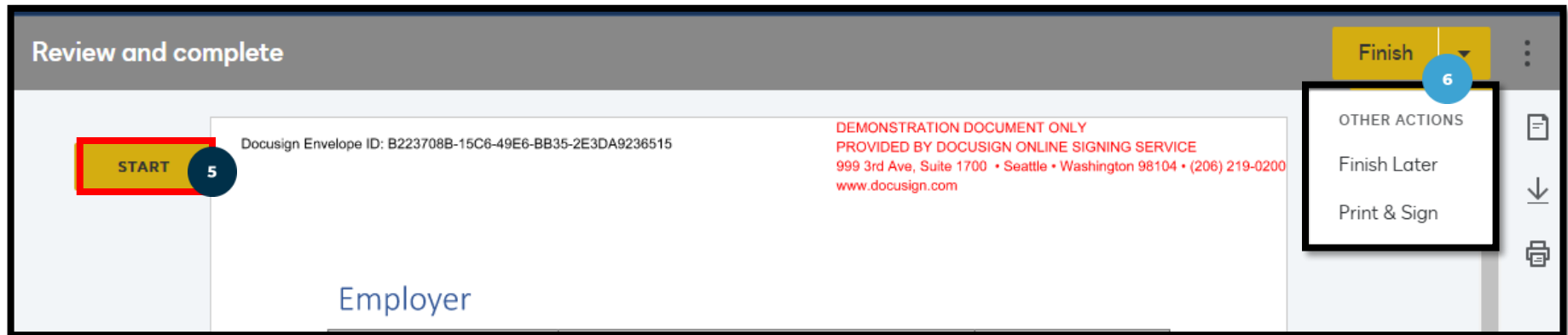
Please read the [Electronic Record and Signature Disclosure.](#) 2

3 ☒ I agree to use electronic records and signatures. *

Change Language - English (US) ▼ Other Options ▼ Continue 4

Complete Auth. Rep. / Employer Packet - DocuSign

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



Complete Auth. Rep. / Employer Packet - DocuSign

- The Auth. Rep. / Employer packet is prefilled based on the information provided in the initial registration
- 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 **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:

Name of Employer/ Representative (if applicable):

Phone: Email Address:

Sign
↓

Participant or Employer/ Representative Signature Date

Complete Auth. Rep. / Employer 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

Complete Auth. Rep. / Employer 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 Auth. Rep. / Employer Packet - DocuSign

Congratulations!

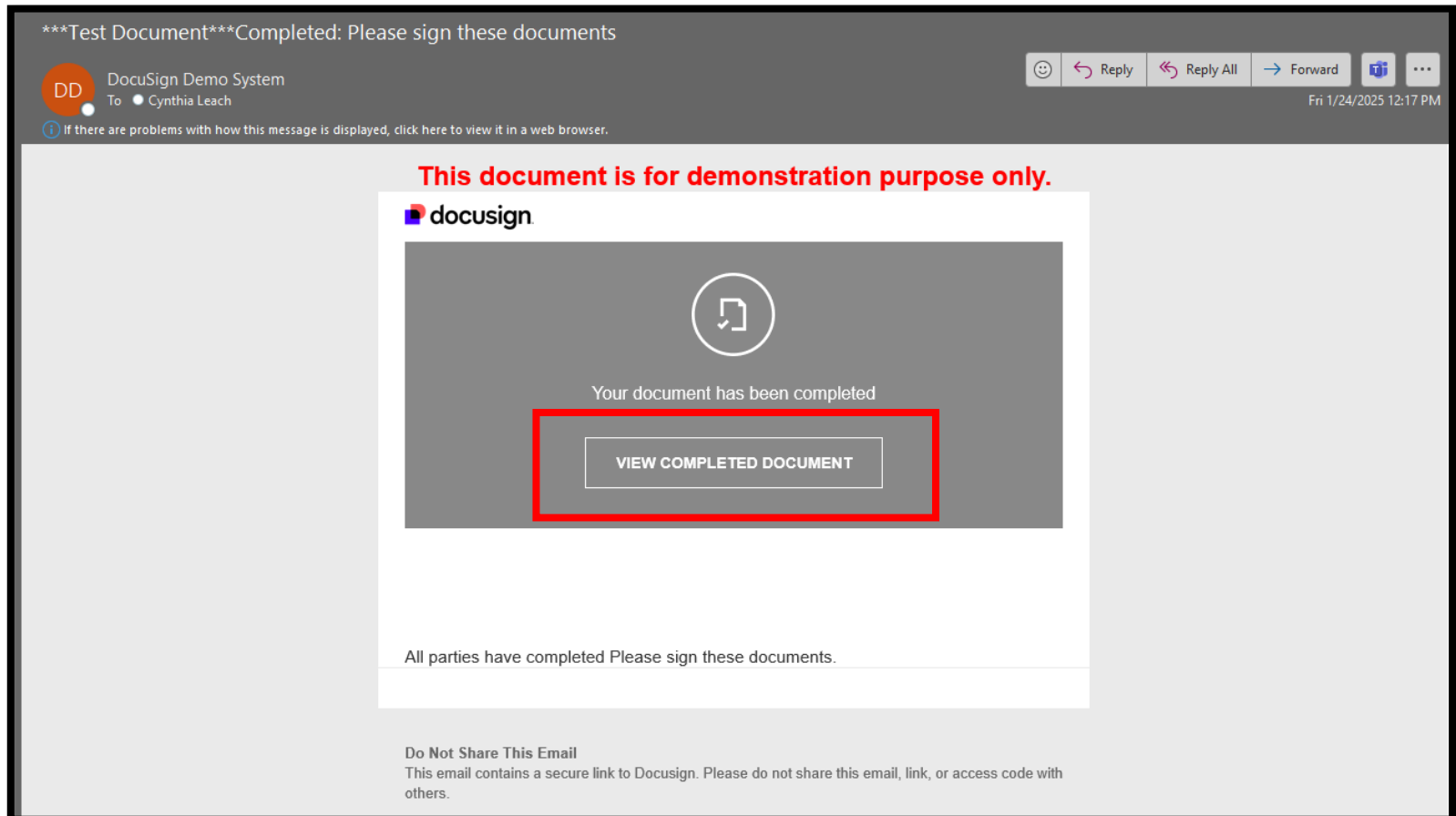
The Auth. Rep. / Employer packet is complete.



- 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 Auth. Rep. / Employer Packet - DocuSign

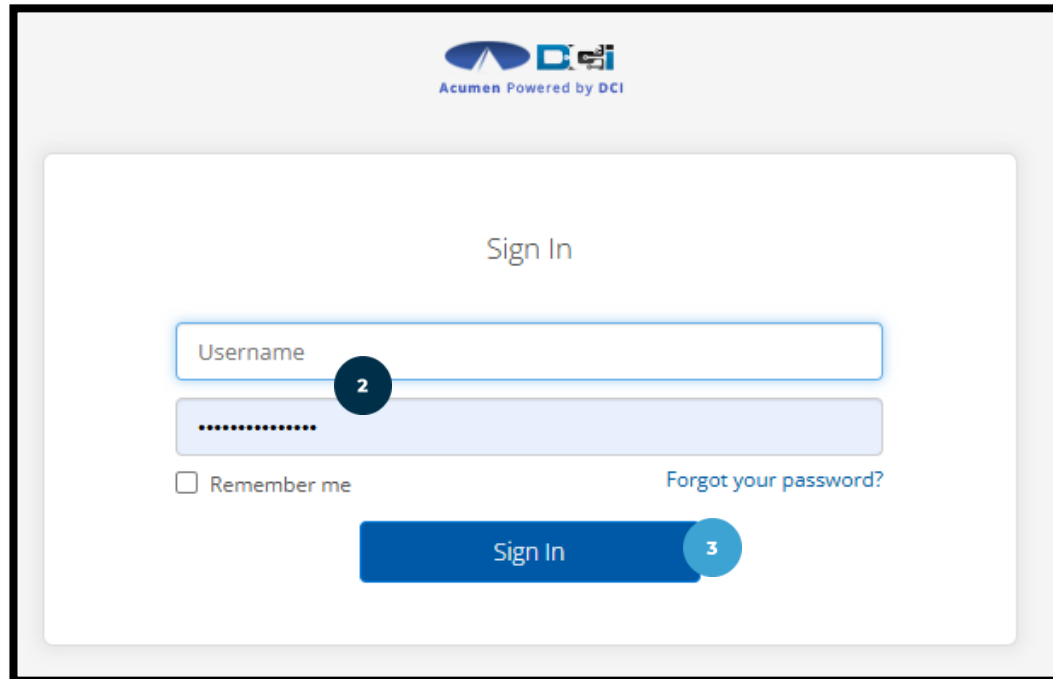
The Auth. Rep. / Employer receives a confirmation email with a link to view the completed document



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/>




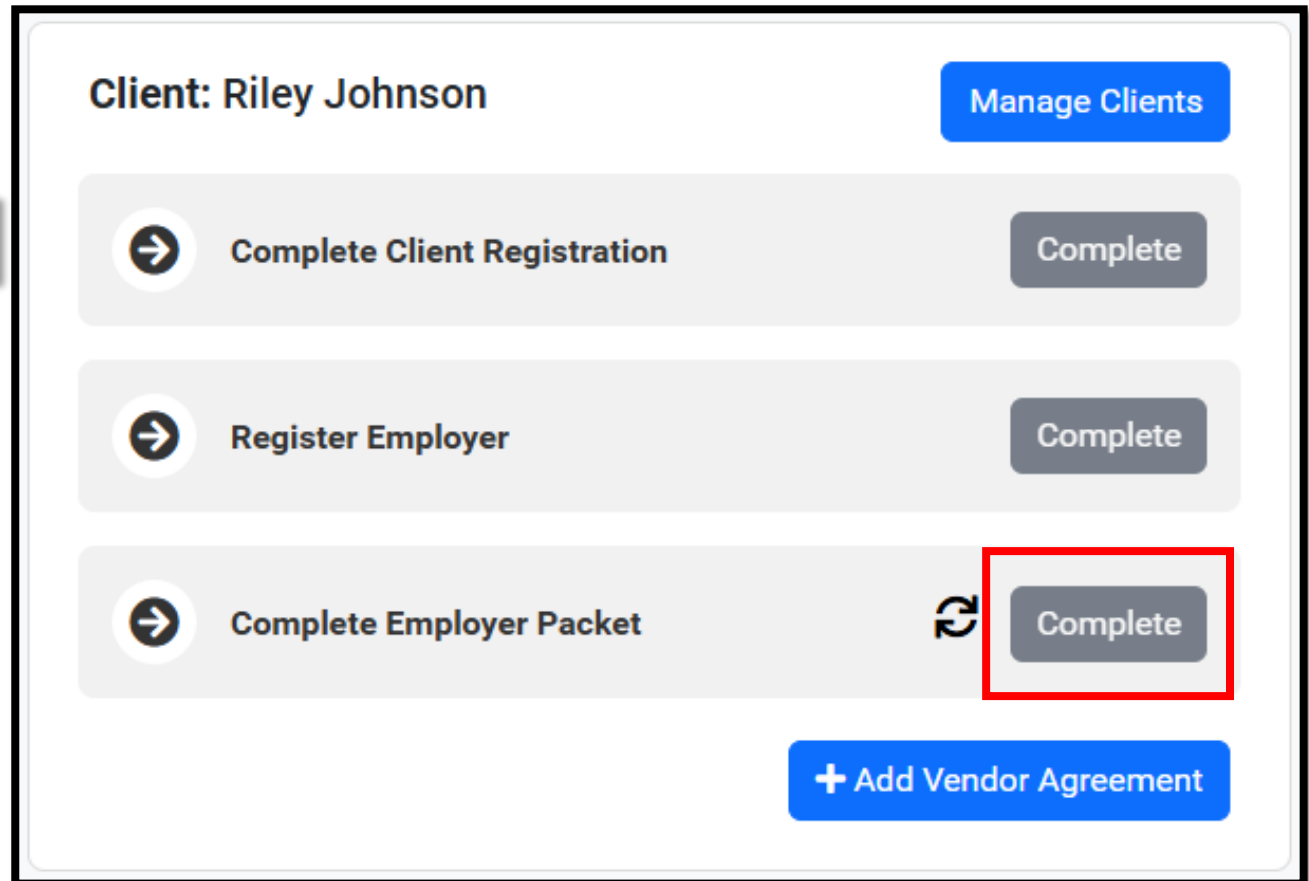
The screenshot shows the login interface for Acumen, powered by DCI. At the top, the DCI logo and the text "Acumen Powered by DCI" are displayed. Below this, the heading "Sign In" is centered. There are two input fields: the first is labeled "Username" and the second is a password field with masked characters.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

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: Riley Johnson [Manage Clients](#)

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

[+ Add Vendor Agreement](#)

Add Vendor Agreement

- Authorized Representative / 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: Riley Johnson [Manage Clients](#)

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

[+ Add Vendor Agreement](#)

Add Vendor Agreement

Complete Create Vendor Agreement:

Employment Details:

1. Client Name (**required**): Auto-populates
2. Program (**required**): NJ DDD – Vendor Only
3. Employer (**required**): Auto-populates
4. Vendor (**required**): Select from list of vendors **or** select “Other – Vendor Not Listed” if your vendor does not appear on the list.

Create Vendor Agreement

Status *	<input type="text" value="Active"/>
Client Name *	<div>1</div> <input type="text" value="Val5 Client"/>
Program *	<div>2</div> <input type="text" value="NJ DDD - Vendor Only"/>
Employer *	<div>3</div> <input type="text" value="Dana5 AuthRep"/>
Vendor *	<div>4</div> <input type="text" value="Other - Vendor Not Listed"/>

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

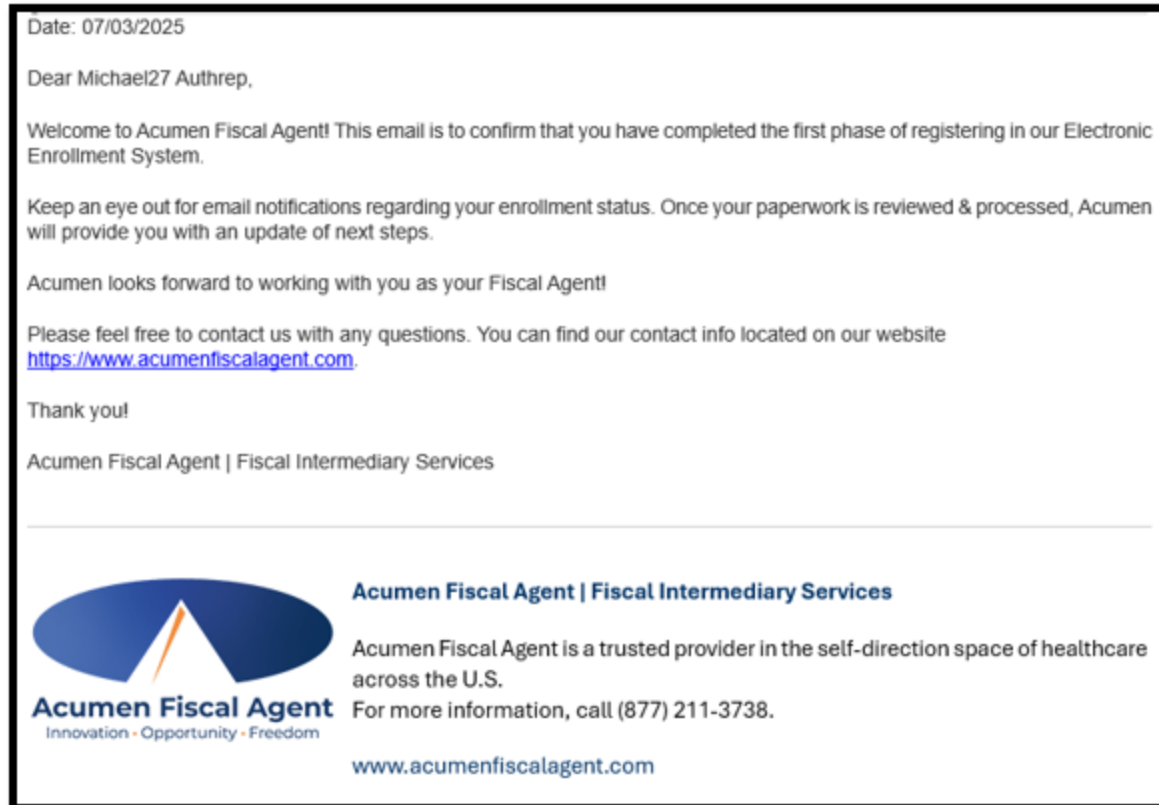
Cancel

Enrollment Phase Completion

After you Add the Vendor Agreement

After clicking **Save**, The Authorized Representative 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*

***Enrollment Completed means the Employment (Vendor Agreement) is complete and ready for review by an Agent**

Logging into EES

1. To log back into EES at a later time, 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 the **Forgot your password** link to reset your password (see [Reset Password](#) section)

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

The screenshot shows the login interface for EES. At the top, the logo 'Acumen Powered by DCI' is displayed. Below it, the text 'Sign In' is centered. There are two input fields: 'Username' and 'Password'. A red box highlights the 'Forgot your password?' link next to the password field. A blue 'Sign In' button is at the bottom. Numbered callouts (1-4) are placed over the URL bar, the input fields, the 'Sign In' button, and the 'Forgot your password?' link respectively.

Enrollment Completed

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

Direct Care Innovations

Home

Enrollment

Dashboard

My Info

Clients

Employees

Employments

English ▾ Acumen EES Implementation \ **riley.johnson** ▾

Welcome!

Welcome to Acumen's Electronic Enrollment System! We're honored you've chosen us as your fiscal agent partner. Our goal is to empower you to manage your Client's care with more freedom. This system is designed to streamline the enrollment process by providing you with all the necessary tools and resources to complete the required paperwork, upload documents, and keep track of the enrollment status. Should you have any questions or encounter any challenges, please feel free to reach out to our dedicated team at (877) 211-3738 or enrollment@acumen2.net.

Thank you for choosing us as your partner in this journey! We're excited to embark on this journey with you and support you every step of the way. Welcome aboard!

Client: Riley Johnson [Manage Clients](#)

NJ DDD (Vendor Only)	Vendor FASI Test Vendor	↻	Employer Packet Completed	✎
-------------------------	-----------------------------------	---	-------------------------------------	---

+ Add Vendor Agreement

Optional: Click the blue **+Add Vendor Agreement** button to add additional Vendor Agreements for the Client. Return to [Add Vendor Agreement](#) section to view instructions on how to complete.

83



Next Steps



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

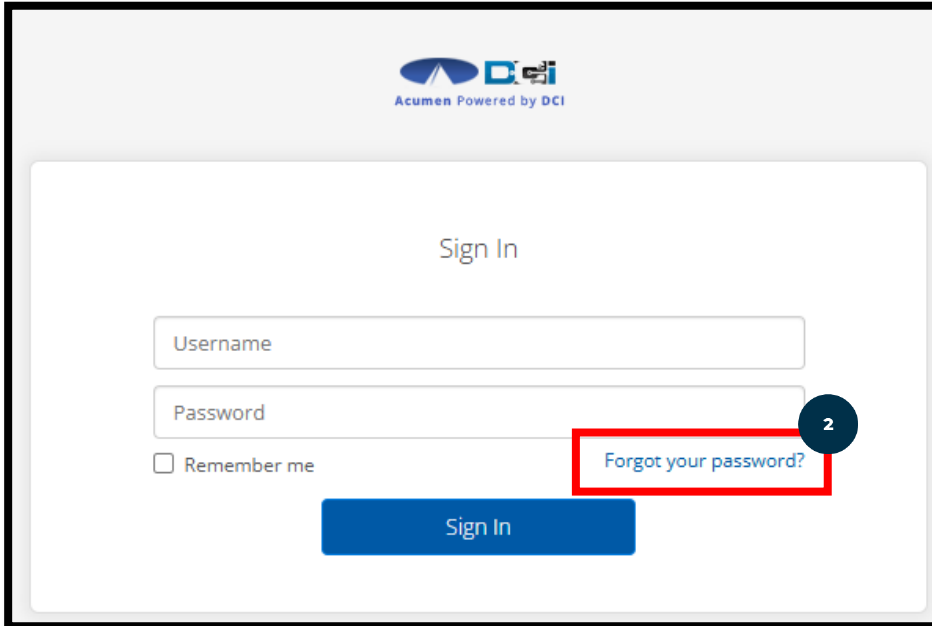
1. An Agent will contact you with the next steps after they have reviewed the information received.

Reset Password

Reset Password

1. To reset your password, navigate to: <https://acumen.dcisoftware.com/>
2. Click the **Forgot your password** link to reset your password

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



The screenshot shows the Acumen login interface. At the top, the DCI logo and 'Acumen Powered by DCI' are displayed. Below this is a 'Sign In' heading. There are two input fields: 'Username' and 'Password'. A checkbox labeled 'Remember me' is positioned to the left of the 'Forgot your password?' link. The link is highlighted with a red rectangle and a blue circle containing the number '2'. A blue 'Sign In' button is located at the bottom of the form.

Sign In

Username

Password

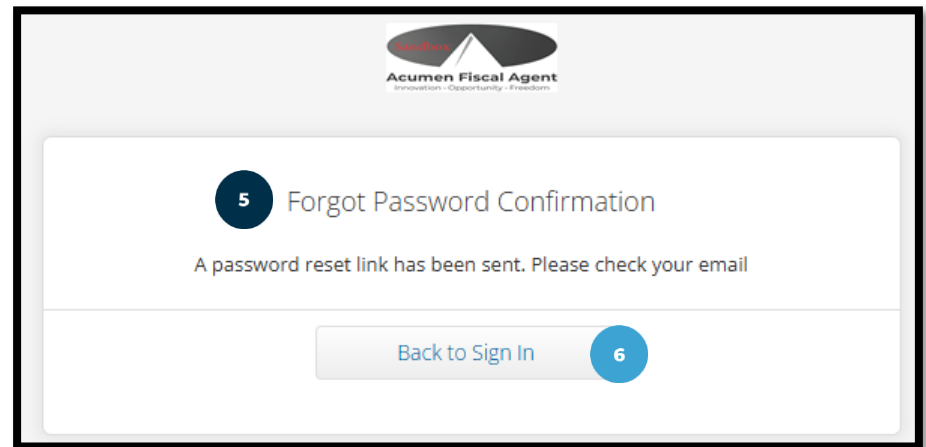
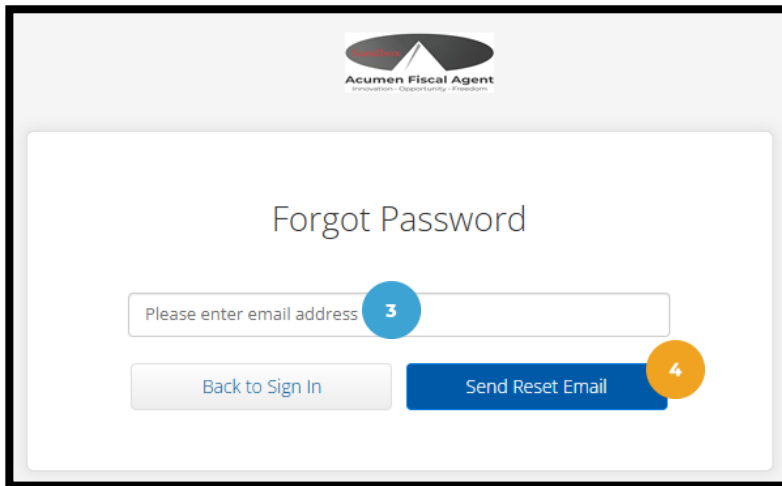
☐ Remember me

[Forgot your password?](#)

Sign In

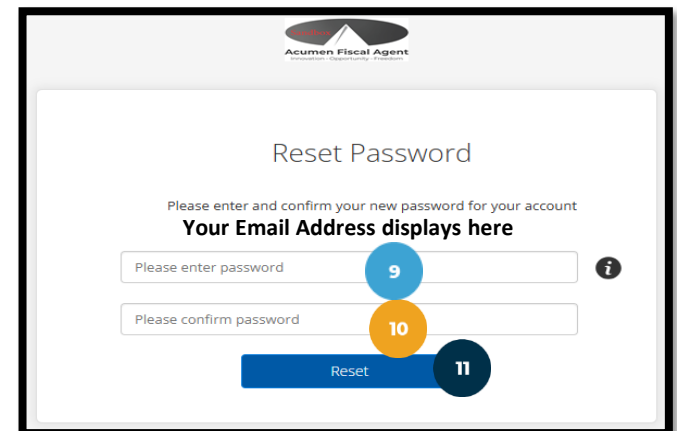
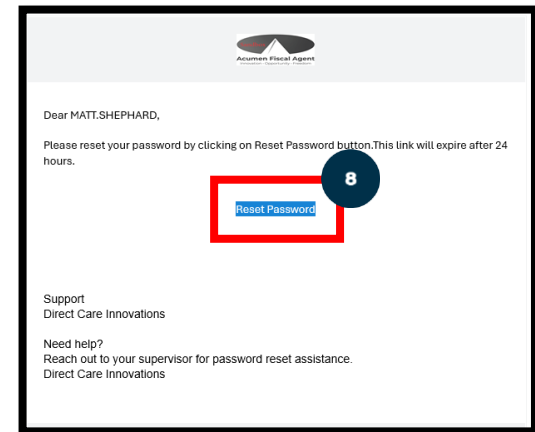
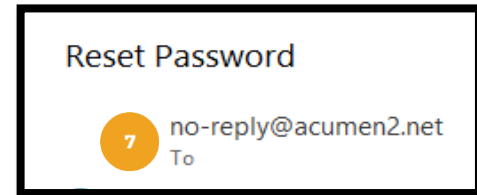
Reset Password

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



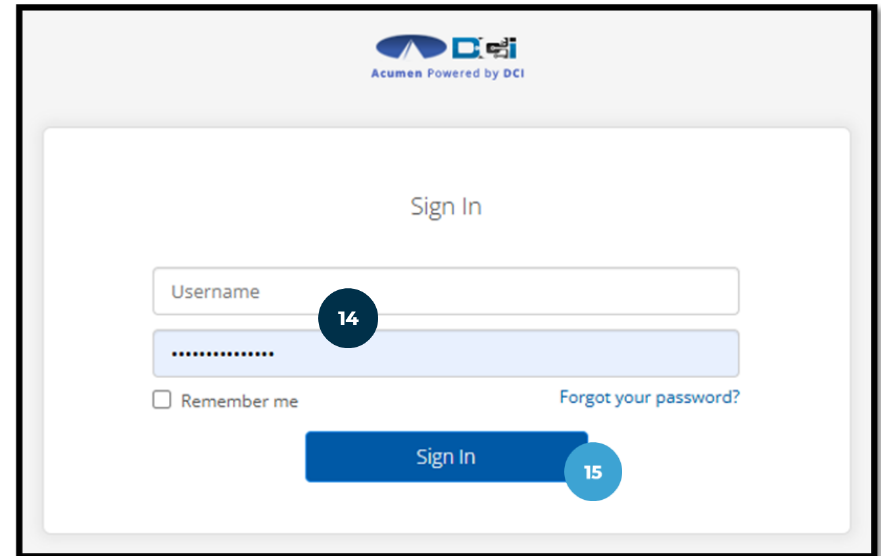
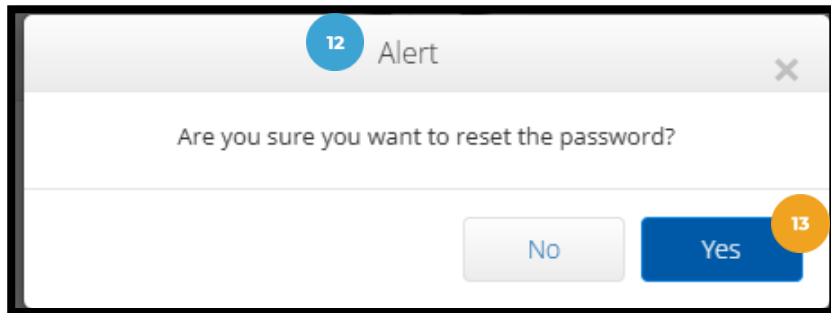
Reset Password

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:
 - Must contain 1 uppercase letter, lowercase letter, number, and special character.
 - No more than two repeated characters in a row
 - Username and password cannot contain three consecutive characters of the Enrollee first or last name.
 - Password cannot contain username
10. Re-enter the new password in the **Please confirm password** field.
11. Click **Reset**



Reset Password

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**.



Support & Resources

- You just learned how to complete your vendor only 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!

Manage Clients

Manage Clients

To add or view additional Clients and manage their enrollment, click the **Manage Clients** button.

The screenshot displays the Acumen EES Implementation interface. On the left is a dark blue sidebar with the DCI logo and navigation links: Home, Enrollment, Dashboard, My Info, Clients, Employees, and Employments. The main content area has a top header with 'English', 'Acumen EES Implementation', and the user 'riley.johnson'. Below this is a 'Welcome!' section with a paragraph of text and a 'Thank you' message. The 'Client: Riley Johnson' section contains a table with two columns: 'Vendor' and 'Employer Packet'. The 'Vendor' column lists 'NJ DDD (Vendor Only)' and 'FASI Test Vendor'. The 'Employer Packet' column shows 'Completed'. A red box highlights the 'Manage Clients' button in the top right of this section. At the bottom right is a '+ Add Vendor Agreement' button.

Vendor	Employer Packet
NJ DDD (Vendor Only)	FASI Test Vendor
	Completed

Manage Clients

To add a new client, click the **+Add New Client** button.

Optionally, click the **Select** button to view and manage the listed Client's enrollment and redirect to the Dashboard.



Manage Clients- Add New Client

Complete the Add New Client Form:

1. First Name (required)
2. Middle Name (optional)
3. Last Name (required)
4. Date of Birth (required):
 - Enter the date in **MM/DD/YYYY** formatOR
 - Click in the field to select a date from the calendar
5. Gender (optional): Select one
 - Male
 - Female
 - Other
 - Prefer Not to Say
6. SSN (optional)

The screenshot shows a web form titled "Add New Client". It contains the following fields and options:

- First Name ***: A text input field with a yellow callout bubble containing the number 1.
- Middle Name**: A text input field with a dark blue callout bubble containing the number 2.
- Last Name ***: A text input field with a light blue callout bubble containing the number 3.
- Date of Birth ***: A text input field with a yellow callout bubble containing the number 4. The field contains the placeholder text "MM/DD/YYYY".
- Gender**: A group of four radio button options: "Male", "Female", "Other", and "Prefer Not to Say". A dark blue callout bubble containing the number 5 is positioned to the left of the "Male" option.
- SSN**: A text input field with a light blue callout bubble containing the number 6. The field contains the placeholder text "###-##-####".

Manage Clients- Add New Client

7. Phone (required)
8. Alternative Phone (optional)
9. Mobile Number (optional)
10. Fax (optional)
11. Email (optional)
12. Medicaid # (optional)
13. Reference # (optional)
14. Effective Date (required):

- Enter the date in **MM/DD/YYYY** format

OR

- Click in the field to select a date from the calendar

Phone	7	(###) ###-####
Alternative Phone	8	(###) ###-####
Mobile Number	9	(###) ###-####
Fax	10	(###) ###-####
Email	11	
Medicaid #	12	
Reference #	13	
Effective Date	14	MM/DD/YYYY

Manage Clients- Add New Client

Complete the Add New Client Form, continued:

15. Preferred Communication Method

(optional): Select one

- Text
- Email
- Phone

16. Statement Delivery Type

(optional): Select one

- Email
- Mail

17. Case Manager (optional)

18. Case Manager Phone (optional)

19. Case Manager Email (optional)

The screenshot displays a form titled 'Add New Client' with the following fields and options:

- Preferred Communication Method (15):** Radio buttons for Text, Email, and Phone.
- Statement Delivery Type (16):** Radio buttons for Email and Mail.
- Case Manager (17):** A text input field.
- Case Manager Phone (18):** A text input field with a placeholder '(###) ###-####'.
- Case Manager Email (19):** A text input field.

Manage Clients- Add New Client

Physical Address

- 20. Address Line 1 (required)
- 21. City (required)
- 22. State (required)
- 23. Zip Code (required)
- 24. Country (required)
- 25. Click **Save**

Physical Address

Address Line 1

20

City

21

State *

Select State

22

▼

Zip Code

#####

23

Country

Select Country

24

✓ Save

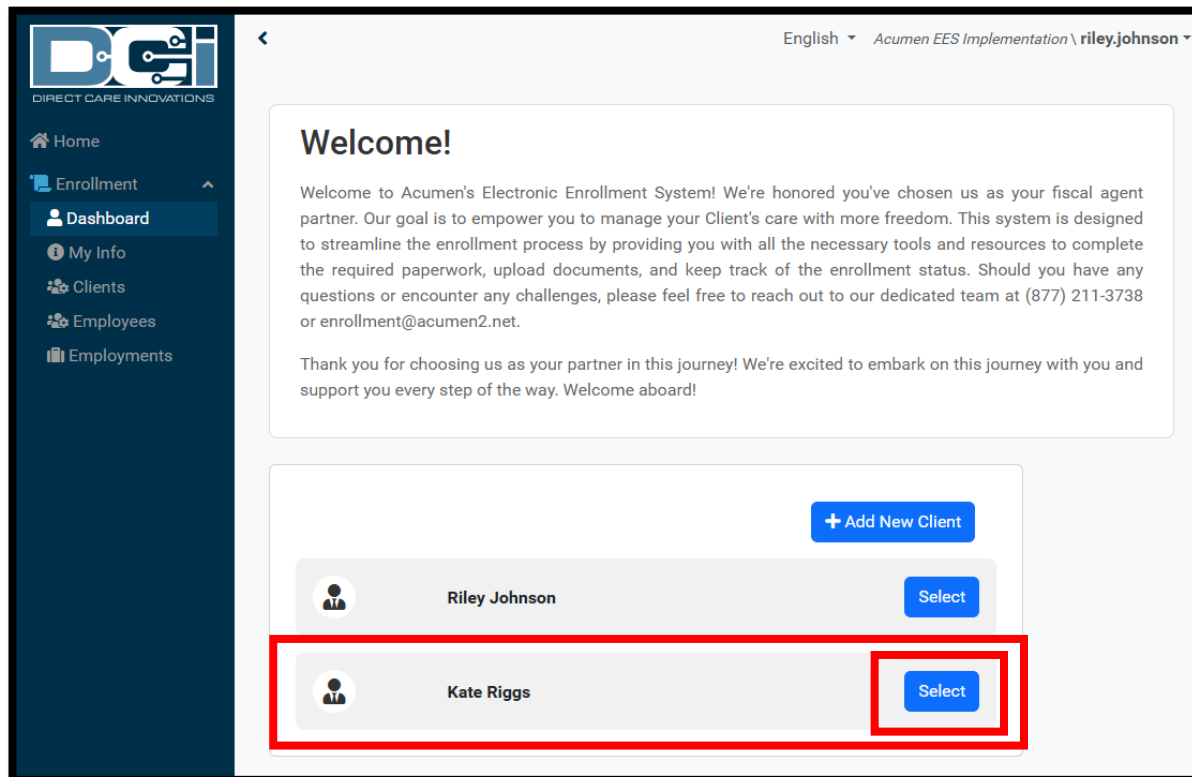
25

Cancel

Manage Clients- Add New Client

The new Client is displayed on the Enrollment Dashboard.

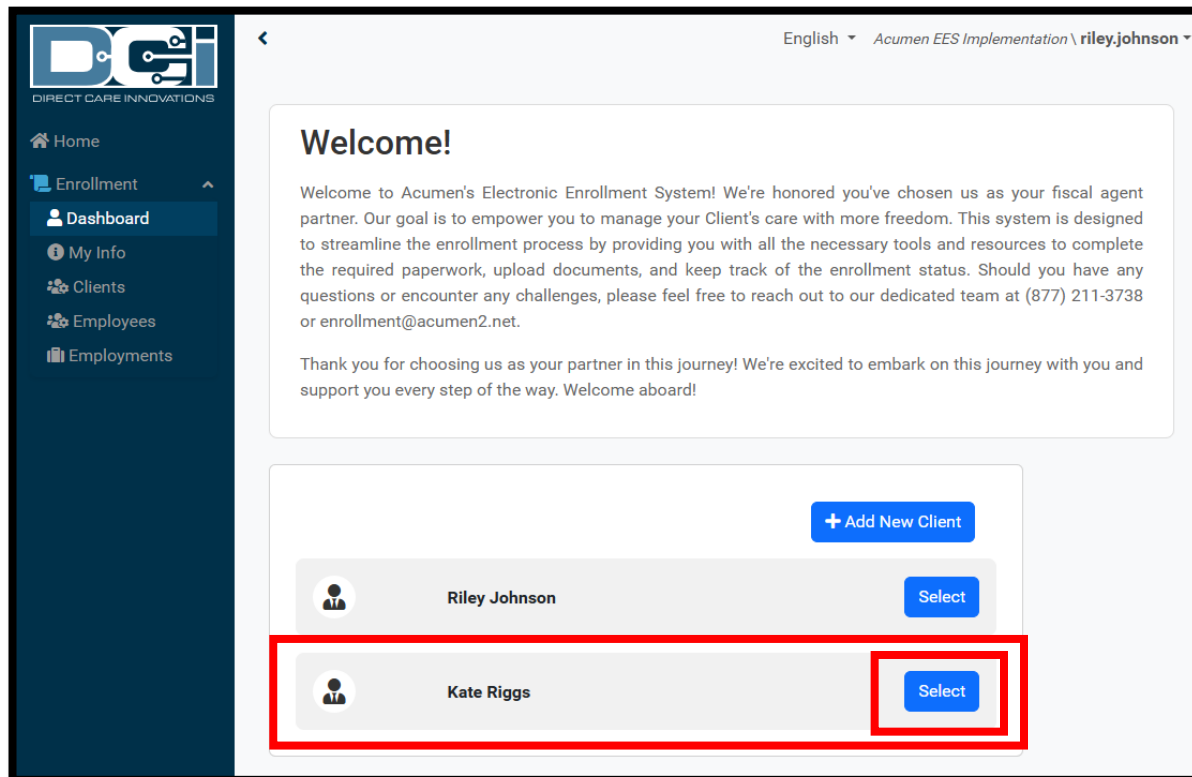
- Click the **Select** button to view and manage the new Client's enrollment and redirect to the Dashboard.



Manage Clients- Add New Client

The new Client is displayed on the Enrollment Dashboard.

- Click the **Select** button to view and manage the new Client's enrollment and redirect to the Dashboard.



Complete Client Registration

The Enrollment Dashboard displays with the following marked as **Complete**:

- ✓ Complete Client Registration
- ✓ Register Employer
- ✓ Complete Employer Packet

Click the **Manage Clients** button to view and manage the listed Client's enrollment and redirect to the Dashboard.

