Welcome to Acumen!

Thank you for joining the Acumen Family!

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

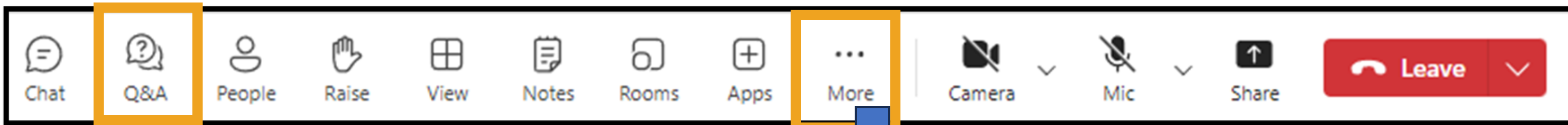
Acumen Fiscal Agent
Innovation · Opportunity · Freedom

DIRECT CARE INNOVATIONS

Acumen powered by DCI

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

Using Microsoft Teams

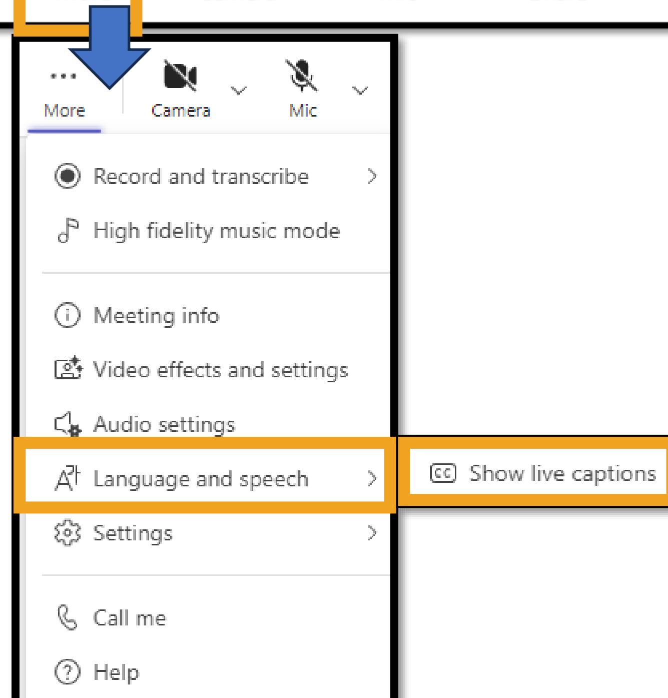


- Ensure both the Camera & Mic are disabled (as pictured above with a line through them)

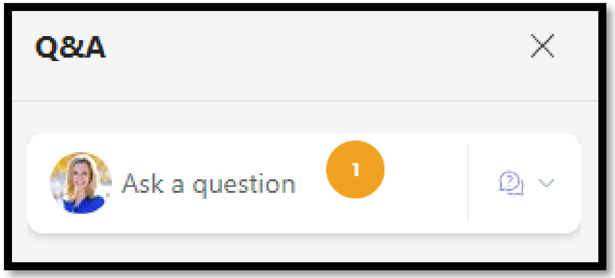
- Today we will not be using the Chat (disabled) or Raise hand features.

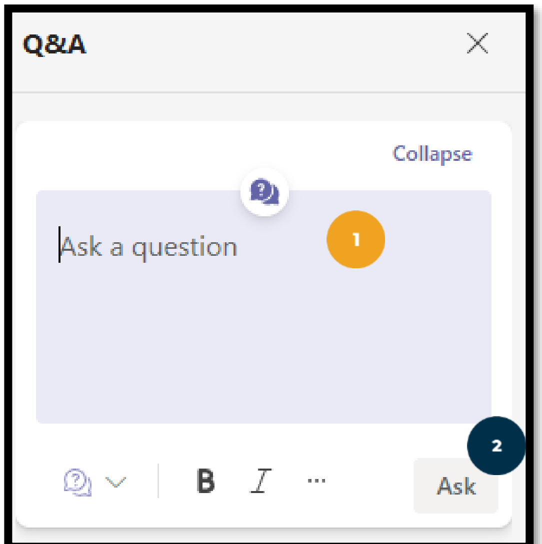
- Click the **Q&A** button to type & send your question during the meeting.

- 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.

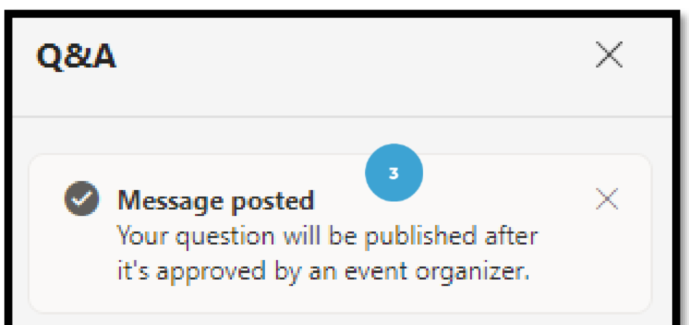


Using the Q&A button

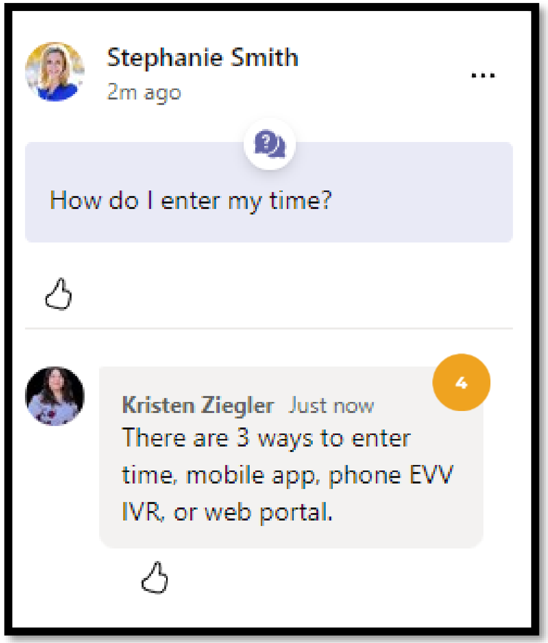




1. After clicking the Q&A button, **type your question** in the Ask a question field.
   - Please do not include any confidential information or the question cannot be published & answered.
2. Click the Ask button
3. Message posted displays



4. Moderators review, approve & post your question.



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

Attend a Training Session for Enrollment → Complete your Electronic Enrollment using EES → Attend a Session for DCI System Training

You will receive a "Good to Go" letter when your enrollment is final → Vendors will submit all payment entries in accordance with the payment schedule* → Payments will be made bi-weekly

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

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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

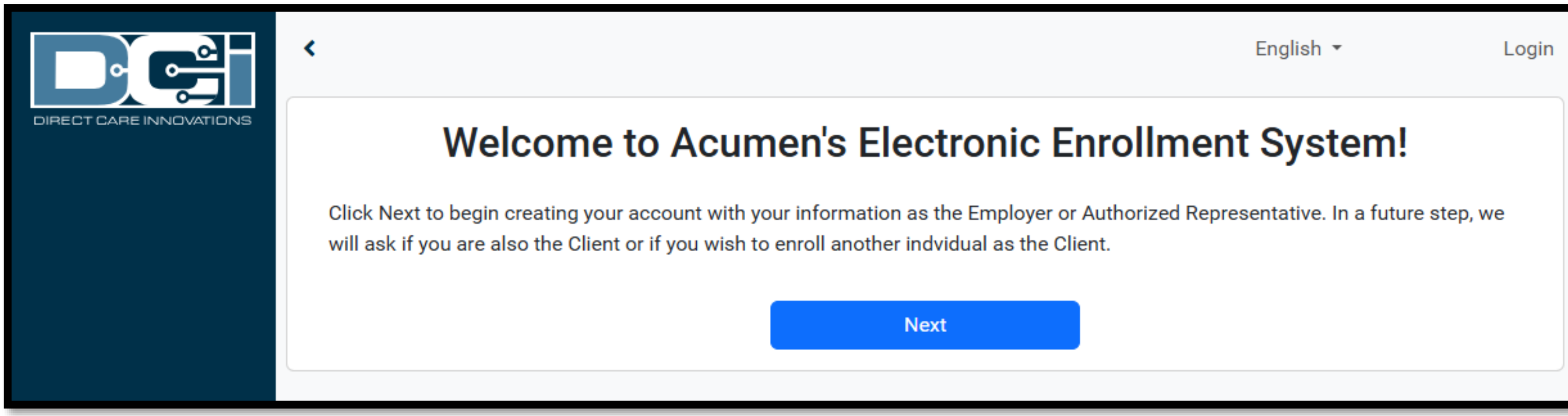
Complete this process if both receiving and managing the care

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)



- ✓ 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.

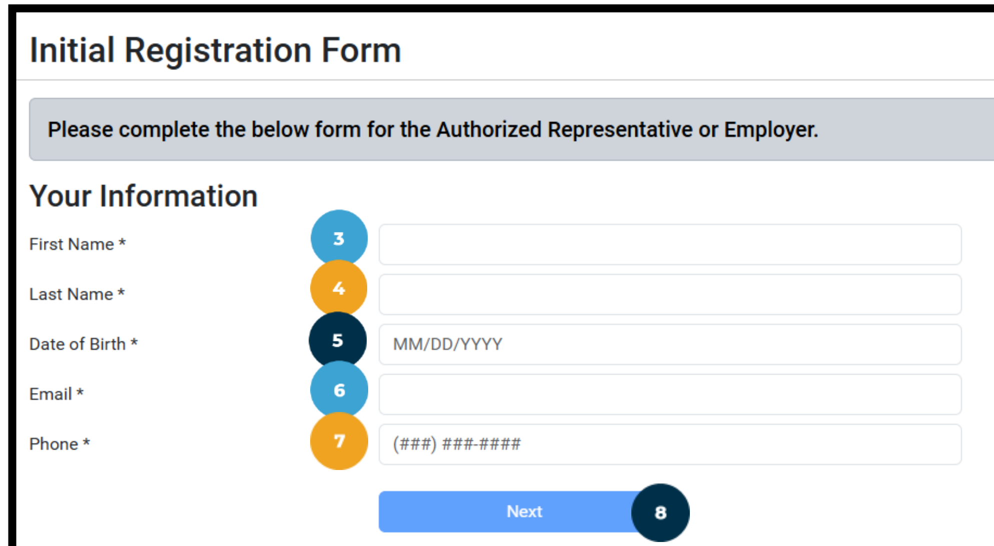
Initial Registration (Auth. Rep. / Employer = Client)

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** format

   OR

   - Click in the field to select a date from the calendar
6. Email (**required**)
7. Phone (**required**)
8. Click **Next**



Initial Registration Form

Please complete the below form for the Authorized Representative or Employer.

Your Information

3 First Name *

4 Last Name *

5 Date of Birth * MM/DD/YYYY

6 Email *

7 Phone * (###) ###-####

Next 8

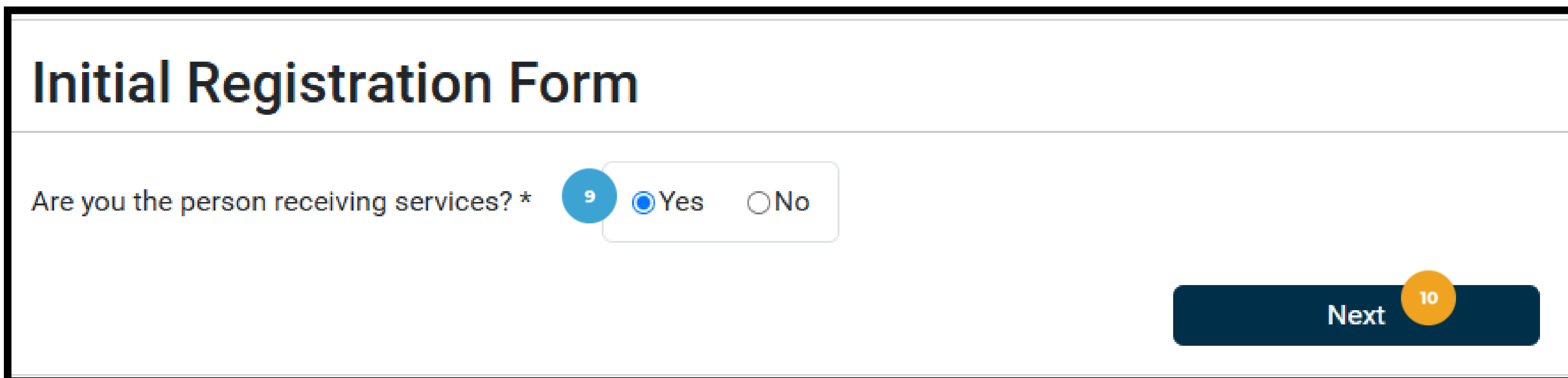
EES searches for existing enrollees with an exact match to First Name, Last Name, and DOB. Use legal information found on the Authorization (budget) to complete Initial Registration.

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

Are you the person receiving services?

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

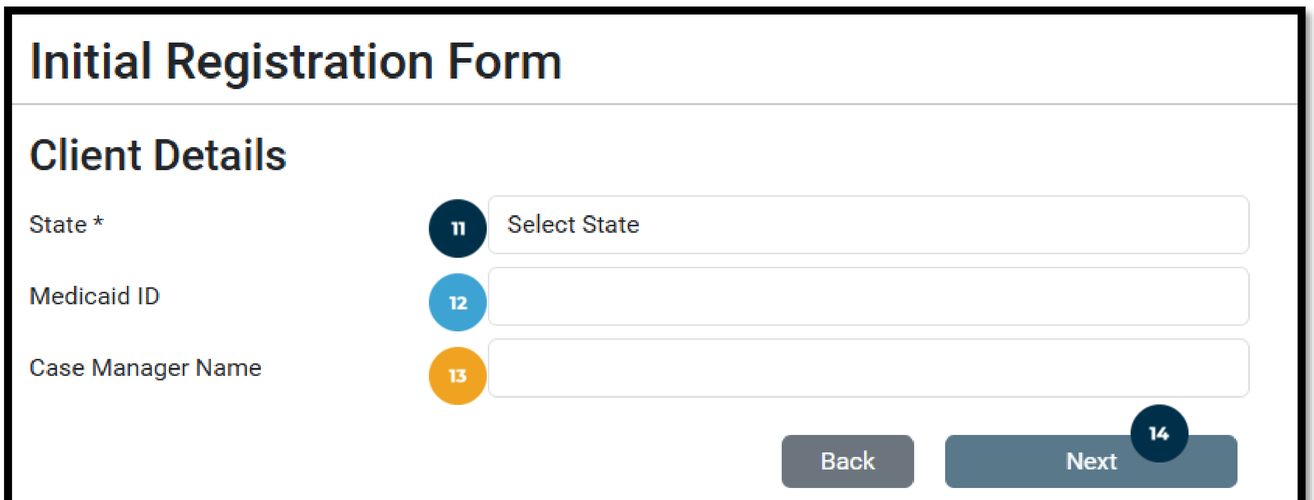
✓ Assigned both the Client & Employer roles



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**

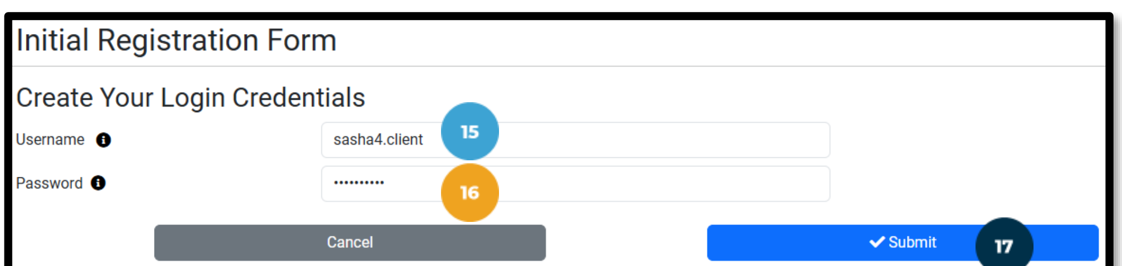


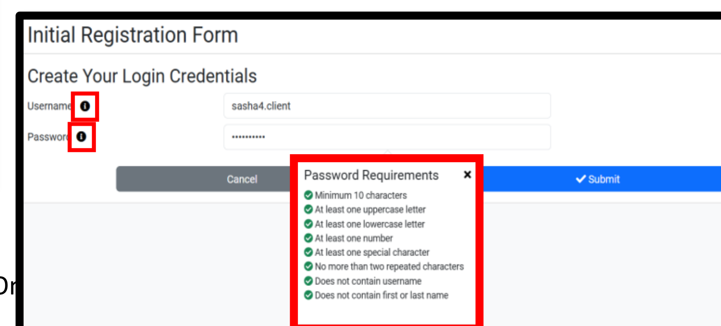
Initial Registration (Auth. Rep. / Employer = Client)

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**

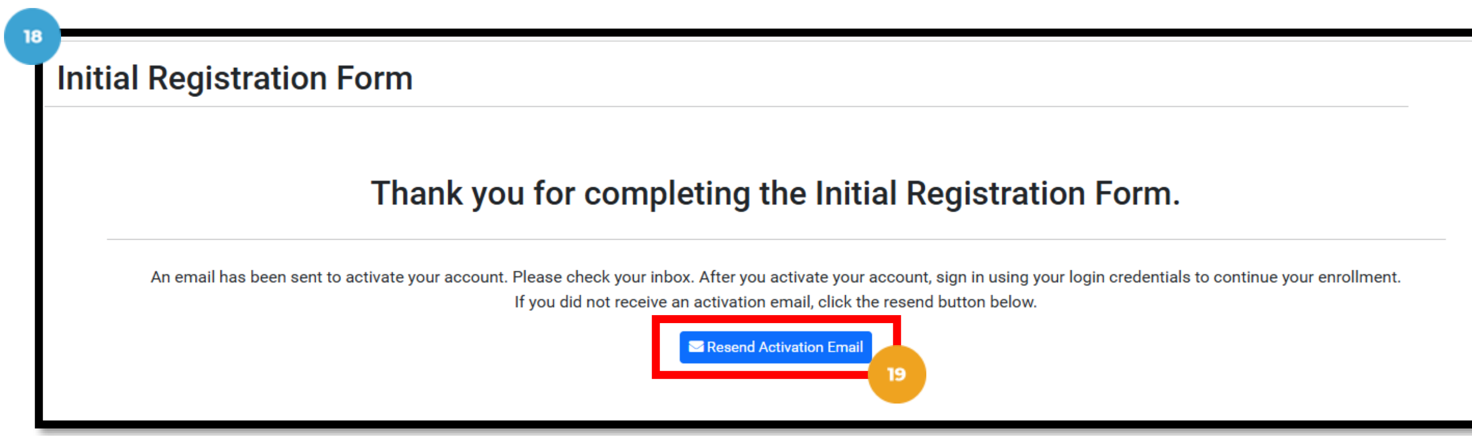
Tip: Click the information button to verify username and password requirements are met.





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

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



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)

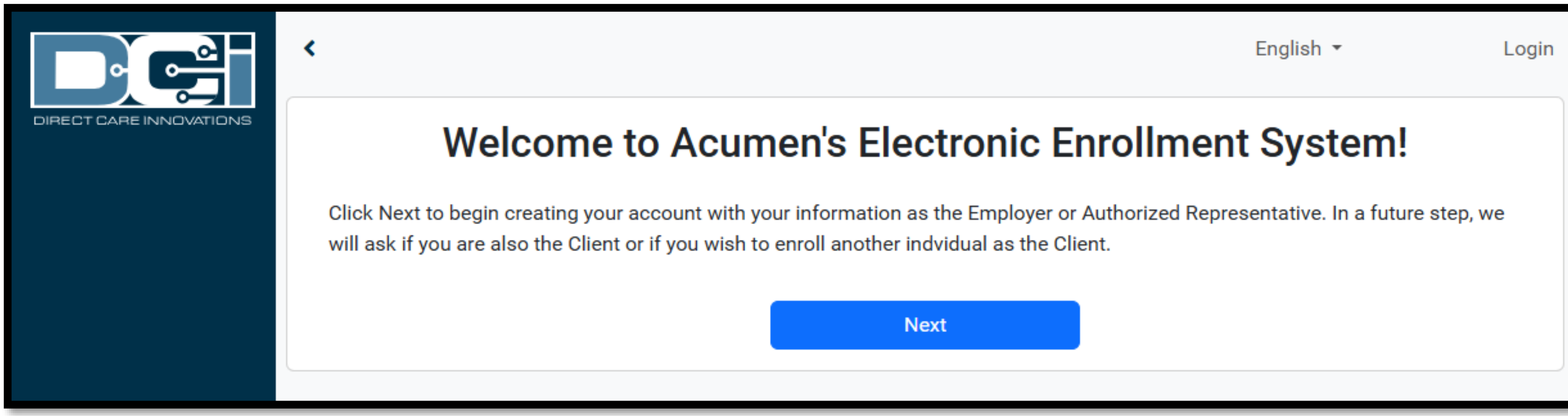
1. Navigate to the **NJ Programs Electronic Enrollment** page:

2. Click the **Go to Electronic Enrollment** button

1

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

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



- ✓ 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.

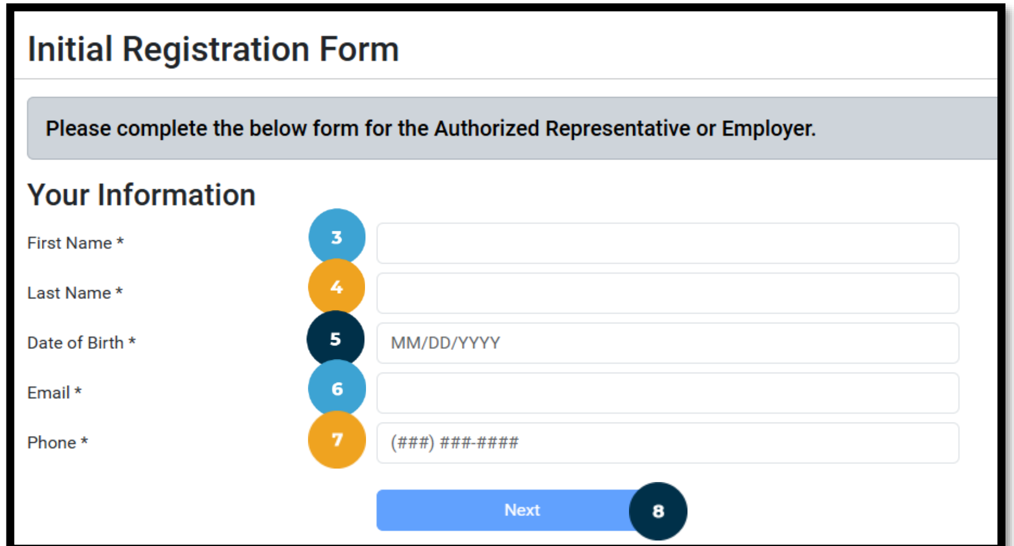
Initial Registration
(Auth. Rep. / Employer is NOT the Client)

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**



EES searches for existing enrollees with an <u>exact</u> 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

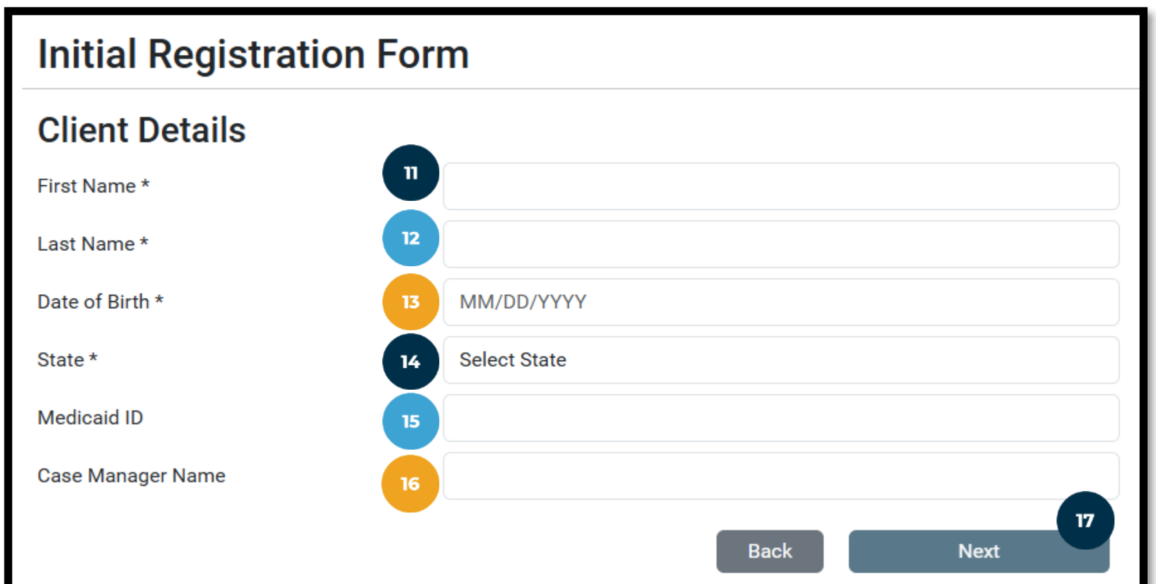
✓ Assigned Employer role

Initial Registration
(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.



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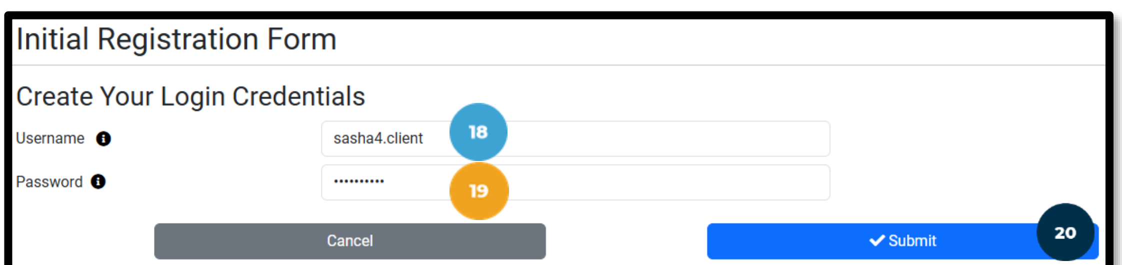
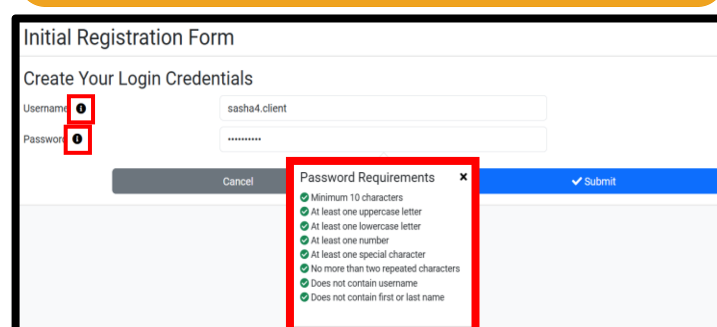
Initial Registration
(Auth. Rep. / Employer is NOT the Client)

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**

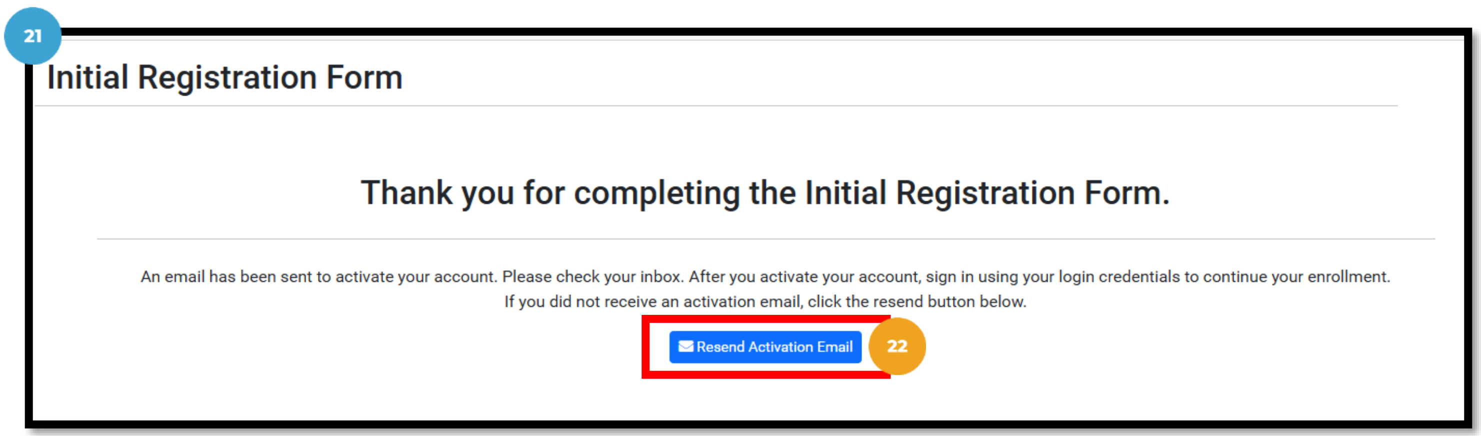


Tip: Click the information button to verify username and password requirements are met.



Initial Registration (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.

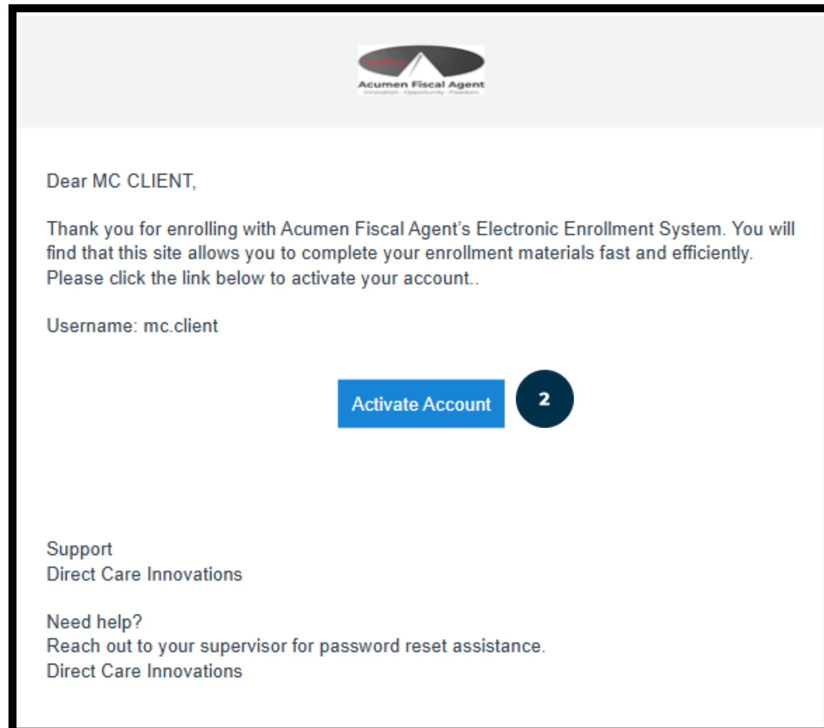


Instructions for logging into EES using a tablet or mobile device

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)

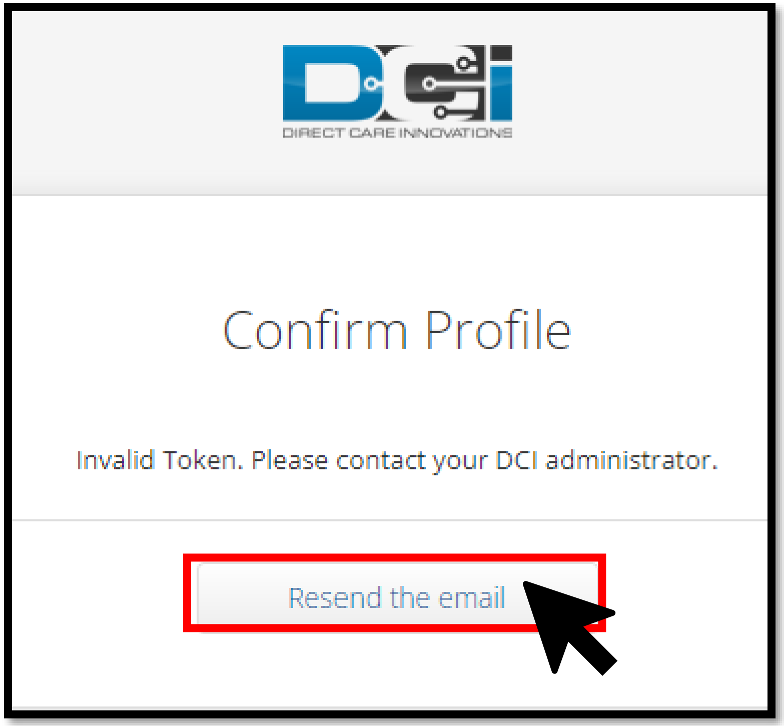


Activate Profile –DCI Mobile Full Site

Note:

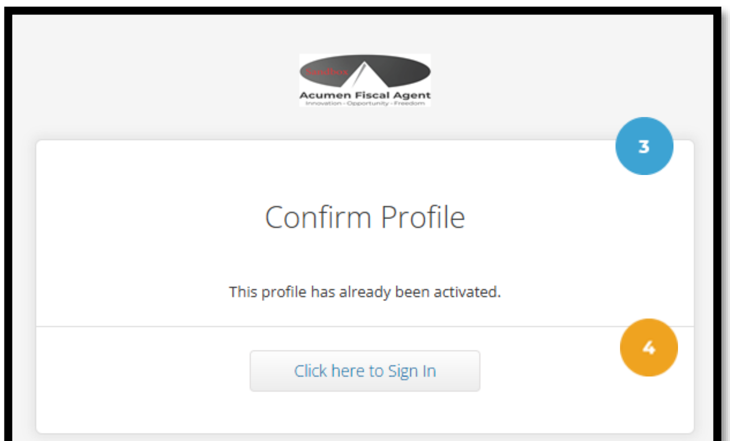
- If after clicking the Activate Account button, **the link is inactive**, an alert stating Invalid Token - Please contact your DCI administrator populates.

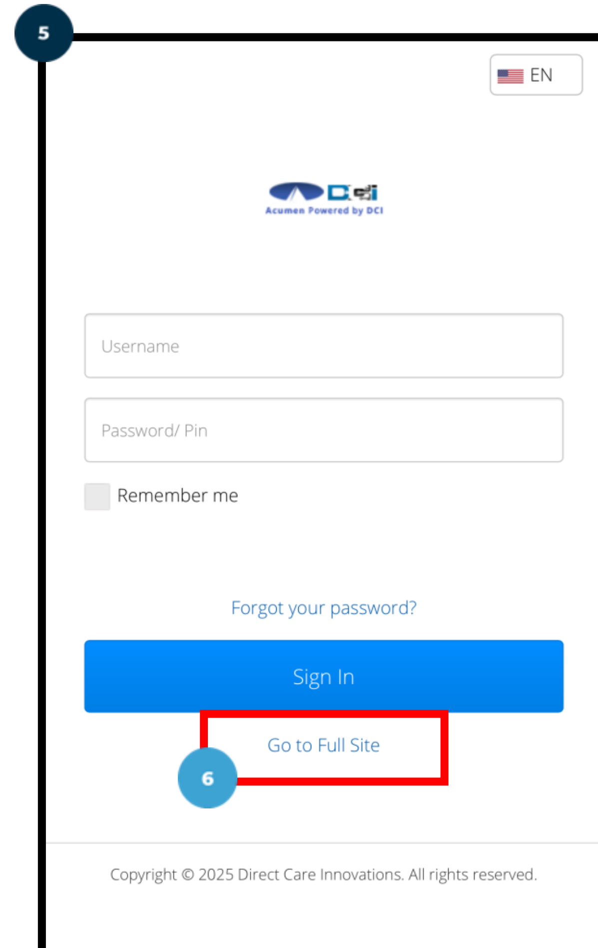
- Click the **Resend the email** button and return to step 2



Activate Profile –DCI Mobile Full Site

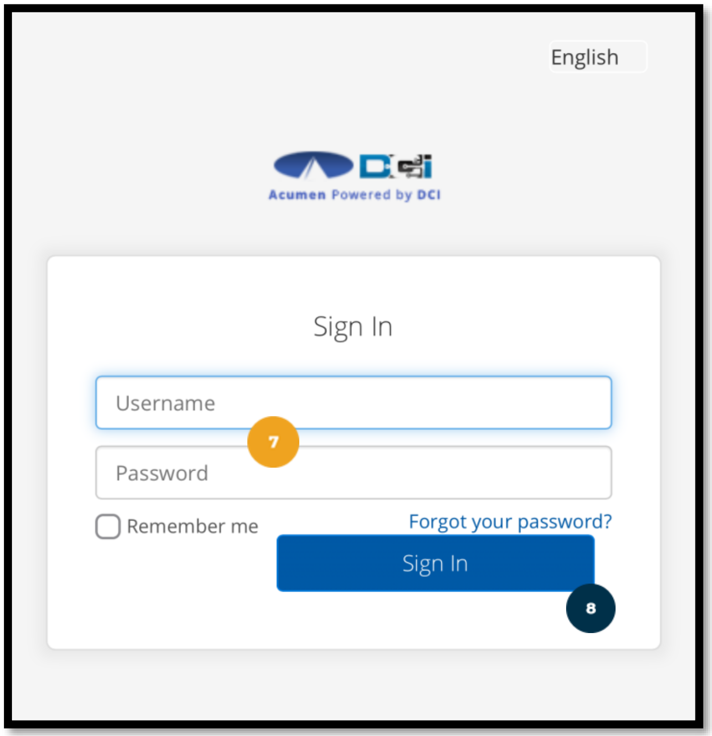
3. The Activate Account button opens a web page that states **Confirm Profile: This Profile has already been activated**
4. Tap the **Click here to Sign In** button
5. The Enrollee is redirected to the **DCI Mobile Web** login screen.
6. *Important! Tap **Go to Full Site** to access the **DCI Mobile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



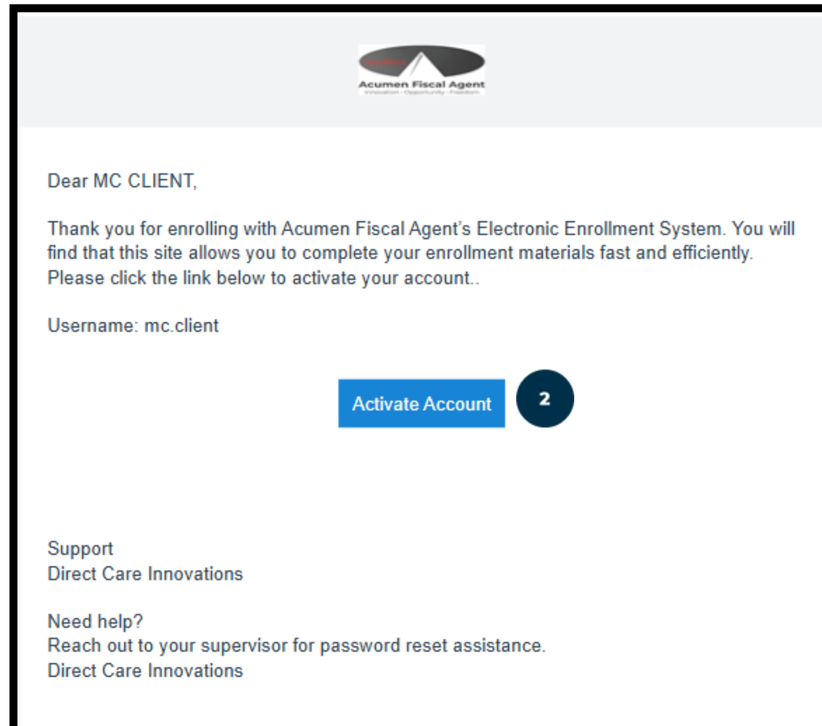
Instructions for logging into EES using a desktop or laptop computer

- ✓ 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)

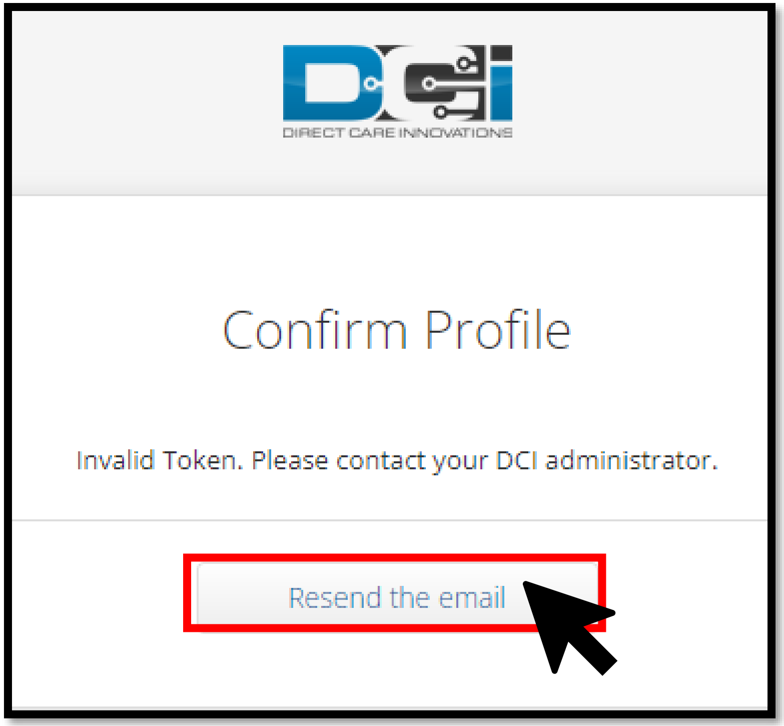


Activate Profile

Note:

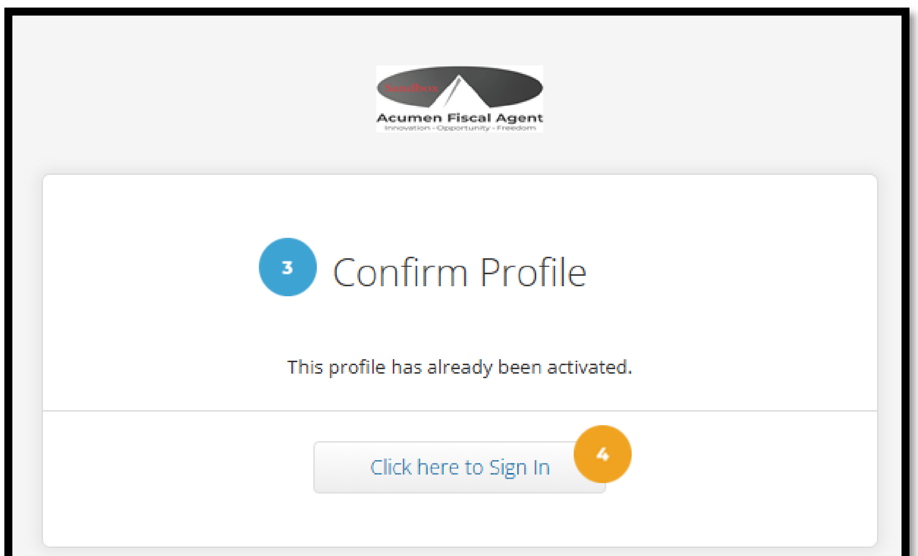
- If after clicking the Activate Account button, **<u>the link is inactive</u>**, an alert stating Invalid Token - Please contact your DCI administrator populates.

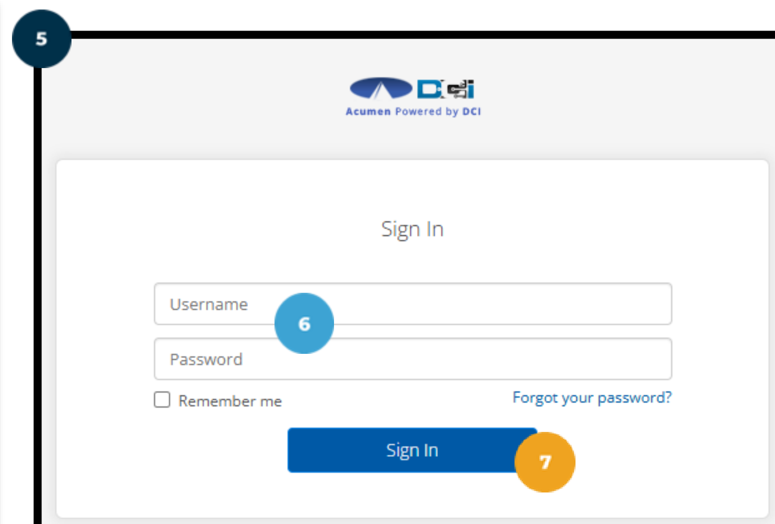
- Click the **Resend the email** button and return to <u>step 2</u>



Activate Profile

3. The Activate Account button opens a web page that states **Confirm Profile: This Profile has already been activated**
4. Click the **Click here to Sign In** button
5. The Enrollee is redirected to the **DCI Web Portal** login screen
6. Enter the **username** and **password** created in the Initial Registration form
7. Click **Sign In** to begin the registration process



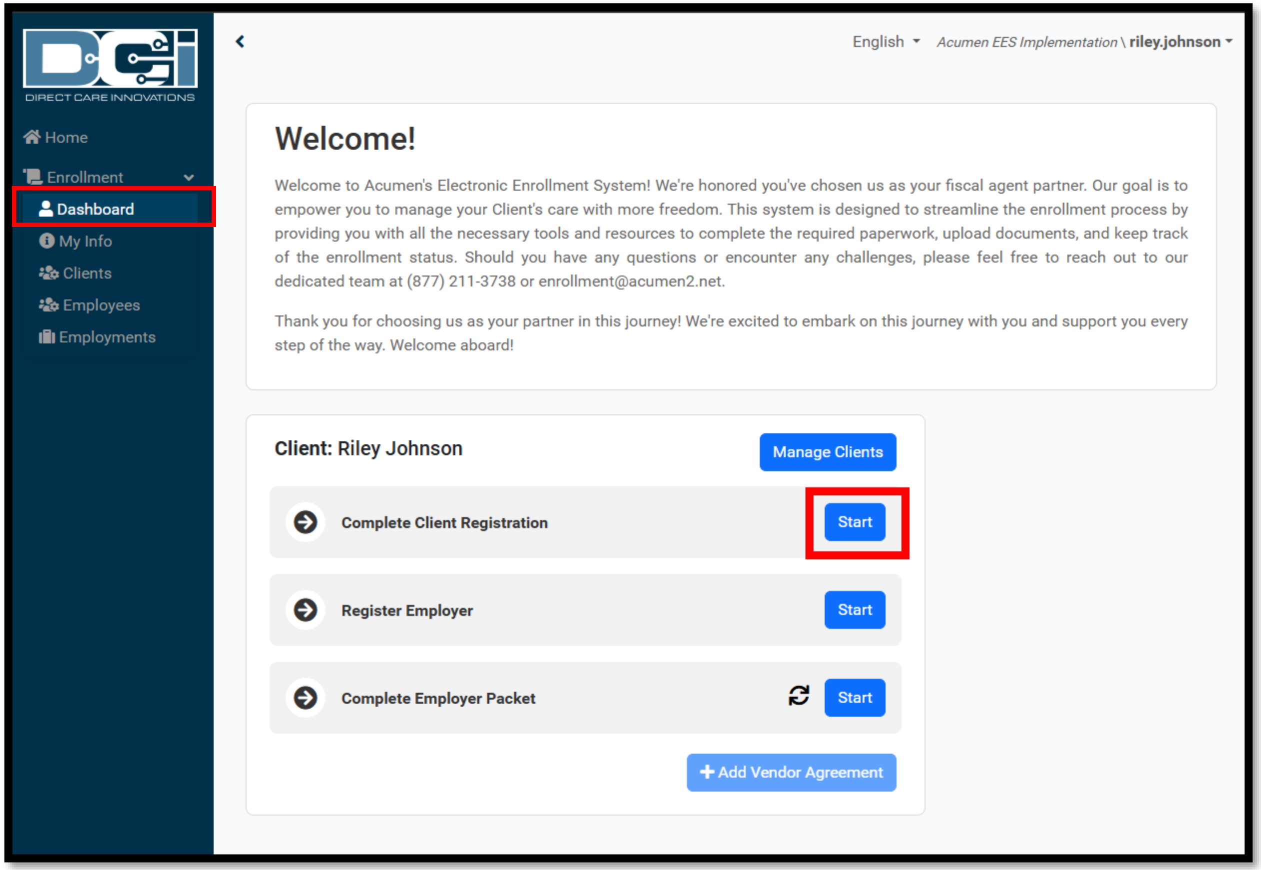


Complete Client Registration

Employer / Authorized Representative completes this process

Complete Client Registration

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

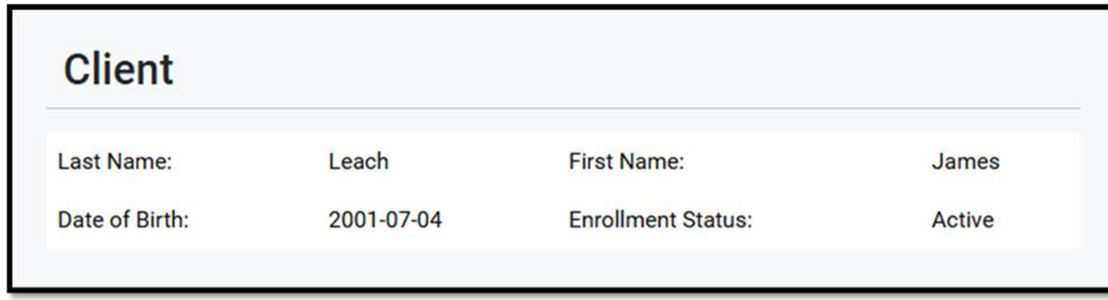


Complete Client Registration

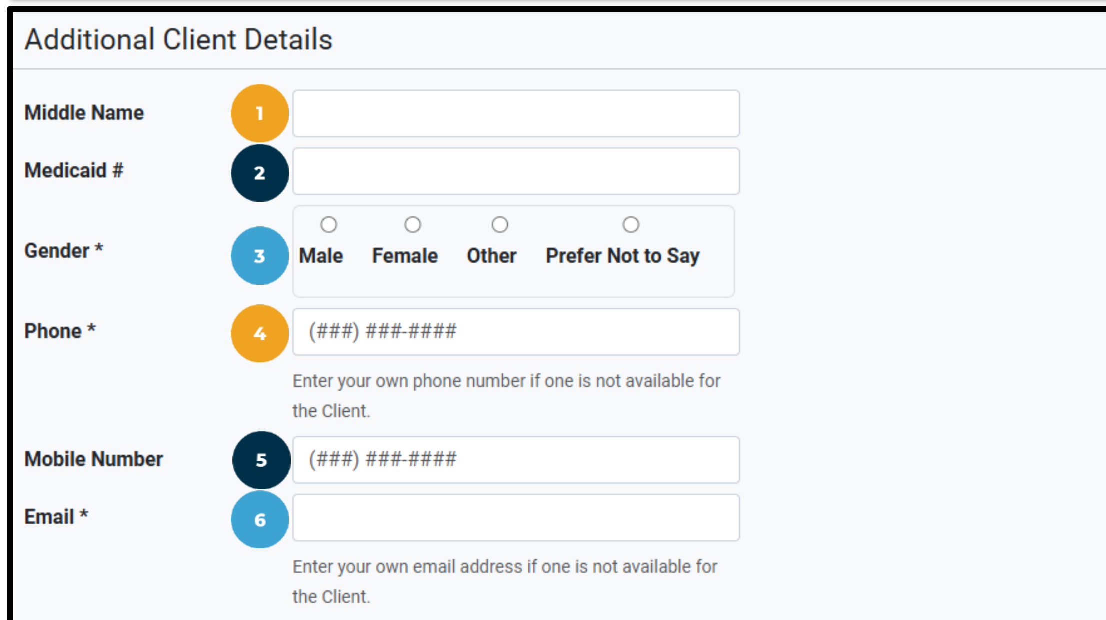
Client information auto-populates at the top of the page with the information provided during the initial registration

Complete Additional Client Details:

1. Middle Name (optional)
2. Medicaid # (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 (###) ###-####

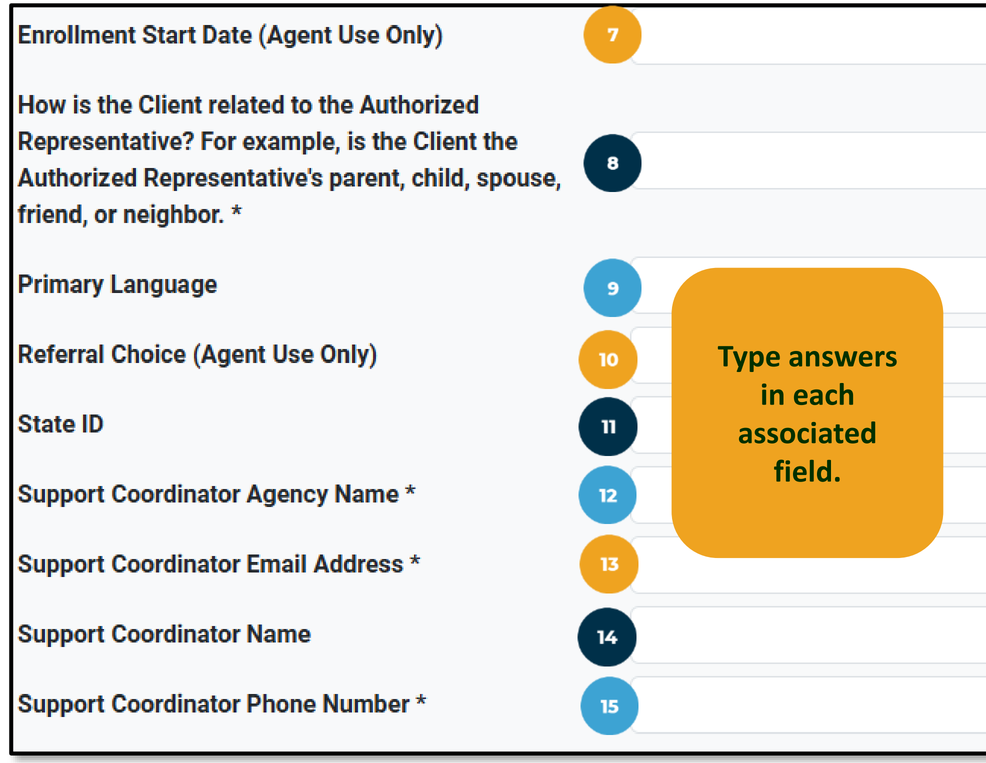
Email * 6

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**):



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

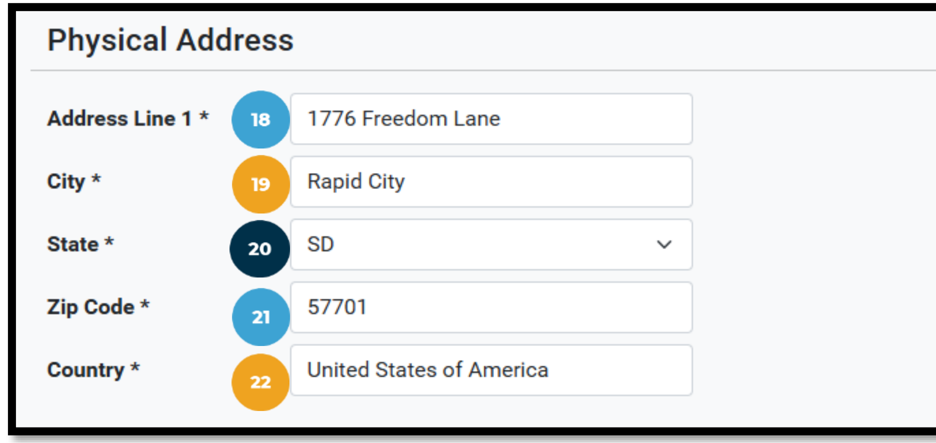
Complete Client Registration

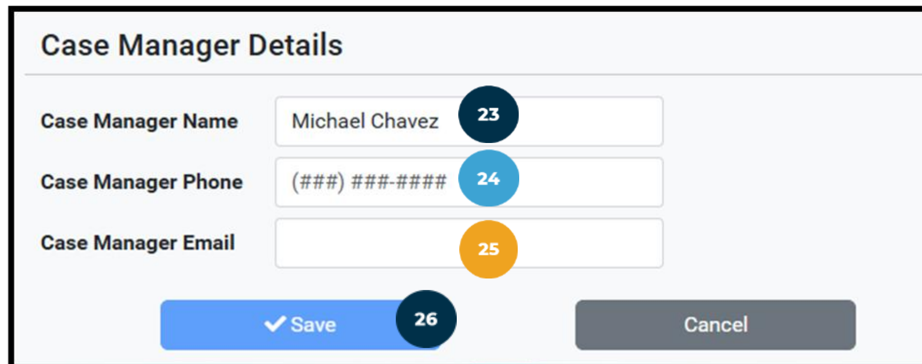
Complete the Physical Address:

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

Complete the Case Manager Details:

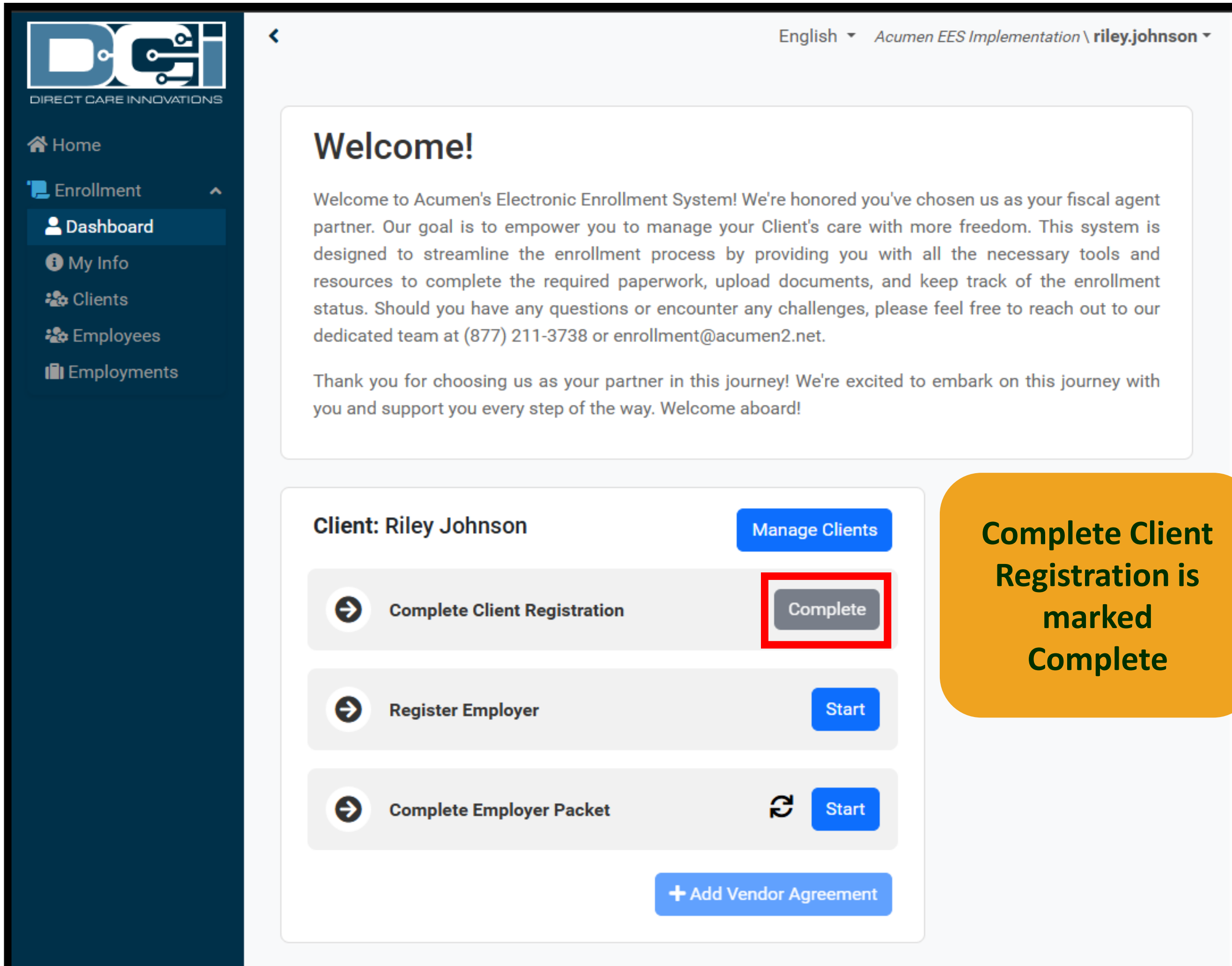
23. Case Manager Name (Not Applicable)
24. Case Manager Phone (Not Applicable)
25. Case Manager Email (Not Applicable)
26. Click **Save** to complete the Client Registration process





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



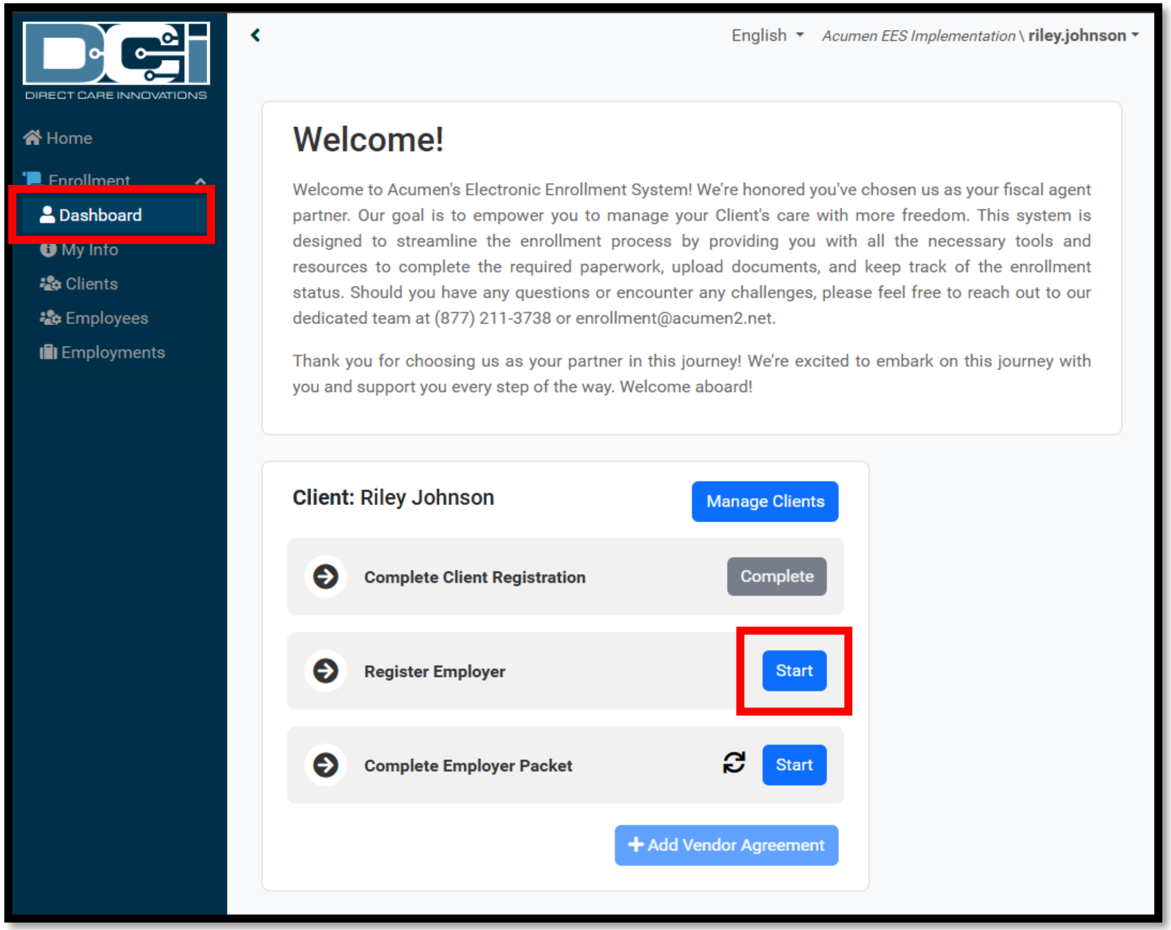
Complete Client Registration is marked Complete

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.



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

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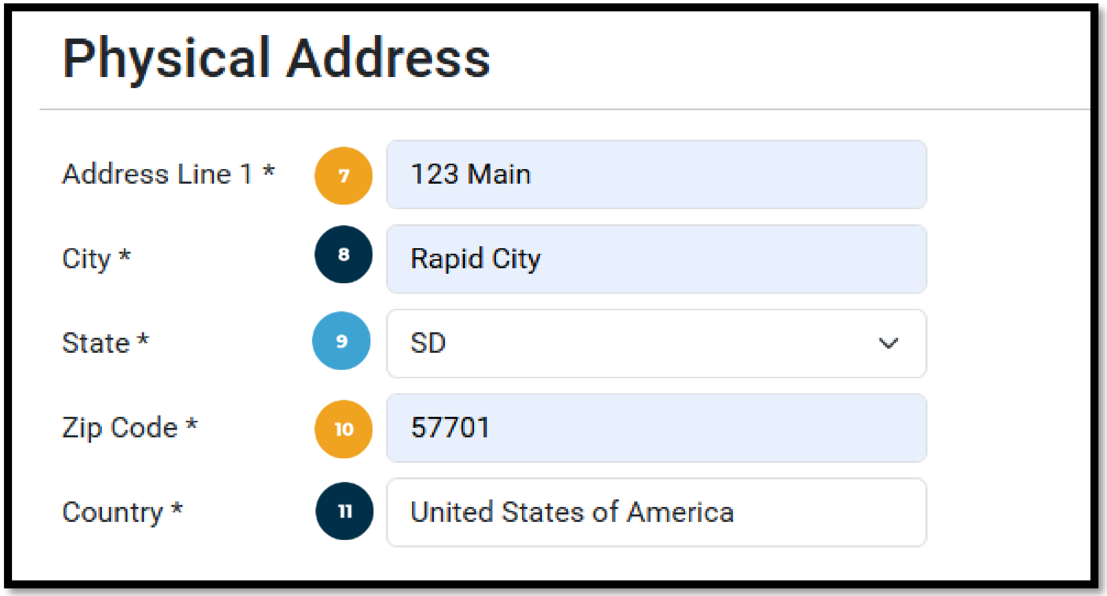
Register Auth. Rep. / Employer

Complete Physical Address details:

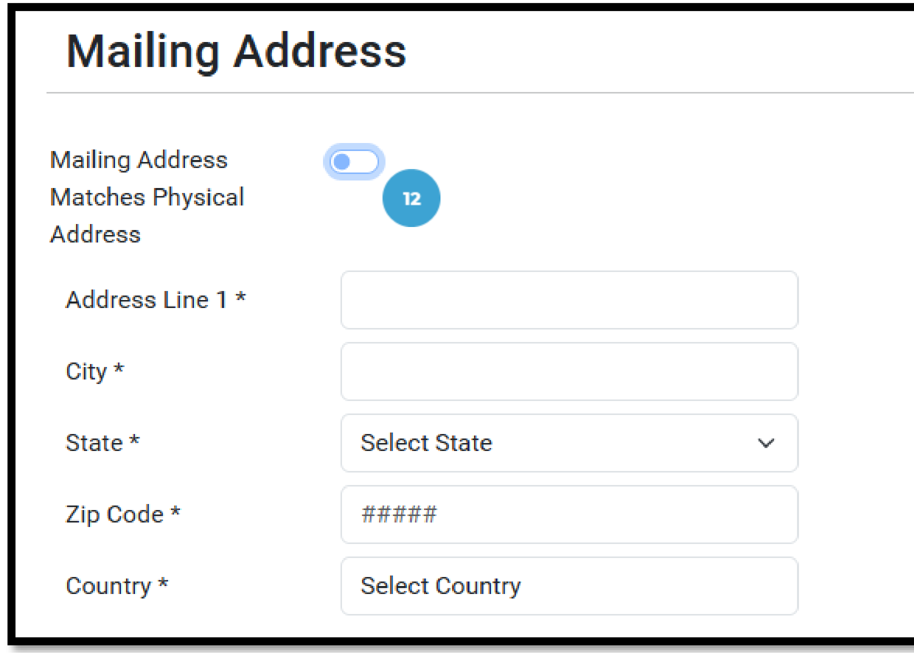
7. Address Line 1 (**required**)
8. City (**required**)
9. State (**required**)
10. Zip Code (**required**)
11. Country (**required**)

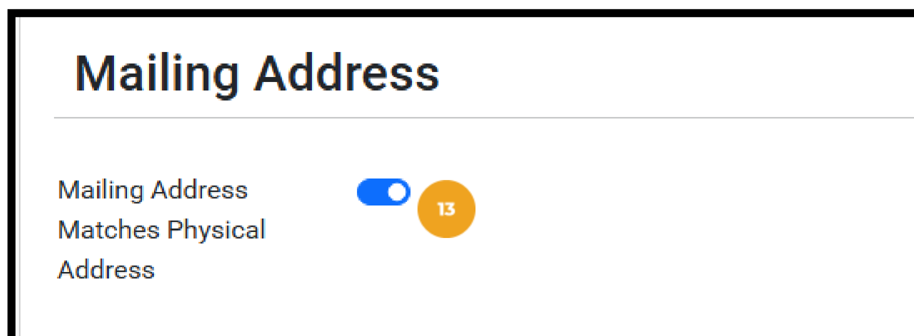


Register Auth. Rep. / Employer

Complete Mailing Address details:

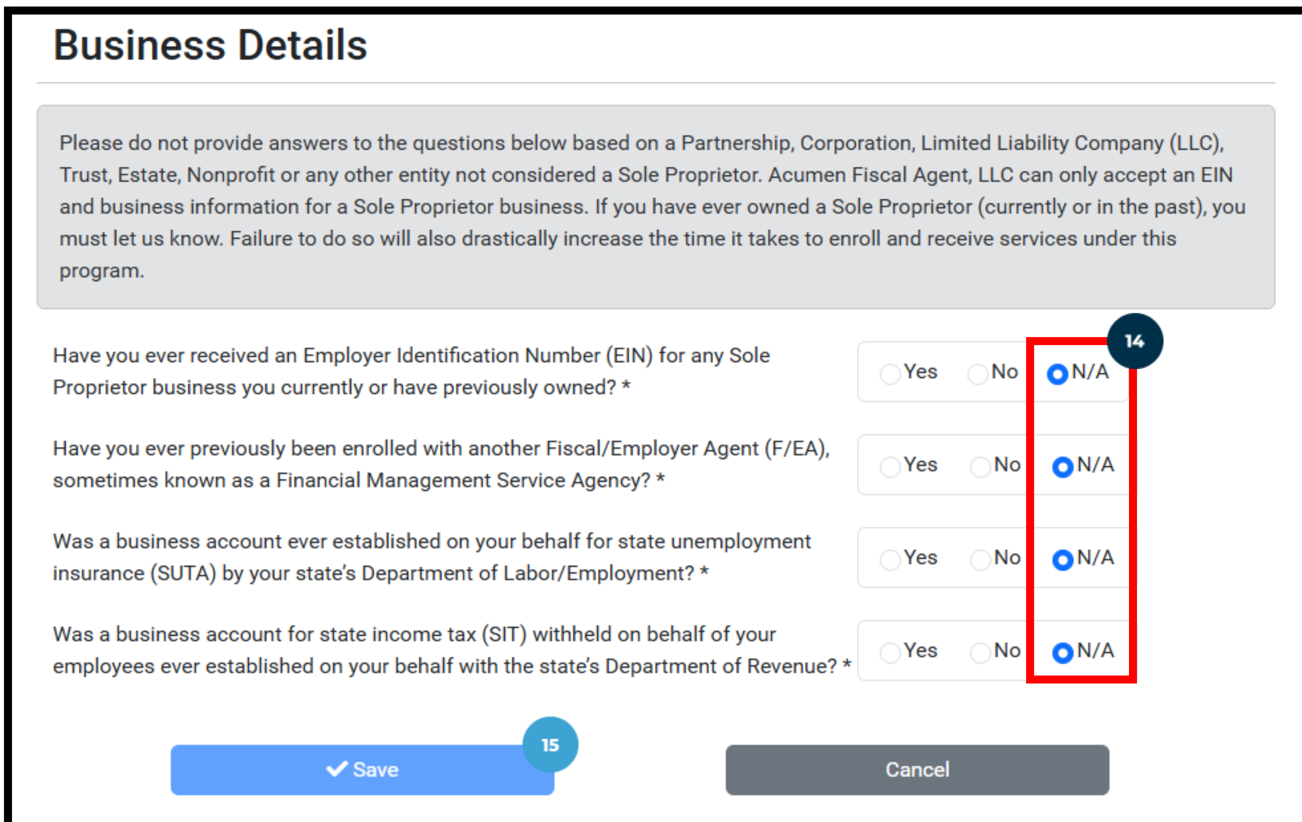
12. Mailing Address Matches Physical Address:
    - Defaults to **OFF**, indicating the mailing address does not match the physical address. Add the mailing address:
        a. Address Line 1 (**required**)
        b. City (**required**)
        c. State (**required**)
        d. Zip Code (**required**)
        e. Country (**required**)
13. Toggle to **ON** position if the mailing address is the same as the physical address





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

14

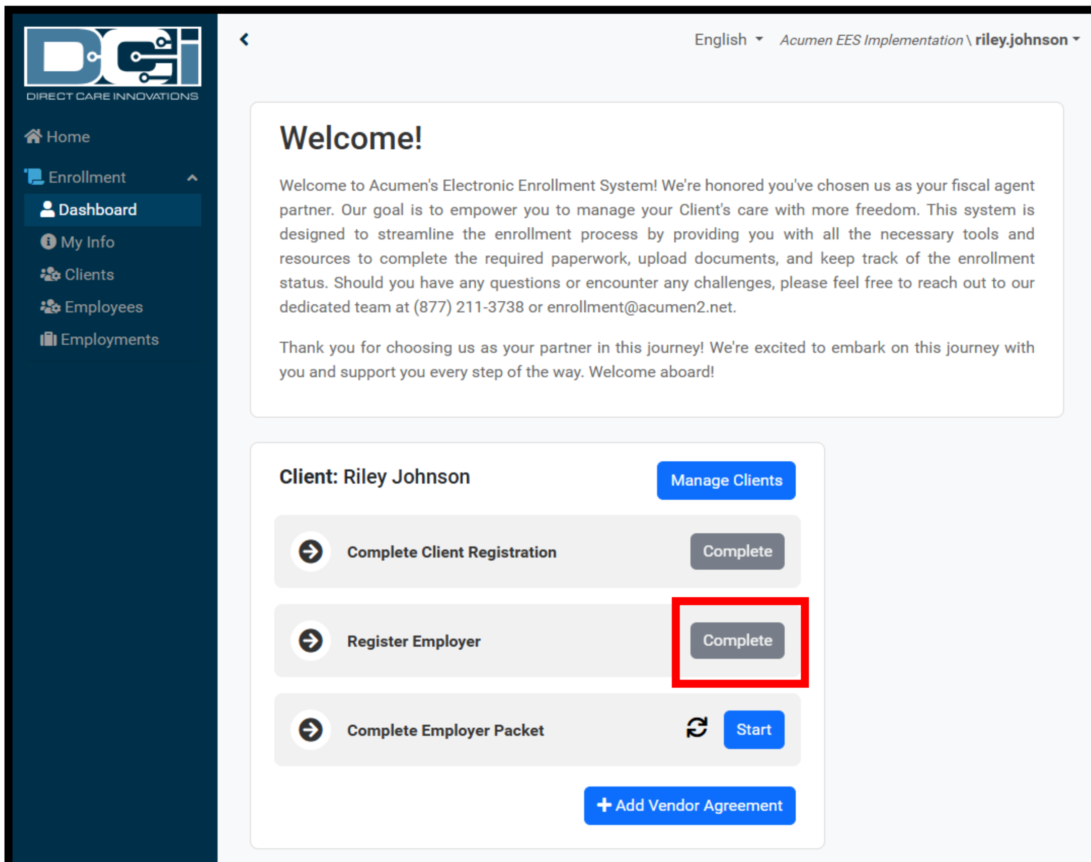
15

Save

Cancel

Register Auth. Rep. / Employer

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



Complete Auth. Rep. / Employer Packet

Authorized Representative / Employer completes this process

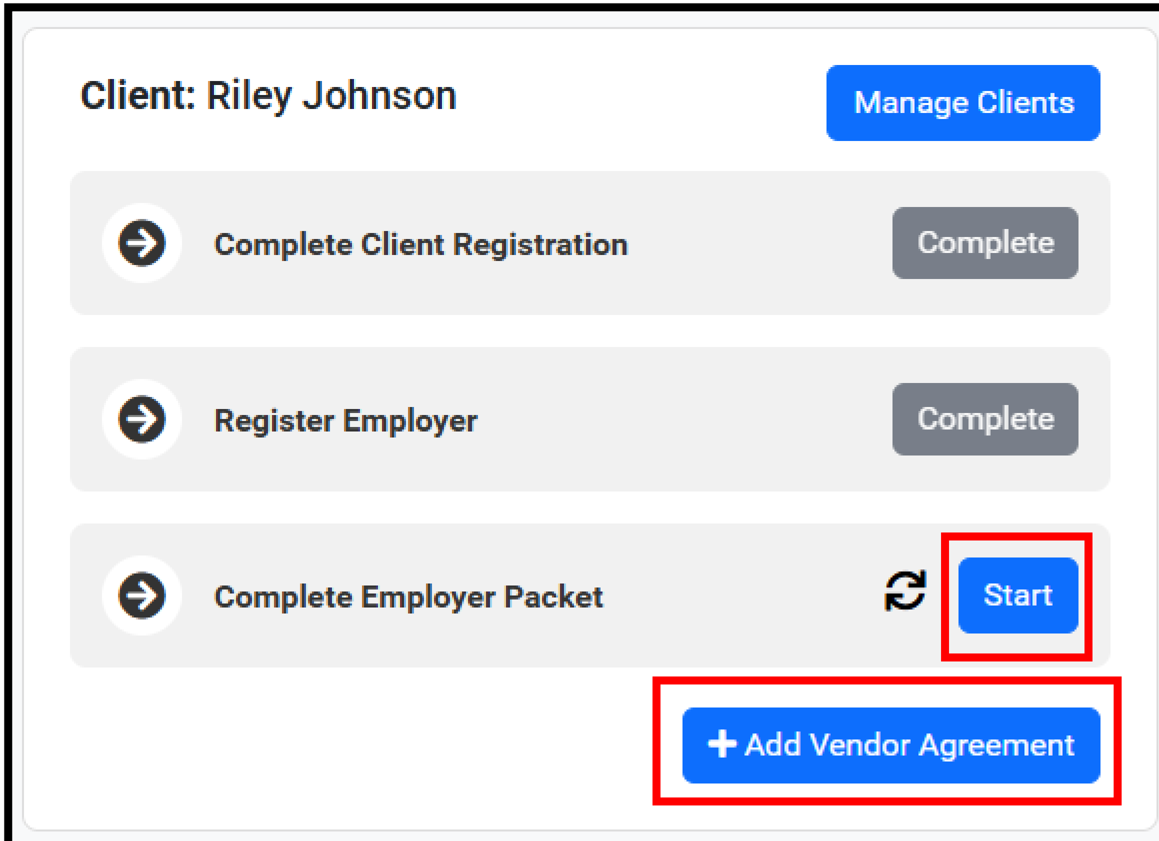
Complete Auth. Rep./Employer Packet

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:

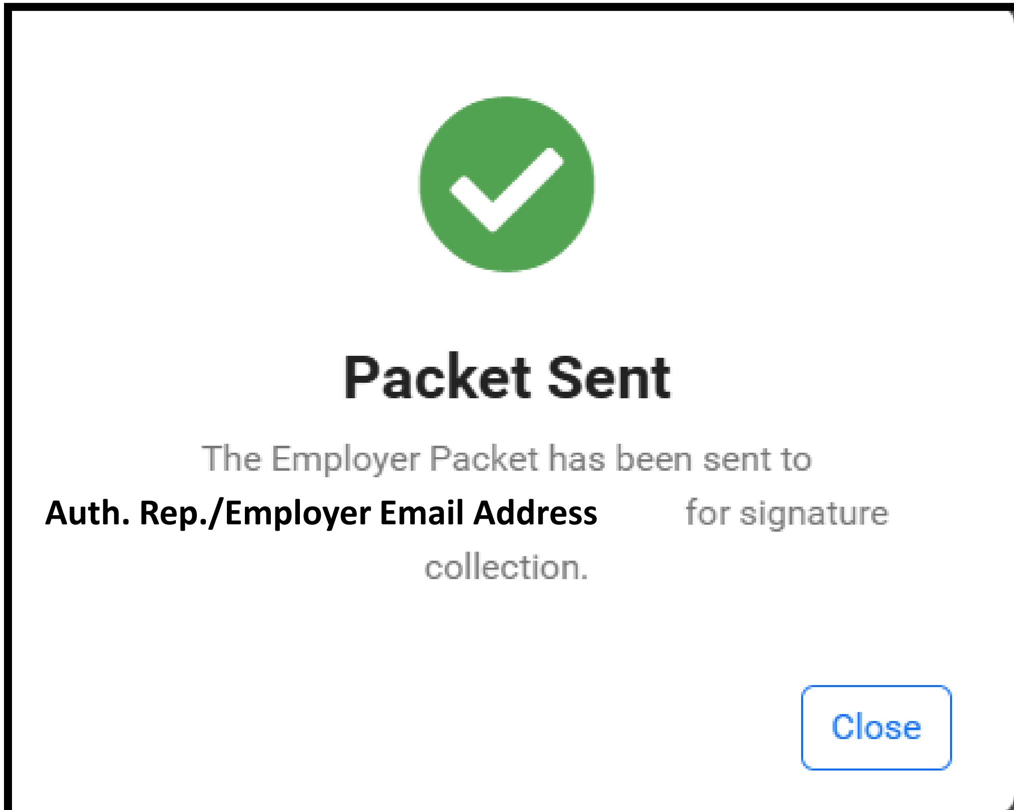
1. **Client Registration**
2. **Register Employer**

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



Complete Auth. Rep. / Employer Packet

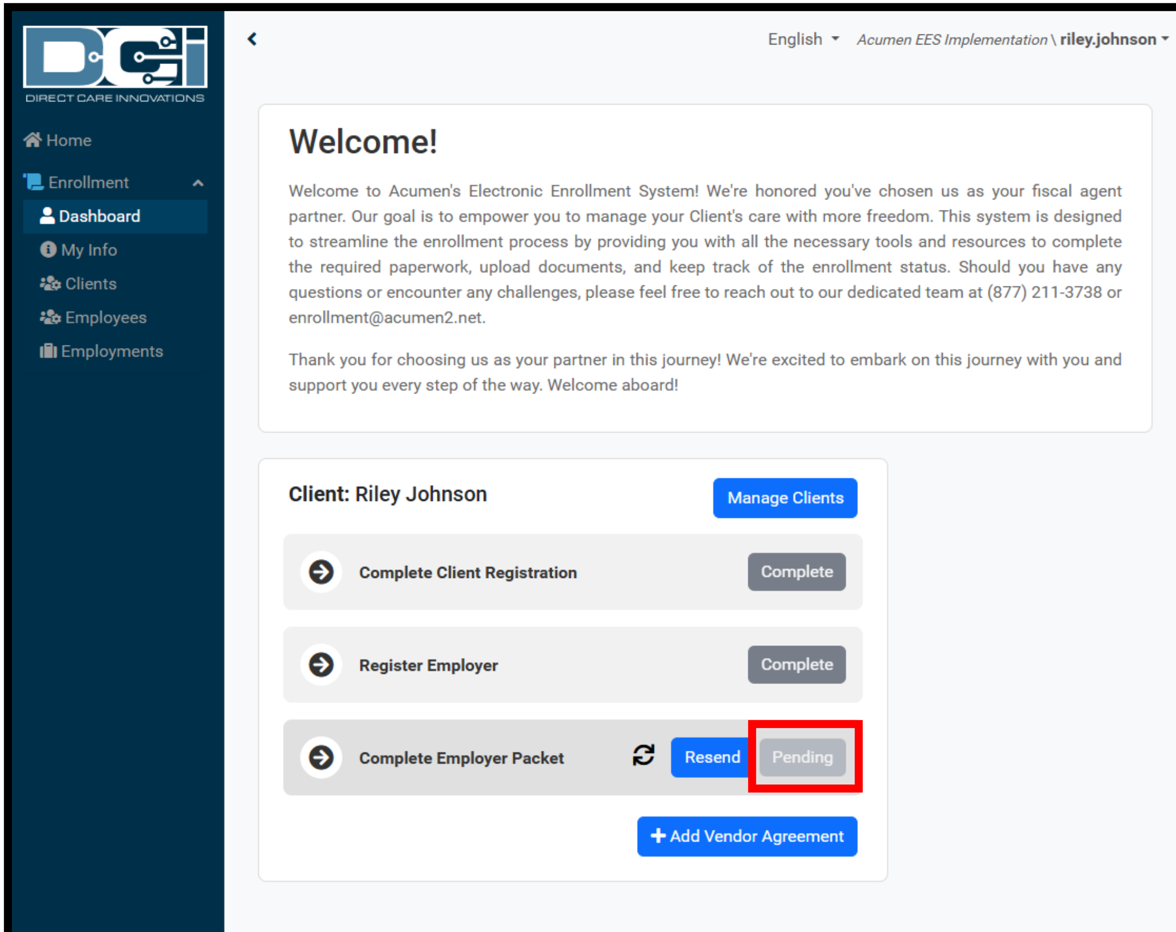
- The pop-up message **The Employer Packet has been sent to [Auth. Rep./ employer's email address] for signature collection** displays.
- Click **Close**



Complete Auth. Rep. / Employer Packet

The Complete Employer Packet button displays **Pending**

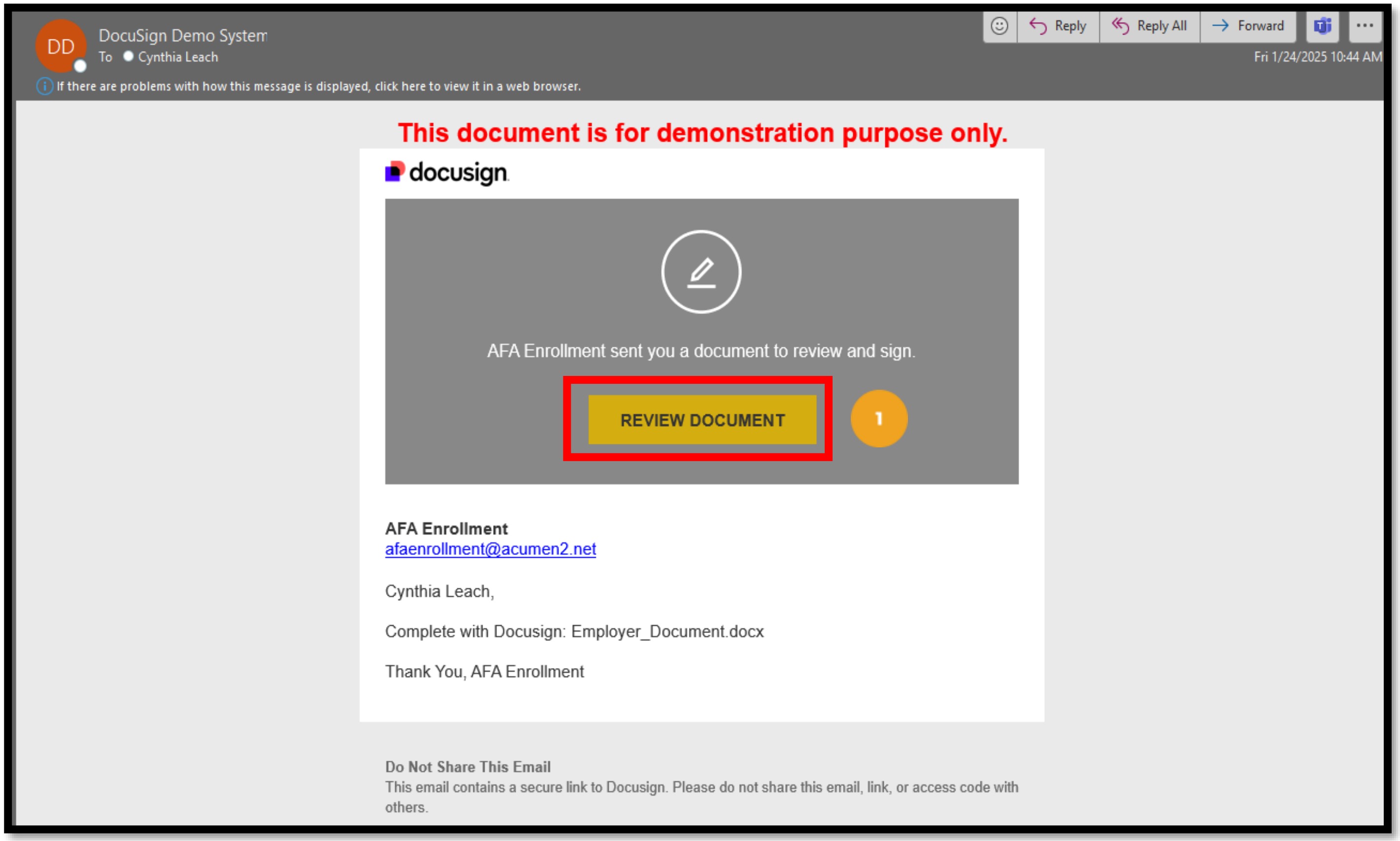
- **Please Note**: When clicking the **Resend button**, the packet is not being resent, only the email for signing is resent.
- If date is altered after initial send, that will not be captured in the document.
- Use the Refresh button to update the status to Complete after signing the documents.



Complete Auth. Rep. / Employer Packet – DocuSign

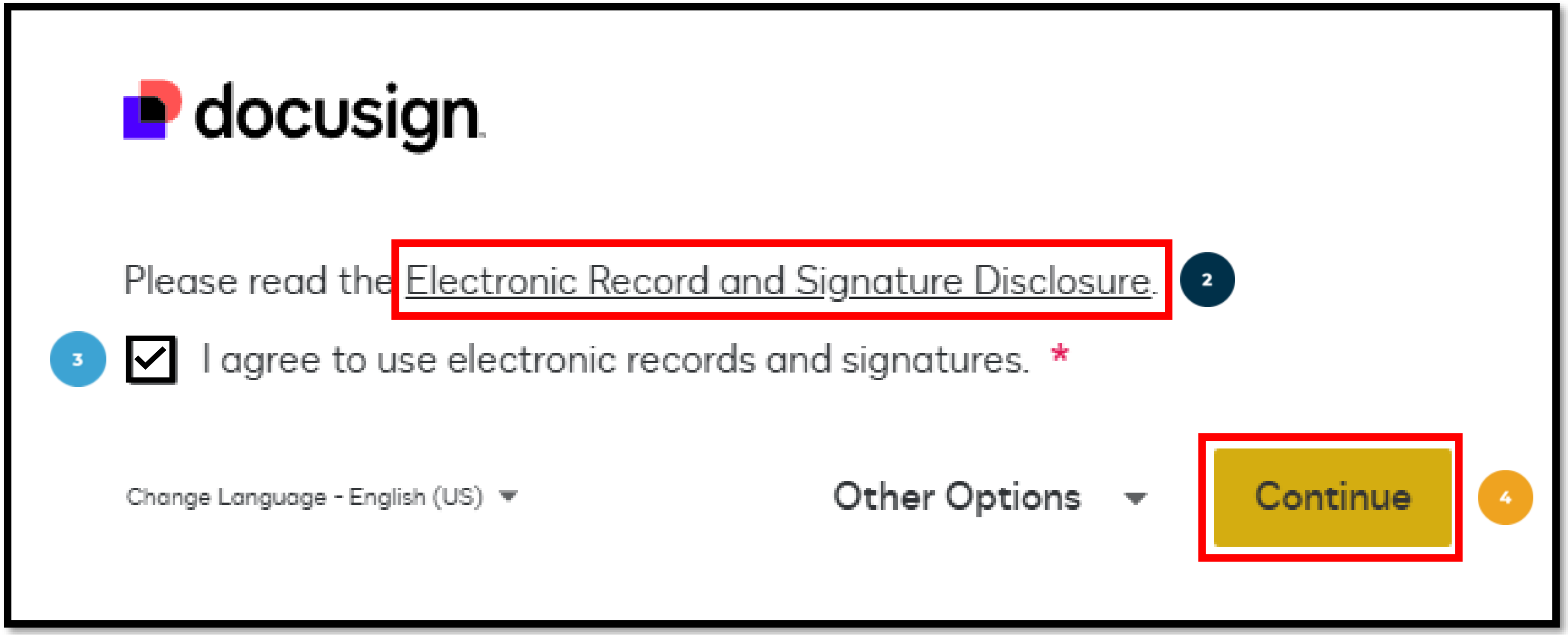
The packet arrives via an email from sender DocuSign. Check junk or spam folders if needed.

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



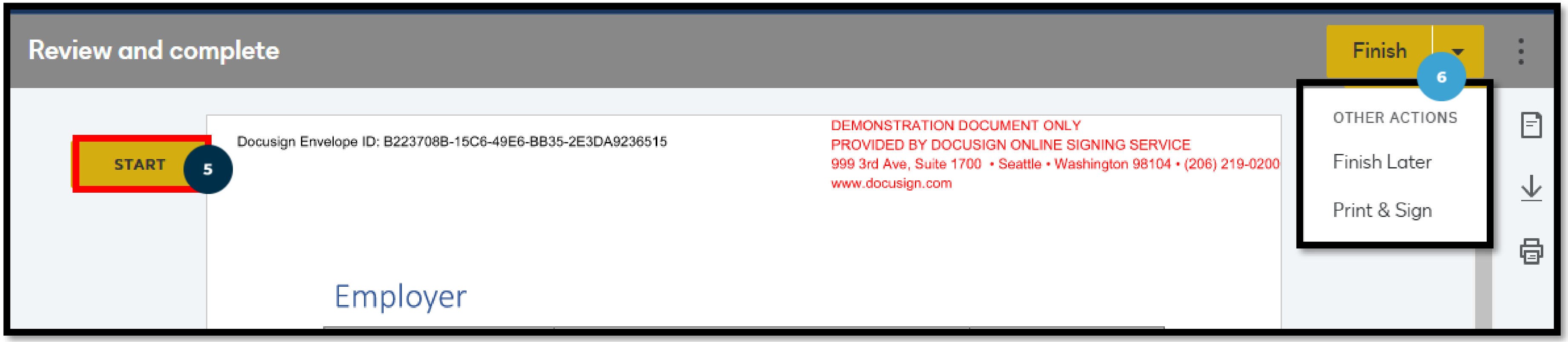
Complete Auth. Rep. / Employer Packet – DocuSign

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



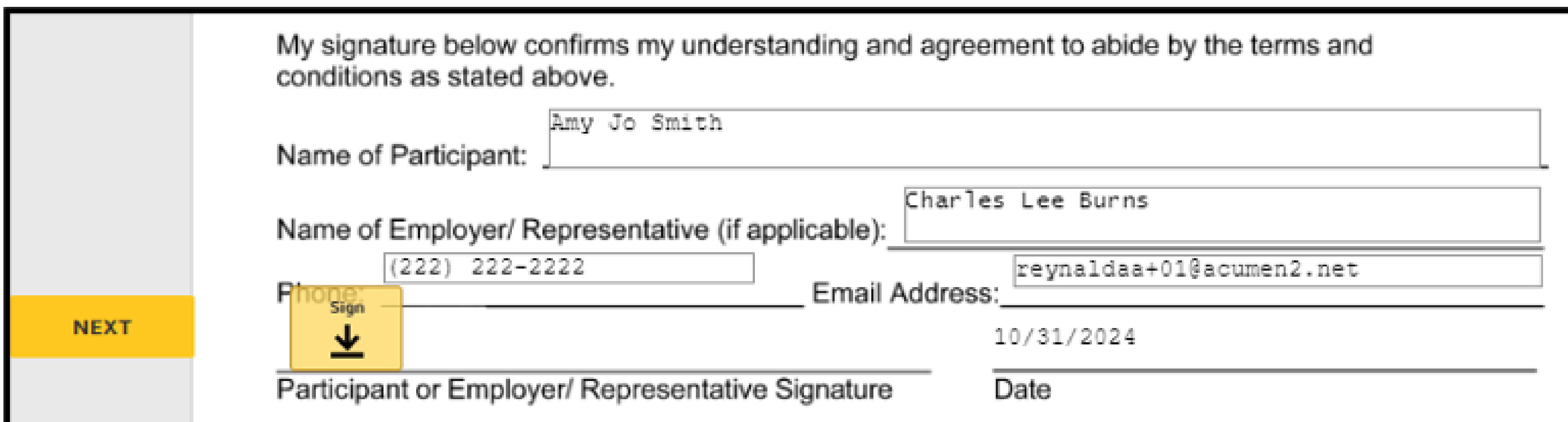
Complete Auth. Rep. / Employer Packet – DocuSign

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

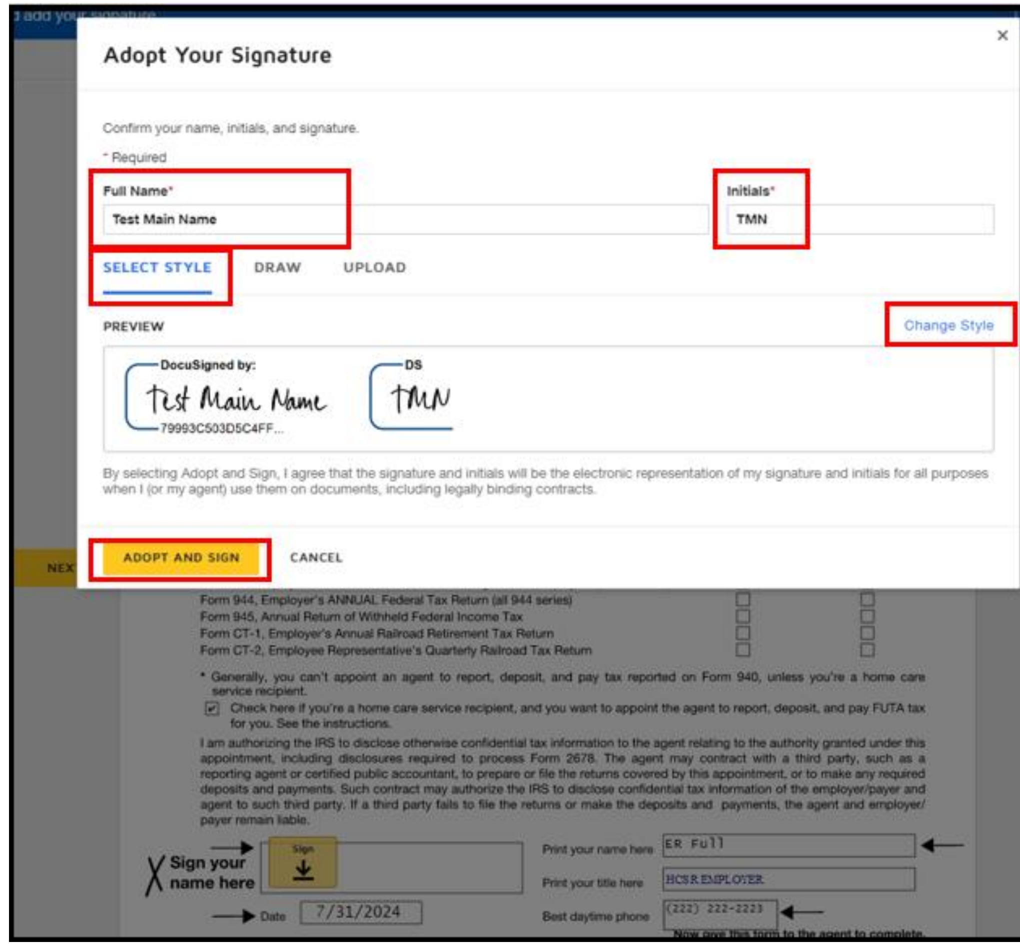
- The Auth. Rep. / Employer packet is prefilled based on the information provided in the initial registration
- Use the tab key on the keyboard to move through each line
- **Important!** Review documents for accuracy.
- If signature and date are required at the bottom of a page, click the **Sign** button to sign and date the form(s).
- Click the yellow **Next** button or scroll down to proceed to the next form



Complete Auth. Rep. / Employer Packet – DocuSign

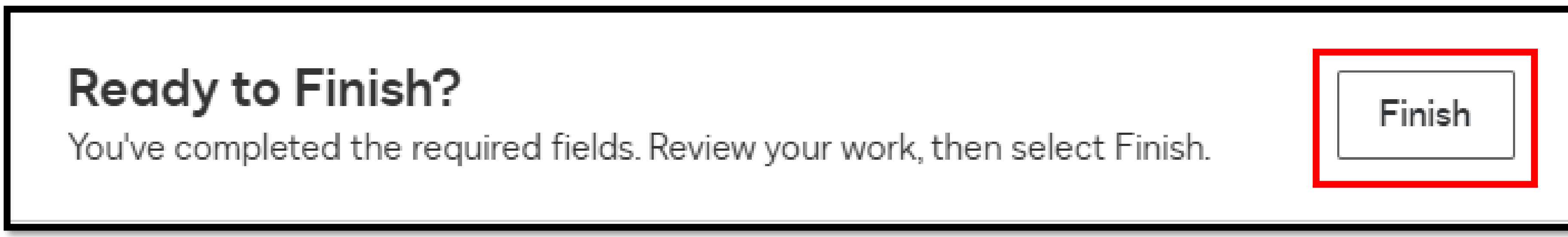
To select a signature style provided by DocuSign:

- ✓ 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



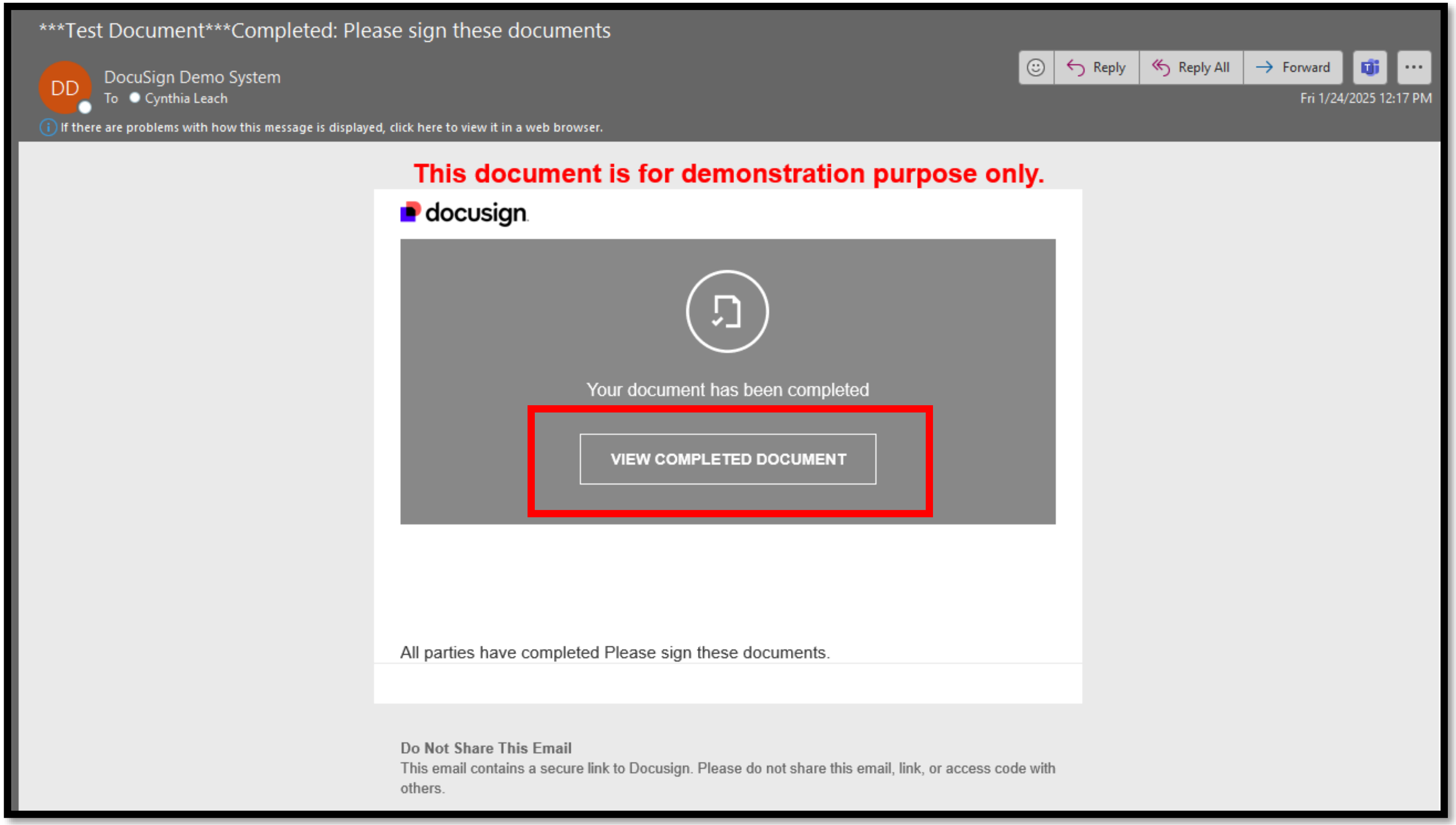
Complete Auth. Rep. / Employer Packet – DocuSign

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

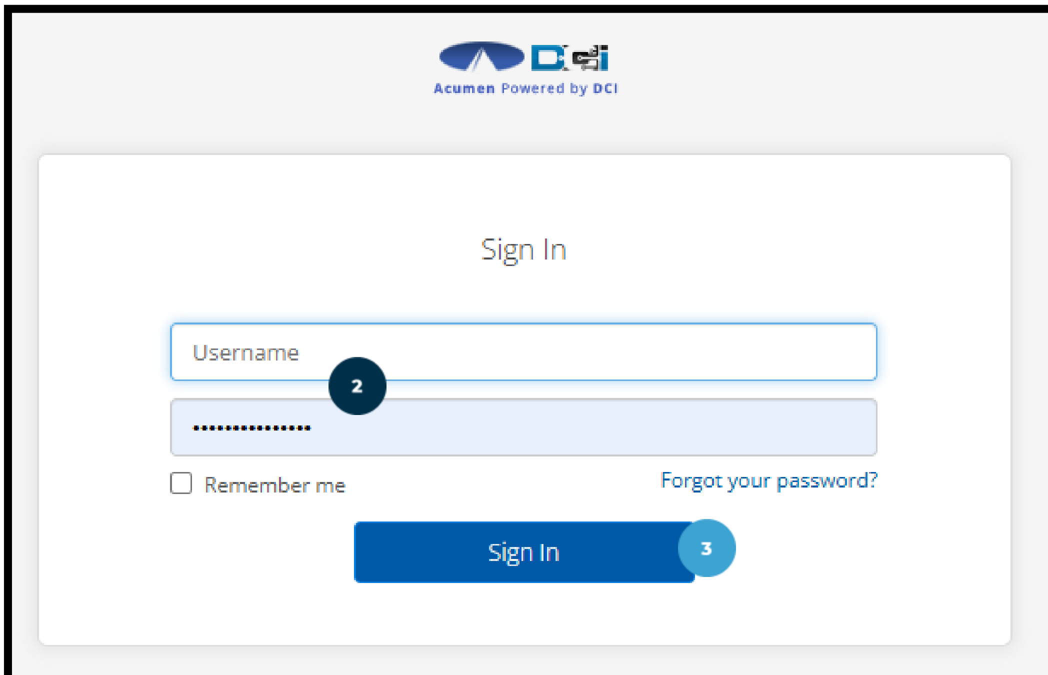
The Auth. Rep. / Employer receives a confirmation email with a link to view the completed document



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/

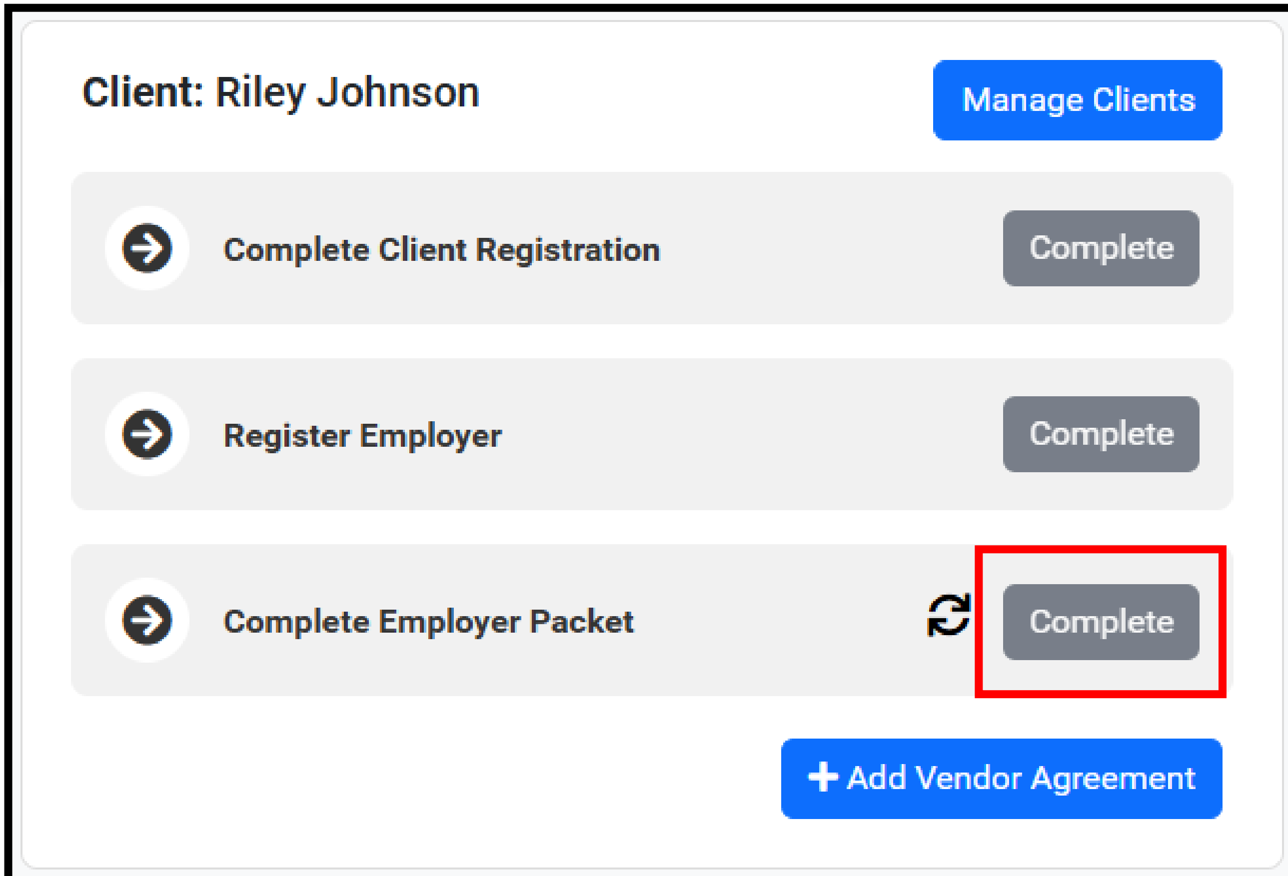


Complete Employer Packet

Please Note:

- The Employer Packet is marked **Pending** until it has been completed
- Use the **Refresh** button to update the status to Complete.
- Please wait 15 minutes between refresh & resend.

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

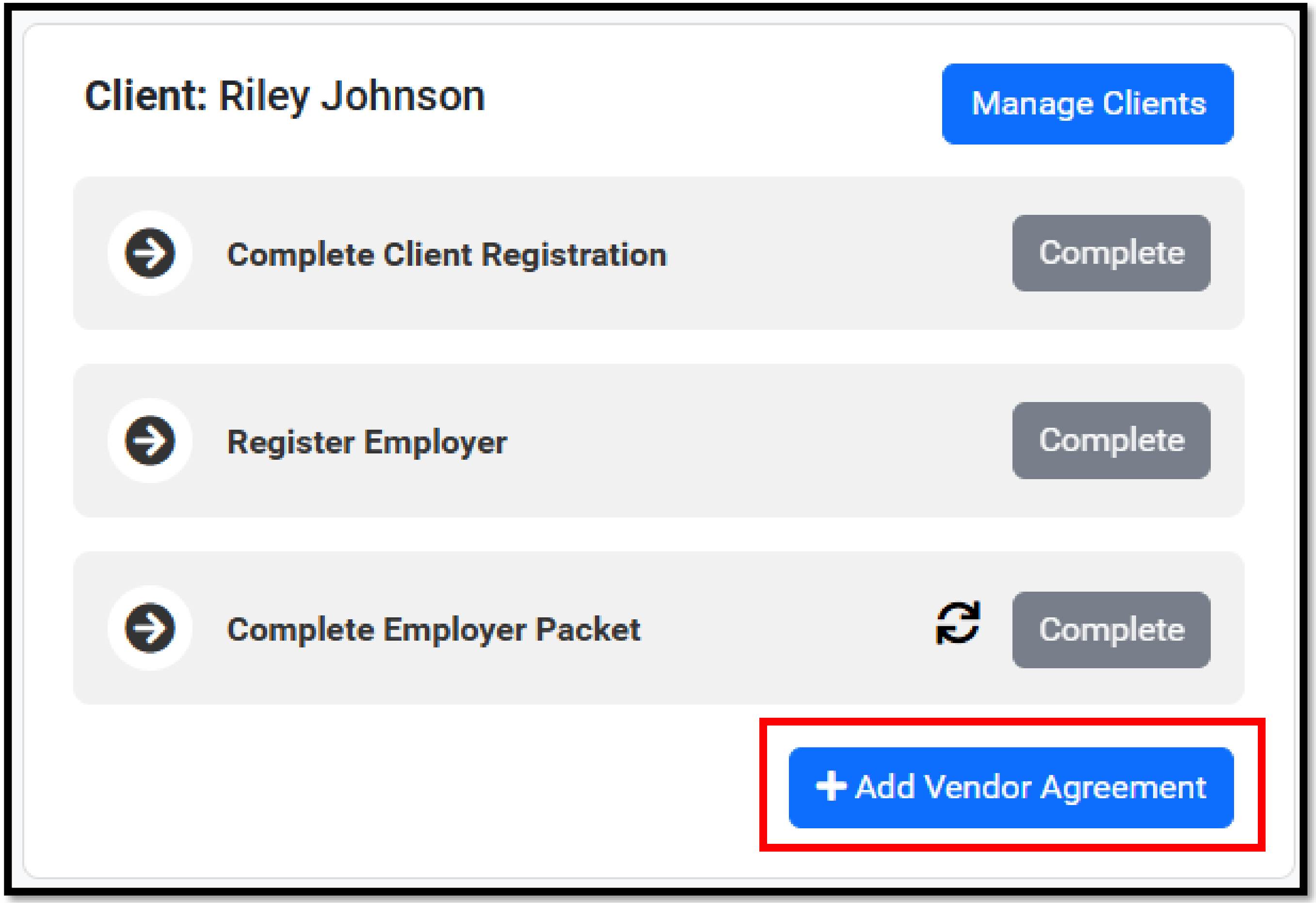


Add Vendor Agreement

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

Add Vendor Agreement

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

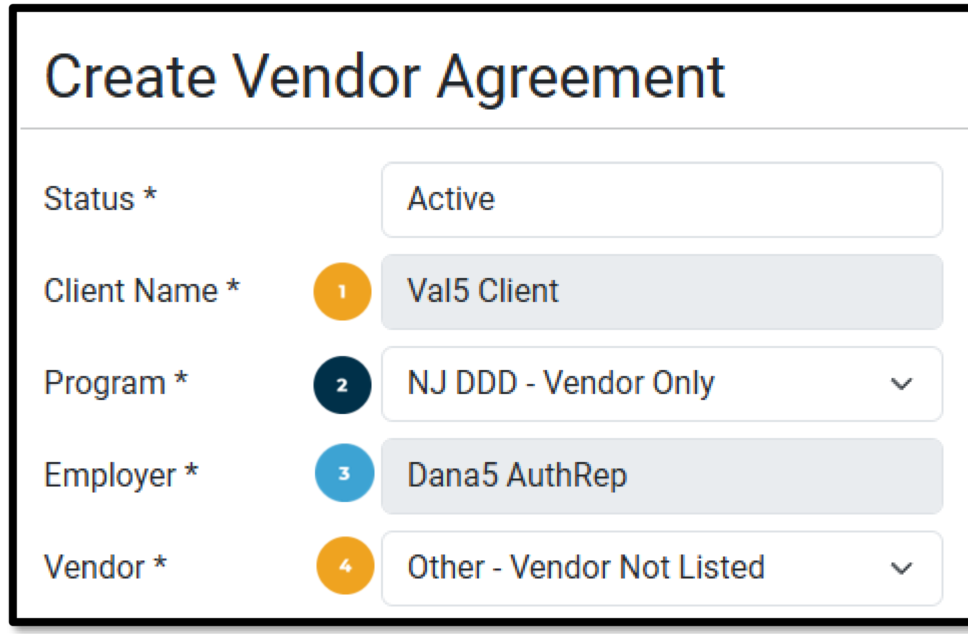


Add Vendor Agreement

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.

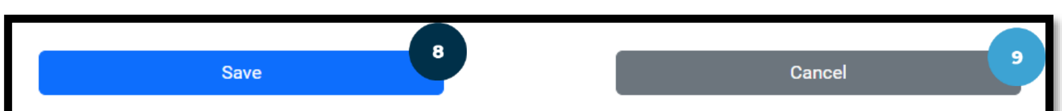


Add Vendor Agreement

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

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



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.

Date: 07/03/2025

Dear Michael27 Authrep,

Welcome to Acumen Fiscal Agent! This email is to confirm that you have completed the first phase of registering in our Electronic Enrollment System.

Keep an eye out for email notifications regarding your enrollment status. Once your paperwork is reviewed & processed, Acumen will provide you with an update of next steps.

Acumen looks forward to working with you as your Fiscal Agent!

Please feel free to contact us with any questions. You can find our contact info located on our website https://www.acumenfiscalagent.com.

Thank you!

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Acumen Fiscal Agent is a trusted provider in the self-direction space of healthcare across the U.S.
For more information, call (877) 211-3738.

www.acumenfiscalagent.com

Enrollment Completed*

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

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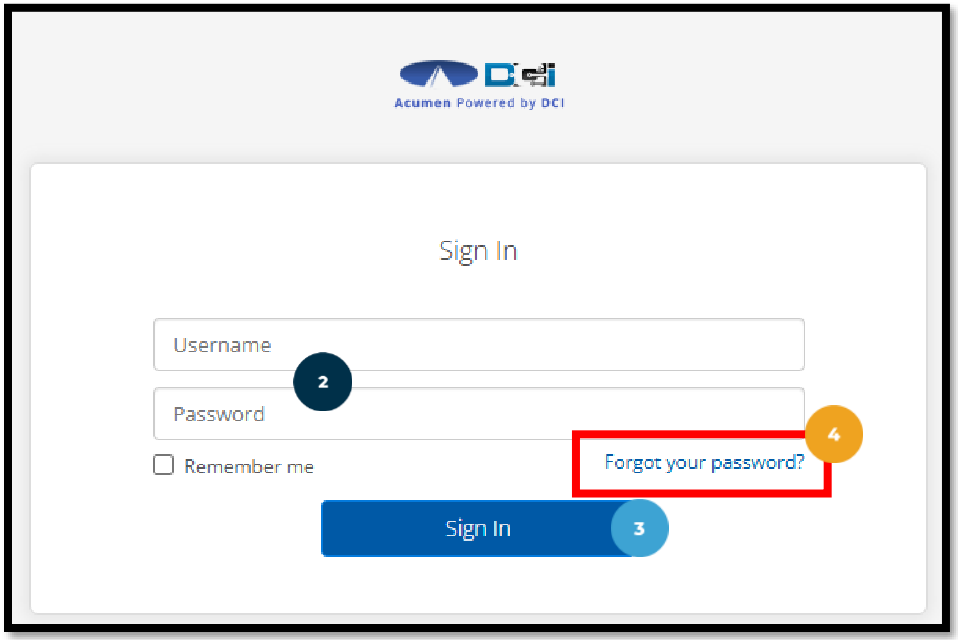
Logging into EES

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)

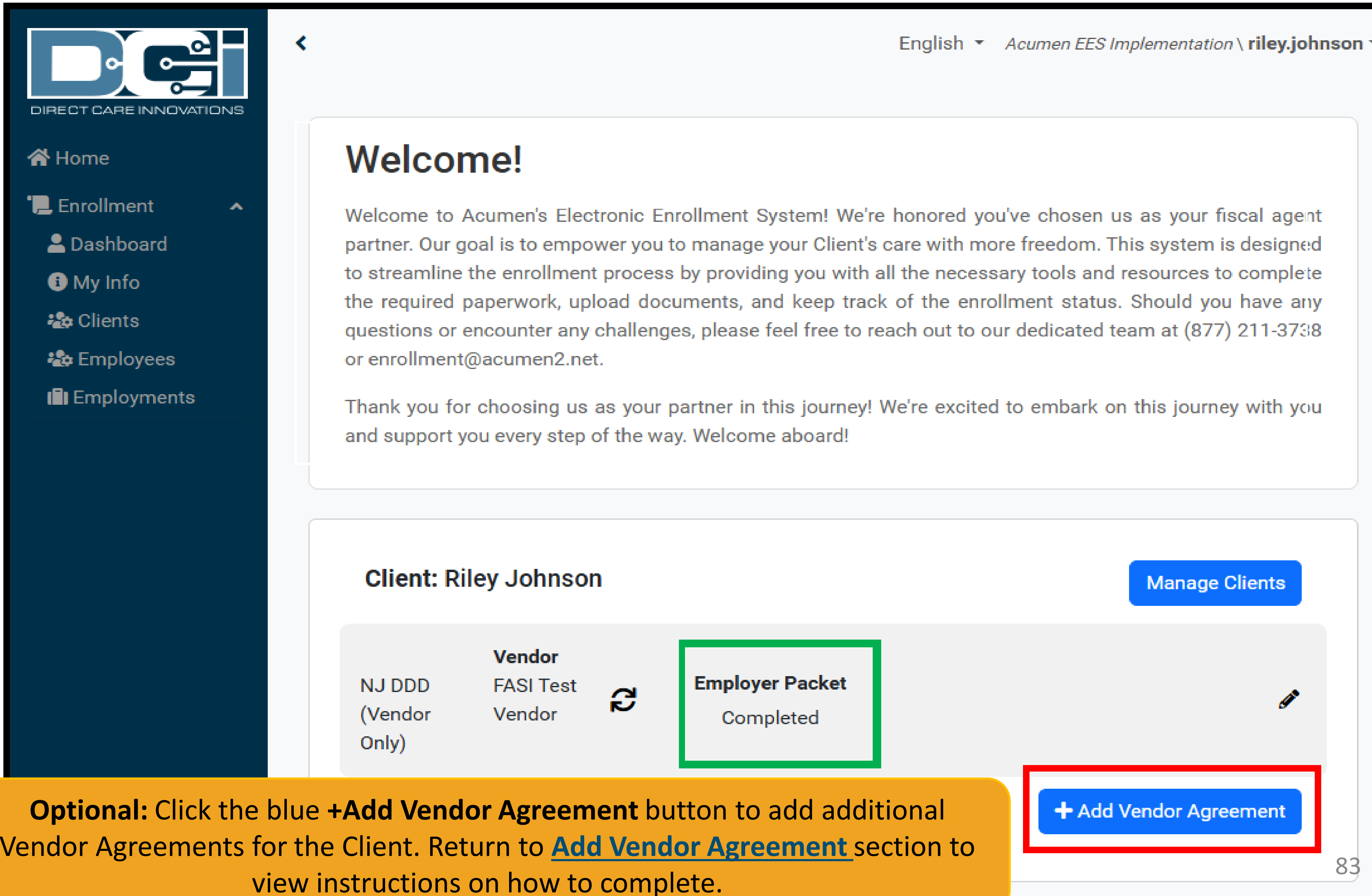
1

https://acumen.dcisoftware.com/



Enrollment Completed

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



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.

Next Steps

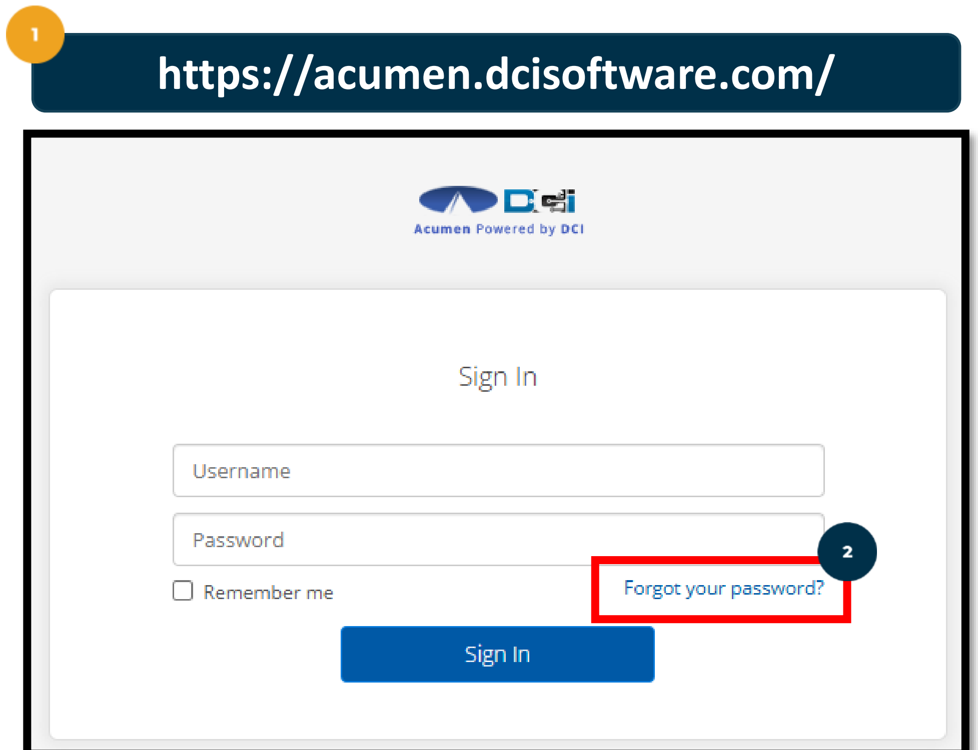
Congratulations! You have completed your portion of the enrollment process! Your enrollment information is now ready to be reviewed by an agent.

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

Reset Password

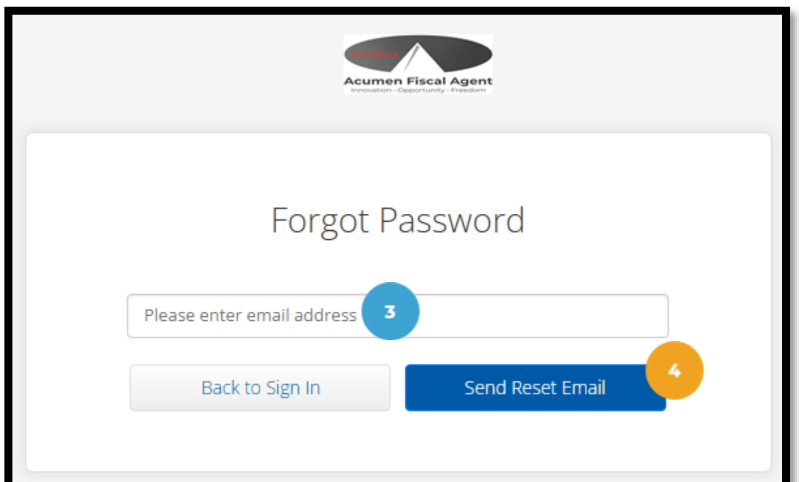
Reset Password

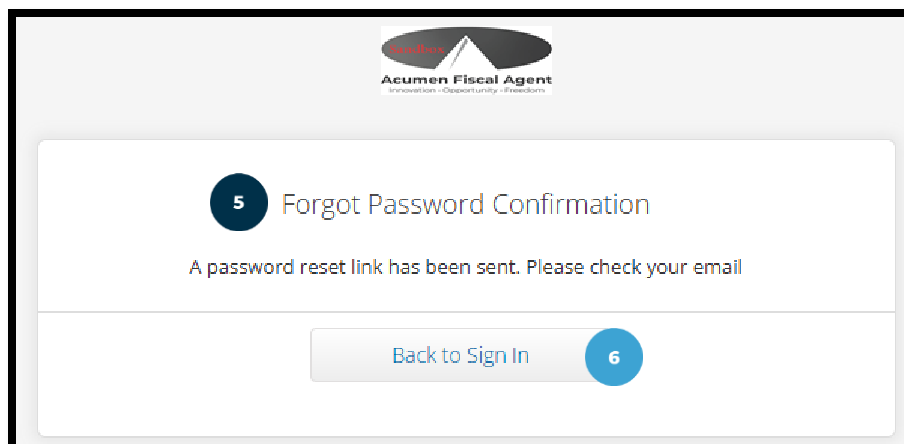
1. To reset your password, navigate to: https://acumen.dcisoftware.com/
2. Click the **Forgot your password** link to reset your password



Reset Password

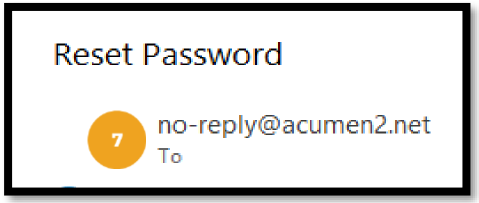
3. In the **Forgot Password** screen, enter the email used during the Initial Registration
4. Click the **Send Reset Email** button.
5. The **Forgot Password Confirmation** screen displays:
    - A password reset link has been sent. Please check your email.
6. Click the **Back to Sign in** button

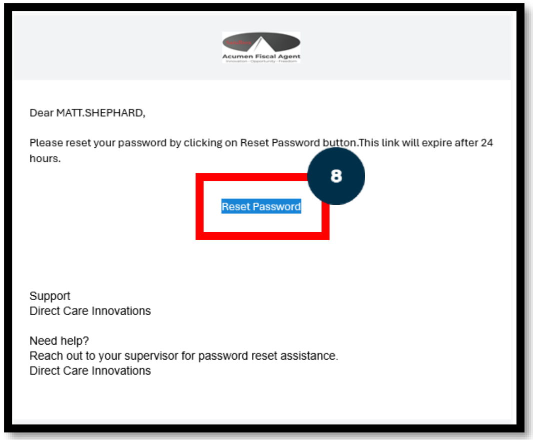


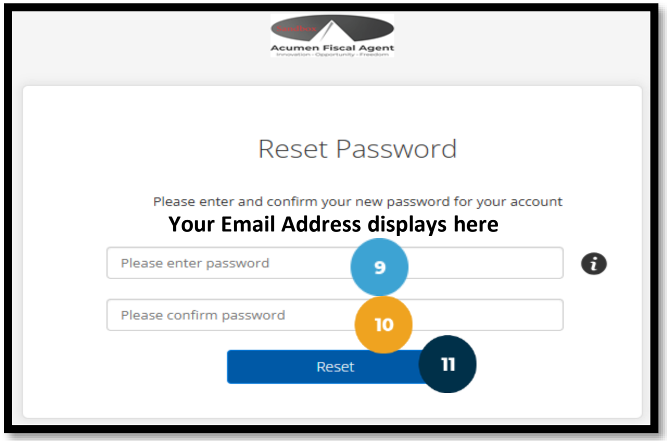


Reset Password

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**

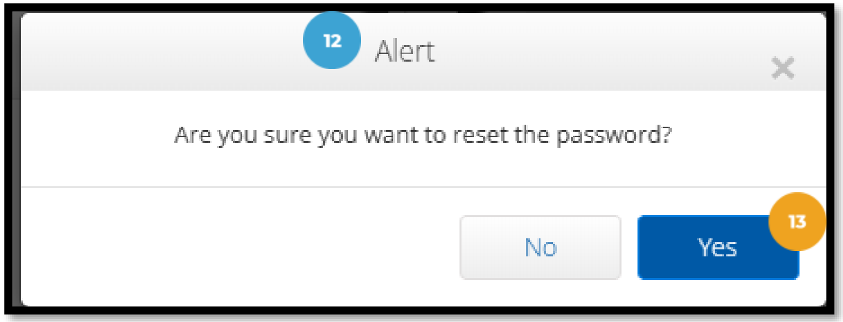


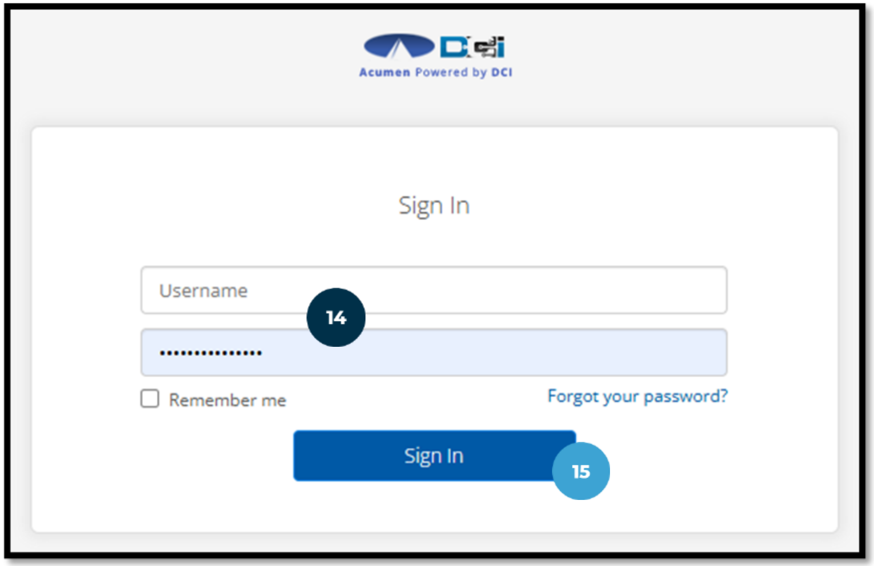




Reset Password

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.

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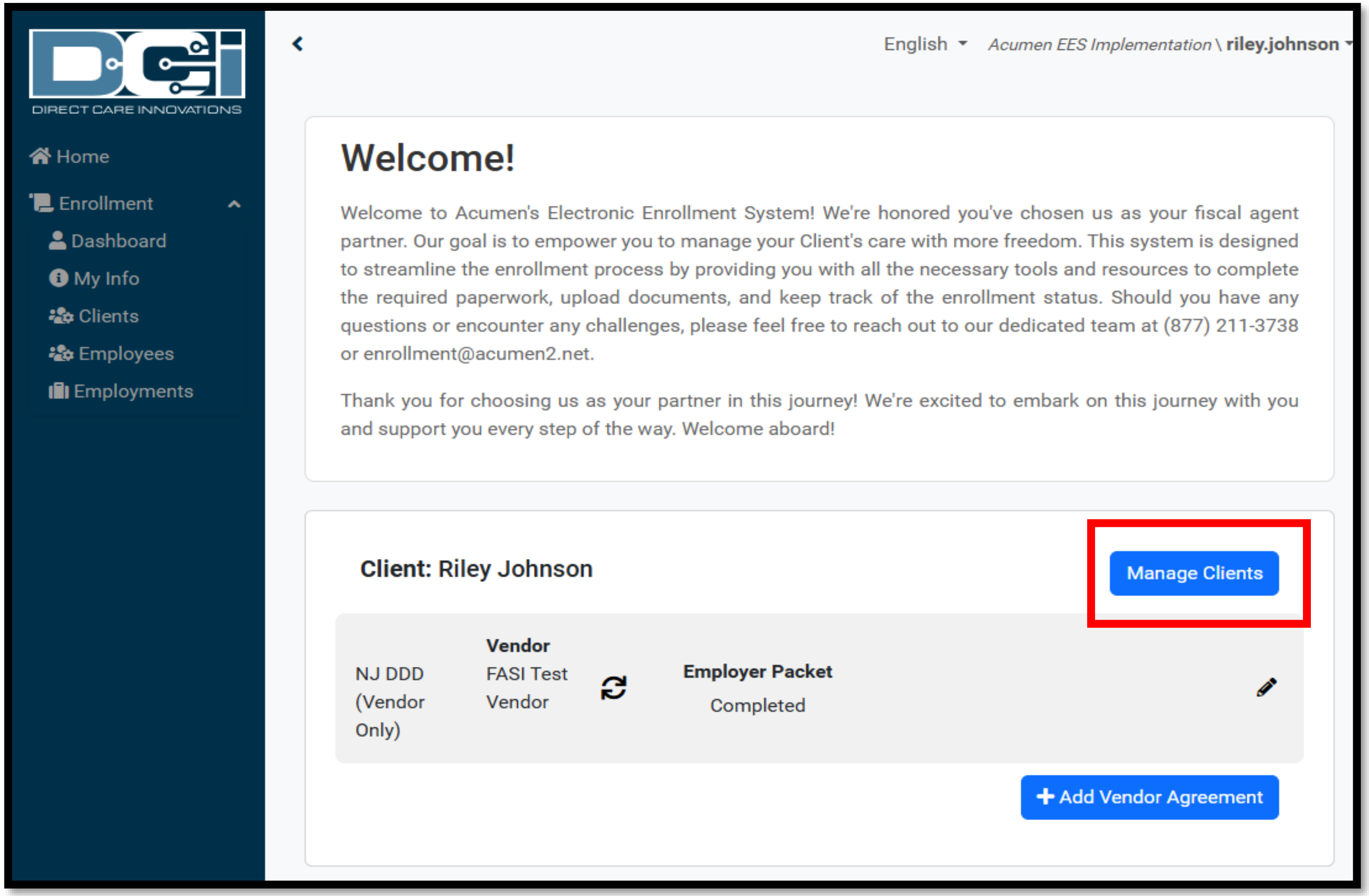
Thank you!

Manage Clients

Manage Clients

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



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.

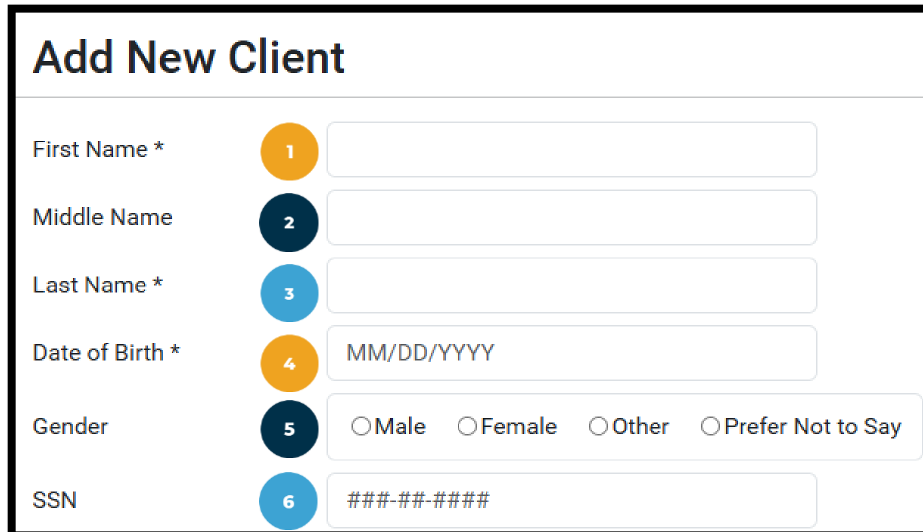
Manage Clients- Add New Client

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** format

   OR

   - 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)

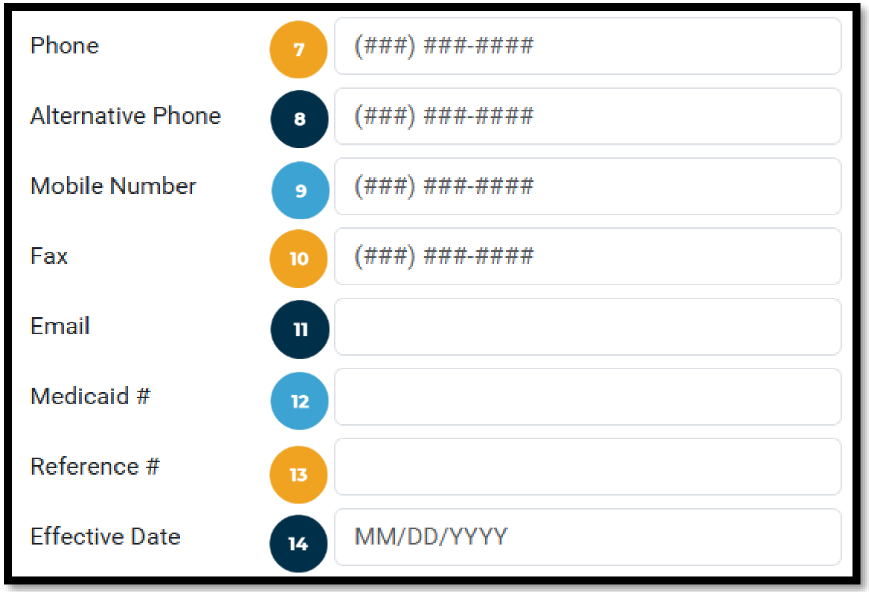


Manage Clients– Add New Client

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



Manage Clients- Add New Client

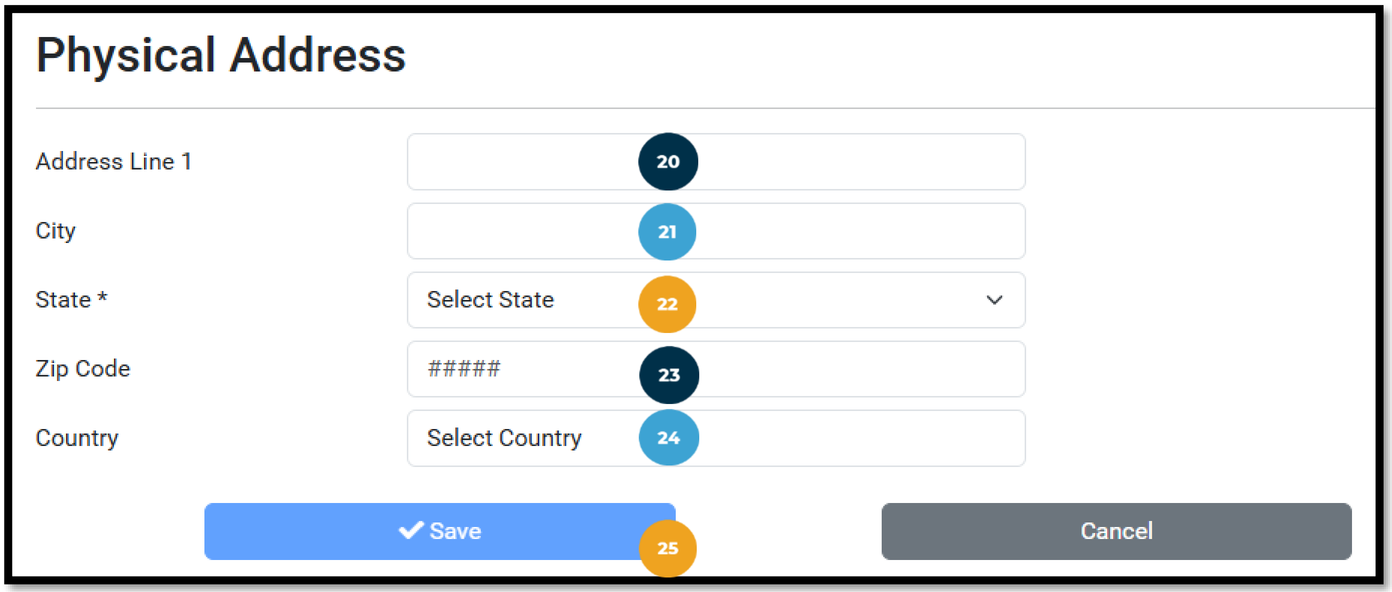
Complete the Add New Client Form, continued:

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)

Manage Clients- Add New Client

Physical Address

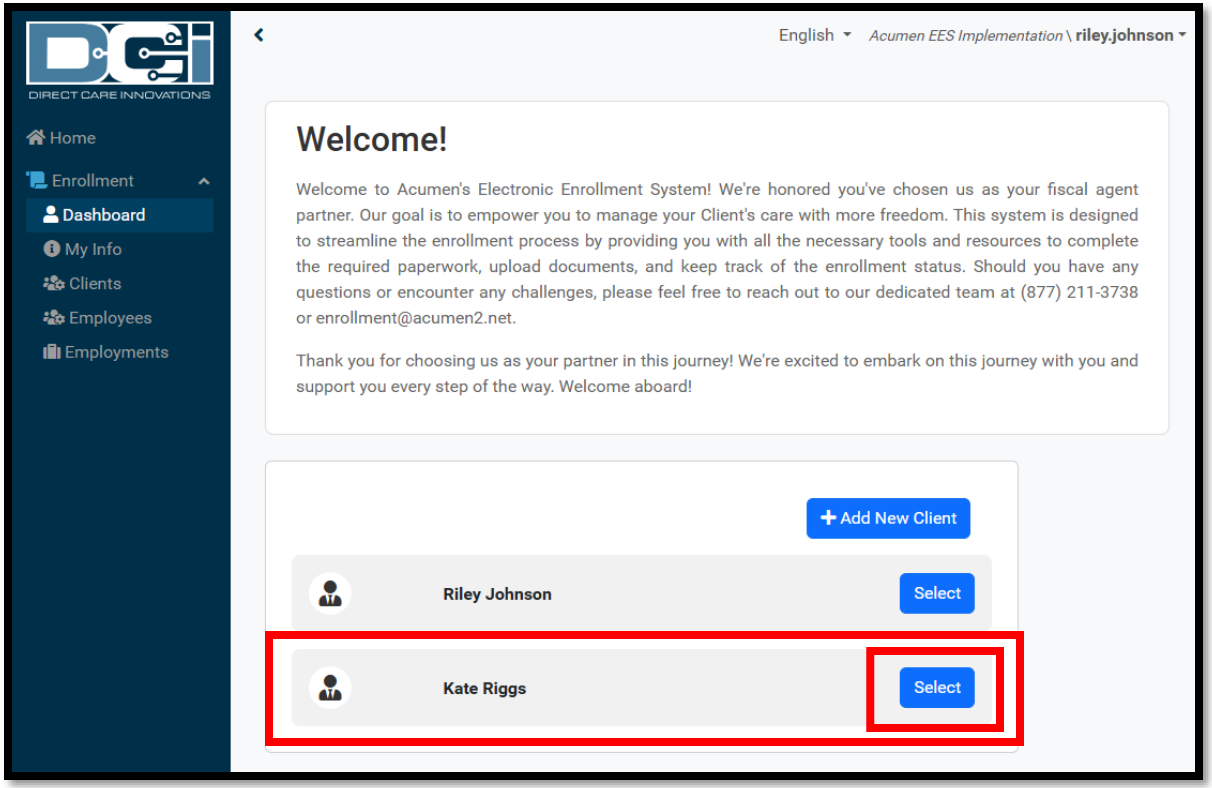
20. Address Line 1 (required)
21. City (required)
22. State (required)
23. Zip Code (required)
24. Country (required)
25. Click **Save**



Manage Clients– Add New Client

The new Client is displayed on the Enrollment Dashboard.

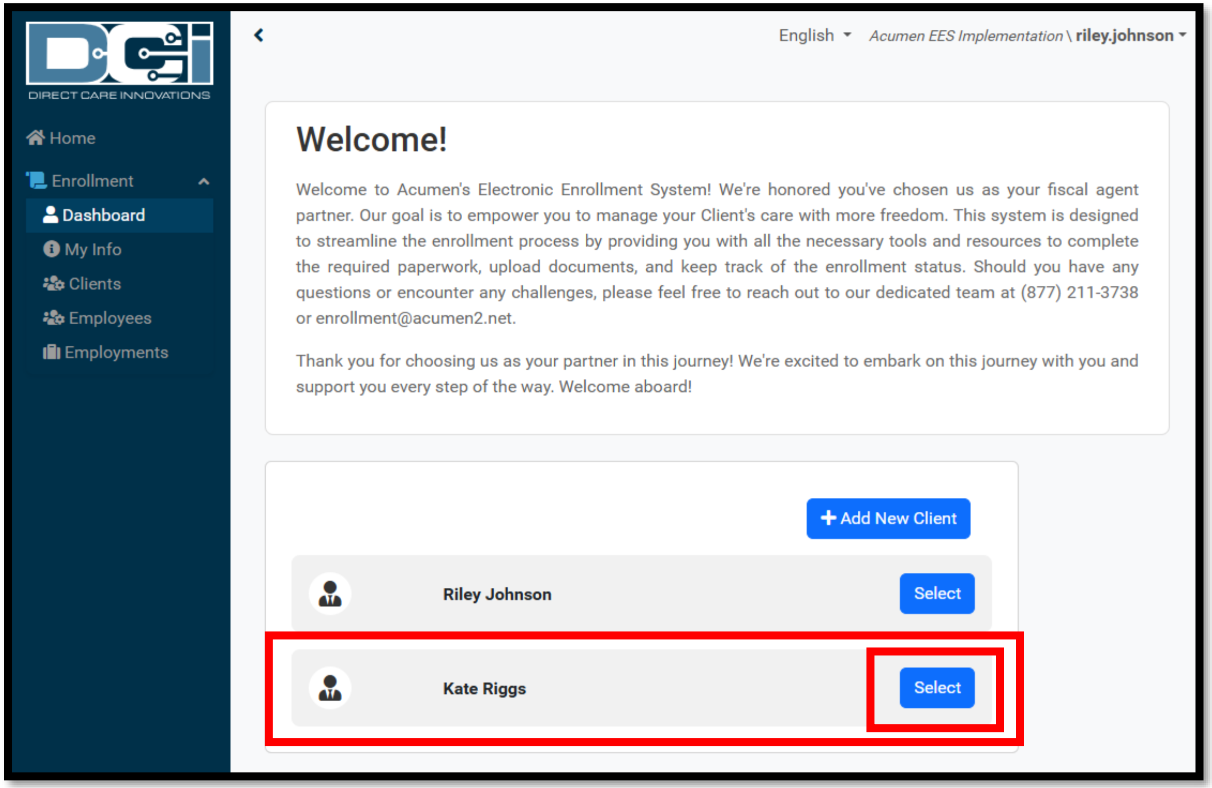
- Click the **Select** button to view and manage the new Client's enrollment and redirect to the Dashboard.



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.



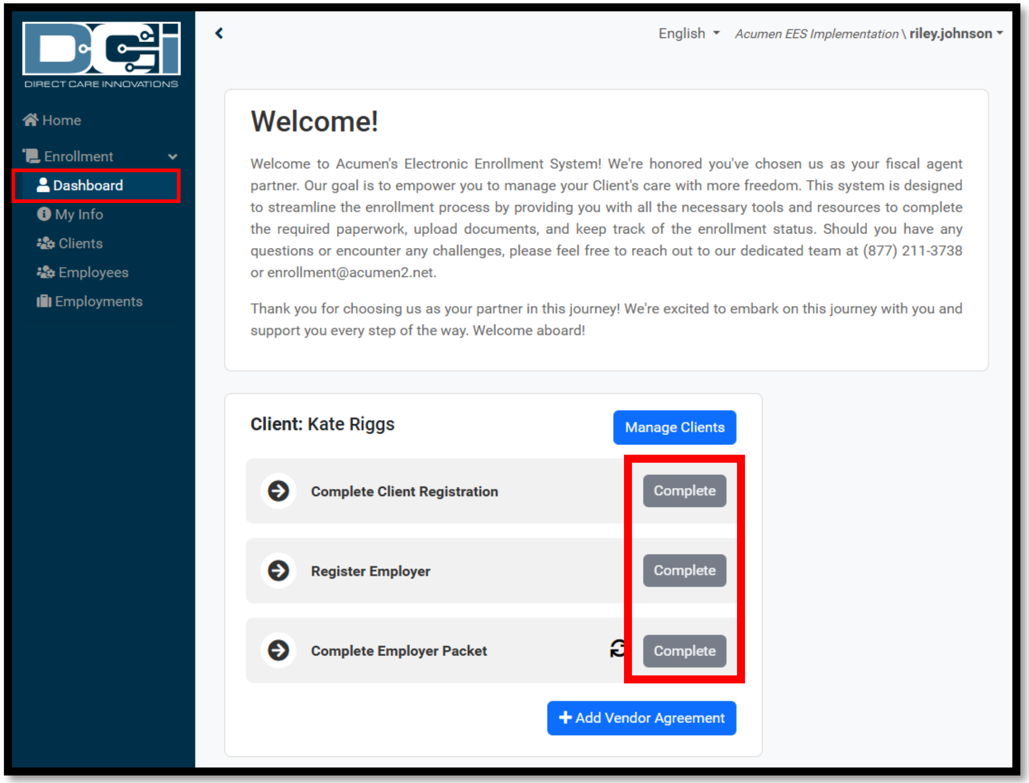
Complete Client Registration

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.