

**MA DCI**  
**Champions**  
**Training**  
**Zendesk**  
**Requests**  
**November 4, 2025**

**Welcome to Acumen!**

Thank you for joining the Acumen Family!



**Acumen powered by DCI**

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

# Agenda



**Acumen Fiscal Agent**  
Innovation • Opportunity • Freedom



**Zendesk Basics & Navigation**



**How to Request an Account**



**How to Add a New Requests**



**Managing Requests**



**Resources and Q/A**

# **Zendesk Basics & Navigation**

# What is Zendesk?

Zendesk is a **CRM** (customer relationships management) platform which is a system for managing all your company's interactions with current and potential customers.

**The goal is simple:** Improve relationships to grow your business. CRM technology helps companies stay connected to customers, streamline processes, and improve profitability.



# Log-in to Zendesk




Sign in to Acumen Fiscal Agent

[Switch to customer sign-in >](#)

Email

Password

[Forgot password?](#)

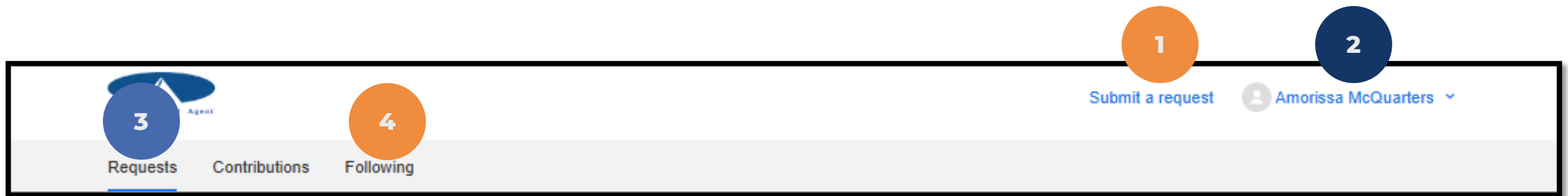
**Sign in**

- ✓ Log-in with your credentials
- ✓ Press the blue **Sign in** button

# Menu Options



1. At the top right corner, you will find an option to Submit a Request
2. You can also find your settings dropdown next to your name
3. Requests are where you can track Requests previously submitted
4. You can also elect to be "Following" requests to see the resolution



# How to Request an Account

# Request an Account

Supervisors or regional manager will need to request the access and provide an email address to link the account. Send your requests to:

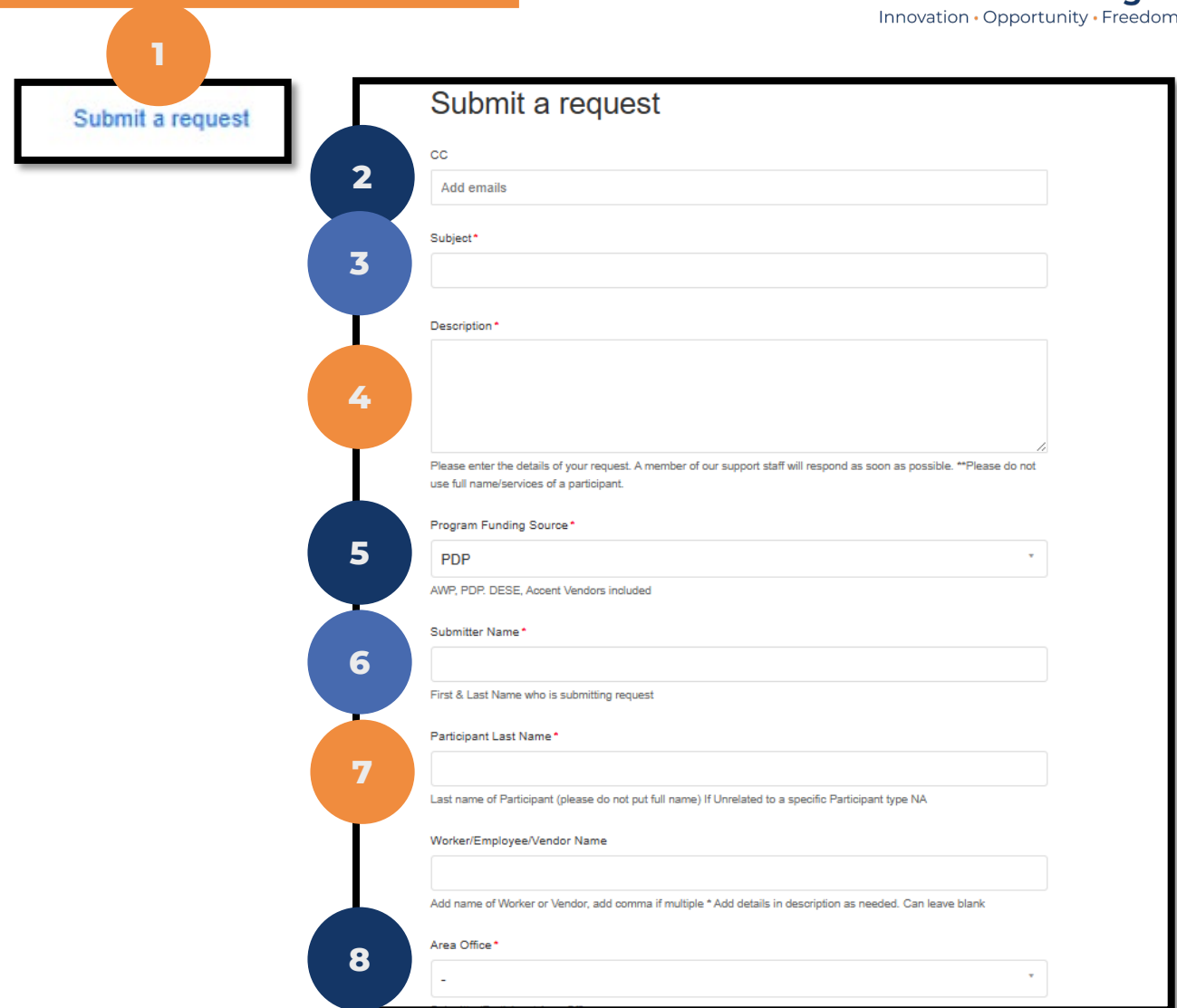
- Jabetsky Edouard:  
[Jabetsky.Edouard@acumen2.net](mailto:Jabetsky.Edouard@acumen2.net)
- Amorissa McQuarters:  
[Amorissa.McQuarters@acumen2.net](mailto:Amorissa.McQuarters@acumen2.net)



# How to Add a New Request

# Adding a New Request

1. Click the **Submit a Request** option in the top right corner
2. Add any additional emails to **CC** column (optional)
3. **Subject:** What the Requests is Regarding
4. **Description:** Give the details of what is requested in the Requests
5. **Program Funding Source:** PDP, AWP or DESE
6. **Submitter Name:** The name of the person filling out this form
7. **Participant Last Name:** Last Name of the Client (Individual in the PDP program)
8. **Area Office:** Four Letter Office Code



The screenshot shows a web form titled "Submit a request" with the following fields and steps:

1. **Submit a request** button
2. **CC** field: "Add emails"
3. **Subject** field: "Subject"
4. **Description** field: "Description" with a text area and a note: "Please enter the details of your request. A member of our support staff will respond as soon as possible. \*\*Please do not use full name/services of a participant."
5. **Program Funding Source** dropdown menu: "PDP" selected, with a note: "AWP, PDP, DESE, Accent Vendors included"
6. **Submitter Name** field: "Submitter Name" with a note: "First & Last Name who is submitting request"
7. **Participant Last Name** field: "Participant Last Name" with a note: "Last name of Participant (please do not put full name) If Unrelated to a specific Participant type NA"
8. **Area Office** dropdown menu: "Area Office" with a note: "Worker/Employee/Vendor Name" and "Add name of Worker or Vendor, add comma if multiple \* Add details in description as needed. Can leave blank"

# Adding a New Request (cont.)

## 9. Acumen Agent:

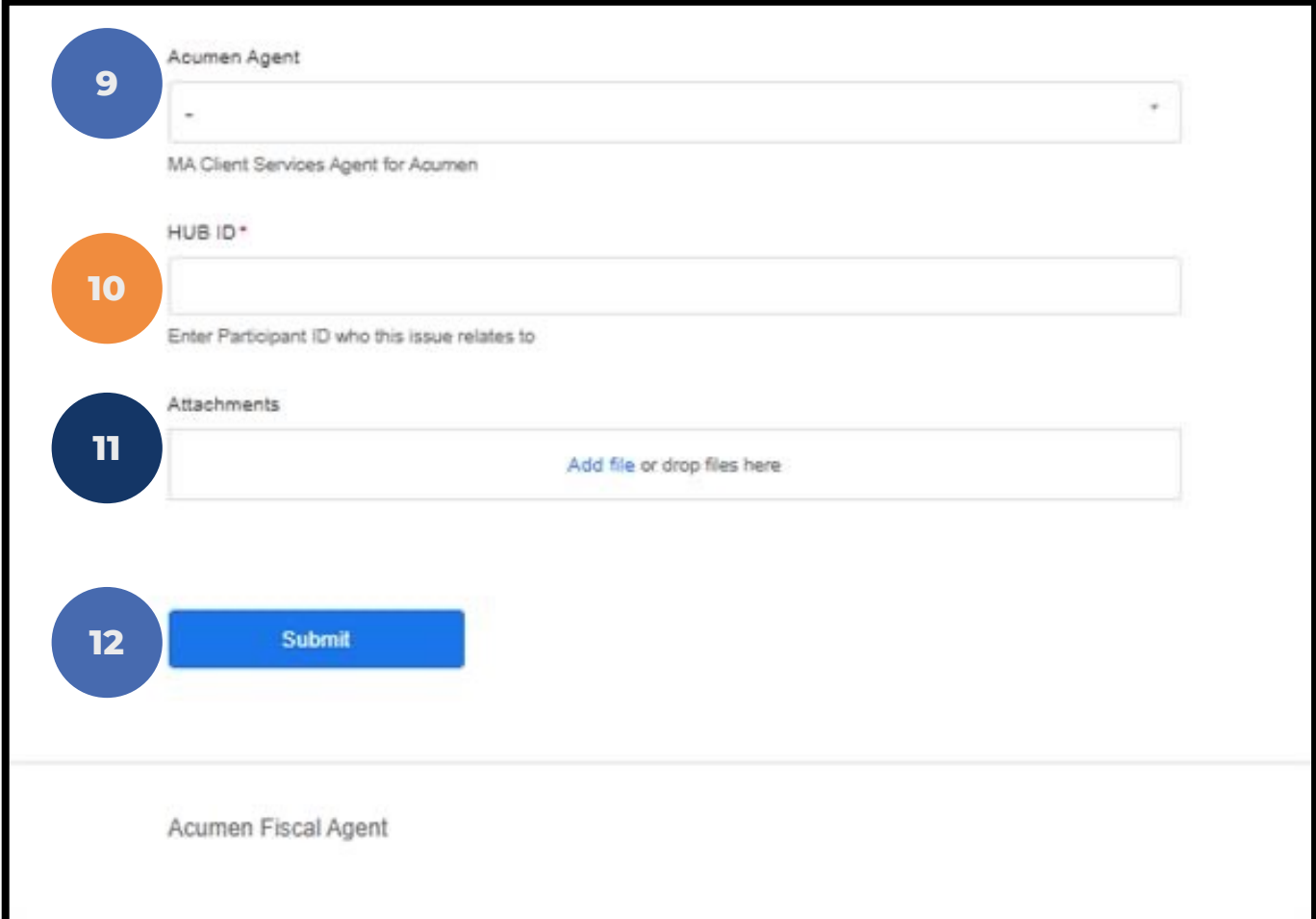
Assigned by area office (brokers can reference the agent assignments on the SharePoint)

## 10. HUB ID:

Participant identifier (6 digit number)

11. Attachments (optional)

12. Click **Submit!**



The screenshot shows a web form with four main sections, each marked with a numbered circle:

- 9 Acumen Agent:** A dropdown menu with a '-' symbol and a '\*' icon. Below it, the text reads "MA Client Services Agent for Acumen".
- 10 HUB ID\*:** A text input field. Below it, the text reads "Enter Participant ID who this issue relates to".
- 11 Attachments:** A file upload area with the text "Add file or drop files here".
- 12 Submit:** A blue button labeled "Submit".

At the bottom of the form, the text "Acumen Fiscal Agent" is displayed.

# Managing Requests

# Managing Requests

## Three Types of Requests:

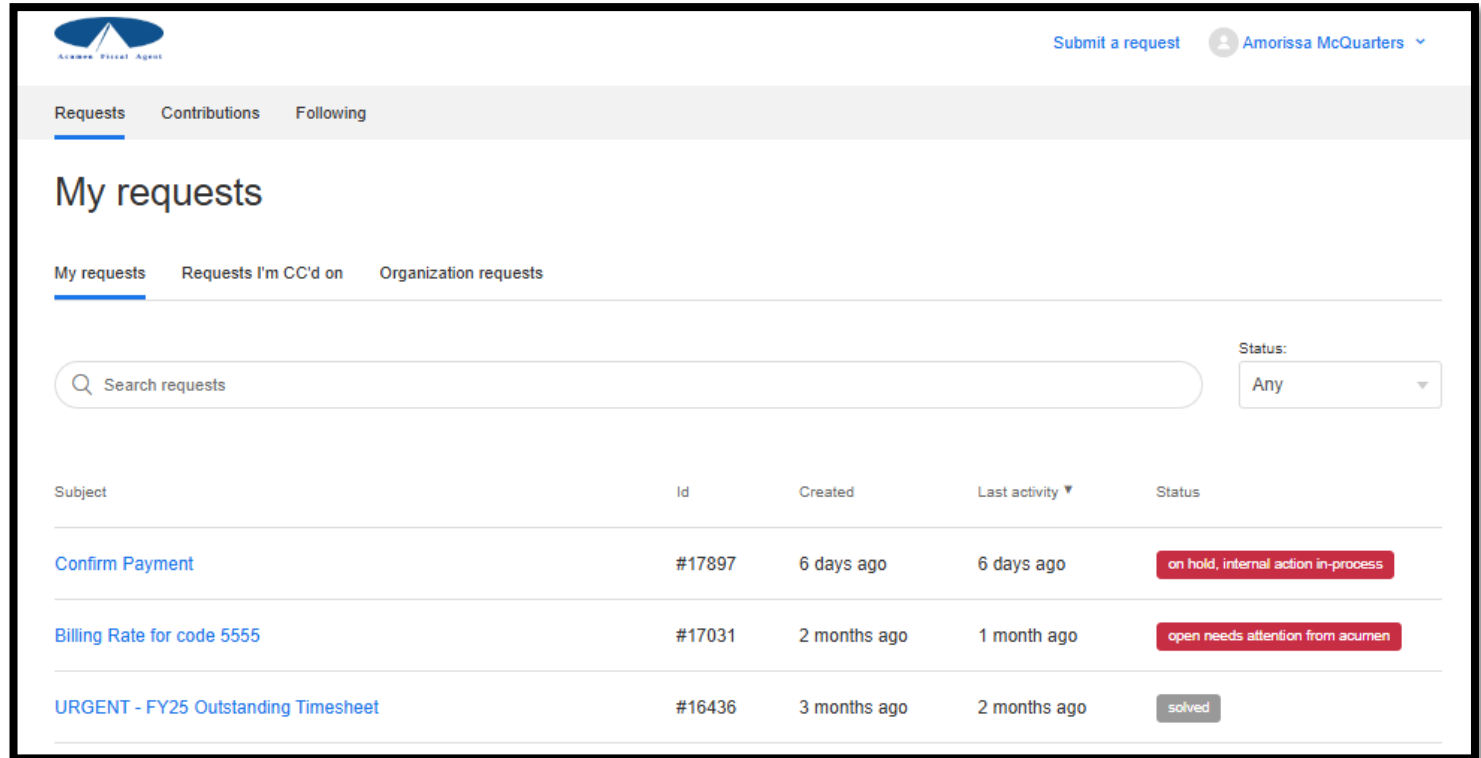
- **My Requests:** Requests I submitted myself
- **Requests I'm CC'd on:** Requests submitted by another who added this email address to the CC box on their ticket
- **Organization Requests:** Request was submitted by your Organization



The screenshot displays the Acumen Fiscal Agent user interface. At the top left is the Acumen Fiscal Agent logo. On the top right, there is a "Submit a request" button and a user profile for "Amorissa McQuarters". Below the header, there are three tabs: "Requests" (which is selected and underlined), "Contributions", and "Following". The main content area is titled "My requests" and features three circular icons with numbers 1, 2, and 3. Below each icon is a label: "1 My requests", "2 Requests I'm CC'd on", and "3 Organization requests". The "1 My requests" label is underlined.

# Managing My Requests

1. Under My Requests, you can **search** for a specific keyword, Id Number or certain status
2. Click any hyperlinked **subject** line to open the ticket details
3. Ticket **ID** Number
4. Created **Date**
5. **Last Activity**
6. **Status**: Where the request is in the process



The screenshot displays the 'My requests' page in the Acumen Fiscal Agent system. At the top, there are navigation tabs for 'Requests', 'Contributions', and 'Following'. Below this, there are sub-tabs for 'My requests', 'Requests I'm CC'd on', and 'Organization requests'. A search bar labeled 'Search requests' and a status dropdown menu set to 'Any' are visible. The main content is a table with the following data:

Subject	Id	Created	Last activity	Status
<a href="#">Confirm Payment</a>	#17897	6 days ago	6 days ago	on hold, internal action in-process
<a href="#">Billing Rate for code 5555</a>	#17031	2 months ago	1 month ago	open needs attention from acumen
<a href="#">URGENT - FY25 Outstanding Timesheet</a>	#16436	3 months ago	2 months ago	solved

# Points of Contact

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- **MA Invoice Team**
  - Add a new vendor
  - Create a VSA (vendor service account)
  
- **AWP Enrollment Team**
- Submit a referral form or follow up on AWP enrollment
  
- **Acumen Agent**
  - All other inquiries

# Resources

# Helpful Resources

## Utilize our Websites

-  [Massachusetts- Training Materials](#) for **more help**
  - This will give you a full list of Training Materials for DCI
-  [Massachusetts State Page](#)
  - This will give you MA specific details with Acumen Fiscal Agent

## Contact the Acumen Support Team

For help with enrollment questions, DCI system questions, or payment issues

-  [Contact Us](#) form at [www.acumenfiscalagent.com/contact](http://www.acumenfiscalagent.com/contact)

-  **Email us at:** [enrollment@acumen2.net](mailto:enrollment@acumen2.net)

-  **By Phone:** (833) 892-0413





**Acumen Fiscal Agent**

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**QUESTIONS?**

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**Thank you!**

**[acumenfiscalagent.com](https://acumenfiscalagent.com)**

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