

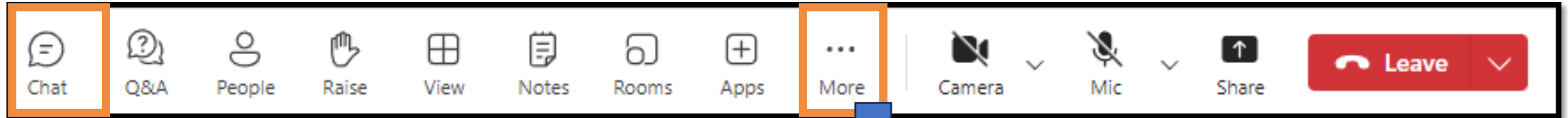
**MA AWP Case
Managers and Support
Brokers
How to Use
Zendesk!**

Welcome to Acumen!
Thank you for joining the Acumen Family!

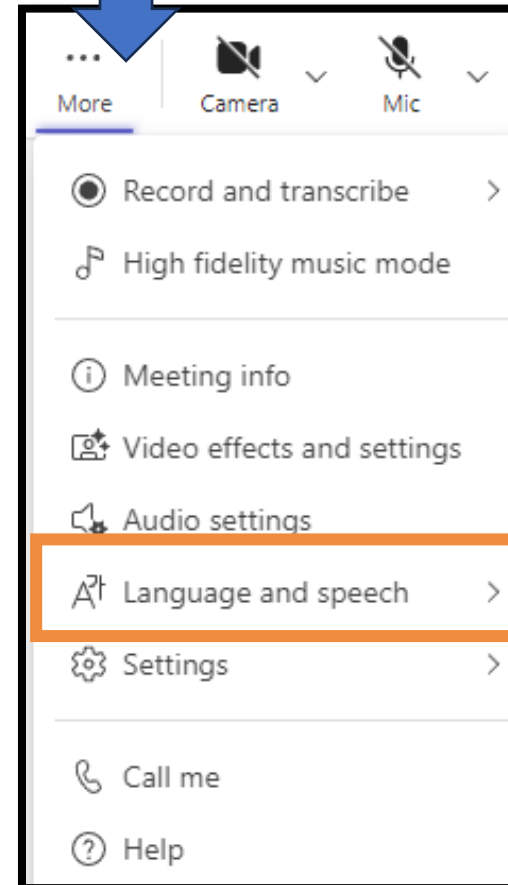


Helping create a positive, long-lasting
impact on people's lives.

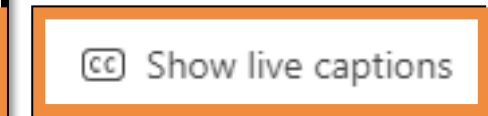
Using Microsoft Teams



- Ensure both the Camera & the Mic are OFF (as pictured above with a line through them)
- Today we will be using the Chat for any questions. Our MA team will be answering those during the presentation.
- Click the **Chat** 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

Agenda



	Zendesk Basics & Navigation
	How to Request an Account
	How to Add a New Ticket
	Managing Requests
	Resources and Q/A

Basic Acronyms to Know

Acronyms to Know



CFA: Client Funding Account

DCI: Direct Care Innovations

ESA: Employee Service Account

VSA: Vendor Service Account

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



Acumenfiscalagent.zendesk.com

A screenshot of the Acumen Fiscal Agent sign-in page. The page has a white background with a light blue border. At the top, it says "Sign in to Acumen Fiscal Agent" and "Switch to customer sign-in >". Below that are two input fields: "Email" with the text "training@acumen2.net" and "Password" with a masked password "....." and an eye icon. A blue "Sign in" button is at the bottom. A link for "Forgot password?" is also visible.

Sign in to Acumen Fiscal Agent

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

Email

training@acumen2.net

Password

.....

[Forgot password?](#)

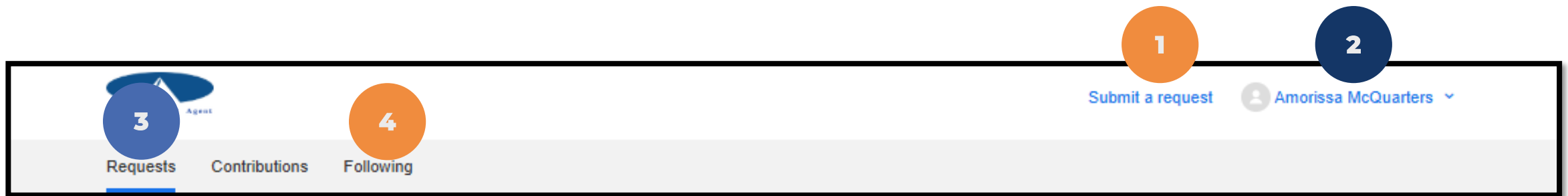
Sign in

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

You will be sent your login credentials on/before March 30th!

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 (AFTER **MARCH 30**, NOT BEFORE):

- Jabetsky Edouard:
Jabetsky.Edouard@acumen2.net
- Amorissa McQuarters:
Amorissa.McQuarters@acumen2.net



When to Create a Ticket

When to Create a Ticket



Enroll a New Vendor

Vendor Service Account

Void and Reissue a Check

DocuSign Related Tickets

Unlocking DCI Accounts

Unable to View Details in DCI/Billing Issues

Enroll a New Vendor

To Enroll a New Vendor, Brokers will submit a ticket with:

- Contact Person's Name
- Phone
- Email
- W9

to MA Invoice Team



Vendor Service Account (VSA)



Marrying a vendor to a participant to complete a purchase



DocuSign Related Tickets



- Tickets assigned to center agent
- Following up on status of signatures
- Requesting a resend of a DocuSign when confirmed it was not received by the parent/provider
- Parent/provider locked themselves out with inputting incorrect pin. A ticket should be created to unlock DocuSign account

DocuSign Related Tickets (cont.)



- DocuSign void and resubmission
 - Wrong provider, participant, service codes. If any of these are incorrect, a ticket needs to be created to void the DocuSign and ASB will resubmit a new referral form
- DocuSign edits
 - Creating a ticket for edits on a produced DocuSign, only when the DocuSign is **not** completed yet (all signatures **not** accounted for)
 - Information not transferred correctly from referral form



Unlocking DCI Account

- Tickets assigned to center agent
- If you're with the parent, try to call the agent while in the home. If unable, or no answer, you can create a ticket to have the agent assist with unlocking the authorized representative (auth rep) account.



Provider Unable to see Child in DCI/Provider Billing Issues



- Tickets assigned to assigned center agent
- If a provider is unable to see child and/or not have the service code drop down a ticket can be created when:
 - ASB confirms contract was completed and signed by all parties
 - ESA/rate is listed under employee's tab in DCI
 - CFA is approved with funds (with correct dates)
 - If the CFA is not completed connect with your ACM first prior to creating a ticket of possible reason for payment block. If possible, please provide screenshots of the error message the provider is getting in your ticket.

When NOT to Create a Ticket

When Not to Create a Ticket



- Requesting check numbers. Please reach out to your ACM for any check numbers, this includes both providers and vendors.
- If a client funding account (CFA – auth code line) is not visible in DCI please connect with your ACM.
- If you see duplicate timesheet entries, please contact your ACM immediately.
- If a parent cannot see auth lines, timesheet approvals, or providers please connect with your ACM.
- If you cannot see a newly enrolled child in DCI contact your ACM.
- If you need the parents EoR contact your ACM.



How to Add a New Request

Adding a New Request

1. Click the **Submit a Request** option in the top right corner
2. **CC Field: REQUIRED:** Add the ACM for all tickets
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 the 'Submit a request' form with the following fields and steps:

1. **Submit a request** button
2. **CC** field (Add emails)
3. **Subject** field
4. **Description** field (with 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 (selected: PDP, with options: AWP, PDP, DESE, Accent Vendors included)
6. **Submitter Name** field (with a note: "First & Last Name who is submitting request")
7. **Participant Last Name** field (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 (selected: -)

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!**

A screenshot of a web form for adding a new request. The form is enclosed in a black border and contains four numbered steps: 9. "Acumen Agent" with a dropdown menu showing a hyphen and "MA Client Services Agent for Acumen" below it; 10. "HUB ID*" with a text input field and "Enter Participant ID who this issue relates to" below it; 11. "Attachments" with a file upload area containing the text "Add file or drop files here"; and 12. A blue "Submit" button. At the bottom of the form, the text "Acumen Fiscal Agent" is displayed.

Managing Requests

Managing Requests

Three Types of Requests:

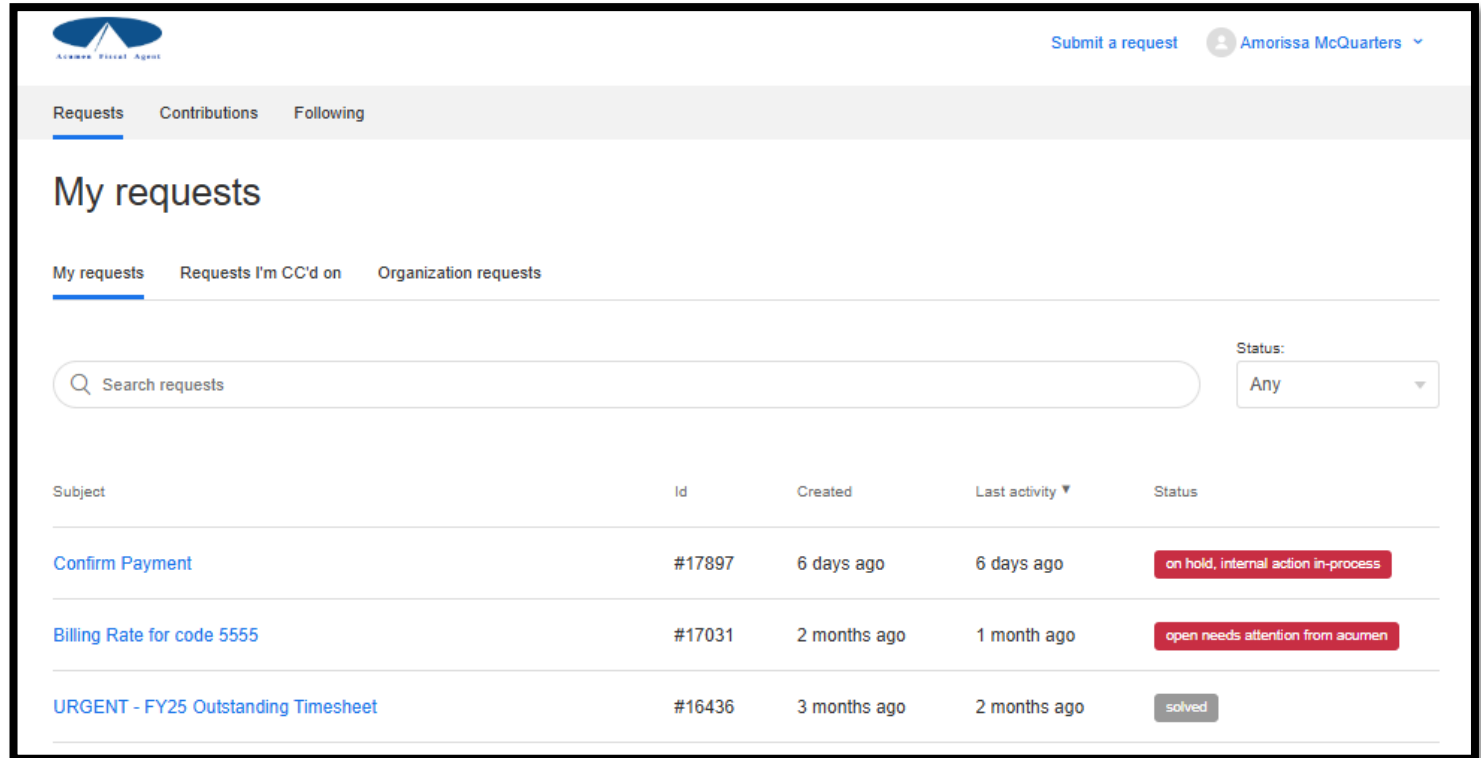
- **My Requests:** Requests I submitted myself
- **Requests I'm CC'd on:** Requests submitted by another who added this email address to the CC box on their ticket
- **Org Requests:** *Note:* Organization Requests won't have anything to show for this group



The screenshot displays the Acumen Fiscal Agent web 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" with a dropdown arrow. Below the header is a navigation bar with "Requests", "Contributions", and "Following" tabs, where "Requests" is selected. The main content area is titled "My requests" and features three sub-sections: "My requests" (highlighted with an orange circle and the number 1), "Requests I'm CC'd on" (highlighted with a dark blue circle and the number 2), and "Organization requests".

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, the page title 'My requests' is shown, along with 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
Confirm Payment	#17897	6 days ago	6 days ago	on hold, internal action in-process
Billing Rate for code 5555	#17031	2 months ago	1 month ago	open needs attention from acumen
URGENT - FY25 Outstanding Timesheet	#16436	3 months ago	2 months ago	solved

Points of Contact



AWP Enrollment Team/Acumen Agent

- Submit a referral form or follow up on AWP enrollment
- All other inquiries

Points of Contact:

- **Lamari Avant:**
 - lamari.avant@acumen2.net
 - (617) 221-7887
 - Support Centers: **xASCCM, xASCMW, xASCMS, xASCSE**
- **Chrystie Lahti:**
 - chrystiel@acumen2.net
 - (414) 244-9523
 - Support Centers: **xASCW, xASCNE, xASCM**

MA Invoice Team

- Add a new vendor
- Create a VSA (vendor service account)

Resources

Office Hours!



Drop in Office Hours!

We are Here to Help!

3/30: Amorissa and Lamari - 11:30am - 12:30pm

4/2: Jabetsky and Chrystie - 12:00pm - 1:00pm

Helpful Resources

Utilize our Websites



[Massachusetts- Training Materials](#) for more help

- This will give you a full list of Training Materials for DCI



<https://acumenfiscalagent.zendesk.com/hc/en-us/articles/33933645593229-Submit-a-Support-Ticket>

- **[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](http://www.acumenfiscalagent.com/contact) form at **www.acumenfiscalagent.com/contact**



Email us at: **enrollment@acumen2.net**

By Phone: (833) 892-0413





Acumen Fiscal Agent

Innovation • Opportunity • Freedom

QUESTIONS?

Thank you!

acumenfiscalagent.com

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