

# **VF/EA Fiscal Intermediary Transition**

## **September 11, 2025**

# VF/EA Fiscal Intermediary Transition

## Plan Revision Guidance for Support Coordinators

- The [SC Plan Revision Guidance](#), updated on August 28, includes guidance for all Cohorts (1 – 5) and replaces all previous guidance.

## FI Transition Update for Individuals and Families

- The [FI Transition Update for Individuals and Families](#), released August 22, includes:
  - Enrollment Information
  - Plan Revisions and Continuity of Services
  - Mandatory Electronic Visit Verification (EVV) Information
  - Mandatory Service Documentation Information
  - Restoration of Rollover Units Request Process

# VF/EA Fiscal Intermediary Transition

## What an SC Must Not Do When Revising a Plan (or Creating a Renewal Plan) with SDEs

**Support Coordinators MUST NOT do any of the following:**

*(Doing so can result in a gap in the individual's services and/or their SDEs being unable to submit to either FI for their hours worked)*

- **DO NOT** enter a "fake" Self-Directed Employee ID Number when adding an Acumen SDE service line.
  - SCs must only enter the SDE ID Number they receive in an Acumen Billable Rate Notification.
- **DO NOT** enter the same billable rate an SDE had when they were enrolled with PPL.
  - SCs must only enter the billable rate they receive in an Acumen Billable Rate Notification.
- **DO NOT** enter any Acumen service start date that was not received in an Acumen Billable Rate Notification.

# VF/EA Fiscal Intermediary Transition

## What an SC Must Do If They Think a Billable Rate Notification has Wrong Information

- If an SC receives a Billable Rate Notification that they feel contains incorrect information (e.g., wrong billable rate, wrong service name), they need to contact Acumen **at the email address it was received from**. We also recommend copying the DDD Fee-for-Service Helpdesk at [DDD.FeeForService@dhs.nj.gov](mailto:DDD.FeeForService@dhs.nj.gov).

# VF/EA Fiscal Intermediary Transition: Workers' Compensation

- State law requires employers to procure and pay for workers' compensation (WC) insurance for their employees. This includes employers in Self-Directed Employee (SDE) Models.
- For individuals participating in either of DDD's SDE Models, the employer cost for maintaining WC insurance is currently funded by the individual's budget.

# VF/EA Fiscal Intermediary Transition: Workers' Compensation

- The cost of WC in the VF/EA model (the amount deducted from the individual's budget) has increased from an annual flat rate of \$172 that covered all SDEs in the individual's plan, to an annual rate of about \$2,100 per year per SDE (based on a 40-hour workweek at an hourly wage of \$25).
- To avoid the need to adjust services to accommodate this change, DDD is pleased to announce that, for the foreseeable future, it will assume the cost of WC for employers in the VF/EA SDE model. This means DDD self-directing employers in the VF/EA model will no longer pay WC from their DDD budgets.
- Support Coordinators do not need to do anything related to workers' compensation for SDEs enrolled with Acumen in the VF/EA SDE Model.

# VF/EA Fiscal Intermediary Transition: Electronic Visit Verification Requirement

- EVV is a federal mandate under the 21<sup>st</sup> Century Cures Act requiring electronic verification of home and community-based service visits.
- EVV systems collect six data elements for each service visit:
  - Type of service performed
  - Individual receiving the service
  - Date of service
  - Location of service delivery
  - Individual providing the service
  - Time the service begins and ends

# VF/EA Fiscal Intermediary Transition: Electronic Visit Verification Requirement

- Except for those who meet the established criteria for a live-in caregiver exemption, all SDEs are required to use Electronic Visit Verification (EVV) when providing any of the following three services entirely or partially in an individual's residence:
  - Community Based Supports
  - Individual Supports-15 Minute
  - Respite
- An SDE's familial relationship to an individual does not, in and of itself, make the SDE eligible for the EVV live-in exemption.

# VF/EA Fiscal Intermediary Transition: Electronic Visit Verification Requirement

- To be eligible for the EVV live-in caregiver exemption, the SDE must meet and be able to document (initially and annually thereafter) one of the following criteria:
  - **Live-In Permanently:** employee permanently resides on the same premises as the individual to whom services are provided by living, working, and sleeping on the premises seven days per week; and, the employee has no home of their own.
  - **Live-In for Extended Periods of Time:** employee resides on the same premises as the individual to whom services are provided for an extended period of time by living, working, and sleeping on premises for at least five days (120 hours) per week.

# VF/EA Fiscal Intermediary Transition: Electronic Visit Verification Requirement

- How does a Self-Directed Employee apply for the live-in caregiver exemption to EVV?
  - The SDE must provide documentation of live-in status to the individual's Support Coordinator.
  - The Support Coordinator will make sure the EVV Live-In Caregiver Attestation is completed and signed by the employee and the individual (or their guardian), and then upload it to iRecord.
  - For employees eligible for the live-in exemption, completion of the **EVV Live-In Caregiver Attestation is required at plan development and annually thereafter**, as well as any time there is a change in live-in caregiver status.

# VF/EA Fiscal Intermediary Transition: Electronic Visit Verification Requirement

- How does a Self-Directed Employee complete required EVV?
  - Training materials can be found on Acumen's Training [website](#)
  - There you can find a schedule of live trainings available weekly, recorded trainings, as well as downloadable documents that highlight information on how to access & use Acumen's EVV tools in addition to troubleshooting any alerts you might receive when completing EVV.

# VF/EA Fiscal Intermediary Transition – Service Documentation Requirement

- All Medicaid waiver program providers – including Self-Directed Employees – are required to complete service documentation (“Notes”) to support Medicaid service reimbursement.
- Documentation of services provides the evidence that the provider (SDE) delivered the services, and delivered them in accordance with the individual’s needs.
- The service documentation requirement applies to all SDEs, regardless of the SDE’s relationship to the individual and regardless of whether the SDE lives with the individual.
- Trainings on service documentation will be offered in the coming weeks. We recommend SDEs and Employers of Record attend, *as timesheets will not be accepted without required Service Documentation at the time of submission.*

# Upcoming Acumen Transition Webinars

|                |                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Sep. 11</b> | <ul style="list-style-type: none"><li>▪ 11:30 am – 12:30 pm <a href="#">Webinar for Support Coordinators and Supports Brokers</a></li><li>▪ 1 – 2 pm <a href="#">Webinar for Individuals/Families, Authorized Representatives, Employers of Record, and Self-Directed Employees</a></li><li>▪ 3 – 4 pm <a href="#">Webinar for Community Vendors and Individuals/Families who use Vendor Services</a></li></ul> |
| <b>Sep. 18</b> | <ul style="list-style-type: none"><li>▪ 11 am – 12 pm <a href="#">Webinar for Support Coordinators and Supports Brokers</a></li><li>▪ 1 – 2 pm <a href="#">Webinar for Individuals/Families, Authorized Representatives, Employers of Record, and Self-Directed Employees</a></li><li>▪ 3 – 4 pm <a href="#">Webinar for Community Vendors and Individuals/Families who use Vendor Services</a></li></ul>       |
| <b>Sep. 25</b> | <ul style="list-style-type: none"><li>▪ 11:30 am – 12:30 pm <a href="#">Webinar for Support Coordinators and Supports Brokers</a></li><li>▪ 1 – 2 pm <a href="#">Webinar for Individuals/Families, Authorized Representatives, Employers of Record, and Self-Directed Employees</a></li><li>▪ 3 – 4 pm <a href="#">Webinar for Community Vendors and Individuals/Families who use Vendor Services</a></li></ul> |



**Acumen Fiscal Agent**

Innovation • Opportunity • Freedom

**NJ VF/EA  
Acumen Transition  
Employer, Employee and  
Authorized Representative  
Webinar**

**Date: September 11, 2025**

# NEW! Acumen NJ Website

We have recently updated our website to better support families, individuals, Self-Directed Employees, Support Coordinators and Supports Brokers. Please check it out for the latest and greatest information on the Vendor Fiscal Employer Agent Self- Direction Model.

- [Acumen | New Jersey](#)



# Don't Wait, Enroll Now!

Participants in all Cohorts (1, 2, 3, 4, 4a, and 5) should complete their enrollment now through the Electronic Enrollment System (EES). You can also book an appointment with a NJ Agent, which will help to ensure you complete all necessary steps.

- [Book an Appointment](#)
- [Electronic Enrollment System \(EES\)](#)
- [NJ Training Materials](#)

# Acumen Acronyms and Titles

| Acumen Fiscal Agent                                                                                                                                                 | Department of Developmental Disability |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| Client (CLT)- Person Receiving Service                                                                                                                              | Individual/ Participant                |
| Employer (ER)- Person with the Registered Tax ID #/ EIN (Employer Identification Number)                                                                            | Employer of Record (EOR)               |
| Employee (EE) - Person Providing Services to the Participant                                                                                                        | Self-Directed Employee (SDE)           |
| Vendor – Business/ Organization Providing Services, for example: Classes                                                                                            | Community Vendor                       |
| Case Manager (CM)                                                                                                                                                   | Support Coordinator (SC)               |
| Authorized Representative (AR)- Person who signs off on Community Vendor Services or person appointed and approved by the ER to approve timesheets in their absence | Authorized Representative (AR)         |



# Enrollment Reminders

- At this time, Acumen has paused the Self- Service option in EES (Electronic Enrollment System). For enrollment assistance please contact the NJ Client Service Agent team at:
  - **848-400-5903**
  - [Enrollment-NJ@acumen2.net](mailto:Enrollment-NJ@acumen2.net)
- New referrals for Self-Directed Employee services with Acumen indicated as the Fiscal Agent can be submitted starting 9/15/2025. The assigned Agent will complete a Welcome Call to the Employer on file to initiate the enrollment process.

# Contacting Your Assigned Agent

- When contacting your assigned Client Services Agent there is no direct phone number or extension needed.
  - If Acumen has the most up to date contact information for the Client, Employer or Authorized Representative; the call will be automatically routed to the designated agent.
  - For Support Coordinators, you can request to be routed to the assigned Agent for the client you have an inquiry about by providing their DDD ID number.

# What You'll Need to Enroll

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- The Employer/Authorized Representative must review the "What You'll Need to Enroll" list and make sure they compile and have with them *all required information and documents for enrollment* **before** starting the process.
- The "What You'll Need to Enroll" lists are found on the Acumen NJ Website, under the Vendors tab and the Employers/Authorized Representatives tab.
  - [What You'll Need to Enroll - Vendor.pdf](#)
  - [What You'll Need to Enroll - Employer and Employees.pdf](#)
- If you log in to EES, attend a scheduled appointment, or come to one of our walk-in enrollment events and you do not have all required information and documents with you, your enrollment will not be able to be completed at that time.
- **PLEASE NOTE:** If employees intend to enroll at an in-person appointment or walk-in event, **the Employer must be present.**

# Booking Enrollment Support

[Click Here  
to  
Scheduled  
Transition  
Enrollment  
Assistance:](#)

- In-Person at Hamilton Office
- Online Video- Microsoft Teams
- Phone Call
- When booking an appointment the Individual or Authorized Representative will be asked to answer a series of questions. During that time they will indicate how they would like to conduct their appointment.  
**SAMPLE Acumen Appointment-Confirmation Email for Cohorts 1 – 5**
- **15 minutes** prior to your appointment a reminder email will be sent indicating what materials and documents you should have handy while completing the enrollment process with a NJ Agent.

Hi <First-Name><Last-Name>  
**Your Booking is confirmed.**

## Bookings details

Service Name  
Transition Enrollment Assistance-Vendor Service Only

With  
<Acumen-Representative-Name>

When  
<Appointment-Date>  
<Appointment-Time>  
Eastern Time (US & Canada)

Location  
3705 Quakerbridge Rd Suite 205 Hamilton NJ

Join your appointment ([LINK TO TEAMS MEETING](#))

Reschedule ([LINK TO RESCHEDULE](#))

## Your Details

DDD ID #  
[REDACTED]

What type of services does the participant receive?  
Community Vendor Services Only

What Cohort was assigned on your Cohort Assignment Notice?  
[REDACTED]

How would you like to meet?  
Phone Call

# Booking Appointment Do's and Don't's

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## DO

- Check to ensure you have prepared all documents needed to enroll in EES as a AR/ER/EE/Vendor.
- Schedule time to complete the EES process alongside your Employee (SDE).
- Request your EIN number from PPL prior to attending the enrollment appointment.
- Inform your Employee (SDE) to bring a voided check or bank letter with full account routing number.

## Don't

- Have your Employee (SDE) book the enrollment appointment without the Employer (ER) being present.
- Proceed with completing enrollment if you are struggling, please contact a NJ Agent and schedule an enrollment appointment.
- Begin to complete your DocuSign paperwork if you are unable to finish as it will not save your information for you to come back to later. You will have to start the process over.

# How Do I Know If my Enrollment is Complete ?

## EES Status'

Complete- no further action needs to be taken. All steps have been completed for this section.

In Progress- the section has been started but additional information or corrections are needed.

Pending- the status will remain Pending until Acumen has received the Authorization from the Division. Acumen will process the Authorization before changing the status to complete.

Active- the initial registration has been complete, linking the AR/ER and Client in the Electronic Enrollment System.

## Client Information COMPLETED



|                                                                                                                                                                        |                             |                                     |                 |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|-------------------------------------|-----------------|
| First Name:                                                                                                                                                            | Fakeclient                  | Middle Name:                        |                 |
| Last Name:                                                                                                                                                             | Three                       | Client #:                           | NJ00016821      |
| Enrollment Status:                                                                                                                                                     | PENDING                     | Date of Birth:                      | 1990-01-01      |
| Status:                                                                                                                                                                | ACTIVE                      | SSN:                                |                 |
| Gender:                                                                                                                                                                | Male                        | Alternative Phone:                  |                 |
| Phone:                                                                                                                                                                 |                             | Email:                              |                 |
| Fax:                                                                                                                                                                   |                             | Medicaid #:                         |                 |
| Reference #:                                                                                                                                                           |                             | Statement Delivery Type:            | Undefined       |
| Effective Date:                                                                                                                                                        |                             | Case Manager Email:                 |                 |
| Preferred Communication Method:                                                                                                                                        | Undefined                   | Case Manager Phone:                 |                 |
| Case Manager:                                                                                                                                                          |                             | Cohort Assignment (Agent Use Only): |                 |
| Agent Full Name (Agent Use Only):                                                                                                                                      |                             | Primary Language:                   |                 |
| How is the Client related to the Authorized Representative?<br>For example, is the Client the Authorized Representative's parent, child, spouse, friend, or neighbor.: | Child                       |                                     |                 |
| Referral Choice (Agent Use Only):                                                                                                                                      |                             | State ID:                           | 000001          |
| Support Coordinator Agency Name:                                                                                                                                       | Support Coordination Agency | Support Coordinator Email:          | Sc@fakemail.com |
| Support Coordinator Name:                                                                                                                                              | Support Coordinator         | Support Coordinator Phone Number:   | 7777777777      |

## Physical Address

|                 |                          |           |         |
|-----------------|--------------------------|-----------|---------|
| Address Line 1: | 123 Nowhere Street       | City:     | Nowhere |
| State:          | NJ                       | Zip Code: | 12345   |
| Country:        | United States of America |           |         |

## Mailing Address

|                 |  |           |  |
|-----------------|--|-----------|--|
| Address Line 1: |  | City:     |  |
| State:          |  | Zip Code: |  |
| Country:        |  |           |  |

# Good to Go Letters: Self- Directed Employee Services

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- A Good to go Letter will be sent to the Employer (Employer of Record) including the service start date once all the requirements below are met:
  - Employer completed initial registration and enrollment documents with Acumen.
  - Self-Directed Employee complete enrollment documents with Acumen.
  - Enrollment documentation has been processed, without corrections needed, by Acumen and an enrollment completion email was sent to the Employer.
  - Billable Rate communication has been sent to the Support Coordinator.
  - Support Coordinator has made the plan revision indicating Acumen as the Fiscal Agent.
  - Acumen receives the authorization and updates their internal system.
  - Separate Good to Go Letters will be provided to the Employer and Self-Directed Employee with DCI login credentials.
- Please be advised that not all Employers will receive a Good to Go letter with a 9/14/2025 start date. There will be no interruption of services when transitioning from PPL to Acumen. If the individual has not transitioned to Acumen as of 9/14/2025, they will continue to have services rendered and paid for through PPL until they have completed enrollment and a Good to Go letter is issued.

# Good to Go Letters: Self- Directed Employee Services

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- If Acumen has received an approved authorization for the individual that indicates a service start date of 9/14/2025, the Employer and Self-Directed Employee(s) can expect their Good to Go Letter this week.
- If the Employer and Self-Directed Employee(s) have not received their Good to Go Letter and have an approved authorization for the individual that indicates a service start date of 9/14/2025, the Employee(s) can log their hours and enter time into the DCI Web Portal back to the start date of the authorization, assuming they are GTG.
- If the Employer or Employee(s) has not completed enrollment, they will not receive a Good to Go Letter with a start date of 9/14. Please contact Acumen to schedule time to complete the enrollment process.
- If you are having difficulty logging into DCI, please contact Customer Service at 833-892-0413.

# What is EVV?

- The 21st Century Cures Act, signed into law December 13<sup>th</sup>, 2016, by President Obama, requires state agencies to use a system of **electronic visit verification** (EVV) for all Medicaid personal care services (PCS) and home health care services (HHCS) that require an in-home visit by a provider.
- EVV uses electronic devices to verify a provider's visit
- The following data is collected for each visit:
  - ✓ The date of the service
  - ✓ The location of the service delivery
  - ✓ The time the service begins and ends
  - ✓ The individual receiving the service
  - ✓ The individual providing the service
  - ✓ The type of service performed



Proprietary: For Acumen and Customer Use Only

# Service Documentation

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- Service documentation is required for all visits.
  - There is no exemption status for service documentation.
  - Service documentation should be a summary of services provided, and the Employer is responsible for reviewing the entry prior to approving the employee's timesheet.
- Best practice for service documentation is to enter the item in DCI after the services have been rendered.
- Service documentation must be entered by the employee who provided the service to the individual.

# Adding New Community Vendors

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- **PLEASE NOTE:** Once an Authorized Representative has completed the Electronic Enrollment System process, they do not need to log in again to complete the Vendor Agreement for a NEW Community Vendor service that has been added to the plan. Support Coordinators should follow their usual process for adding a new vendor service. Once the service is approved, Acumen will receive the service prior authorization electronically, process it, and add it to the vendor and participant account.
- The Vendor Directory located on our website that lists all vendors that have been enrolled with Acumen.
  - [Vendor Directory](#)

# Community Vendors Invoice Submission

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On the Acumen New Jersey Home Page, Community Vendors, Authorized Representatives and Employers can find the link to DCI (Direct Care Innovation), which is the platform they will use to submit and approve invoices for reimbursement.

- [Login | DCI Portal](#)

To aid Community Vendors in the invoice submission process Acumen has created a Vendor Entries and Action to Take Quick Reference Guide.

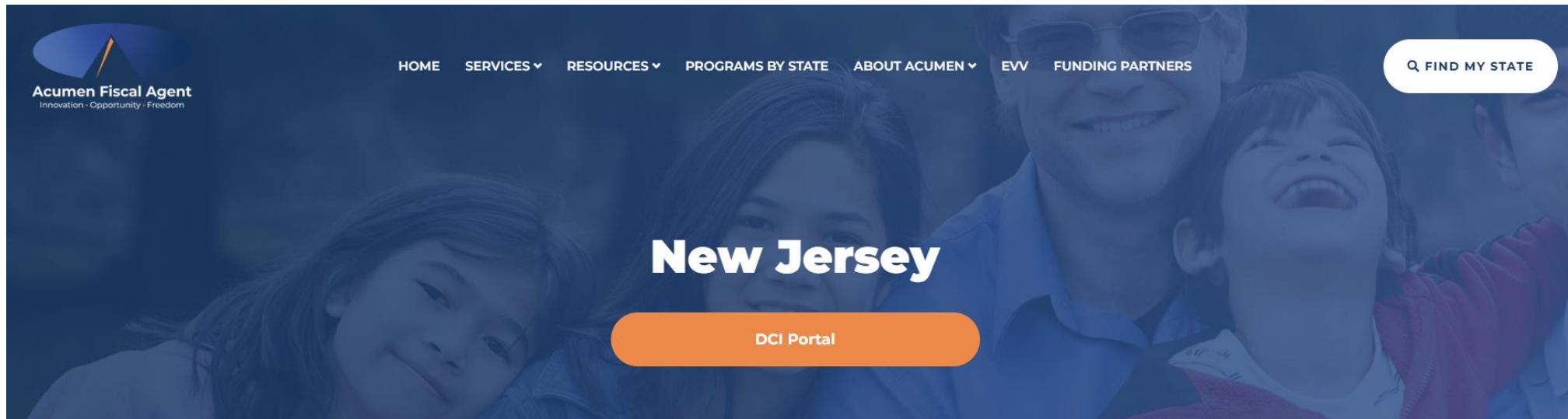
- [Vendor Entries and Action to Take \(Quick Reference Guide\)](#)

# Self-Directed Employee Timesheet Submission

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On the Acumen New Jersey Home Page, Self-Directed Employees and Employers can find the link to DCI (Direct Care Innovation), which is the platform they will use to submit and approve timesheet entries for payment.

- [Login | DCI Portal](#)



# UPCOMING TRAINING

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Check our website for ongoing updates:

[New Jersey - Training Materials – Acumen Fiscal Agent](#)

Training Schedule:

Self-Directed Employee: [Self-Directed Employees Training Schedule](#)

For Participants and Employers (Employer of Records) with Self-Direction Services: [Employer of Self-Directed Employees Training Schedule](#)



# Training Delivery Methods



- Virtual Instructor-Led Training (VILT)
  - Live webinars delivered via Microsoft Teams
    - ✓ Q & A features enabled and moderated in real time
    - ✓ Live captions available
    - ✓ Multiple Dates Scheduled- Individuals, Authorized Representatives, Employers, Employees, Community Vendors, Support Coordinators and Support Brokers can attend as many trainings as they would like.
  - Training content is delivered with a mix of presentation via PowerPoint, real time video demonstrations, and screen sharing of training resources.
    - ✓ Located on the Acumen Training Help Center and Acumen Fiscal Agent website
      - Live Webinar Training Link: [Click Here](#)



- Video on Demand Training (VOD)
  - Recorded webinar or pre-recorded training
  - Allows users to access anytime, anywhere, and as often as needed
  - Option to pause and enable captions
  - Chapters allow users to navigate content quick and easily

# Who To Contact:

- ✓ **Client Service Agent Team**
  - **848-400-5903**
  - **Enrollment-NJ@acumen2.net**
- ✓ **Vendor Service Agent Team**
  - **848-400-5738**
  - **Vendor-NJ@acumen2.net**
- ✓ **Customer Service Team**
  - **833-892-0413**