

# Acumen Transition Packet FAQ

*For those who have not received a packet to review as of November 27<sup>th</sup>, the deadline to get the packet back to Acumen has been extended to December 11<sup>th</sup>.*

1. **What if someone got locked out of their packet?** Acumen is routinely unlocking packets. It will automatically unlock, so if you get locked out, please try again later that day or the following day.
2. **What if I am the Employer of Record (EOR) for more than one participant?** If you are the EOR for more than one participant, you will get only one packet. If after entering the social security number of the first participant doesn't work, please try using the social security number for the other participant you are EOR for.
3. **What if demographic information is incorrect on the packets?**
  - a. **If it is wrong for the EOR:** Acumen performed Employer Identification Number (EIN) checks before sending out packets to ensure the information was correct. The information included in the packet you received matches what the IRS has on file for you and your EIN. The information on file with the IRS captures a moment in time when you applied for the EIN. If you need to make corrections to any of your demographic information, you will need to work with the IRS to get it updated before it can be updated in Acumen's system. You should still sign the packet even if you have to go through the IRS to make updates/corrections.
  - b. **If it is wrong for the provider(s):** If demographic information is incorrect for the provider, *you should still sign the packet*. As follow up, the provider should complete an information change form and send it to Public Partnerships (PPL). A name change requires a copy of the provider's updated license AND social security card to be included with the information change form. Subsequent data transfers from PPL to Acumen will fix the demographic information on Acumen's end.
4. **What if one or more of my providers are missing from my packet?**
  - a. Agencies, Independent Contractors, and vendors will NOT show up on the packets.
  - b. Each packet CANNOT contain more than 7 providers.

If neither situation applies, *the EOR should still sign the packet*. Record the name of the Participant, EOR, and missing provider name and send to your support broker or

regional self-direction manager. Acumen will need to follow up on missing data to make sure they get it from PPL in subsequent data transfers.

5. **Should someone sign a packet that has incorrect/missing information?** Yes, unless the wrong EOR is listed or there is an error with the EIN. The packet's purpose is to establish Acumen as the fiscal agent for the EOR, or for the participant if no EOR exists.
6. **What about people who need a paper version of the packet?** Acumen is focusing on people with email addresses first. People without email addresses will receive a paper copy in the mail. These paper packets will be sent after all the emailed packets go out.
7. **What if I am using Marion Edwards as an alternative EOR?** Acumen has a subsidiary, Accent, who will be taking over for Marion Edwards. Packets will be sent out to you after the traditional EOR packets are sent out to employers.

Acumen Customer Service can be reached at  
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