# Independent Choices Program (ICP) Acumen Referral Fact Sheet

Updated Feb. 12, 2026

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## Oregon Administrative Rule (OAR) requirement

Per OAR 411-030-0100(3)(c) If an ICP participant is unable to manage the ICP cash payment accounting, tax, or payroll responsibilities and does not have a representative, the participant must arrange and purchase the ongoing services of a fiscal intermediary, such as an accountant, bookkeeper, or equivalent financial services.

## Fiscal intermediary - Acumen

Aging and People with Disabilities (APD) has contracted with Acumen, a fiscal intermediary with the intent to assist ICP participants with their bookkeeping and payroll responsibilities. In addition, Acumen offers Federally compliant Electronic Visit Verification (EVV) time tracking options.

## Benefits of using Acumen

- Acumen offers full payroll, bookkeeping and time capture services for free for all ICP participants.
    - If you pay someone to help you take care of any of these services, you will no longer have to pay them for their services, leaving you more money to pay your provider(s) wages.
- Acumen will manage your ICP cash benefit, accounting, taxes, wages and payroll responsibilities.
- Acumen provides payroll and tax reports to your case manager, as required for participation in the ICP.
- You will be able to access all your payroll, time entry and budget reports in one well organized place.
- Acumen will educate participants as needed on how to manage their budget as it relates to calculating employer taxes.
- You will be assigned an agent with Acumen who will be a resource to you in answering questions and assisting to ensure enrollment is fast and easy.
- Acumen will track funding type (service, Contingency, and Discretionary funds), and will provide case managers/eligibility worker with all required financial information for each review.
- Your provider(s) may be able to access benefits through SEIU.

## Acumen referral process

- Case manager must submit each the following information to enrollment@acumen2.net and the ICP email box at icp.spd@odhsoha.oregon.gov:
    - ICP Acumen Referral form
    - SDS 0548 Independent Choices Program Employee Provider(s) Information form
    - ICP Budget Worksheet form
- Acumen's Enrollment email address is to be used during the enrollments process only. Staff, participants and providers can contact Acumen with questions using the following contact information once the enrollment process is completed:
    - Email – enrollment@acumen2.net or customerservice@acumen2.net

- Website – [www.acumenfiscalagent.com](http://www.acumenfiscalagent.com)
- Toll Free Phone Number – (866) 235-4745
- Toll Free Fax Number – (844) 343-2590
- TTY – (888) 853-0010

## Additional information that must be reported

Staff must email the icp.spd@odhsoha.oregon.gov mailbox within one-week when:

- Participant has been reassessed
- ICP benefit ends
- Participant passes away
- There is a temporary interruption of ICP services when a participant is absent from their home
- An ICP provider has been hired, fired or quits
- An ICP provider's hourly rate changes
- There is a change to the participant's ICP Budget Worksheet

## Acumen enrollment timelines

- New ICP participants may be enrolled with Acumen at any time.
- Current ICP participants may enroll with Acumen at any time if they agree to not pay their provider's wages, taxes or WBF for the quarter their enrollment begins. In this case, Acumen will manage the payroll and file taxes for the entire quarter on their behalf. Otherwise, the participant will have to wait to have their payroll services stated until the beginning of the next tax quarter.
  - Quarter 1: January – March
    - Enrollment completed by December 1
    - First service dates paid December 16 – December 31
    - Check date – January 15
  - Quarter 2: April – June
    - Enrollment completed by March 1
    - First service dates paid March 16 – March 31
    - Check date – April 15
  - Quarter 3: July – September
    - Enrollment completed by June 1

        - First service dates paid June 16 – June 30
        - Check date – July 15
    - Quarter 4: October – December
        - Enrollment completed by September 1
        - First services dates paid September 16 – September 30
        - Check date – October 15

## What do fiscal agents provide?

- Review the Acumen brochure
- Enrollment
    - Prepare and update enrollment and education materials in multiple formats.
    - Availability to meet with, enroll, and train participants in their homes or community.
    - Provide multiple enrollment formats (update each as needed, minimum twice annually).
    - Individually process enrollments: make sure paperwork is complete.
    - Communicate need for corrections, train and assist case manager, consumer-employer and employee on how to complete all forms (IRS, federal, state, program and Acumen forms).
- Electronic Visit Verification (EVV) compliant options
    - **Mobile app** for the provider to punch in and out at the beginning and ending of each shift. Approval is provided by:
        - Participant entering a password or pin after each log in and log out. A picture is taken with their smart phone through the mobile app and compared to a picture previously submitted.
    - **Telephone landline** (telephonic) for the provider to call in at the beginning and ending of each shift from the participant's telephone landline.
        - Information is submitted either through voice or number entries.
    - **FOB device** that stays with the participant for the provider to click to punch in and out at the beginning and ending of each shift.
    - The FOB provides a unique number that is used when entering time.
- Budgeting
    - Process updates as needed, including mass updates.
    - Withdraw funds (the entire monthly cash benefit) from participant's ICP checking account to pay provider's wages and taxes.

    - Ensure Acumen system matches amount provided by program.
    - Track funding type (Provider wages, Contingency & Discretionary funds).
    - Inform participants/representatives when payment cannot be processed due to lack of funding.
    - Educate participants as needed on how to manage their budget as it relates to calculating employer taxes.
- Payroll
    - Process provider time submitted through online portal or mobile app.
    - Ensure all business rules associated with each service code meet billing requirements prior to payment.
    - Process/pay overtime, as appropriate.
    - Notify participants/representatives when we cannot process pay due to a rule conflict.
    - Run statement reports for each participant/representative semi-monthly.
    - Schedule paper checks and/or direct deposits for each provider and vendor.
- Taxes
    - Set up each consumer-employer with all tax accounts.
    - Calculate, collect and file individual employer and employee taxes quarterly and annually.
    - Issue W-2's and 1099's annually.
    - Stay up to date on federal and state tax laws and forms and implement any changes necessary.
    - Work with the federal and state tax agencies as necessary if any filing concerns arise.
- Customer service
    - Handle all incoming calls, emails, faxed communication.
    - Provide additional training on any aspect of Acumen services (how to complete enrollment forms, how to submit time and use the time entry system, how to calculate taxes, roles and responsibilities, etc.).
    - Follow up with participants on issues that require research.
    - Process mass mailings and email blasts.
- Quality assurance and other duties
    - Reply to federal PERM Audits.
    - Gather information and reply to state audits and requests for information.
    - Fraud/Abuse detection and reporting.

  - Submit reports of suspected fraud and abuse to the appropriate entity and provide follow up documentation as needed.
  - Respond to unemployment requests and wage verifications.
  - Ensure we have appropriate bonding, credentialing, etc. as needed.
  - Satisfaction survey and reporting.
- Program management
  - Keep up to date with program manuals to determine changes, effect of changes and management of change as it affects internal and external stakeholders.
  - Train participants/representatives, case managers, internal staff, etc. on program.
  - Communication of program and company updates as it pertains to any aspect of participant-direction.
  - Issue resolution.
  - Keep up to date on federal and state changes as they relate to participant-direction, to include EVV, DOL, waiver changes, etc.
  - Acumen also offers software/system tools for participant-directing participants/representatives such as: budget management and utilization, time entry, certification and training management, reporting, etc.

You can get this document in other languages, large print, braille or a format you prefer free of charge. Contact the Aging and People with Disabilities at apd.ltss@odhs.oregon.gov or 503-945-5600. We accept all relay calls.

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