

We are Industry
Leaders. We are
here for you.



PHONE: 866-710-0456

FAX: 501-821-0045

palcofirst.com



@palcofirst



Palco, Inc.



Palco, Inc.



Palco, Inc.



INFO@PALCOFIRST.COM

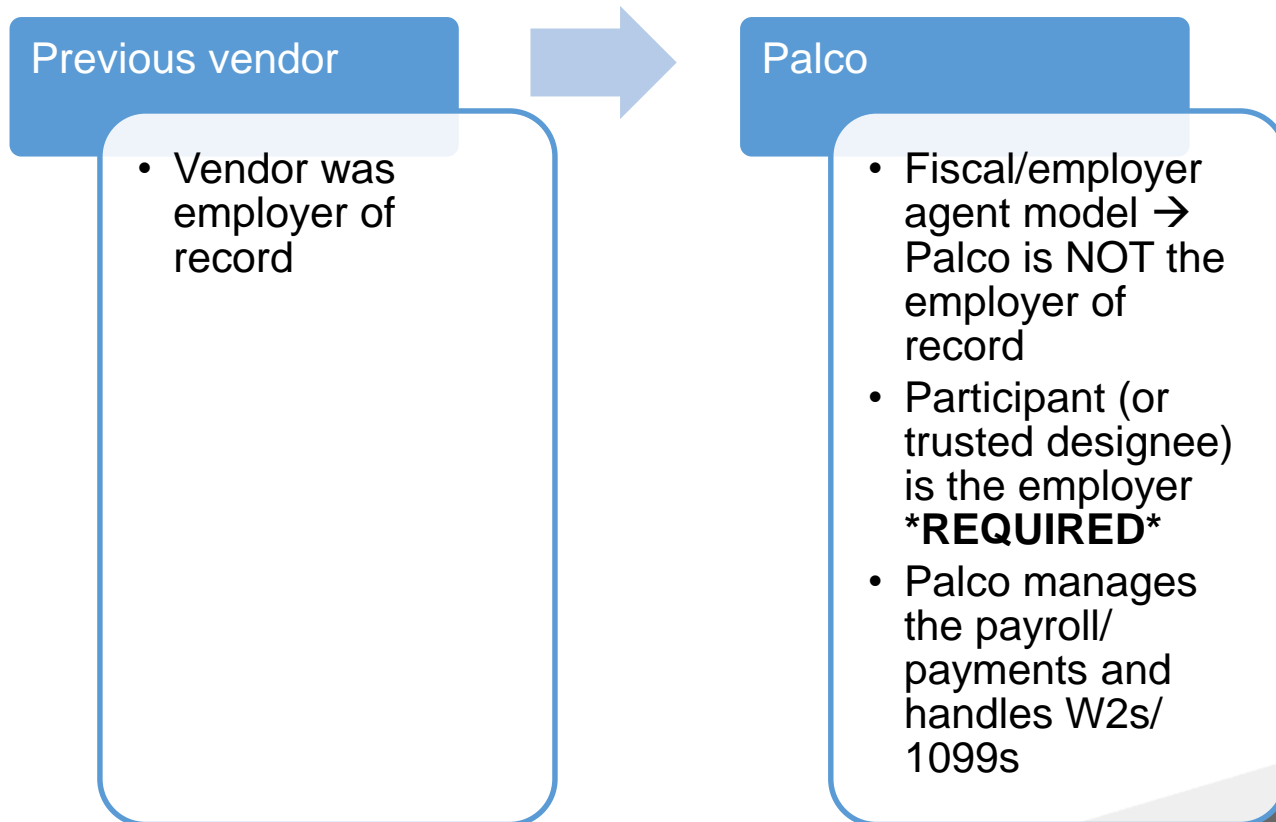
Agenda

- Transition overview
- Enrollment
 - Forms
 - Online enrollment
- Budgets and pay rates
- Online timesheet submission
- Payroll and payments
- Contact info

Palco, Inc.

- First Fiscal/Employer Agent in country
- Our mission is support individuals overcome barriers to living in the community
- Worked through several transitions in multiple states and understands the challenges involved with transitioning to a new program

Transition Overview



Important Enrollment Dates

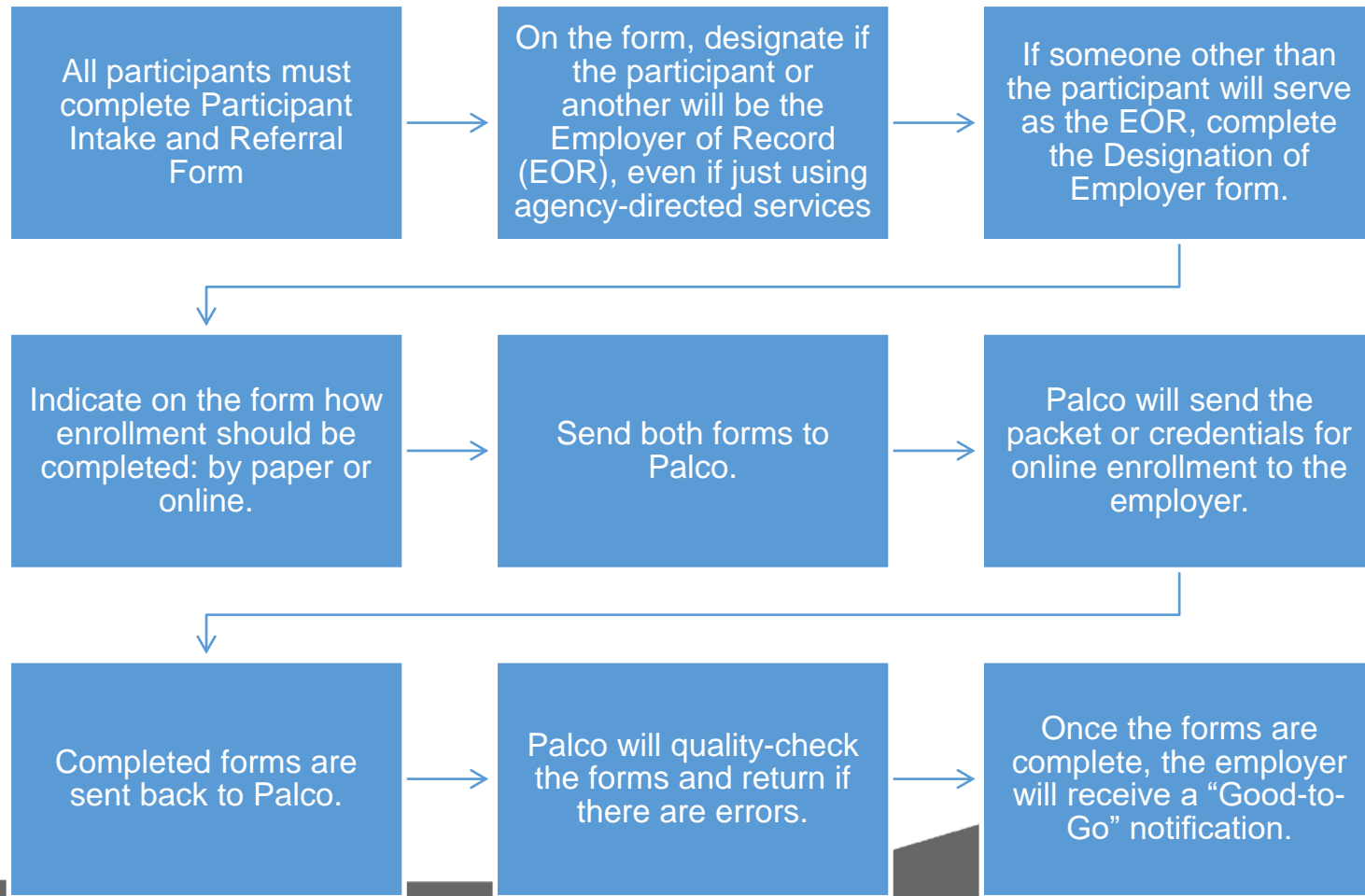
- Successful transition of current participants by January 1, 2019.
- New participants may begin enrolling with Palco December 15, 2018.
- Transitioning participants who need to add new workers will begin on December 15, 2018 with Palco.



Important Payroll Dates

- For services rendered on or before **December 31, 2018**, submit timesheets and vendor payment request to previous vendor
- Palco's first pay period for current participants begins **January 1, 2019** and ends **January 5, 2019**
- First Timesheets due by **January 8, 2018**.
 - Follow the timesheet submission dates on the BI-WEEKLY PAYMENT SCHEDULE
- First Payroll **January 18, 2018**

Enrollment Process – Participants



Employer Paperwork

Participant Referral & Intake

- Establishes member in Palco system
- For agency-directed services, may cross through “hire, recruit, etc.” language

Designation of Surrogate Employer (Optional)

- Use only if member does not want to be his/her own employer
- For agency-directed services, may cross through “hire, recruit, etc.” language

Employer Responsibilities & Attestation

- Acknowledge that Palco is not the employer and the duties of the member or designee as the employer

Authorization Agreement

- Outlines Palco’s responsibilities and authorizes Palco to ensure compliance with the IRS and other federal and state tax authorities on the employer’s behalf

K-CNS 032 Employer Representative Authorization

- Allows us to comply with quarterly SUTA requirements and file taxes on member’s behalf

KS DO-10 Kansas Dept of Revenue POA

- Allows us to comply with state income tax requirements on behalf of the member

IRS Form SS-4

- Apply for federal employer identification number used to file W2s and 1099s

IRS Form 2678

- Makes Palco the agent for the member and thus liable for paying taxes on behalf of members

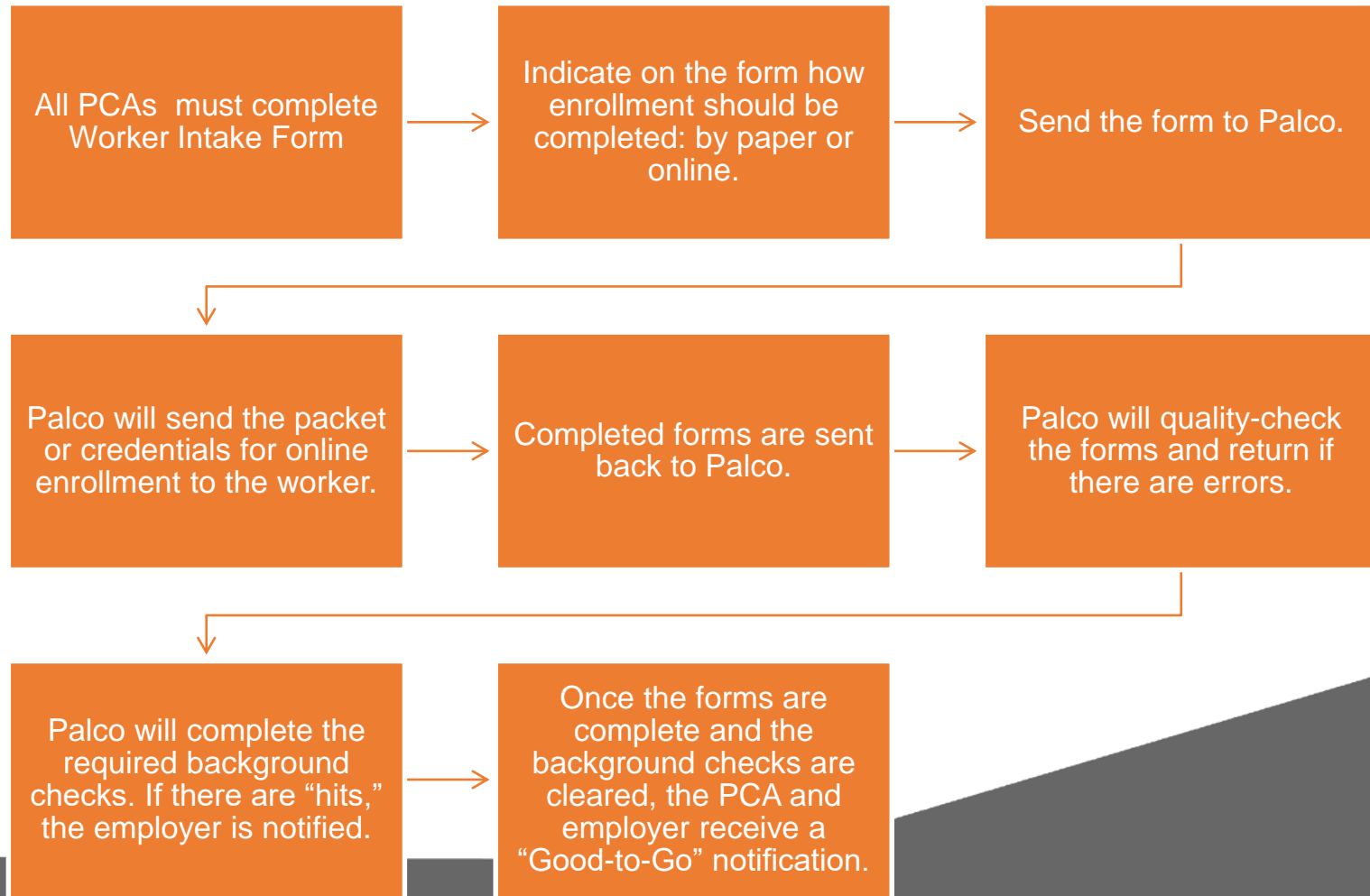
IRS Form 8821

- Allows Palco to speak with the IRS in case of a problem with federal taxes

PCA Pay Rate Form

- Establishes the rate of pay for each service provided by the PCA

Enrollment Process – PCAs



PCA Paperwork

Worker Intake Form

- Needed to establish the worker's information in our system

Worker Info & Qualification Form

- Acknowledges understanding of participating as worker on the program

KBI Check form

- Required to run criminal background check

Child Abuse Registry Check form

- Required to run child abuse registry check

Adult Abuse Registry Check form

- Required to run adult abuse registry check

Payroll Information Worksheet

- Helps us set up any federal exemptions allowed by the IRS
- Sets up an exemptions from the federal DOL Home Care Rule for overtime pay

U.S.CIS Form I-9

- Required by US govt to verify that the worker can be legally employed in the United States

I-9 supporting documentation

- See page 3 of I-9 for allowable forms of documentation

Copy of Social Security Card

- Can be used for I-9; Palco also required to verify SSN for W-2 reporting purposes

IRS Form W-4

- To set up the proper federal income tax withholdings from the paycheck

Kansas K-4

- To set up the proper state income tax withholdings from the paycheck

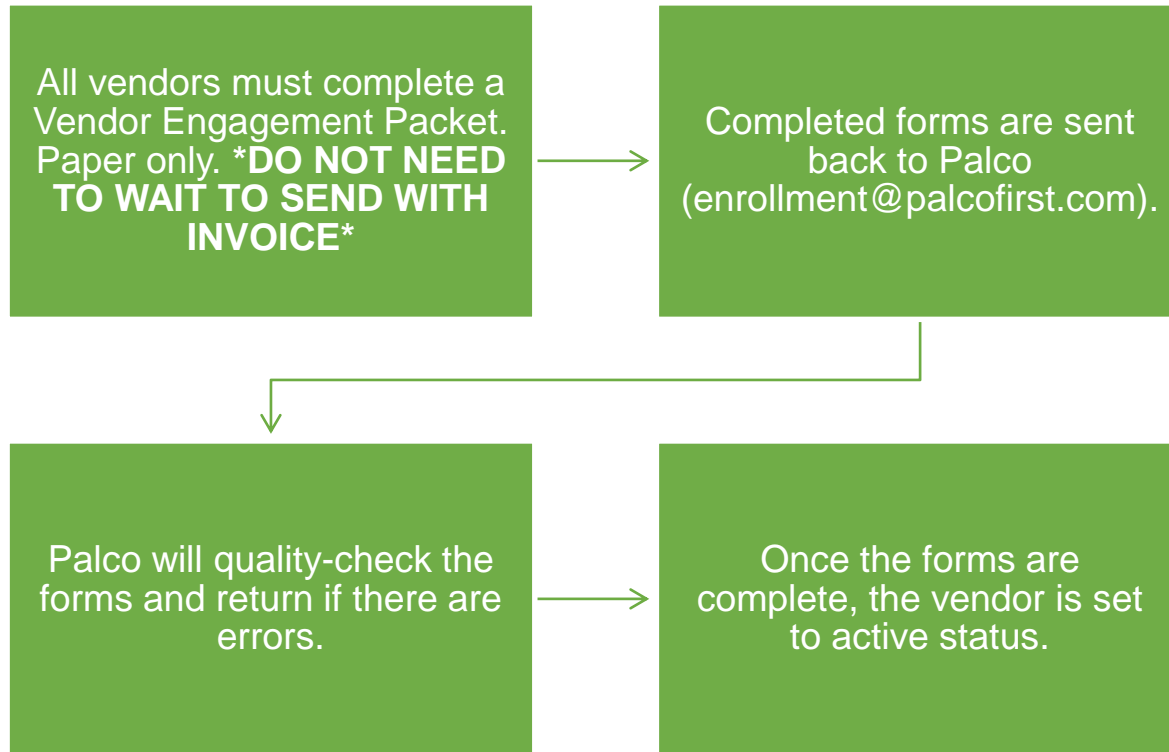
Pay Selection and Direct Deposit Form

- Lets us know how the worker wants to be paid: check, direct deposit, pay card

Money Network Card form (optional)

- If you would like Palco to send you a pay card

Enrollment Process – Vendors



Vendor Paperwork

New Vendor Setup

- Establishes member in Palco system

IRS Form W-9

- Required to establish the independent contractor and issue a 1099 at year-end

Pay Selection and Direct Deposit Form

- Lets us know how the worker wants to be paid: check or direct deposit.
- Please note that pay cards are not an option for vendors

Online Enrollment – Step 1

- Fastest way to enroll
- Immediate error-checking
- Email is sent to the user from support@palcofirst.com
 - Check spam folder if not received
 - Internet Explorer is not supported
- Email contains encrypted link for online enrollment
 - Link expires in 30 days!

Enrollment Request from Palco ▷ Inbox x



support@palcofirst.com via [sendgrid.net](#)
to me ▾

9:13 PM (0 minutes ago) ☆ ↶ ⋮

Welcome, [b\[REDACTED\]@gmail.com](#)! Thank you for choosing to enroll online through Palco Intake, Palco's self-service portal. This option is the fastest and easiest method of enrollment. To log into our system and begin your enrollment, please click on this [LINK](#) and complete the remaining steps to enroll with Palco. Enrollment will not be finalized until all information is submitted, Palco has verified the information, and the employer has provided a start date. THIS LINK EXPIRES IN DAYS.

Palco will communicate with you through this email address. It is your responsibility to notify Palco of any changes to your email address. Be sure to add our email address to your address book.

If you need assistance or have changed your mind and do not want to enroll online, please contact a friendly customer support representative at 1.866.710.0456.

We look forward to serving you!

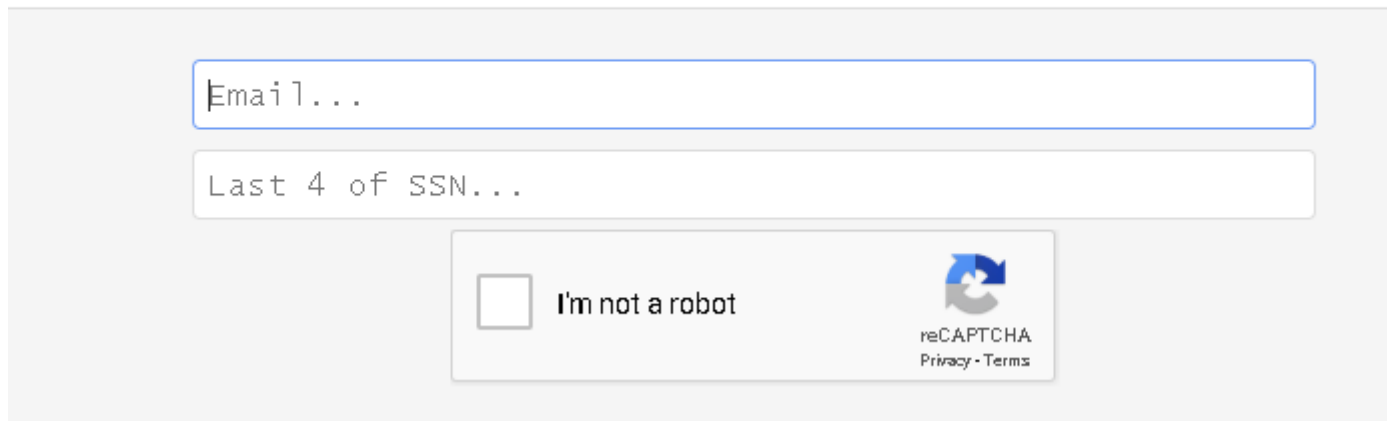
Sincerely,

Palco, Inc.

Online Enrollment – Step 2

- After clicking link, verify with last 4 of SSN and email address

YOU'VE BEEN INVITED TO ENROLL



The screenshot shows a web form with the following elements:

- A text input field with the placeholder text "Email..."
- A text input field with the placeholder text "Last 4 of SSN..."
- A checkbox labeled "I'm not a robot" with a small square icon to its left.
- A reCAPTCHA widget consisting of a blue circular icon with a white arrow and the text "reCAPTCHA" and "Privacy • Terms" below it.

Online Enrollment – Step 3

- Complete tabs with required data fields
- Submit signature
- Sign forms
- Correct anything with red star
- Click submit!
- Be sure to download forms for reference

Notes about Enrollment

- Preferred method of payment is direct deposit
 - If PCA does not have a bank account, they can request a prepaid card from Palco
 - To do this, submit a Money Network card
 - NO ONLINE OPTION
- Employers must submit a PCA Rate Sheet
 - NO ONLINE OPTION
- Changes should be submitted to enrollment@palcofirst.com
- Ensure that PCAs with a garnishment notify their garnishor to have the levy switched to Palco
- During the transition, workers will not need to complete the Worker Intake Form – unless they are new to the WORK program

Budgets and Pay Rates

- Palco will receive budget and pay rate information on existing members from Sunflower/previous vendor prior to January 1, 2019
- For new members, changes to existing members' budgets, and carryover approvals:



- Pay rate changes should be reported via PCA Rate Sheet to enrollment@palcofirst.com

Online Timesheet Submission

- <https://connect.palcofirst.com>
- Permissions given with the good-to-go notification for those who enrolled online
 - Individuals who did not enroll online may sign up later by contacting customer support
- Access to latest information about timesheet and payment status

Payroll and Payments

- Timesheets may be faxed or submitted via mail
 - Please allow 48 hours for processing
- Vendors have two options when submitting invoices:
 - Vendor Payment Request: PDF used for single participant requests
 - Agency/Vendor Invoices: Excel spreadsheet used for multiple participants
- Follow the payroll schedule for important dates!

Contact Information -Palco

Customer Support

Phone Number: 1-866-710-0456

8:00 a.m. to 5:00 p.m., CST

KSWORK@palcofirst.com

General inquiries

Enrollment@palcofirst.com

New participant, employer, PCA, or vendor enrollments; termination requests, PCA Rate Sheets, and other enrollment related paperwork

Timesheets@palcofirst.com

Completed timesheets

FMS@palcofirst.com

Completed budgets

Fax/Mail

Timesheets:

<https://connect.palcofirst.com>

Paperwork and timesheets may also be faxed to Palco at:

Fax: 1-877-859-8757

Website: palcofirst.com

Program: Kansas

<http://www.palcofirst.com/programs/kansas/work-program/>

Mail:

Palco, Inc.

Attn: Enrollment

P.O. Box 242930

Little Rock, AR 72223