

New Mexico Online Enrollment Instructions

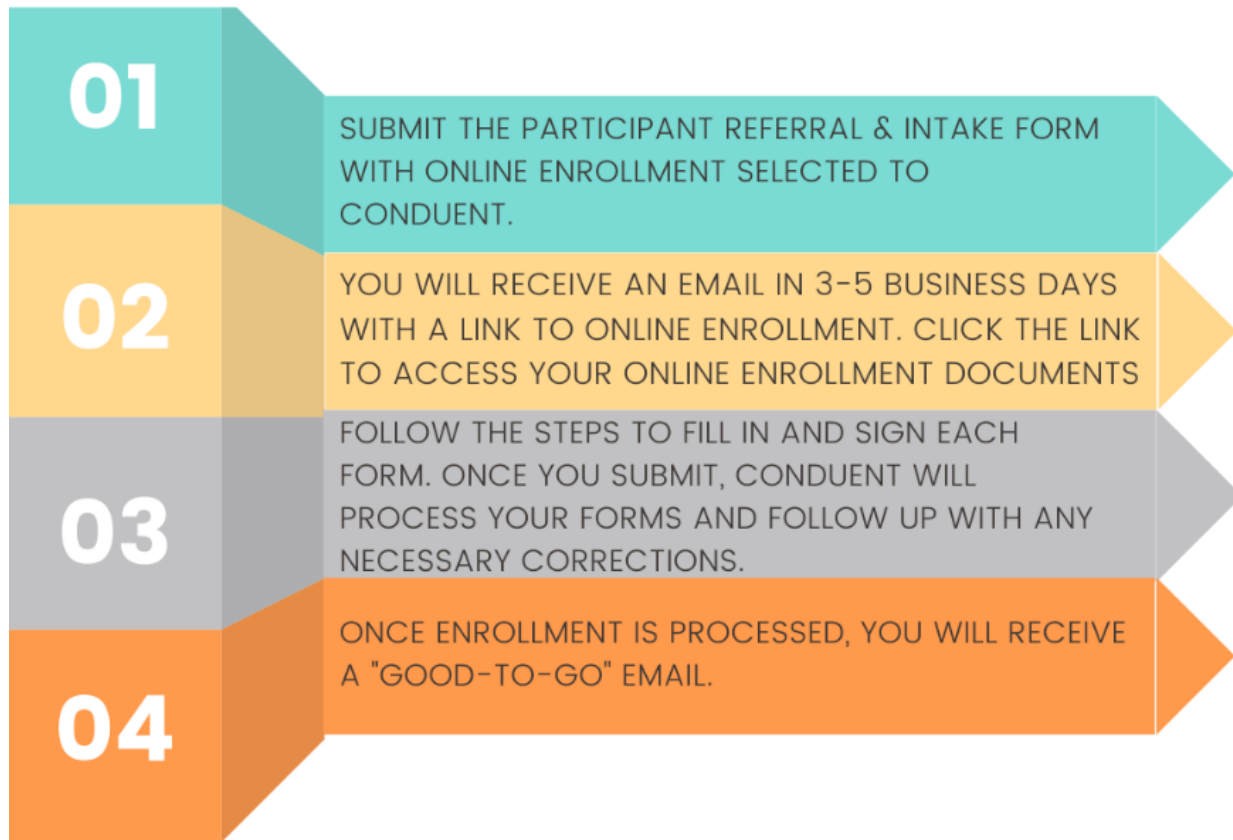
All Participant/Employer forms required for enrollment are available in the “Intake” section of Palco’s online enrollment platform. This secure web-based tool allows Participants/Employers and Workers the ability to complete the required enrollment forms online. Enrollment must be fully completed and processed by Conduent before services can begin and workers can be paid. Using **Intake** is the preferred and fastest method for completing and submitting documents. Intake helps guide you through each form and provides prompts to ensure that all required data and signatures are included prior to submission. Many of the forms can be signed electronically through the system. Other forms may require that you download, print, and sign them before submission.

- Before you can begin an online enrollment or request a pre-filled packet, each Participant/Employer and Worker must first complete and submit an [Intake Form](#).
- This form is available on the Palco website.
- Palco is the financial management service provider who will process all payments for services. Conduent is the entity facilitating and processing the enrollment.
- If you have issues downloading the form or do not have internet and would like to request a copy of the intake form, you can contact the:
 - Consolidated Customer Service Center (CCSC) at **1.800.283.4465**
Business hours (7:00 am MT to 6:30 pm MT)
- To enroll or request a packet, complete the Intake form, and select either the “Online Enrollment” or one of the other options to have a prefilled packet “emailed” or “mailed” and submit the form to Conduent for processing. You can find instructions for submitting the form via email, fax or mail on the Intake form. Within 3-5 business days, Conduent will process the request.

The remainder of this document walks through the general online enrollment steps you will take when using the Intake online enrollment tool. All browsers are compatible except for Internet Explorer for access to the Intake Online Enrollment tool. The document is broken out by Employer and Worker instructions, you may skip to the section applicable to your role if you would like.



ENROLLMENT PROCESS OVERVIEW



General Information

Once Conduent has processed your request, you will receive a secure email from Palco support outlining the next steps needed to complete the electronic enrollment process. See an example of the email below. If you have not received the email after 5 business days, you might need to check your junk folder or contact CCSC to check on the status.





From: support@palcofirst.com
Sent: Wednesday, August 25, 2021 3:14 PM
To: moise.kean@mailinator.com!
Subject: Self-Direction Enrollment Link

Welcome, moise.kean@mailinator.com! Thank you for choosing to enroll online through the Palco Intake application. 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. Enrollment will not be finalized until all information is submitted, Conduent has verified the information, and the employer has been provided a start date. THIS LINK EXPIRES IN 30 DAYS.

Conduent will communicate with you through this email address. It is your responsibility to notify the Consolidated Customer Service Center (CCSC) of any changes to your email address. Be sure to add our email address to your address book.

Should you need any assistance during this process, please contact the Consolidated Customer Service Center (CCSC) at 1.800.283.4465

We look forward to serving you!

Sincerely,

Palco, Inc.

CONFIDENTIALITY NOTICE: This e-mail and all attached material are private and confidential. All materials are privileged and are intended solely for the intended recipient. Any unauthorized copy, disclosure, review, distribution, or any other use of this material is strictly prohibited and may result in legal liability on your part. If you have received this transmission in error, please notify Palco immediately at privacy@palcofirst.com.

Example: Auto-generated email to allow the individual to start the enrollment process online.

When you click on the link in the email, you will be directed to Palco's Intake tool. You must enter your email and last four numbers of your social security number (SSN). These must match the information exactly as you provided it to Conduent on the Intake form.

The screenshot shows the PALCO INTAKE web interface. At the top left is the PALCO INTAKE logo, and at the top right is a "LOG OUT" button. The main content area has a heading "YOU'VE BEEN INVITED TO ENROLL". Below this heading are two input fields: "Email..." and "Last 4 of SSN...". A blue "VERIFY" button is positioned below the second input field.

If you are not able to log in, verify that the information you have entered matches the information you submitted to Conduent on the intake form. Also, check that there are no blank spaces before or after your email address or SSN. If you are still unable to log in, please contact CCSC at 1.800.283.4465 during business hours (7:00 am MT to 6:30 pm MT).



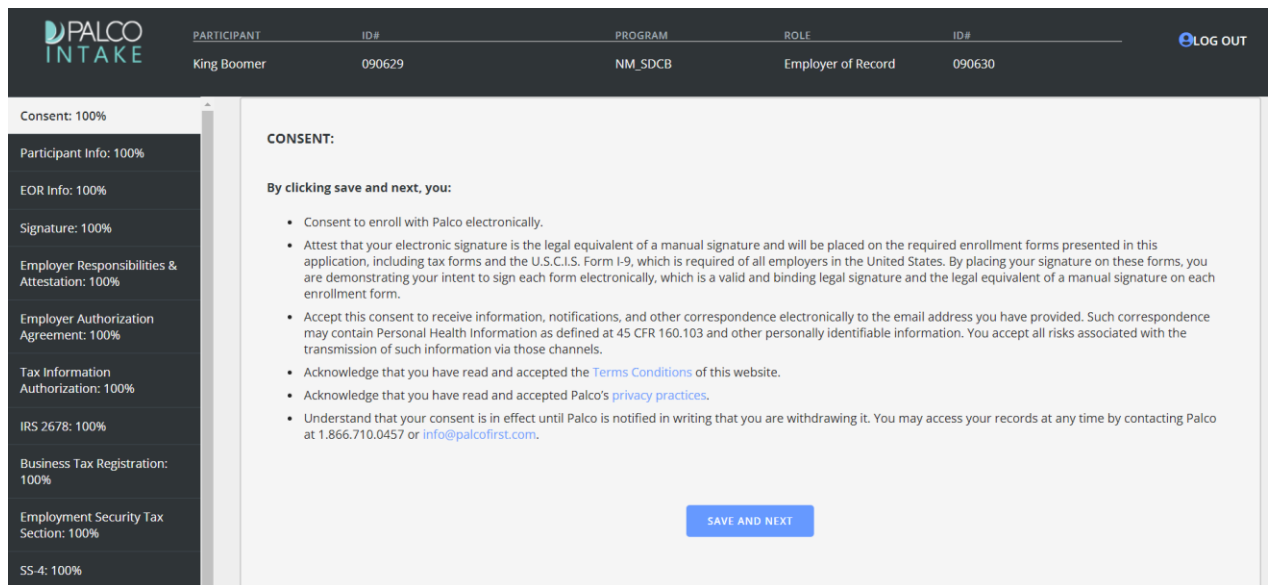
Employer/Participant Enrollment

To become an **Employer/Participant, certain state and federal forms must be completed.** This section will walk you through the next steps needed to complete your enrollment. If you are a Worker, please see “Worker Enrollment” in the next section of this manual to complete your enrollment.

To begin the Employer/Participant Enrollment process, go to the Palco Intake form page and enter your email address and last four digits of your SSN to log in to the system.

1. Once you are logged in, you can begin the enrollment process. A set of tabs will appear on the left side of the screen. Each tab will show you the section that needs to be completed. It will also show the percentage you have completed for each section.

Example:



PARTICIPANT	ID#	PROGRAM	ROLE	ID#
King Boomer	090629	NM_SDCB	Employer of Record	090630

CONSENT:

By clicking save and next, you:

- Consent to enroll with Palco electronically.
- Attest that your electronic signature is the legal equivalent of a manual signature and will be placed on the required enrollment forms presented in this application, including tax forms and the U.S.C.I.S. Form I-9, which is required of all employers in the United States. By placing your signature on these forms, you are demonstrating your intent to sign each form electronically, which is a valid and binding legal signature and the legal equivalent of a manual signature on each enrollment form.
- Accept this consent to receive information, notifications, and other correspondence electronically to the email address you have provided. Such correspondence may contain Personal Health Information as defined at 45 CFR 160.103 and other personally identifiable information. You accept all risks associated with the transmission of such information via those channels.
- Acknowledge that you have read and accepted the [Terms Conditions](#) of this website.
- Acknowledge that you have read and accepted Palco's [privacy practices](#).
- Understand that your consent is in effect until Palco is notified in writing that you are withdrawing it. You may access your records at any time by contacting Palco at 1.866.710.0457 or info@palcofirst.com.

[SAVE AND NEXT](#)

2. Consent Tab - Read the consent form entirely and ensure that you understand and agree to the terms. Once you consent, click “Save and Next” to move forward. If you do not consent to the terms, you must request a paper enrollment packet by resubmitting an Intake form or contact CCSC to request a packet via email or mail.
3. As the Employer of Record (EOR), you must review the “Participant Info” and “EOR Info” tabs to ensure all information is correct and 100% complete. Make any updates or additions to the demographic/personal information as necessary. When you have verified that all information in the “Participant Info” and “EOR Info” tabs are accurate and complete, click “Save and Next.”



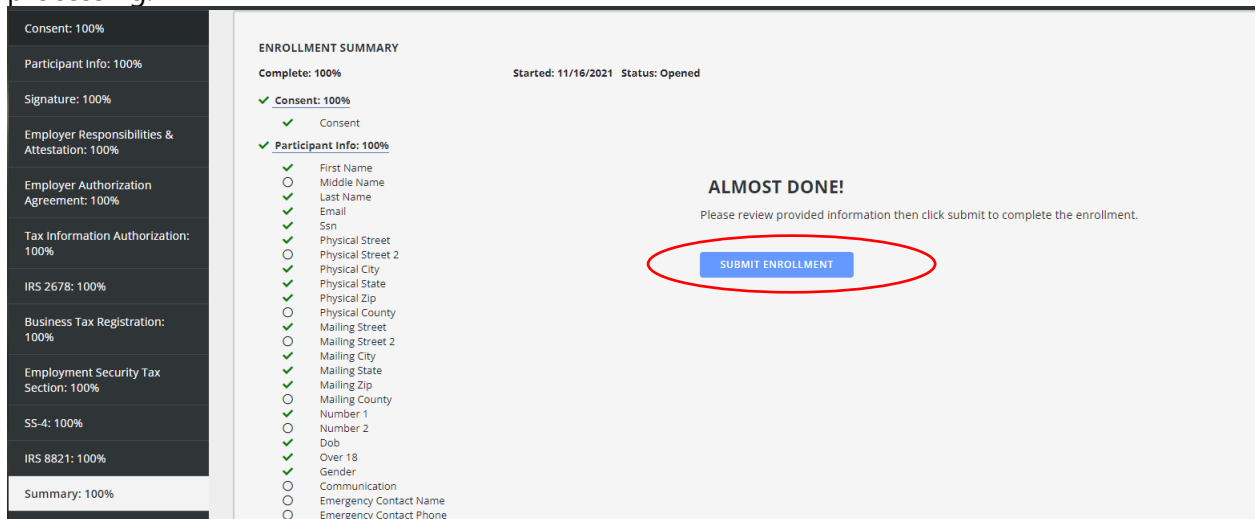
4. Signature Tab - Navigate to the "Add New Signature" box. Notice that when the cursor is inside the box, it changes to a T-shape. You will sign your name by holding down the cursor to make a mark (using your mouse or finger if on a touch screen). Once you are happy with your signature on the screen, click "Apply." The signature will then display in the "Current Signature" box. You can redo the signature as many times as needed by clicking "Clear" to reset it. Once you are satisfied with your signature, click "Save and Next."



5. You are now ready to electronically sign all forms necessary to establish you as a self-direction Employer of Record (EOR). Please review each form before applying your signature. **You will need to apply your signature and click "Save and Next" for each form.**
 - A. **Employer Responsibilities and Attestation** A Palco form; Designates the legal Employer of Record (EOR) for self-direction and provides an outline and acknowledgement of responsibilities.
 - B. **Employer Authorization Agreement** A Palco form; Further explains the employers' legal responsibilities and the aspects of service management that Palco will assist with.
 - C. **NM ACD-31102 Tax Information Authorization** A NM Taxation and Revenue form; Authorizes Palco to receive EOR applicable Federal and State tax information on your behalf.
 - D. **NM ACD-31015 Business Tax Registration** A NM Taxation and Revenue form; Allows Palco to establish required business accounts with the New Mexico Department of Taxation and Revenue.
 - E. **ES-802 NMDOL Status Report** A NM Department of Workforce Solutions form; Allows Palco to establish the required State of New Mexico unemployment accounts.
 - F. **2678 Employer/Payer Appointment of Agent** An Internal Revenue Service (IRS) form; Allows Palco to be designated as the fiscal agent on behalf of the EOR.
 - G. **SS-4 Application for Employer Identification Number** An Internal Revenue Service (IRS) form; Allows Palco to apply for a Home Care Service Recipient Federal Employer Identification Number [EIN] on behalf of the EOR.

H. **8821 Tax Information Authorization** An Internal Revenue Service (IRS) form; allows Palco to manage and pay the taxes and related payments to the Internal Revenue Service for the established EIN.

6. Summary Tab – All fields required for enrollment must be completed before you can submit your information. All fields must show as being 100% complete. When they are complete, the “Submit Enrollment” button will turn blue. This means you are ready to submit your enrollment forms. Just click “Submit Enrollment”. If you do not complete this step, the forms will not be finalized and delivered to Conduent for review and processing.



Consent: 100%

Participant Info: 100%

Signature: 100%

Employer Responsibilities & Attestation: 100%

Employer Authorization Agreement: 100%

Tax Information Authorization: 100%

IRS 2678: 100%

Business Tax Registration: 100%

Employment Security Tax Section: 100%

SS-4: 100%

IRS 8821: 100%

Summary: 100%

ENROLLMENT SUMMARY

Complete: 100% Started: 11/16/2021 Status: Opened

✓ Consent: 100%

✓ Consent

✓ Participant Info: 100%

✓ First Name

○ Middle Name

✓ Last Name

✓ Email

✓ Ssn

○ Physical Street

○ Physical Street 2

○ Physical City

○ Physical State

○ Physical Zip

○ Physical County

✓ Mailing Street

○ Mailing Street 2

✓ Mailing City

○ Mailing State

○ Mailing Zip

○ Mailing County

✓ Number 1

○ Number 2

✓ Dob

✓ Over 18

○ Gender

○ Communication

○ Emergency Contact Name

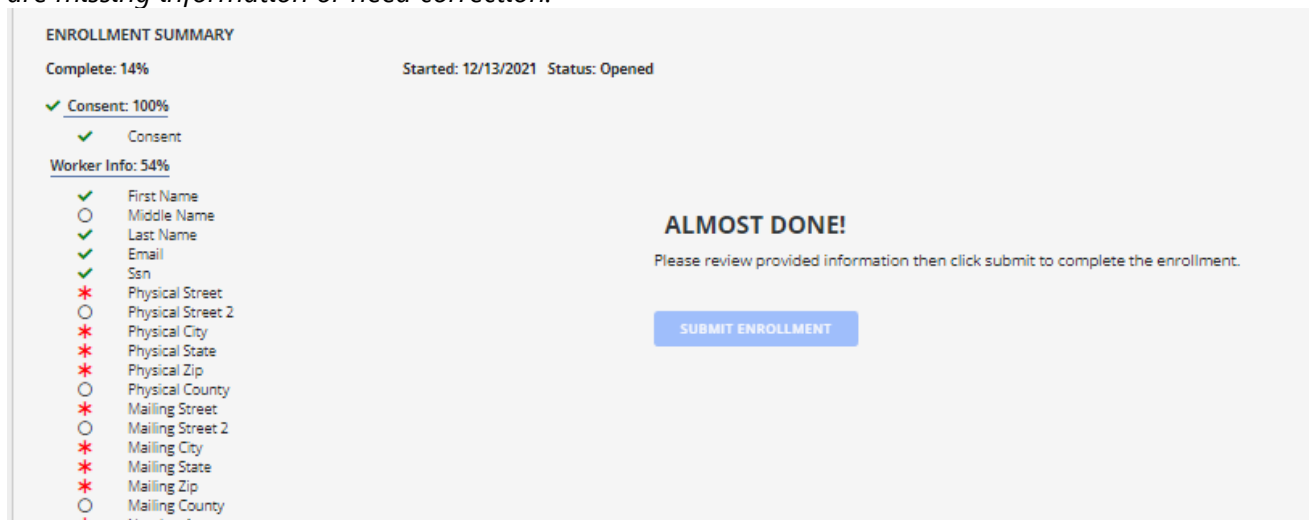
○ Emergency Contact Phone

ALMOST DONE!

Please review provided information then click submit to complete the enrollment.

SUBMIT ENROLLMENT

If you attempt to submit the enrollment and the “Submit Enrollment” box is greyed out, you will need to look at the Enrollment Summary to see which items have a red asterisk*. Items with a red asterisk* will need to be corrected before the enrollment can be finalized and submitted. You will need to use the tabs on the left to navigate back to the tabs that are missing information or need correction.



ENROLLMENT SUMMARY

Complete: 14% Started: 12/13/2021 Status: Opened

✓ Consent: 100%

✓ Consent

Worker Info: 54%

✓ First Name

○ Middle Name

✓ Last Name

✓ Email

✓ Ssn

* Physical Street

○ Physical Street 2

* Physical City

* Physical State

* Physical Zip

○ Physical County

* Mailing Street

○ Mailing Street 2

* Mailing City

* Mailing State

* Mailing Zip

○ Mailing County

* Number 1

ALMOST DONE!

Please review provided information then click submit to complete the enrollment.

SUBMIT ENROLLMENT











7. Once the enrollment is submitted, you can download the signed forms from the confirmation page for your records. Other helpful documents like the payroll schedule and change of information forms can be downloaded as well. These forms can also be downloaded from Palco's website under the New Mexico program page located here: <https://palcofirst.com/new-mexico/>

Log out

THANK YOU - ENROLLMENT SUBMITTED FOR REVIEW




Please allow 1-2 business days for CONDUEENT to review electronically submitted documents.

Download submitted documents for your records:

- ✓ Employer Responsibilities & Attestation.pdf - 
- ✓ Employer Authorization Agreement.pdf - 
- ✓ Tax Information Authorization.pdf - 
- ✓ IRS 2678.pdf - 
- ✓ Business Tax Registration.pdf - 
- ✓ Employment Security Tax Section.pdf - 
- ✓ SS-4.pdf - 
- ✓ IRS 8821.pdf - 

Other Downloadable Forms:

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- ✓ Employer IRS Instructions.pdf - 
- ✓ Notice of Privacy Practices.pdf - 
- ✓ NM Change of Information.pdf - 

Confirmation page will display once enrollment is submitted.



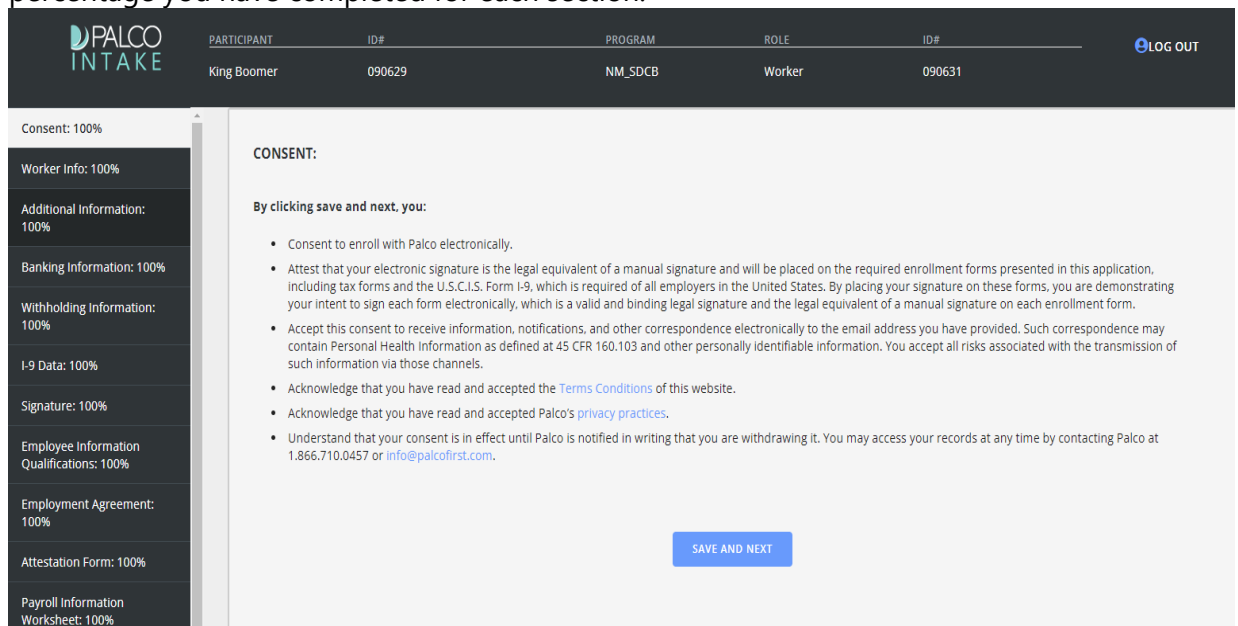
Worker/Employee Enrollment

This sections outlines the steps a Worker (employee employed by the self-directing participant / designated representative) will take to complete their enrollment packet via the online system

To become a Worker, certain documents and information must be submitted. This includes state and federally required documents for employment purposes including the background check process, as well as documents needed to process your pay. This section will walk you through the next steps needed to complete your enrollment. If you are an Employer/Participant, please see "Employer/Participant Enrollment" in the previous section of this manual to complete your enrollment.

To begin the Worker Enrollment process, go to the Palco Intake form page and enter your (the workers) email address and last four digits of your SSN to log in to the system.

1. Once you are logged in, a set of tabs will appear on the left side of the screen. Each tab will show you the section that needs to be completed. It will also show the percentage you have completed for each section.



PARTICIPANT	ID#	PROGRAM	ROLE	ID#
King Boomer	090629	NM_SDCB	Worker	090631

Consent: 100%

Worker Info: 100%

Additional Information: 100%

Banking Information: 100%

Withholding Information: 100%

I-9 Data: 100%

Signature: 100%

Employee Information Qualifications: 100%

Employment Agreement: 100%

Attestation Form: 100%

Payroll Information Worksheet: 100%

CONSENT:

By clicking **save and next**, you:

- Consent to enroll with Palco electronically.
- Attest that your electronic signature is the legal equivalent of a manual signature and will be placed on the required enrollment forms presented in this application, including tax forms and the U.S.C.I.S. Form I-9, which is required of all employers in the United States. By placing your signature on these forms, you are demonstrating your intent to sign each form electronically, which is a valid and binding legal signature and the legal equivalent of a manual signature on each enrollment form.
- Accept this consent to receive information, notifications, and other correspondence electronically to the email address you have provided. Such correspondence may contain Personal Health Information as defined at 45 CFR 160.103 and other personally identifiable information. You accept all risks associated with the transmission of such information via those channels.
- Acknowledge that you have read and accepted the [Terms Conditions](#) of this website.
- Acknowledge that you have read and accepted Palco's [privacy practices](#).
- Understand that your consent is in effect until Palco is notified in writing that you are withdrawing it. You may access your records at any time by contacting Palco at 1.866.710.0457 or info@palcofirst.com.

SAVE AND NEXT

2. Consent tab - Read the consent form entirely and ensure that you understand and agree to the terms. Once you consent, click "Save and Next" to move forward. If you do not consent to the terms, you must request a paper enrollment packet by resubmitting an Intake form or contact CCSC to request a packet via email or mail.
3. Navigate through each of the data tabs and review or fill in all of the necessary information requested on each tab. As information is completed, the percentage on the left side of the screen updates in real time.



- a. Worker Info Tab – Review and verify your (the workers) demographic/personal information. Be careful not to change important details, such as SSN, unless an error was made. Click “Save and Next” when complete.
- b. Additional Information Tab - Fill out the requested information and click “Save and Next”.
- c. Banking Information Tab – Choose your (the workers) payment type. **Direct deposit is recommended for all workers to ensure the most quick and efficient payments.** You must enter your banking information for direct deposit. If you would like to find out more information about the Money Network Card offered by Palco’s partner, FISERV, visit the [Palco website](#) , select the New Mexico program page, choose the program that is applicable to you from the menu options, and view the Pay Selection Form found under the “Worker Forms” section for more details.
- d. Withholding Information Tab – Fill out each section to indicate how you would like withholdings to be set up. This information will automatically populate on the W-4 forms (both Federal and State) that you will review prior to submitting these enrollment forms. If you have questions, consult the link at the top of the form labeled “See FAQ on the Form W-4” which will take you to the IRS website. Palco and Conduent cannot advise you on how to fill out your withholdings on your tax forms.
- e. I-9 Data Tab - Answer each question on the screen and determine if you will be providing one approved citizen document from list A (like a passport) or two citizen documents from list B and C (like a driver’s license and social security card). Enter the document details requested for each document and use the uploader function (“Choose File”) to attach a picture or PDF of the document. If you have questions, review the link embedded in the page which will take you to the U.S. Citizenship and Immigration Services website.

*Citizenship Documents
Instructions for filling out these items can be found [here](#) on page 3

List B & C

Document B:

*Document Title	*Issuing Authority	*Document Number	*Expiration Date
Drivers License	New Mexico MDV	465978121251652	10/27/2021

*Upload New File (accepts .jpg, .jpeg, .png, .gif, .pdf - up to 450KB in size)
Choose File No file chosen

Document C:

*Document Title	*Issuing Authority	*Document Number	*Expiration Date
Social Security	DHS SSA	501770097	10/27/2021

*Upload New File (accepts .jpg, .jpeg, .png, .gif, .pdf - up to 450KB in size)
Choose File No file chosen



4. **Signature Tab** - Navigate to the "Add New Signature" box. Notice that when the cursor is inside the box, it changes to a T-shape. You will sign your name by holding down the cursor to make a mark (using your mouse or finger if on a touch screen). Once you are happy with your signature on the screen, click "Apply." The signature will then display in the "Current Signature" box. You can redo the signature as many times as needed by clicking "Clear" to reset it. Once you are satisfi



- and Next."
5. You (the worker) are now ready to sign forms. Please review each form before applying your signature. **You will need to apply your signature and click "Save and Next" for each form.**
- Electronic Visit Verification (EVV) Registration Form:** A Palco form (used for MiVia and Supports Waiver only) to enroll in EVV and set up the worker to use the system. This form is not used for SDCB.
 - Employee Information & Qualification** A Palco form; Used to enroll workers and consent to required terms of employment including who the legal employer of record is and State and Federal requirements.
 - Employment Agreement:** A Palco form; Used to document an agreement established between the Employer and Employees for how the employment relationship will be conducted including rates of pay and services provided. This form must be downloaded and printed by the enrollee. It must be initialed on every page and signed by both the Employer and Employee and sent to Conduent via email, fax or mail.
 - Attestation Form** A New Mexico Human Services Department (HSD) form; Must be completed for any residential or non-residential Home and Community Based Services (HCBS) provider, who offers self-directed services in a setting where individuals live and/or receive HCBS.
 - Payroll Information Worksheet** A Palco form; Used to set up the worker properly for tax exemptions and exclusions that may apply per the IRS.
 - Form I-9** A U.S. Citizenship and Immigration Services form: Verifies that the applicant worker can be legally employed in the United States.
 - The Employer of Record's (EOR) electronic signature must be on file in the Palco system or it cannot be applied to the I-9 form. In this instance the form will need to be corrected. If the employer's electronic signature is not available, a downloadable version of a [blank I-9 form](#) is available on the Palco website for manual submission to Conduent.
 - Federal W-4 Employee's Withholding Certificate** An Internal Revenue Service (IRS) form; Indicates how you would like Federal taxes withheld from your



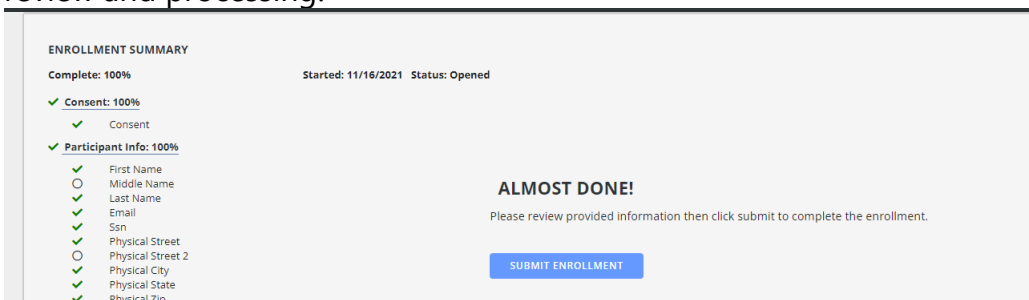
paycheck. The form is prepopulated with information you provided on the “withholding information” tab during the enrollment process. If you would like to change what is on the form before signing, navigate back to the “withholding information” tab and make the desired edits.

- h. **State W-4 Withholding Certificate** A NM Taxation and Revenue Department form (NMTRD) form; Indicates how you would like State taxes withheld from your paycheck. The form is prepopulated with information you provided on the “withholding information” tab during the enrollment process. If you would like to change what is on the form before signing, navigate back to the “withholding information” tab and make the desired edits.
- i. **Direct Deposit Authorization Agreement** A Palco form; Designates the banking information for direct deposits or requests to have payroll payments applied to a Money Network Card. The form is prepopulated with information you provided on the “Banking Information” tab. If you would like to change what is on the form before signing, navigate back to the “Banking Information” tab and make desired edits.

Submitting Documents to Conduent:
Fax: 866.302.6787
Email: docprocessing@conduent.com

<p>Physical Address: 1720-A Randolph Rd SE Albuquerque, NM 87106</p>	<p>Mailing Address: PO Box 27460 Albuquerque, NM 87125-7460</p>
-------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------

- 6. Summary Tab - Make sure all fields are showing 100% complete. Once all fields are complete you will see the box for “Submit Enrollment” turn blue. This means you are ready to submit your enrollment forms. Just click “Submit Enrollment”. If you do not complete this step, the forms will not be finalized and delivered to Conduent for review and processing.



If you attempt to submit the enrollment and the “Submit Enrollment” box is greyed out, you will need to look at the Enrollment Summary to see which items have a red asterisk. Items with a red asterisk* will need to be corrected before the enrollment can be finalized and submitted. You will need to use the tabs on the left to navigate back to the tabs that are missing information or need correction.*



ENROLLMENT SUMMARY

Complete: 14% Started: 12/13/2021 Status: Opened

✓ **Consent: 100%**

- ✓ Consent

Worker Info: 54%

- ✓ First Name
- Middle Name
- ✓ Last Name
- ✓ Email
- ✓ Sex
- * Physical Street
- Physical Street 2
- * Physical City
- * Physical State
- * Physical Zip
- Physical County
- * Mailing Street
- Mailing Street 2
- * Mailing City
- * Mailing State
- * Mailing Zip
- Mailing County
- * Number 1

ALMOST DONE!

Please review provided information then click submit to complete the enrollment.

[SUBMIT ENROLLMENT](#)

7. Once the enrollment is submitted, you can download the signed forms from the confirmation page for your records. Other helpful documents, like the payroll schedule and change of information forms, can be downloaded as well. Depending on your individual situation or the type of services you provide (for example, transportation services), you may also see other forms required to complete your enrollment.

8. To log out, just click on the “Log out” button on the top right-hand corner of the screen.

[Log out](#)

THANK YOU - ENROLLMENT SUBMITTED FOR REVIEW

Please allow 1-2 business days for CONDUENT to review electronically submitted documents.

» **Reminder:** Please submit the following form(s) or any application document by using one of these options:

» [Employment Agreement.pdf](#) -

»

Mailing Address: CONDUENT P.O. BOX 27460 Albuquerque, NM 87106	Fax: (866) 302-6787	Email: docprocessing@conduent.com
--------------------------------------------------------------------------------	-------------------------------	---------------------------------------------

Download submitted documents for your records:

- ✓ [Mobile Application Registration.pdf](#) -
- ✓ [Employee Information Qualifications.pdf](#) -
- ✓ [Attestation Form.pdf](#) -
- ✓ [Payroll Information Worksheet.pdf](#) -
- ✓ [Form I-9, Employment Eligibility Verification.pdf](#) -
- ✓ [W-4 2021 Employee's Withholding Certificate.pdf](#) -
- ✓ [W-4 State Withholding Certificate.pdf](#) -
- ✓ [Direct Deposit Authorization Agreement.pdf](#) -

Other Downloadable Forms:

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- ✓ [Notice of Privacy Practices.pdf](#) -
- ✓ [Appendix to Employment Agreement - Transportation Services.pdf](#) -
- ✓ [I-9 Instructions.pdf](#) -

Confirmation page will display once enrollment is submitted.

