PALCO

Palco New Mexico Phase II Training

Consolidated Customer Service Center (CCSC) Palco Training

Webinar Training Guidelines

- All lines are muted and will remain muted for the duration of the training.

- We will use the “Questions” feature for your questions and pause at designated times to answer them.
  - If we do not have time for all your questions, you can include your email address and we will follow up with you in the coming days.

- Please reserve the chat for questions only and refrain from sharing comments or opinions to keep things organized.
  - Only Palco staff should answer questions that are asked.

Training Audience

Today's training is for **CCSC Staff** who will be utilizing the Palco system and assisting self-directed participants.

Hello, it’s my pleasure to be here!

Trainer Name, Title

- Trainer details and introduction
- Trainer details and introduction
- Trainer details and introduction

INSERT INDIVIDUAL TRAINER SLIDE

Training Agenda- Part One

Misc. (Case Management Portal- CMP Application)

- Where to find info – General CMP Navigation
- User roles/permissions -General CMP terminology
- Statuses/changes -General CMP definitions and active vs terminated
- Notes -Where to find and how to enter case notes and alerts

Training Agenda- Part Two

Time Entry / EVV

- Time entry – EVV *How a Worker would enter EVV time into Authenticare*
- Time entry – Connect *How a Worker would enter non EVV time into Palco's online timesheet application*
- Paystubs (Connect) -*How a Worker would view their paystubs in Connect*
- Viewing Utilization in Connect -*How an Employer would review their utilization in Connect*
- Running Reports in Connect-*How an Employer would run reports in Connect*
- EVV information (CMP tab) -*Where EVV data and configuration is stored in the Palco system*
- EVV Exemptions-*Where EVV exemptions are documented and approved in the Palco system*

Training Agenda- Part Three

Payments/Utilization (CMP Application)

- Time entry – paper -*How paper timesheets are keyed into the Palco system*
- Viewing time and Vendor Payment Requests in CMP
- Pay statuses- *The various statues available, what they mean, and how to use them including viewing failures.*
- Withholdings -*Where to view a worker's withholdings*
- Pay selection (DD, Paper, MNC) and updates-*Where to view and update a workers payment selection*
- Notifications -*Types of notifications that are sent automatically from the system as it relates to payroll and what the Employer / Workers can expect*
- Validations on payments -*Overview of the Palco payroll validations and what they check for*
- Viewing Utilization in CMP

30 min Lunch Break

Training Agenda- Part Four

Budgets (CMP Application)

- Features & components of the budget screen in CMP
- Employer costs – *what costs are associated with the employer and how to see them in Palco's system*
- Worker rate of pay – *how to enter worker rates of pay in CMP*

Reports

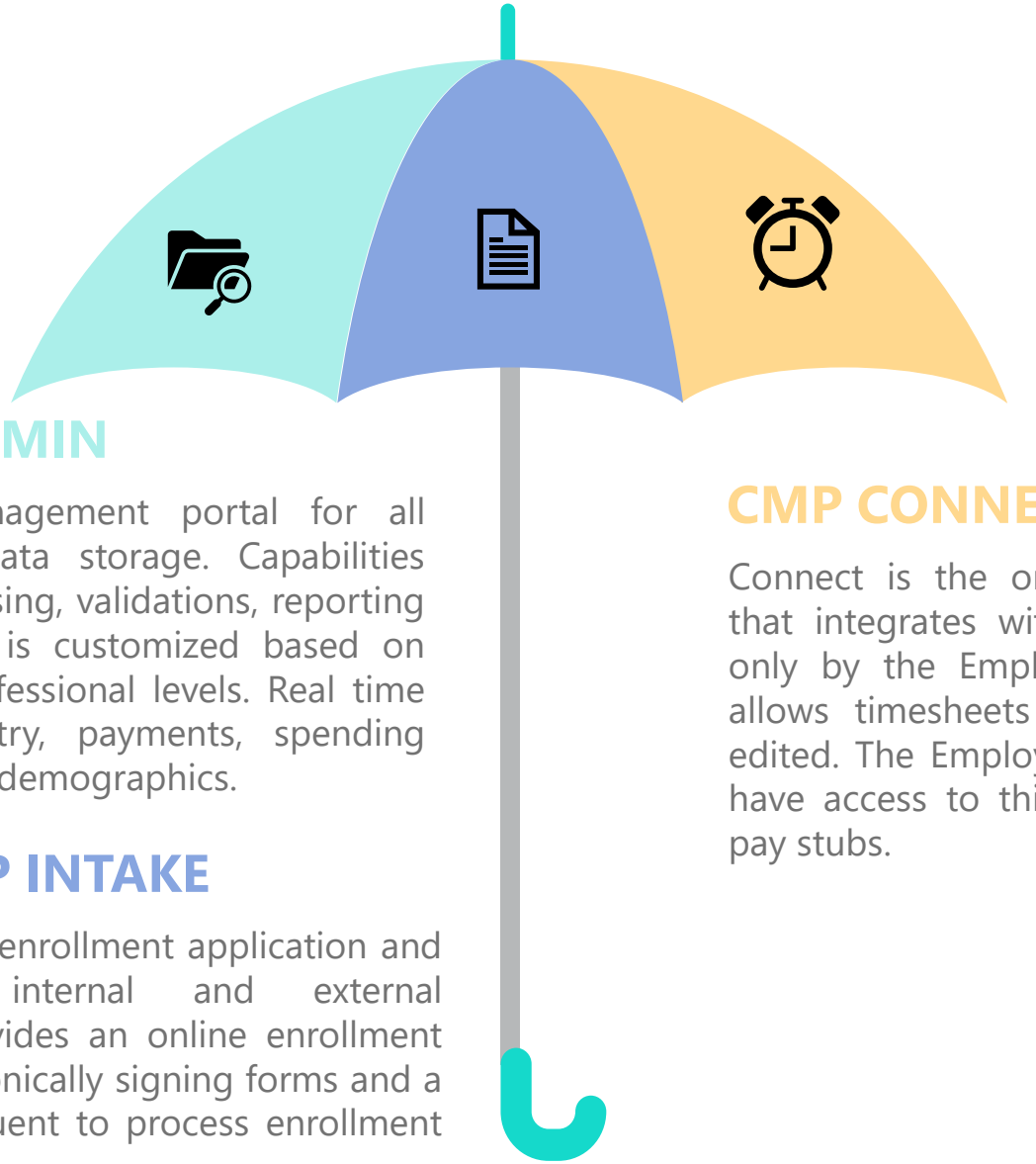
- Running in CMP-*Where to view and run reports in the Palco system*
- Widgets v. Reports

Training Agenda- Part Five

General Support

- Conduent Functions and Responsibilities
- CMP/Connect Troubleshooting Tips
- CMP System Support Process

Palco Case Manager Portal (CMP)



CMP ADMIN

The main case management portal for all demographics and data storage. Capabilities include payroll processing, validations, reporting and budgets. Access is customized based on different levels of professional levels. Real time visibility of time entry, payments, spending history, utilization and demographics.

CMP INTAKE

Intake is the Palco enrollment application and contains both internal and external capabilities. It provides an online enrollment platform for electronically signing forms and a platform for Conduent to process enrollment forms.

CMP CONNECT

Connect is the online timesheet system that integrates with EVV. It is accessible only by the Employer and Employee. It allows timesheets to be submitted and edited. The Employer and Employees also have access to things like utilization and pay stubs.

Common Terms

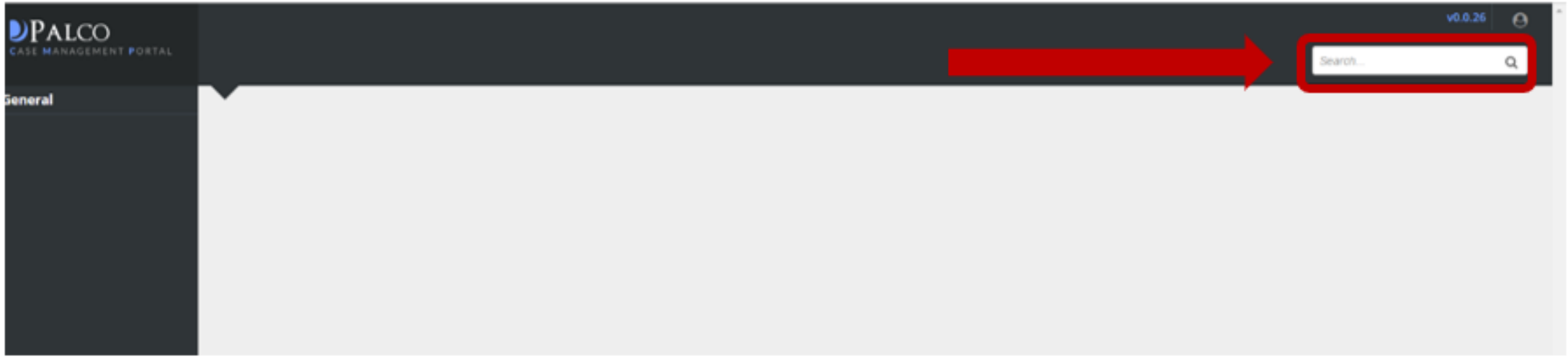
- **Case Manager Portal (CMP):** The main Palco system used by all professional users in New Mexico. This system is replacing FOCoS.
- **Connect:** Palco online time entry system used by workers and employers.
- **Intake:** Palco online enrollment system used by Employers/Workers enrolling and by Conduent for processing.
- **Electronic Visit Verification (EVV):** Electronic visit verification is a mandate of the 21st Century Cures Act that requires Medicaid service recipients to check in/out in real time using a compliant system that captures 6 points of data.
- **Employer (EOR):** The individual managing the self-directed services and legally responsible. Can be the Participant/Member/Service Recipient or a designated individual.
- **Worker:** The self-directed individual hired by the Employer, also known as employee to that legal employer of record. These are not Palco employees.
- **Vendor:** An individual or business that provides services or goods for a participant which are billed, invoiced, or reimbursed. Vendor services are not recorded on a timecard or in a time tracking application.
- **Program Terminology:** Each program will have its own distinct abbreviation in CMP.
  - **NM_MV** = Mi Via
  - **NM_SW** = Supports Waiver
  - **NM_SDCB** = Self-directed Community Benefit

Resources- User Guide

A **CMP Master User Guide** will be available post go-live within the Palco CMP System for professional users.

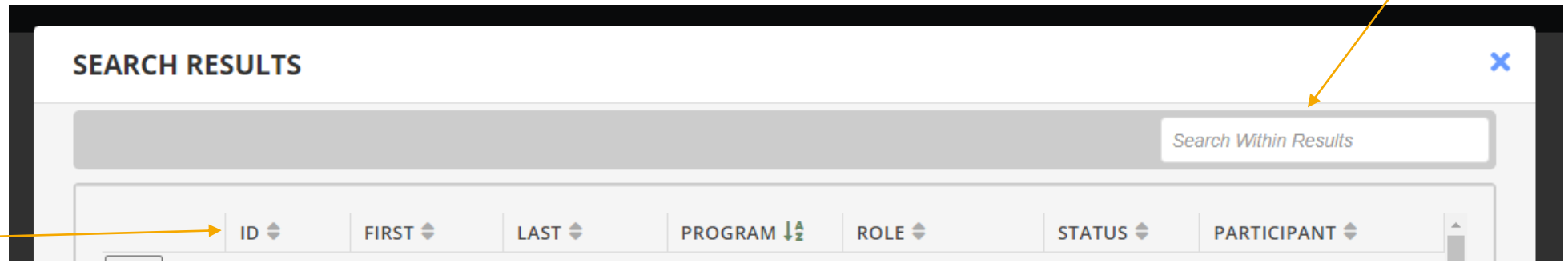
Searching

Once you are logged in, use the "**Search"** at the top to locate the participant, employer, or employee you would like to access. You can search by first name, last name, or PALCO ID number. You can also search by social security number (no dashes) or by the beginning of a user's email address (before the @ symbol).



Searching

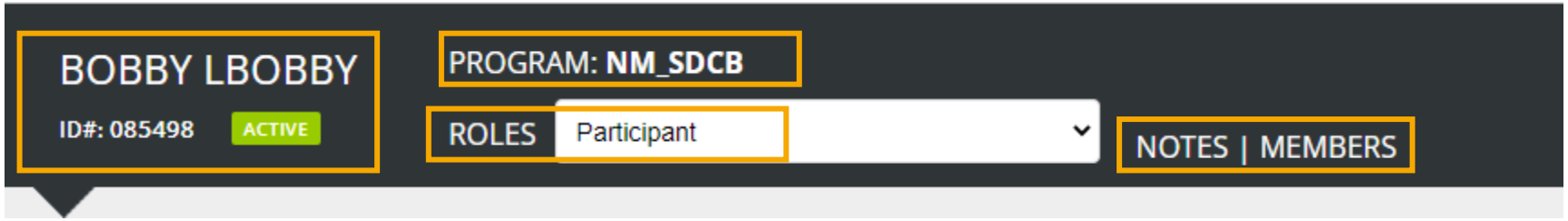
Once your search results display you can sort and filter the results to help narrow down the record you are looking for. You can also search again within the results to help make the results more specific.



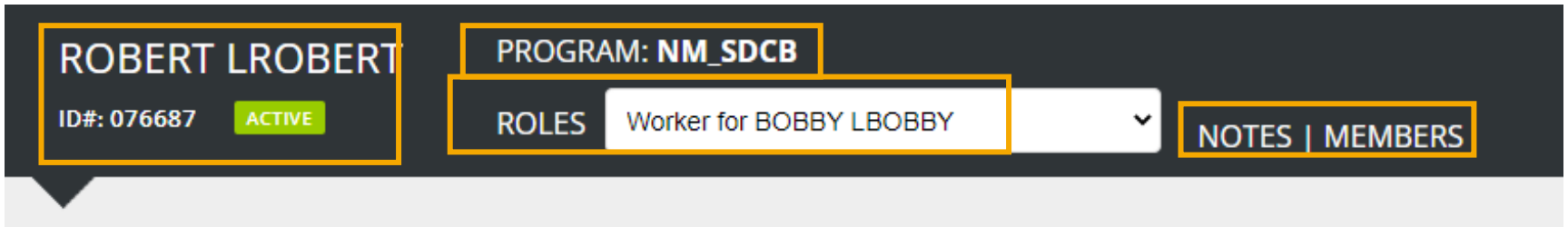
For example, if you typed in the last name Martinez and received many results, you can then type the first name into the “search within results” box to narrow your search.

Profile Menu

Every profile will display a Profile Menu at the top of the screen. The Profile Menu contains information like the individual's Name, Palco ID and Program. You will also see the individual's assigned role, notes and access to associated members.

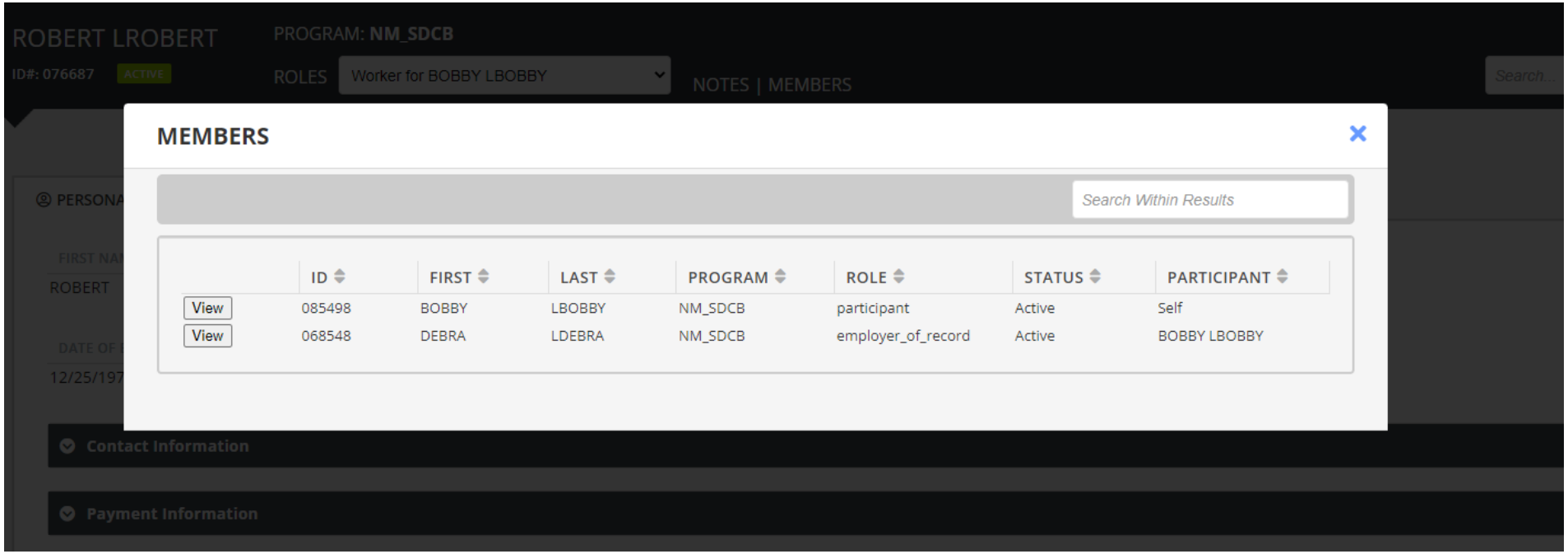


If an individual is associated with multiple people (for example, a worker who is employed by multiple Participants) you can switch between associations by using the ROLES drop down.



Profile Menu

To see all of the associations for that individual (for example, a list of Workers associated with that Participant/Employer) select the MEMBERS option and a list will display.



Tabs and Information

Once you access the record, you will see the options on the left side specific to your user role and permissions.

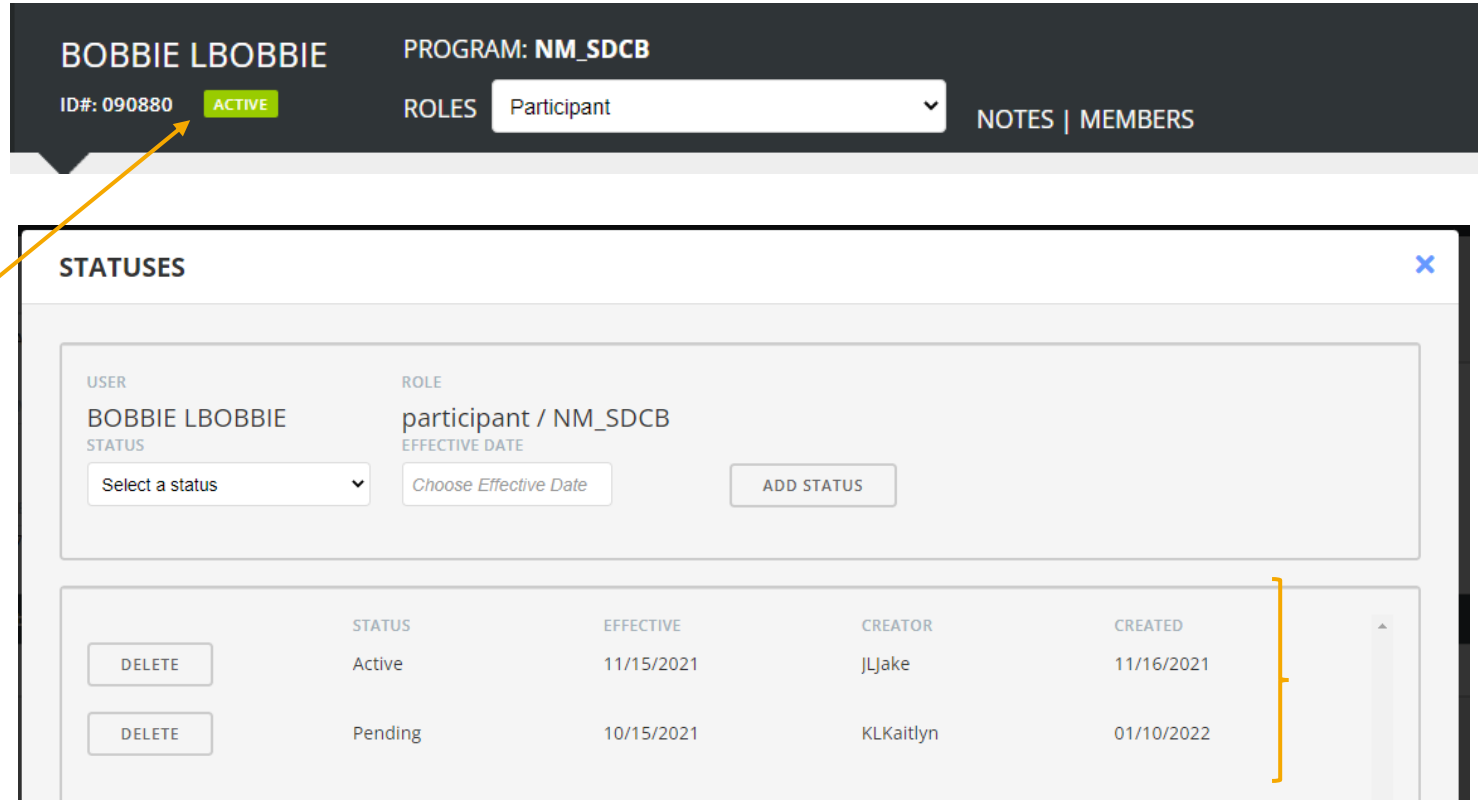
Tab	Function
Member Info	This tab will allow users to see the demographic data for each participant/employer/employee.
Enrollment	This tab will allow users to view the status of the participant/employer/employee enrollment with PALCO.
Budget	This tab is where designated users will enter the participant's budget and others can view budget details – Only viewable on participant profile.
Account Info	This tab will allow users to access time sheet history, utilization report and payments made to employees and vendors.
Employer Cost	This tab is where users will be able to se the cost to the employer in calculating budget checks. You will also be able to see tax exemptions per worker.
Rate of Pay	This tab is where the employee's rate of pay is entered per each service authorization.

Permissions and Caseloads

- Every tab and data element in the system is assigned to a permission set that designates who can see what.
  - If you do not have access to something that you think you need, speak to your supervisor.
- Every Participant is assigned to a caseload via a hierarchy that designates who can see that person and their associated contacts (employer and employees).
  - If you do not have access to a record that you think you should, speak to your supervisor.
- A full list of user roles and permissions is available in the CMP Master User Guide.

Case Status

By clicking on Status at the top of the profile, you can see current and historical statuses, when they are effective, who created them, and when they were created.



The most current status will always display in the main profile menu.

Users with designated access can change the case status via the menu. Every status must have an effective date.

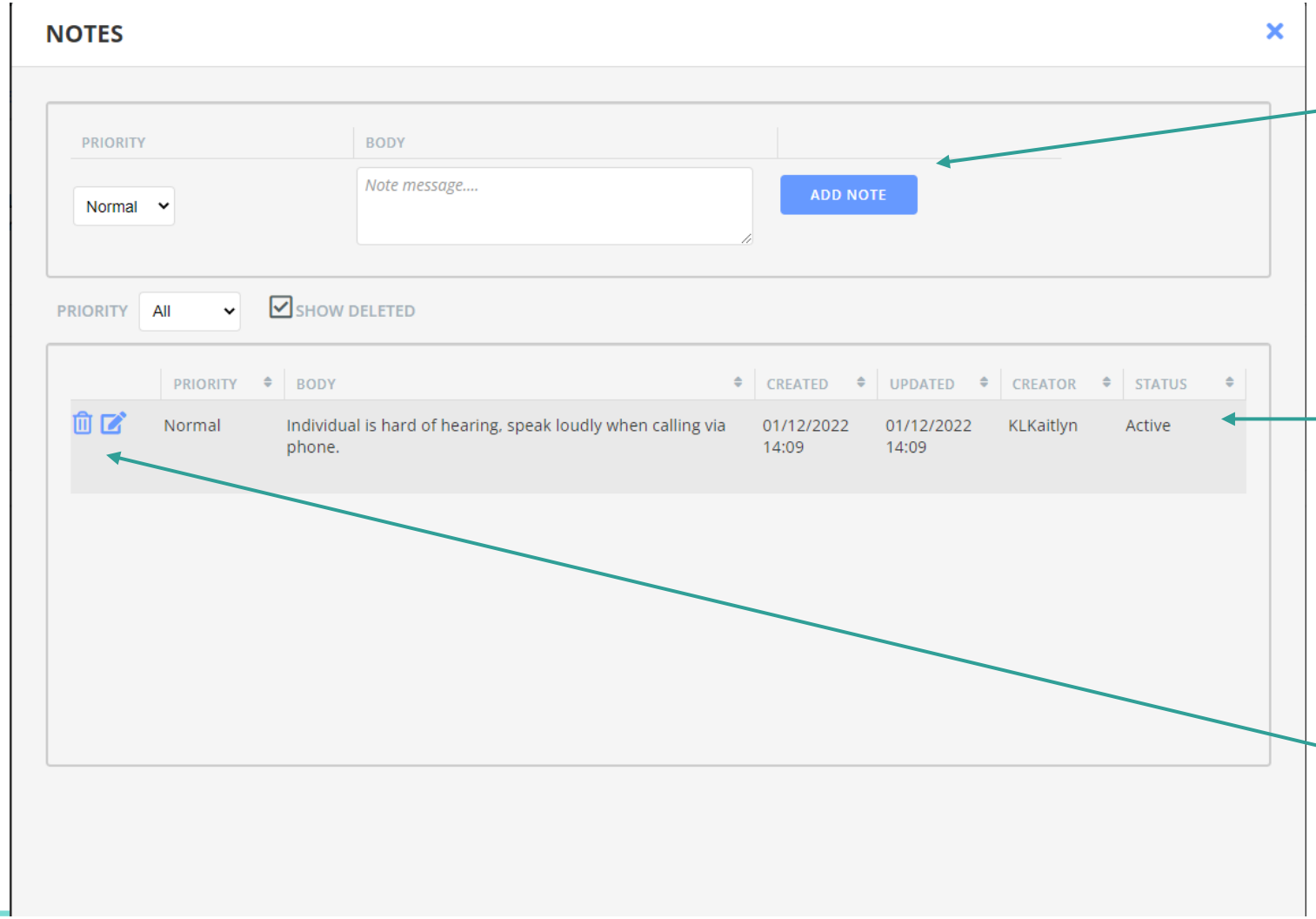
List of Statuses

Role	Case Status	Meaning
Participant	Active	Participant is fully enrolled and able to receive services.
	Terminated	Participant has been removed from the program and can no longer receive services as of the effective date.
	Pending	Participant is in the process of enrolling.
	Deceased	Participant has passed away.
Employer	Active	Employer is fully enrolled.
	Terminated	Employer is no longer active as the employer for the Participant.
	Pending	Employer is in the process of enrolling.
	Deceased	Employer has passed away.
Worker	Active	Worker is fully enrolled and able to be paid.
	Terminated	Employer has fired the worker, or the worker has quit.
	Deceased	Worker has passed away.
	Pending	Worker has completed enrollment and is waiting on start date.

Case Notes

- Case Notes provide anyone accessing the record with important details they may need to know.
  - Think about key things CCSC or another Support Broker may need to know about.
- By clicking on Notes, a pop-up box will display where a person can add notes about the profile. You can choose to add a normal note or an alert.
  - Alerts will pop up in red when any user accesses the profile.
- Once the priority is indicated, the user can write the message in the body and click add note.
- The screen also displays all notes that have previously been written, when they were created and by whom.

Case Notes

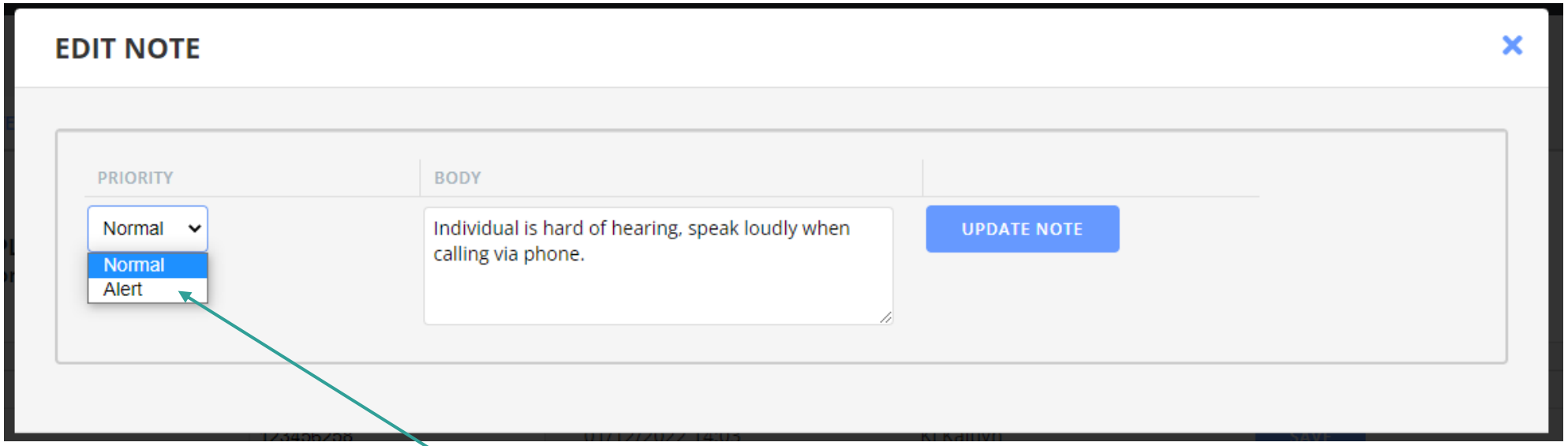


The first section of the Notes screen is for adding new case notes and alerts.

The lower section will provide a log of all historical notes and alerts.

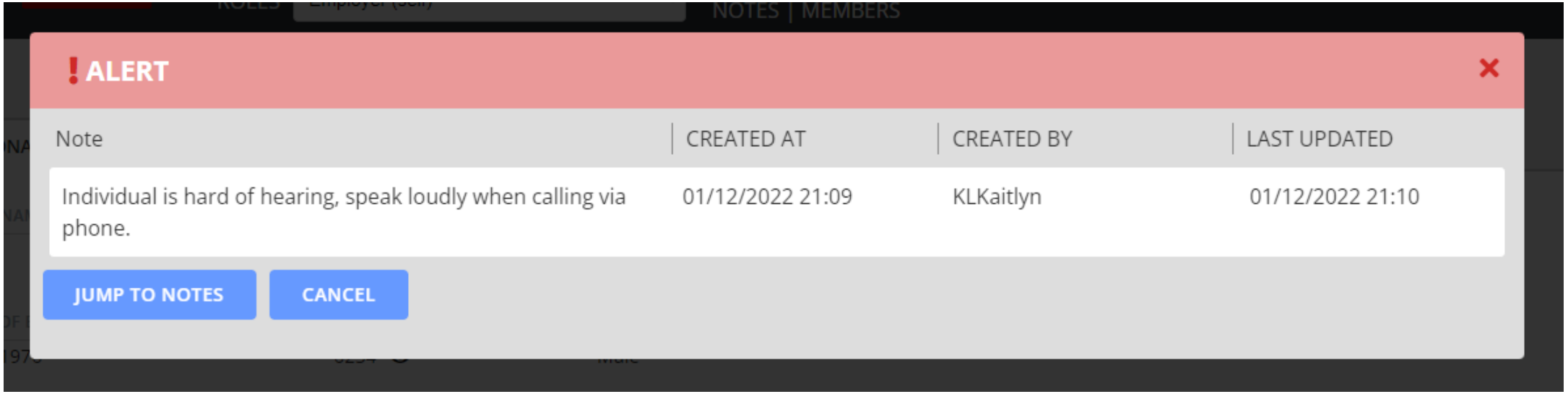
Notes can be deleted if a users has access to that functionality.

Case Notes



When adding or editing a note, you can indicate if it should have normal priority or if it is an Alert you want to pop up in red for anyone accessing the record.

Alerts



Alerts will pop up immediately and display a red attention bar when that individual's profile is accessed.

QUESTIONS

Enter your questions in the CHAT box, we will answer as many as we can.

Break- 10 min

Next- Time Entry / EVV Training will provide details on the Palco Connect application for time management, how it integrates with EVV, and the experience Employers and Workers will have using the Palco tools.

Part Two

Time Entry & Electronic Visit Verification (EVV)

Connect Overview

- Connect is Palco's online time entry portal used by **Employers and Workers** to record and submit their time. This will replace the current system.
- Connect is integrated with EVV and all EVV shifts recorded in AuthentiCare are imported into Connect.
- Connect includes additional features like reports for Employers and paystubs.
- Instructions for using Connect as well as viewing paystubs can be found in the **Time Entry User Guide** for New Mexico located on the Palco website.

EVV

- Electronic Visit Verification (EVV) is used to capture certain services in real time via either the AuthentiCare mobile app or telephony (by calling in).
- EVV shifts are imported from AuthentiCare to Connect daily (every morning for the previous days shifts)
- Shifts must be complete in order to import to Connect.
  - Start and End Date & Valid service code are required
- AuthentiCare Mobile Application will roll out for Mi Via and Supports Waiver on 5/21/2022
  - Telephony option will remain unchanged.

EVV- Mobile Application Registration

Self-Directed Community Benefit (SDCB)	Mi Via & Supports Waiver
The Employer can register workers on the AuthentiCare website. Support Brokers can provide training and assistance on this.	The worker and employer will complete the EVV Registration Form and submit it to Conduent. Conduent will register the device ID provided and issue temporary login credentials via email.

Instructions for obtaining your device ID and the proper setup code specific to your program can be found in the mobile app user guide located on the Palco New Mexico website.

Processing the EVV Form (MV and SW)

- Registration forms received by Conduent for active MiVia and SW workers will need to be keyed into CMP. The device ID must be exactly as shown on the worker's phone.
- The device ID will transfer to AuthentiCare the following business day.
- Conduent staff will need to email the EOR and Worker to let them know it has been processed and provide them the temporary password of “Palco123” for login the next day.

EVV Mobile App Registration Form- New Mexico FFS

This form is for the purpose of Electronic Visit Verification (EVV) registration with Palco as well as changes to an existing EVV registration. Please complete the entire form and review for accuracy before submitting. This form is only for Mi-Via and Supports Waiver Fee for Service (FFS). It cannot be used for SDCB or Agencies.

☐ **New EVV Setup for New Worker** ☐ **Change to Existing EVV Registration**

PARTICIPANT INFORMATION		
Full Name (First, Middle, Last):		Email:
Palco ID:	SSN:	Phone:

EMPLOYEE INFORMATION		
Full Name (First, Middle, Last):		Email:
Palco ID:	SSN:	Phone:

Finding your Device ID:

1. Using the smart phone or device that will be used for clocking in/out, go to the iPhone app or Google play store and search for the “Authenticare” app.
2. Download the app.
3. When the download is finished, open the app.
4. Tap “allow” for the app to access the devices location and to make and manage phone calls.
5. Enter the set-up code for New Mexico FFS which is, “**PALCONMPRD**”
6. On the login screen, click on “Settings” at the bottom right of the screen.
7. Click on “See Device Identifier” from the menu options.
8. Record your Device ID exactly as it is shown on the screen below. Please include all letters, numbers, and dashes.

AUTHENTICARE MOBILE APPLICATION REGISTRATION

Device ID:

PRINT CLEARLY! INCLUDE ALL DASHES (-) IF APPLICABLE.

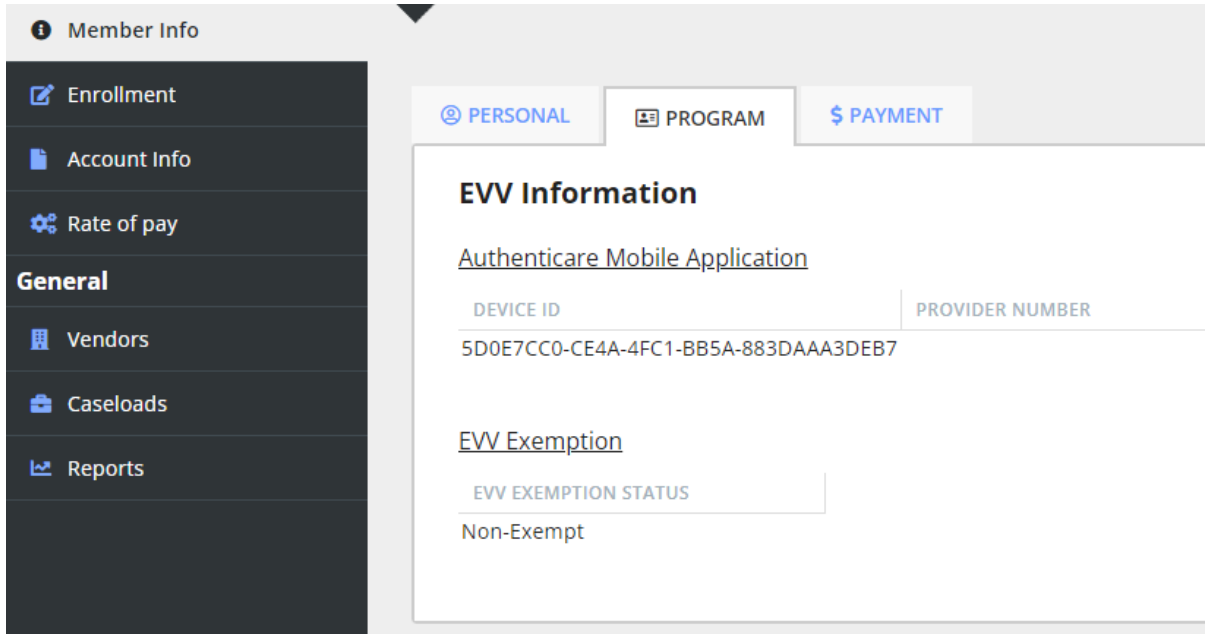
For instructions on obtaining your Device ID with images, visit https://palcofirst.com/new-mexico/ . Failure to provide your proper device ID will result in your time being rejected and a delay in payroll. Your device ID is NOT your phone number, IMEI number or serial number! You must follow the instructions above exactly.

Processing the EVV Form(MV and SW)

- Conduent will update this in CMP by navigating to the worker's profile, selecting the Member Info tab, and clicking on the Program sub-tab.

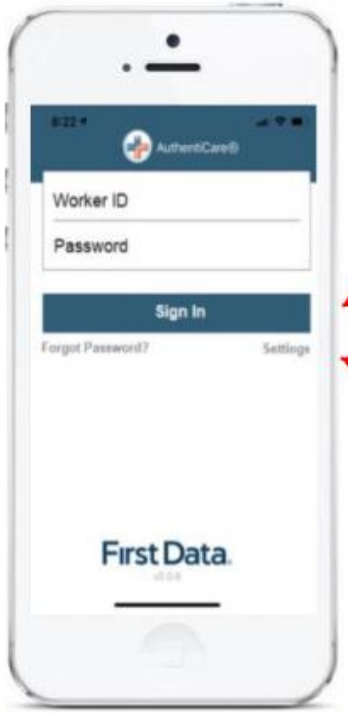
- Information pushes to AuthentiCare from CMP the next business day! This means the worker will need to wait to log in at least 1 day after their form as been processed or an update has been made.

This is a common troubleshooting item for CCSC assisting workers/employers with EVV.



EVV- Using the Mobile Application

PALCO EVV AuthentiCare Mobile App



Click **"Sign In"** to start

Click **"Settings"** to obtain Device ID.

QR Code- Sharing Devices

(Mi Via and Supports Waiver Only)

- Workers are highly encouraged to not share devices. If a device is being shared, it is recommended they use the Telephony option (rather than mobile app)
  - If mobile app is preferred, all workers should use their own unique device and not share if possible.
- If a worker MUST temporarily use a smartphone that is not theirs OR share a smartphone with other workers a QR code can be generated.
- To request a QR code, the Employer will need to contact the FISERV Helpdesk at 1-800-441-4667 *(6:00 AM – 6:00 PM MST, M-F)* to request a QR code for each worker.
  - The QR Code will be unique to each worker and can be printed and used to scan repeatedly for each shift.

Overlapping Jurisdiction Users

- If a worker provides services for a Participant on multiple programs (ex: Self-Directed Community Benefit and Mi Via or Supports Waiver) then they must reset their app before every use.
  - The correct setup code, which is entered at the very beginning download of the app, must be entered or else you will not be able to find the correct Participants.
  - Refer to the AuthentiCare Mobile App Instructions, on the Palco website, for each program to obtain the setup code.
  - This process will be labor intensive at each shift and is not recommended.
- It is recommended that workers who provide services for Participants in both Mi Via / Support Waiver and Self-Directed Community Benefit programs use different devices for recording time or different methods.
  - *For example: Mobile App with Participant A on Mi Via and Telephony for Participant B on SDCB.*

AuthentiCare Access

- SDCB Employers will have read only access to the time entry section of AuthentiCare once Phase II is live.
  - No time entries or edits will be allowed in AuthentiCare. All time management will happen in Connect.
  - SDCB Employers will still be able to register new Workers in AuthentiCare.

- Mi Via and Supports Waiver Employers will not have any access to AuthentiCare (unchanged).

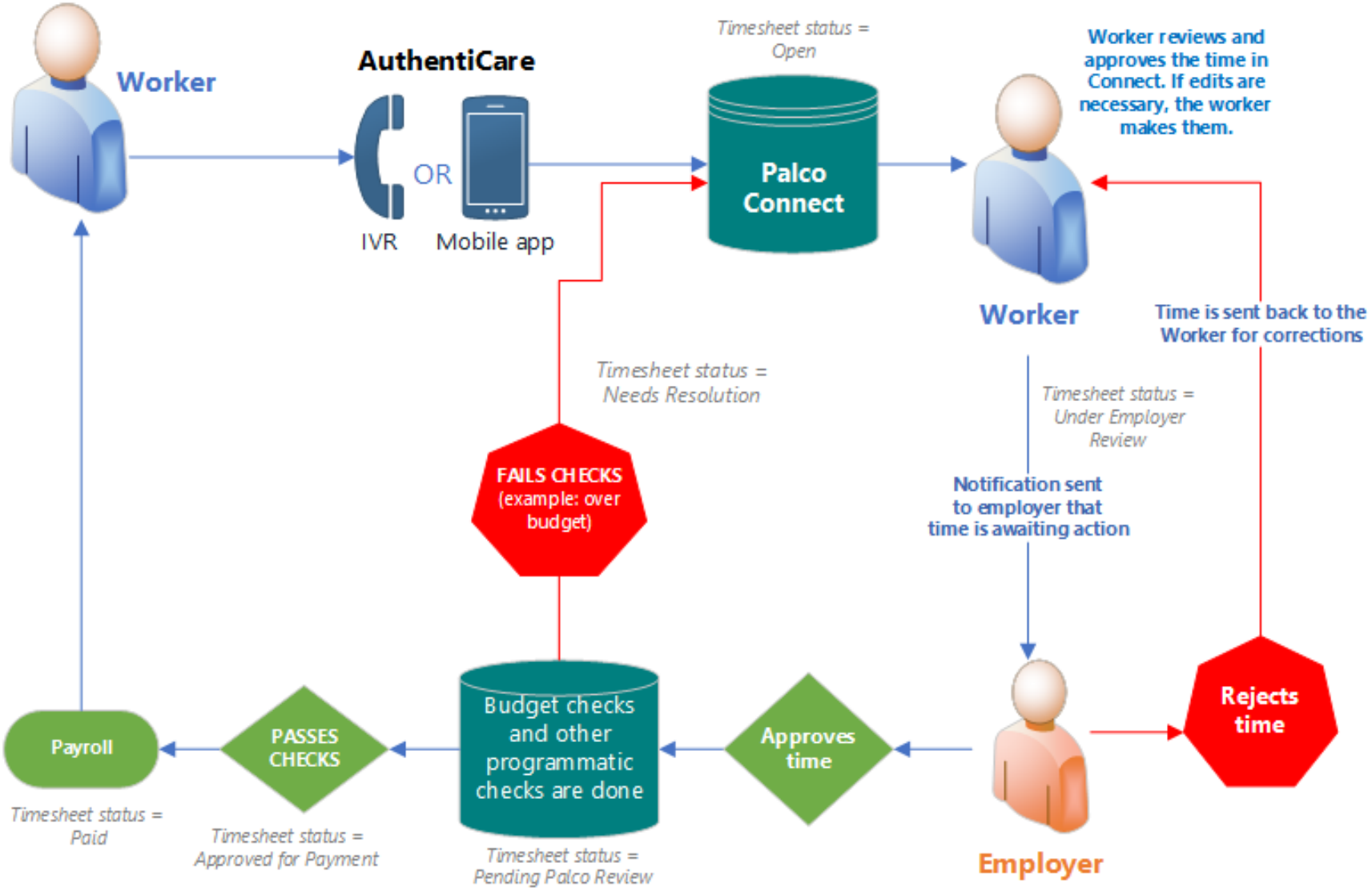
EVV Exemptions

- If a Participant is approved for an EVV or Online time entry exemption, they will be allowed to submit paper timesheets.
  - Speak to your Consultant/CSC/Support Broker for more information
- Anyone else without an approved exemption is required to use EVV and Connect.

QUESTIONS

Enter your questions in the CHAT box, we will answer as many as we can.

Payroll Process- General



Payroll Process- Deadlines

- Pay Periods run Saturday-Friday, two weeks long
  - **Paper timesheets** are due the Saturday following the end of the pay period by midnight.
  - **Online timesheets** must be submitted by Tuesday at 12:00pm following the end of the pay period.
- Payments are made by Palco every other Friday by 5pm following the published payroll schedule
- Review the payroll schedule for full details: https://palcofirst.com/wp-content/uploads/2021/12/NMSD_Payroll_Schedule_2022.pdf

- Let's look at an example
  - The pay period highlighted below starts 4/9 and ends 4/22.
  - Paper timesheets are due by Saturday 4/23 and online time must be submitted by the Employer by 4/26 at Noon.
  - Payments are issued on 5/6.
- Any time not submitted by the designated deadlines are not guaranteed for payment on that pay day.

New Mexico Self-Direction Program

Service Period		Faxed Timesheets Due by 12 am	Online Timesheets Due by 12 pm	Payments Made by Palco by 5pm
SATURDAY	FRIDAY	SATURDAY	TUESDAY	FRIDAY
Start Date	End Date	Deadline	Deadline	Paid On
March 26, 2022	April 8, 2022	April 9, 2022	April 12, 2022	April 22, 2022
April 9, 2022	April, 22, 2022	April 23, 2022	April 26, 2022	May 6, 2022
April 23, 2022	May 6, 2022	May 7, 2022	May 10, 2022	May 20, 2022

Connect Overview (recap)

- Connect is Palco's online time entry portal used by Employers and Workers to record and submit their time.
- Connect is integrated with EVV and all EVV shifts recorded in AuthentiCare are imported into Connect.
- Connect includes additional features like reports for Employers and paystubs.
- Instructions for using Connect as well as viewing paystubs can be found in the **Time Entry User Guide** for New Mexico located on the Palco website.

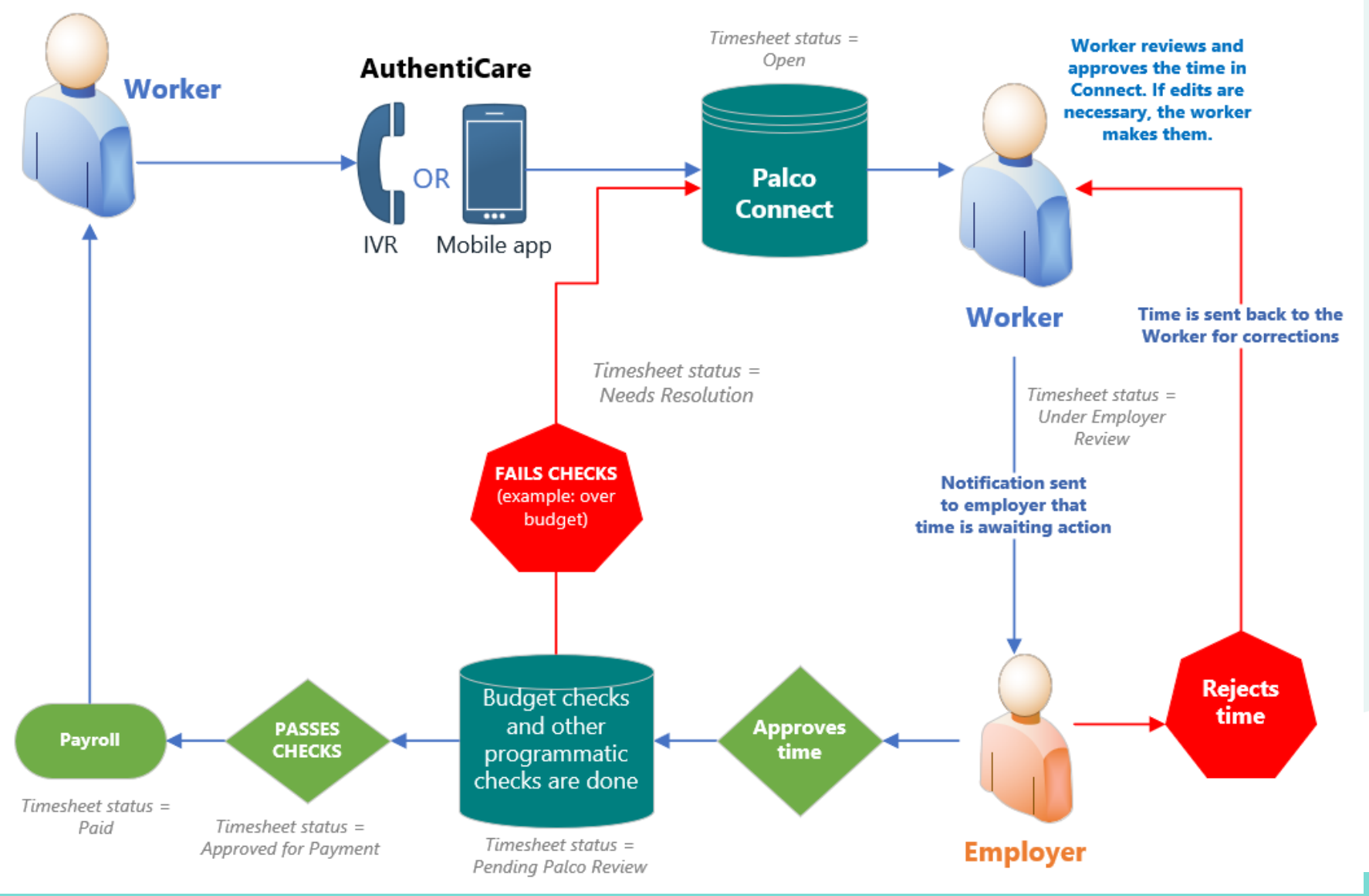
Pay Statuses

Status	Description
Open	Data has been received from EVV system and is ready for worker review. Changes can be made to the time at this stage.
Under Employer Review	Time has been submitted to the Employer for approval.
Needs Resolution	The Employer has rejected the time and sent it back to the worker for correction. Changes can be made to the time at this stage.
Under Palco Review	Time has been submitted by the Employer to Palco. Palco is performing validations on the time to ensure it is payable and there are no issues.
Approved for Payment	Time has passed all Palco checks and validations. It is going through the final step of billing before it can be paid.
Paid	The timesheet is closed and paid.
Rejected	Palco rejected the timesheet for the reason listed in the portal. No changes can be made. To correct, a new timesheet must be started via Connect and will be recorded as an edited timesheet facing the same warnings as listed above.

Registering for Connect

- All Employers and Workers must register for Connect using the online web page.
  - An email will be sent out about this prior to go-live.
- Link to Register in Connect - **https://connect.palcofirst.com/#/registration/data_verification**
  - Employers and Workers will Register with their Palco ID, Social Security Number and email address.

Connect with EVV Process Flow

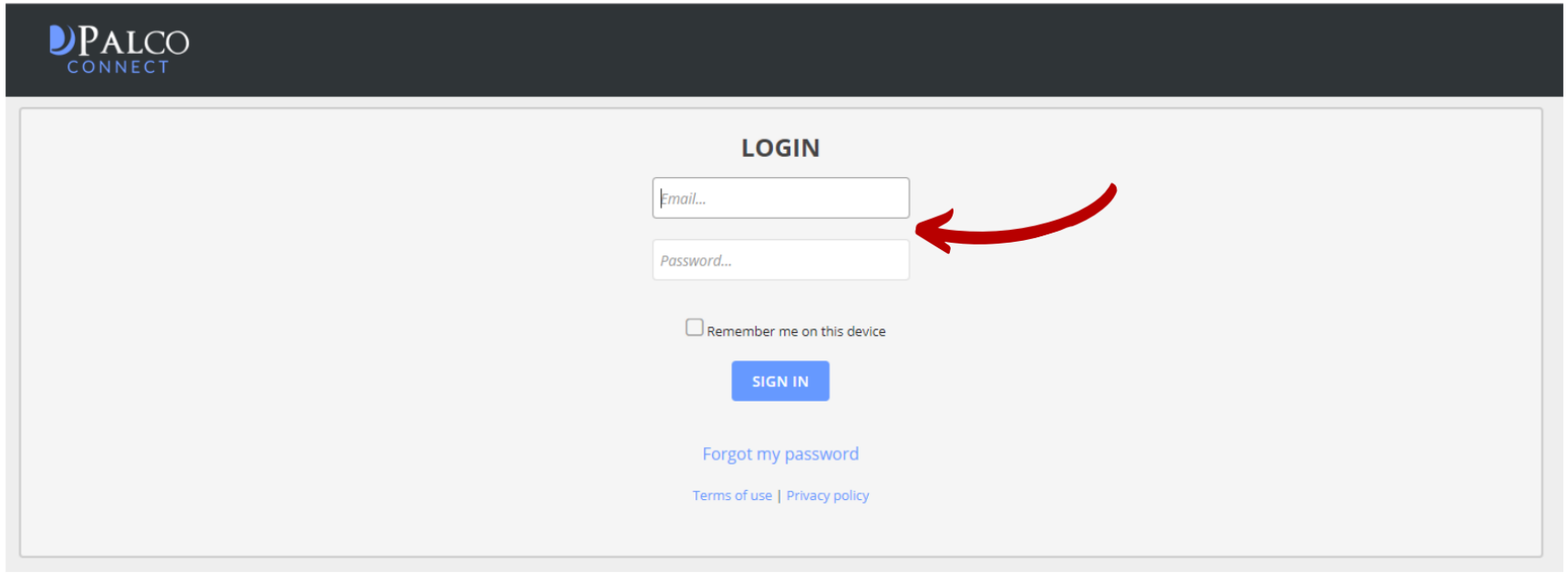


EVV & Connect Integration

- Shifts are imported into Connect from AuthentiCare daily each morning.
  - This means Employers and Workers will see their EVV shifts the next day.
- Time comes in to Connect in an “open” status under the **Worker**.
- Time must be reviewed and submitted for approval at the end of each pay period (not every day).

Reviewing/Approving Time- Worker

1. The worker will login to Connect for initial review.



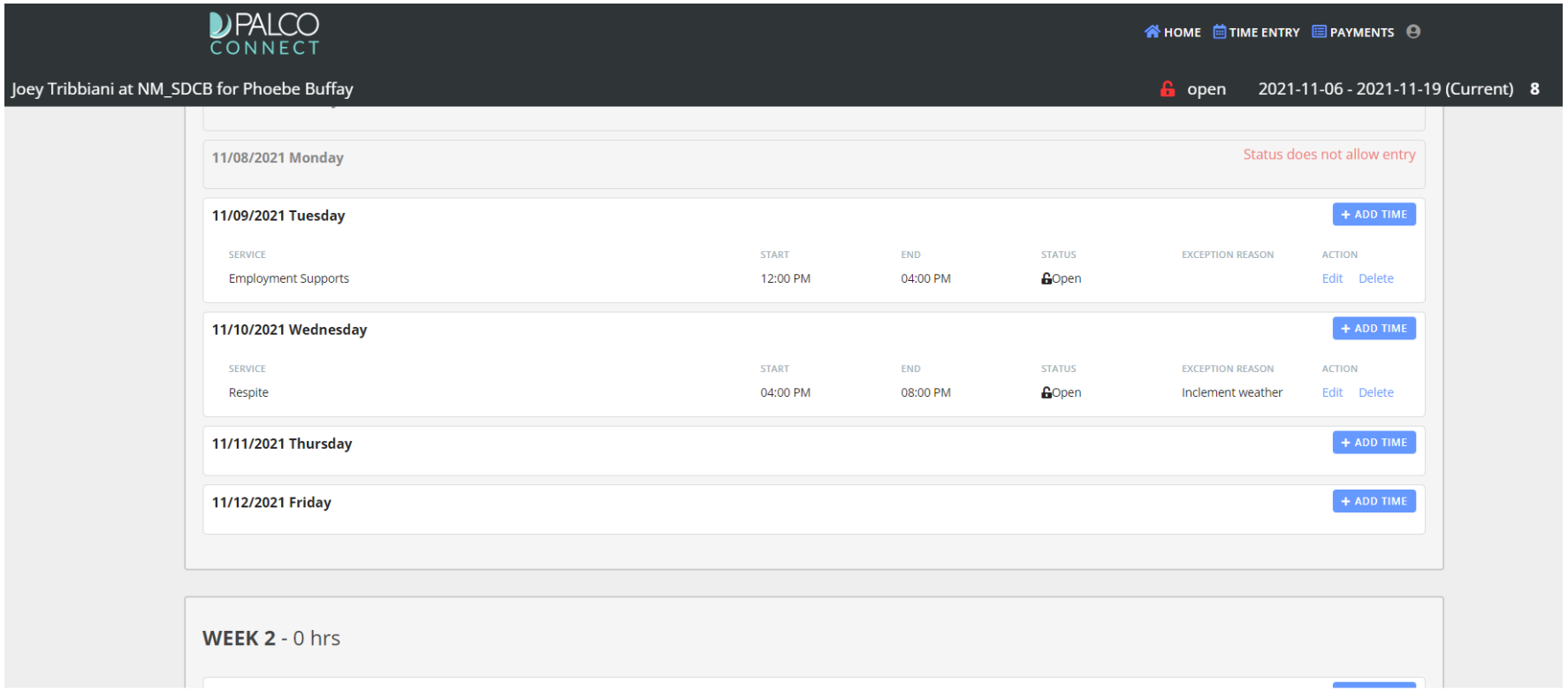
Website: connect.palcofirst.com/

Reviewing/Approving Time- Worker

2. The Worker clicks time entry at the top, selects their participant and selects the current time sheet.

Reviewing/Approving Time- Worker

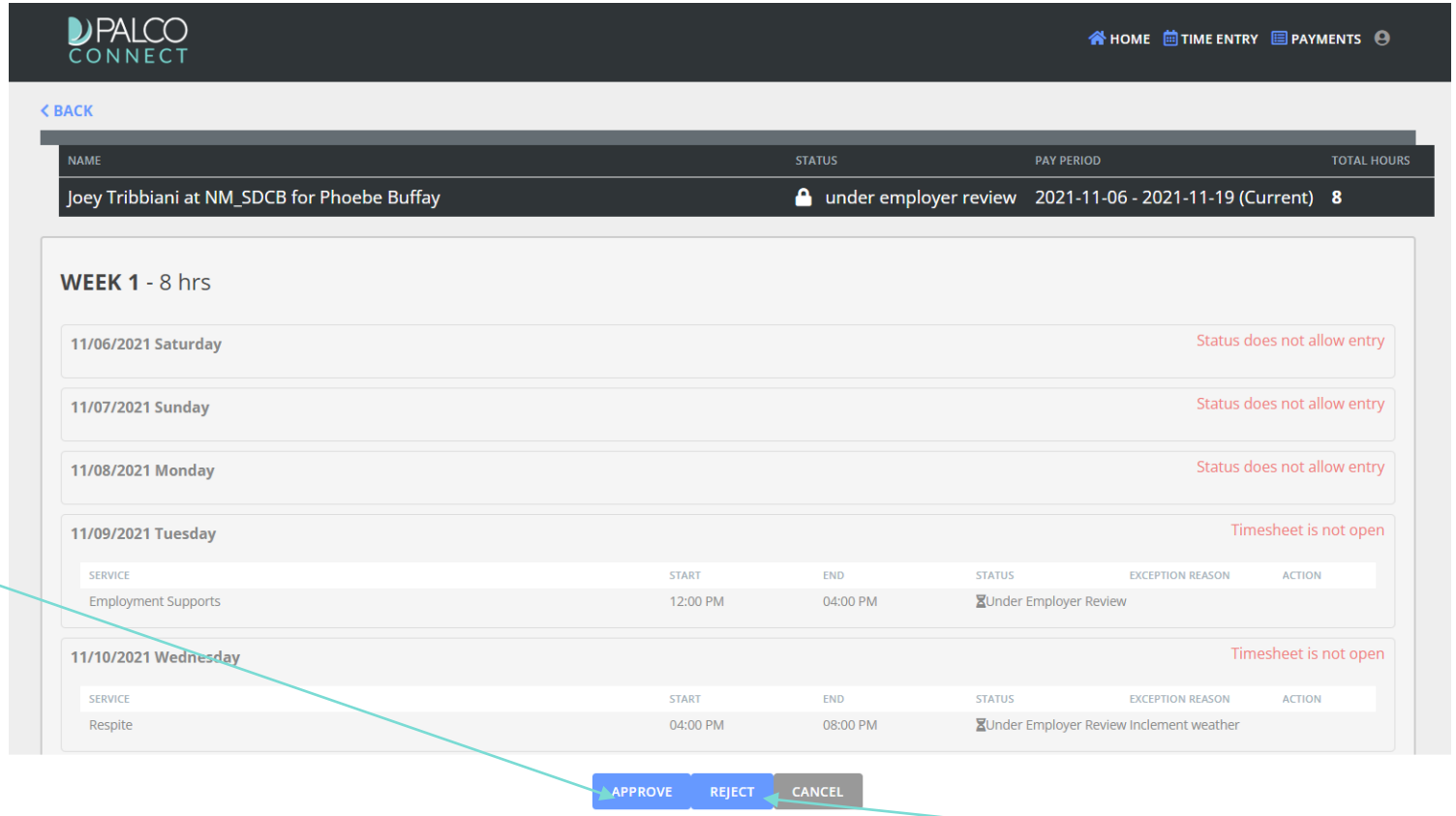
3. The Worker will review all the submitted time and ensure it is correct. If everything looks correct, select “SUBMIT FOR APPROVAL”

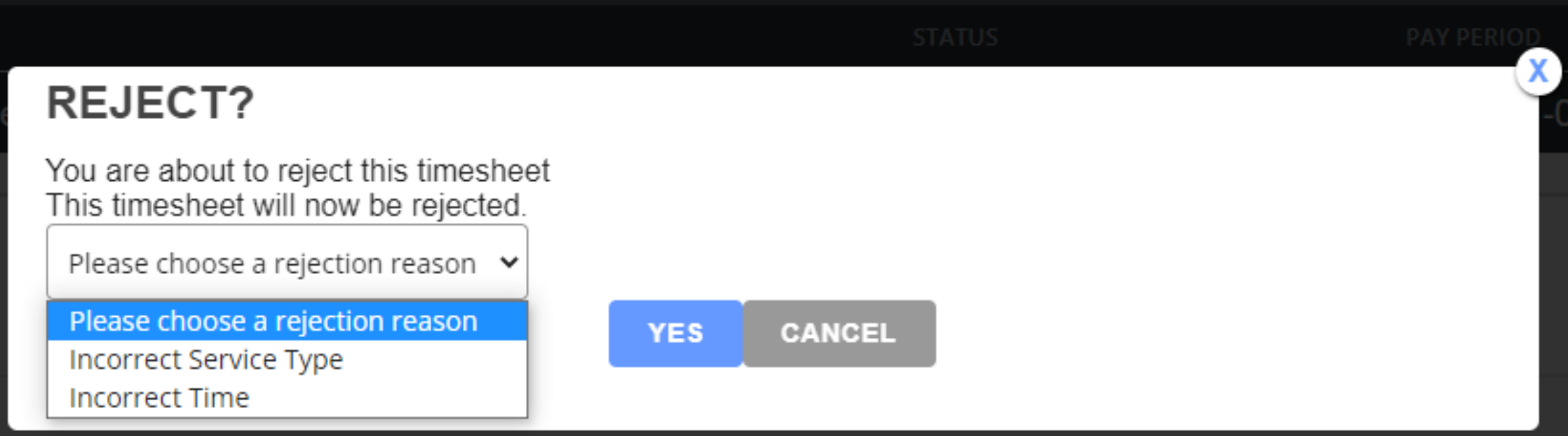


Reviewing/Approving Time- EOR

The **employer** will then login to their account and choose to Approve or Reject the time.

Approving Time can be done by selecting the blue "Approve" button at the bottom.



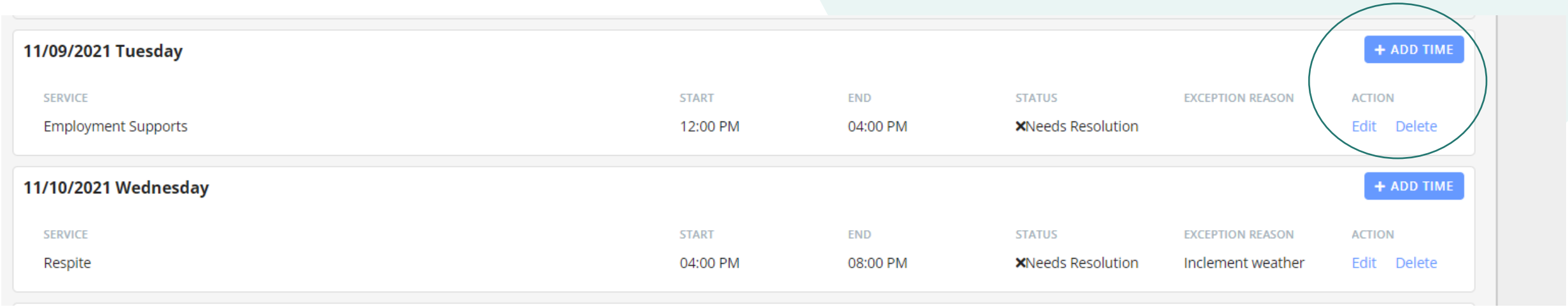


Rejecting Time

- Selecting "Reject" will deny the timesheet and send it back to the worker for corrections
- The Employer will need to indicate the reason they are rejecting the timesheet.
- Employers should only reject a timesheet if it is wrong or requires an edit.
- Edits should only be made when <u>necessary</u>! Edits on EVV time will be flagged and too many edits could cause Employers to be out of compliance with the 21st Century Cures Act.

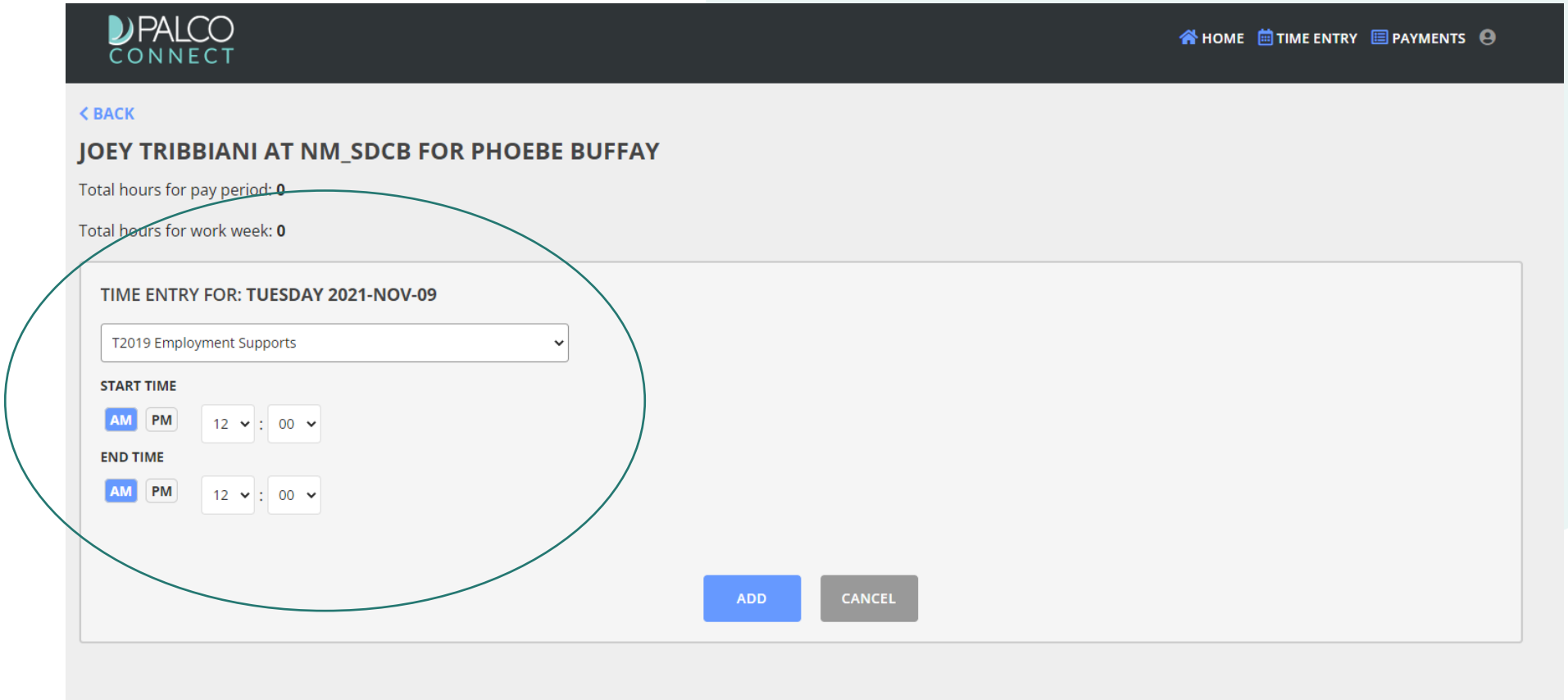
Modifying/Adding Time

1. If a shift requires an edit or a new shift needs to be added, the worker must do this while the timesheet is in an “Open” status in Connect. They can select “+ Add Time” “Edit” or “Delete” on the right-hand side next to any shift.



Modifying Time

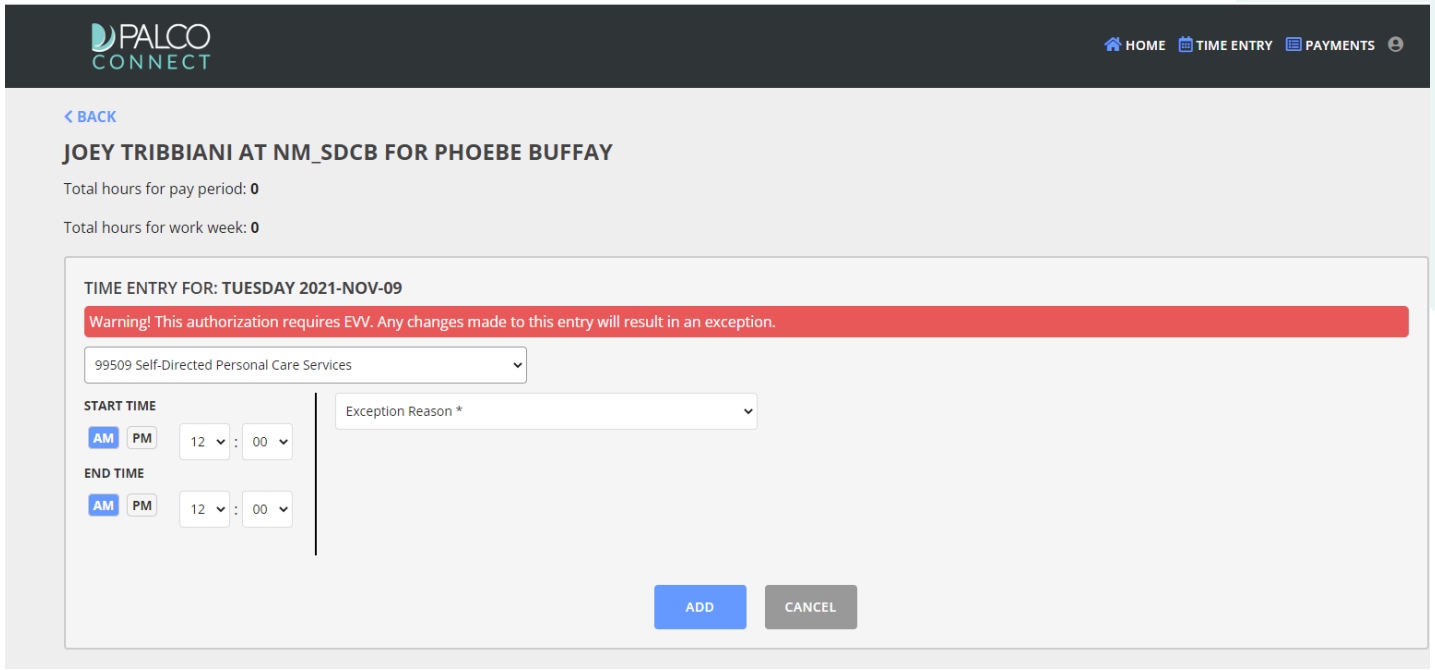
2. In Edit mode, the worker can change the service type or adjust the start and end time using the drop-down boxes.

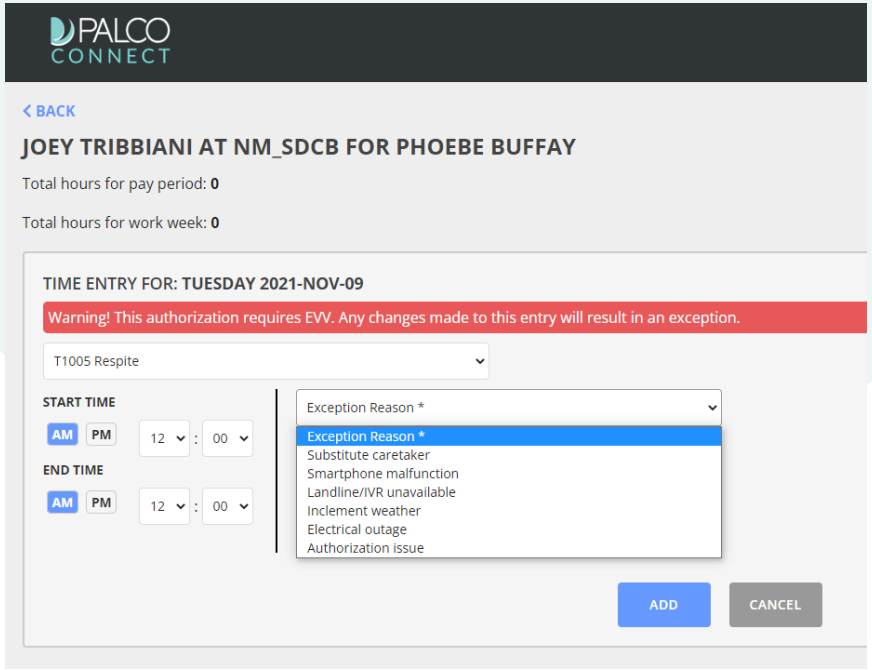


Modifying Time

3. If the service code being entered/modified is an EVV service, the system will alert them that they are changing a shift that requires EVV and ask them to select the reason* for why they are editing/adding a shift.

Warning! This authorization requires EVV. Any changes made to this entry will result in an exception.

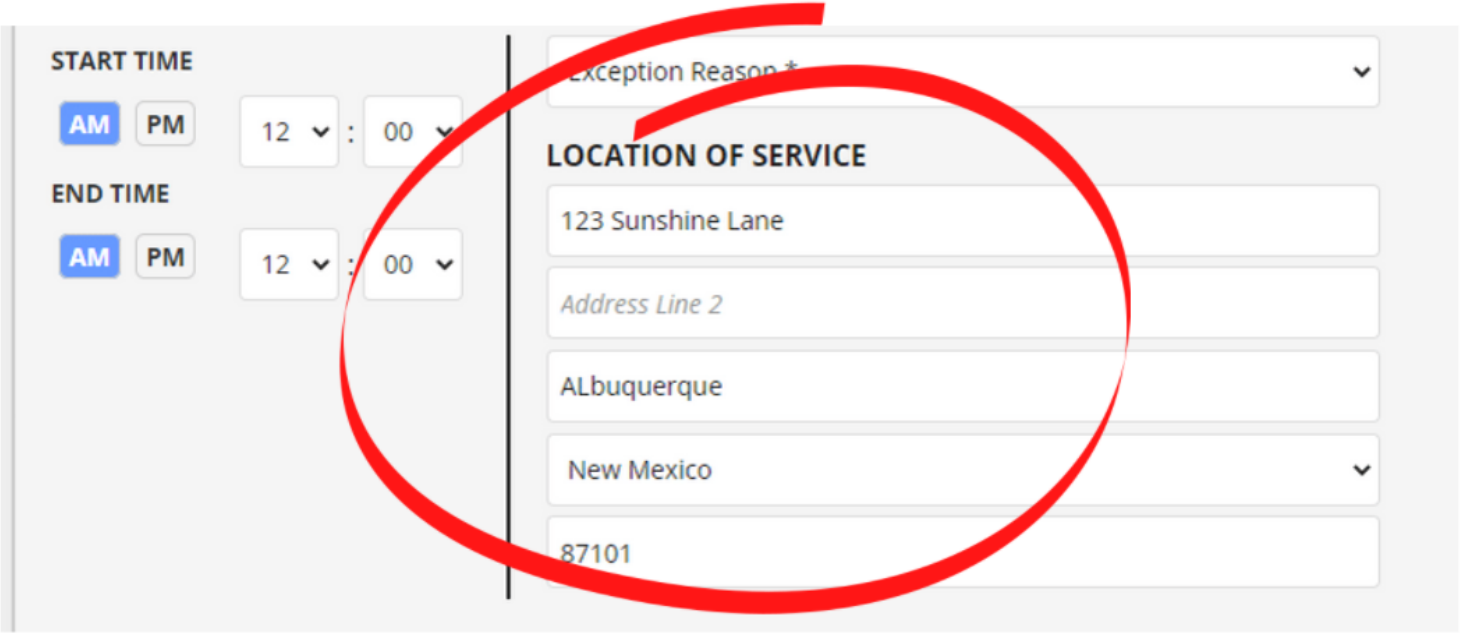




** Reason codes will vary based on the program they are working for.*

Modifying Time

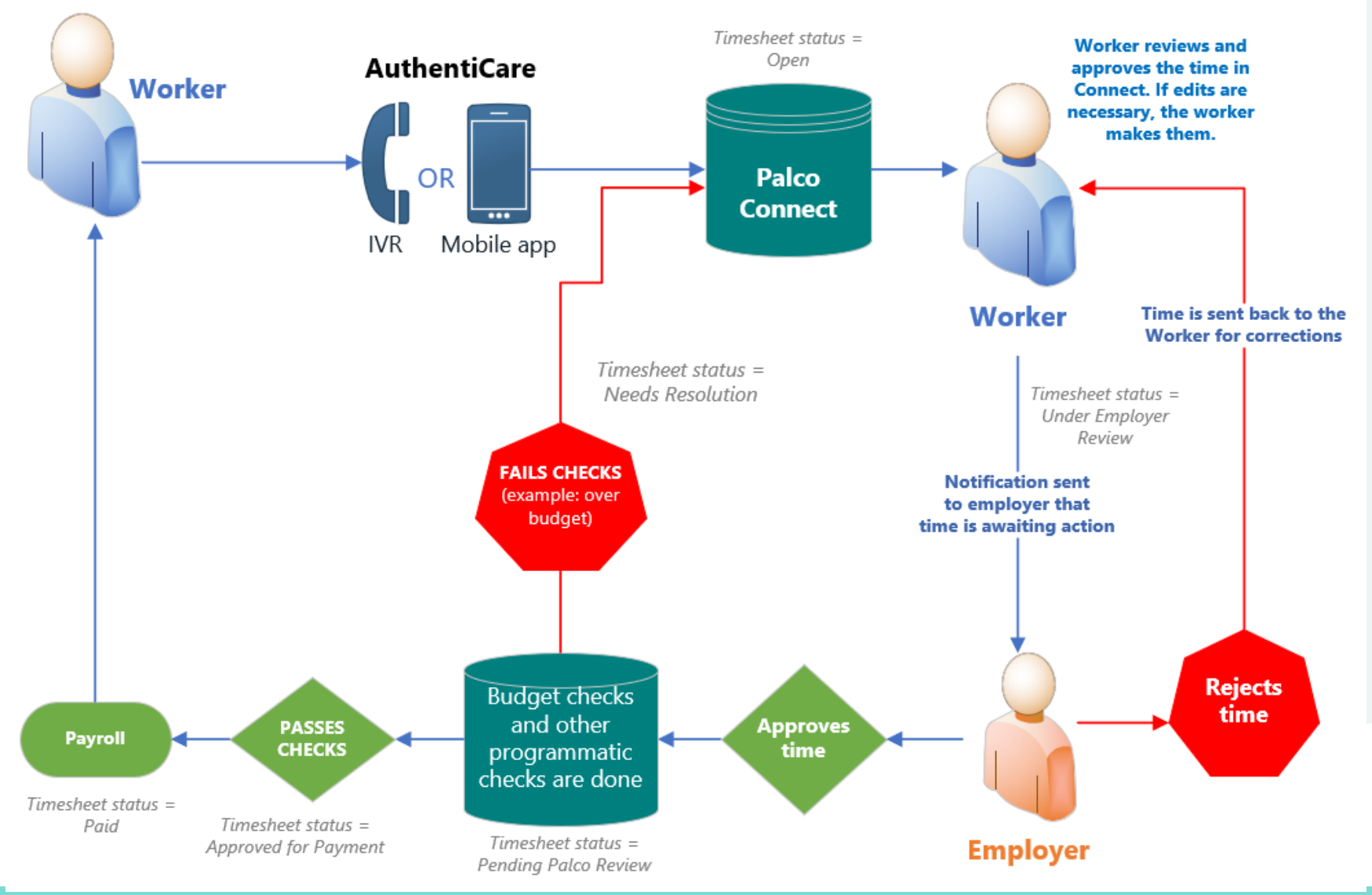
4. Edits and manual entries to EVV time will also require the worker to indicate the location where services were provided. Enter the full address including city, state and zip where services were provided.



Modifying Time

4. Once all edits are complete, the worker can submit for approval by the Employer and the cycle begins again.

Connect with EVV Process Flow



Payroll Validations

- Once a timesheet is submitted by the Employer to Palco, the timesheet will become locked and in a “Pending Palco Review” status.
  - This status indicates Palco is running payroll validations to check that the timesheet is payable in accordance with State, Federal and Program rules.
- A few examples of things Palco will check for include:
  - Medicaid Eligibility for the Participant
  - Worker enrollment completion
  - Budget authorization for funds and units
  - Budget authorizations for services

Failures and Rejections

- If a timesheet fails the validation process, the Employer will be emailed immediately notifying of the issue and what corrections are needed.
  - For example, if a timesheet has more hours than what is allowed on the budget, the Employer will be emailed notifying of the overage and what shifts are causing the issue.
- The Worker will then need to log in to Connect and fix the timesheet in a “Needs Resolution” status.
- They will resubmit the timesheet to the Employer who will then log in to Connect to review and resubmit to Palco.
- Then, the validation process begins again.

Notifications

- In addition to the failure email notifications just covered, the Palco system will also send notifications for other timesheet events that occur such as:
  - A timesheet is ready for Employer review
  - A timesheet has been rejected by the Employer and requires corrections

Quick Question Check In

Enter your questions in the CHAT box, we will answer as many as we can.

Connect Reports

In addition to being Palco's time entry system, the Connect Portal also provides valuable reports for supporting the journey of self-directed services and supports.

Two of those features are Spending Summaries and Payment Details.

Both of these reports can be accessed by logging in to the Connect Portal: **https://connect.palcofirst.com/**

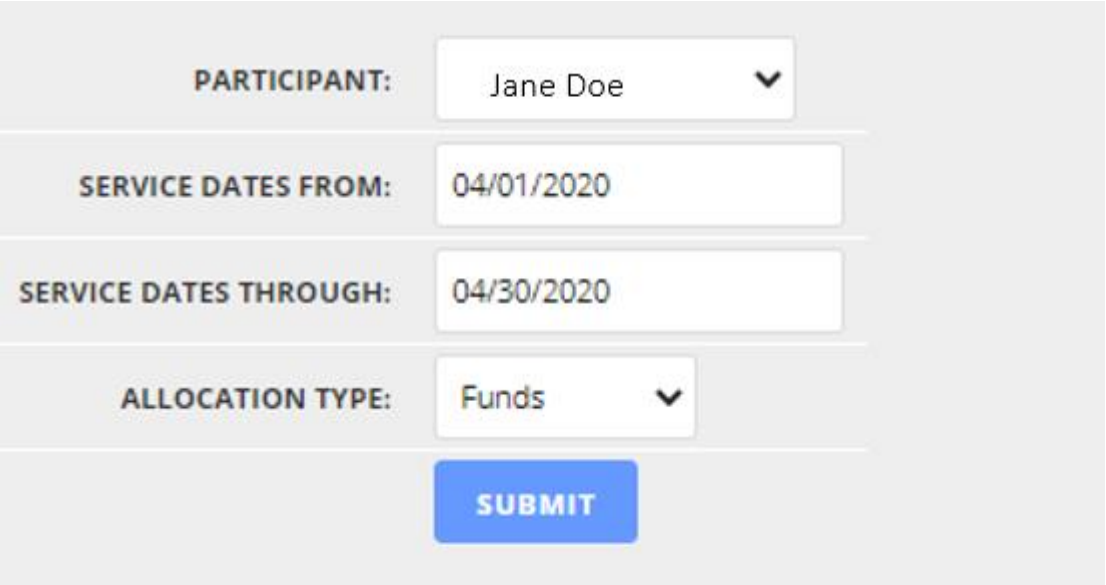
- **Spending Summaries** provides Employer's information to help track utilization.
- **Payment Detail** provides both the Employer and worker, employed by the participant with access to pay stub information and history.

Spending

Spending details are available only to the Employer. To Access, login to Connect and select “Spending” from the tool bar in the top right of the screen.

Spending

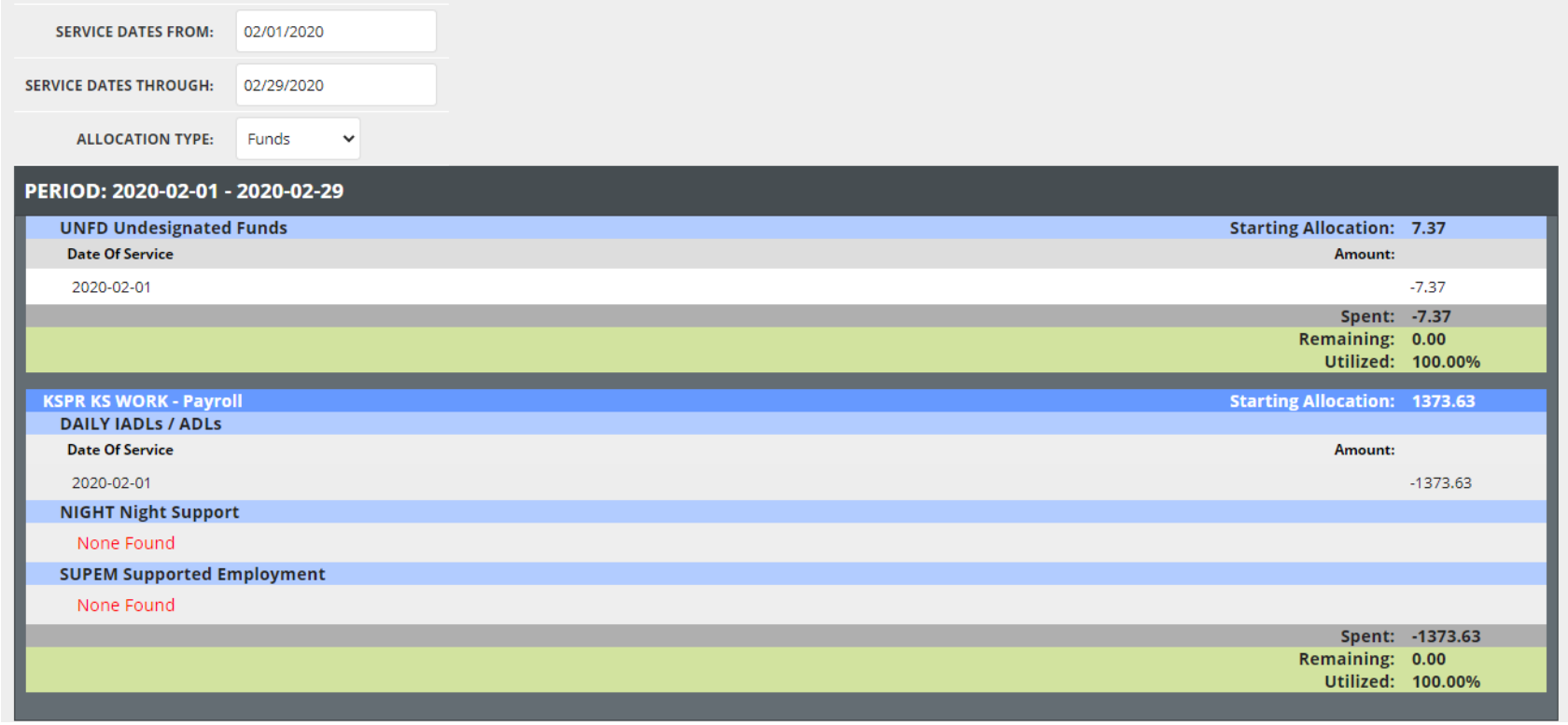
Once on the spending screen, you can enter the details for the date span you would like to see.



- *If you are an employer for multiple participants, choose the participant you want to see utilization for.*
- *Enter the start and end date for the span you would like to see, you can focus on one specific pay period or longer.*
- *Under "Allocation Type" you can select either **Funds** which will display dollars or **Units/Hours** to display the number of hours used.*
- *Once you have set up all of your search criteria, hit **Submit**.*

Spending

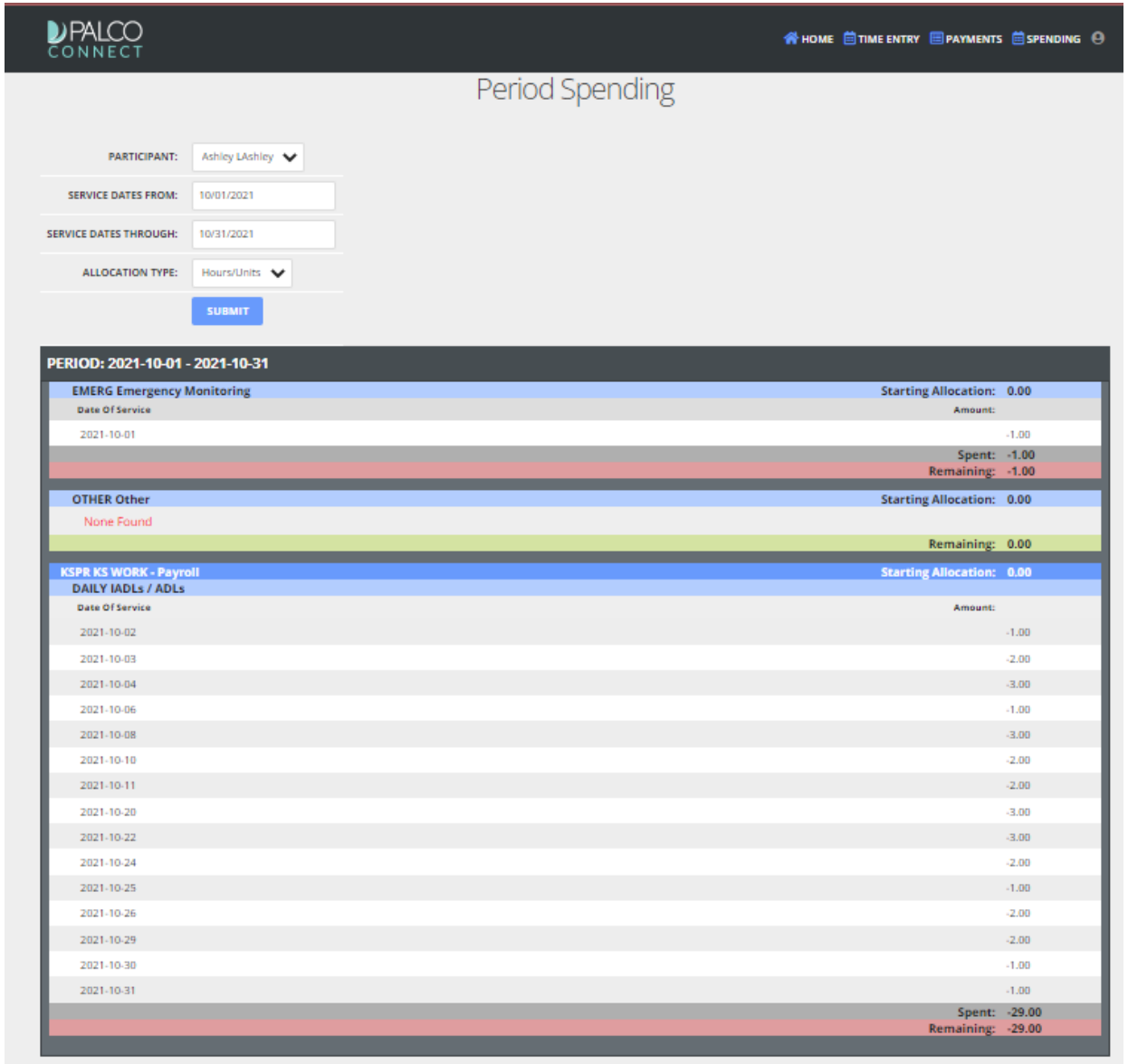
Once you click submit, the details will display.



- *The bottom bar will display the total amount spent and total amount remaining for the month.*
- *You will also see the percentage of the budget that was utilized.*

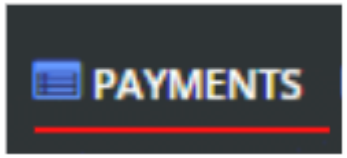
Spending

If you want to see hours used per service category, select “Hours/Units” when you search, and the system will display the number of hours you used for each service code during that pay period.



Pay Stubs

- Paystubs are visible by both the Employer and Workers on pay day.
- Payment details are available to both the Employer and the worker, employed by the participant. To access, login to Connect and select "Payments" from the tool bar in the top right of the screen.



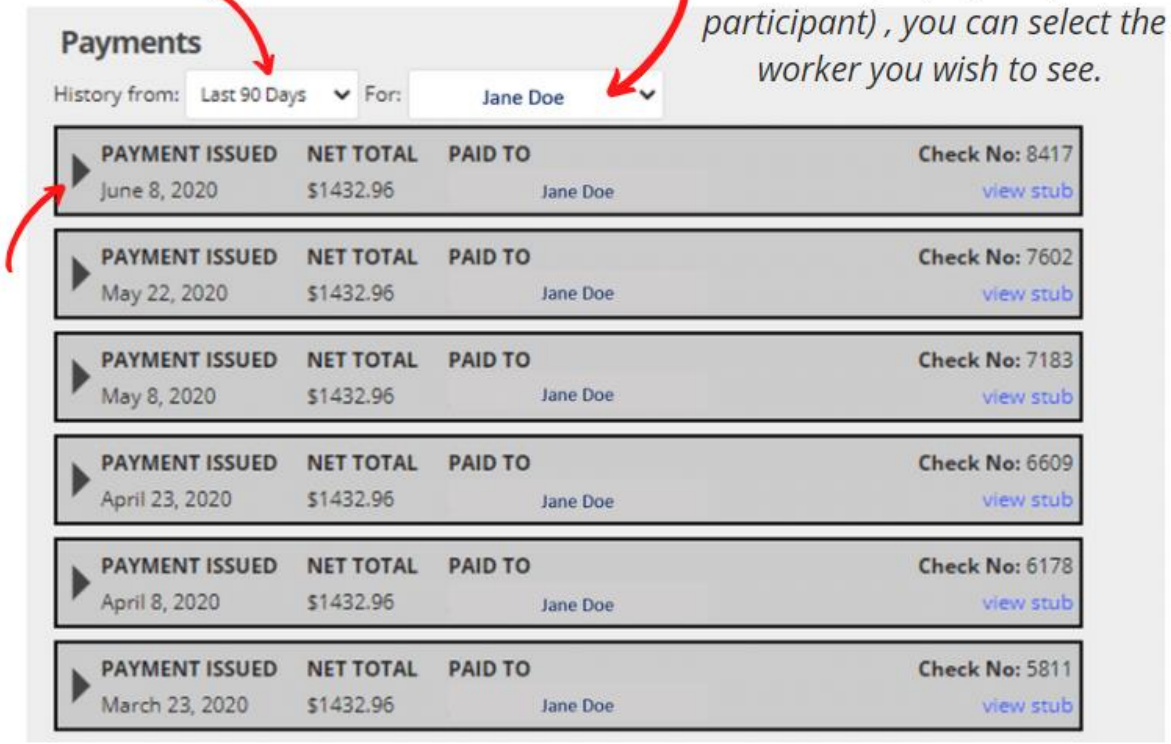
Pay Stubs

- Once on the payment screen there are many options:

Select the time frame for what stubs you would like to see

If you are an employer with multiple workers (employed by the participant) , you can select the worker you wish to see.

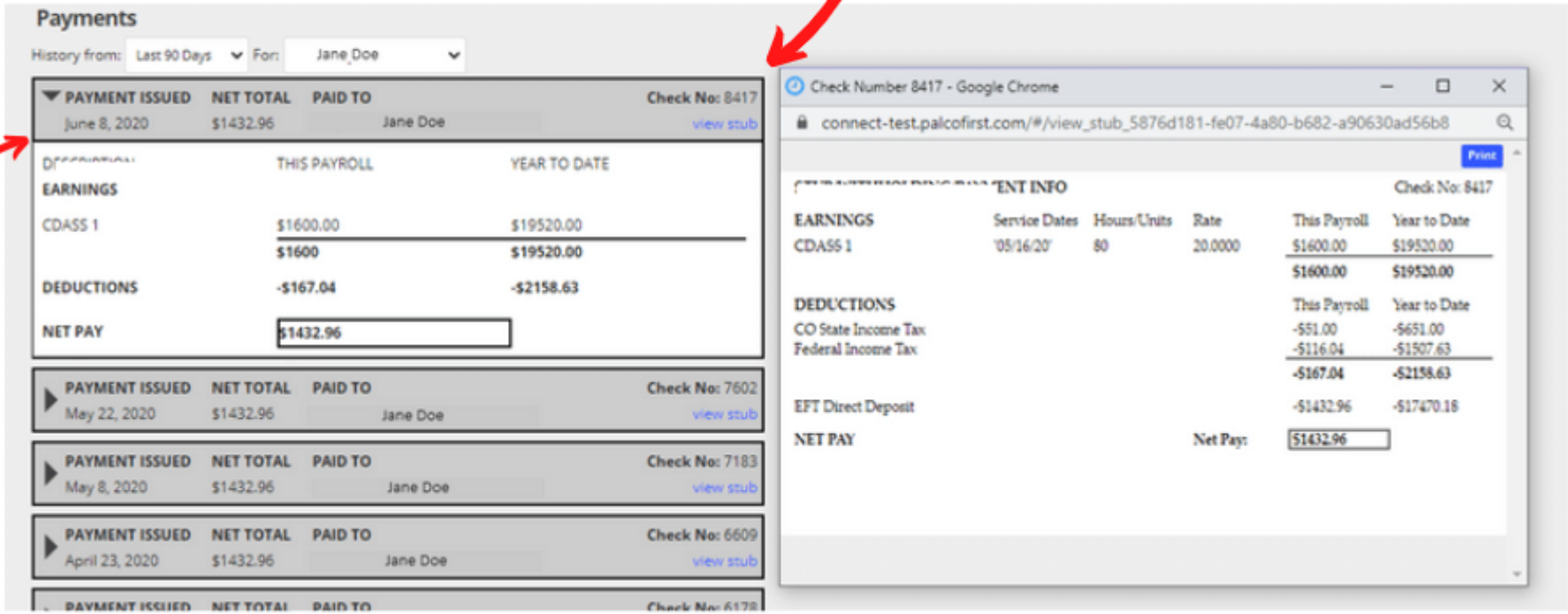
Choose the black triangle on the left to expand the pay stub you would like to see more details on (shown below).



Pay Stubs

By clicking on the blue "View Stub" link, a pop up will open with full stub details and ability to print.

Within the expanded display more details on the payment can be seen



Updating Pay Information

- If the way a Worker would like to be paid changes at any time, they must complete a new Pay Selection and Direct Deposit Authorization Agreement located on the Palco website.
  - Palco offers either Direct Deposit to the Workers account or for the worker to sign up for a free Money Network Card.
  - Paper check is also an option but highly discouraged.
  - These options are key to receiving timely payments! Please ensure you have signed up!
- Please note, changing your payment information can take up to 1 pay cycle later so submit the form to Conduent right away.

QUESTIONS

Enter your questions in the CHAT box, we will answer as many as we can.

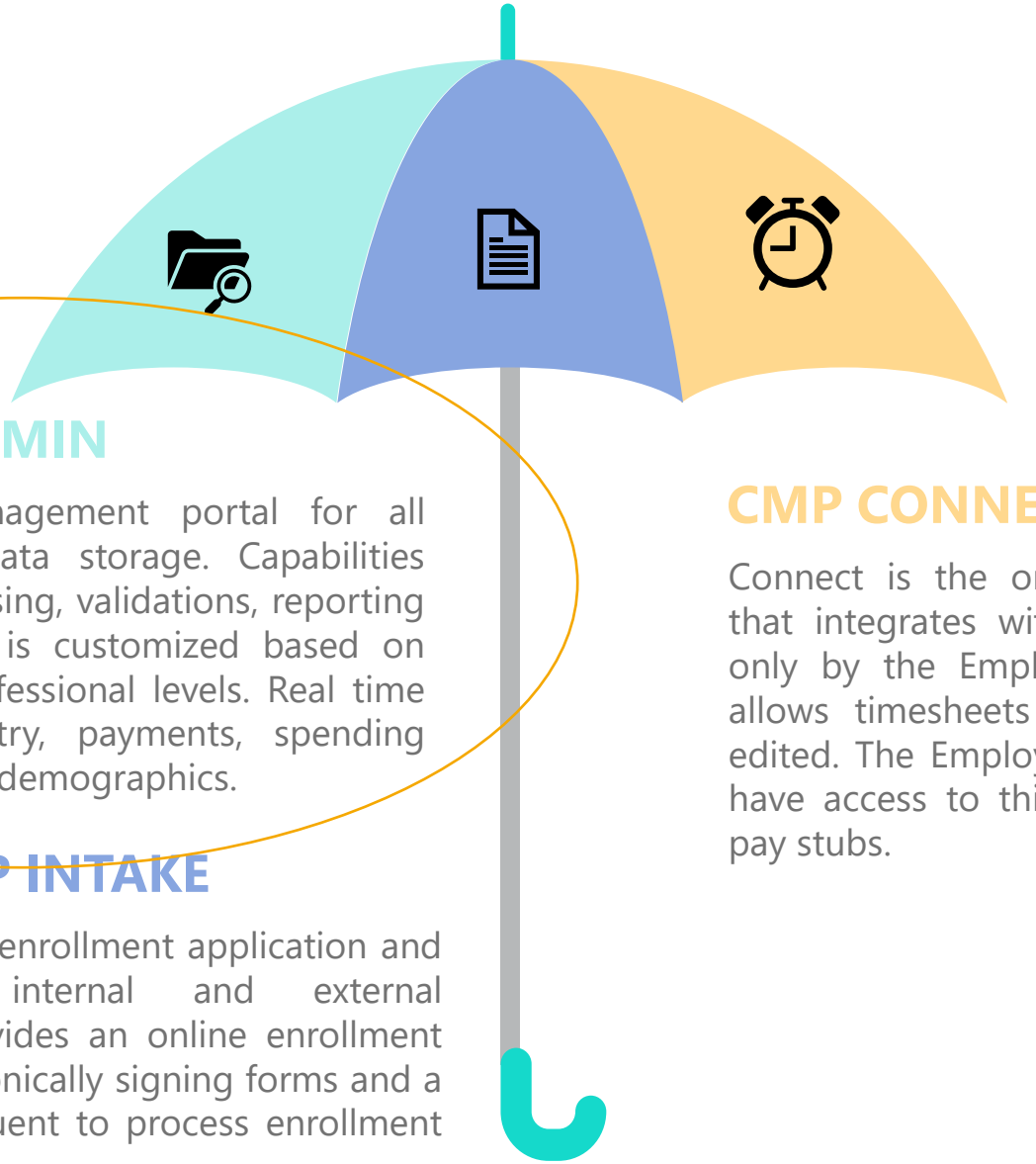
Break- 10 min

Next- Payments Training will provide details on how CCSC will review payment and time entry details within CMP. We will review all aspects of payment details and utilization within CMP and how to find valuable information to help callers.

Part Three

Payments and Utilization – CMP Application

Palco Case Manager Portal (CMP)



CMP ADMIN

The main case management portal for all demographics and data storage. Capabilities include payroll processing, validations, reporting and budgets. Access is customized based on different levels of professional levels. Real time visibility of time entry, payments, spending history, utilization and demographics.

CMP INTAKE

Intake is the Palco enrollment application and contains both internal and external capabilities. It provides an online enrollment platform for electronically signing forms and a platform for Conduent to process enrollment forms.

CMP CONNECT

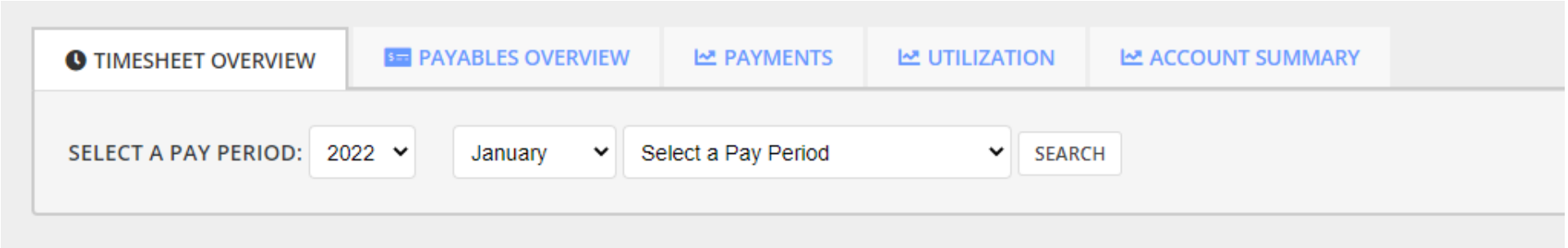
Connect is the online timesheet system that integrates with EVV. It is accessible only by the Employer and Employee. It allows timesheets to be submitted and edited. The Employer and Employees also have access to things like utilization and pay stubs.

Time Entry – Payables Tab

- The **Payables Tab** located within the Participant record of CMP is where paper timesheets and Payroll Request Forms are entered.
- Only Conduent has access to this tab for the purpose of entering these paper forms.
- Time and Payables that have been entered by Conduent in the payables section is visible to other professional users under the **Account Info** tab.

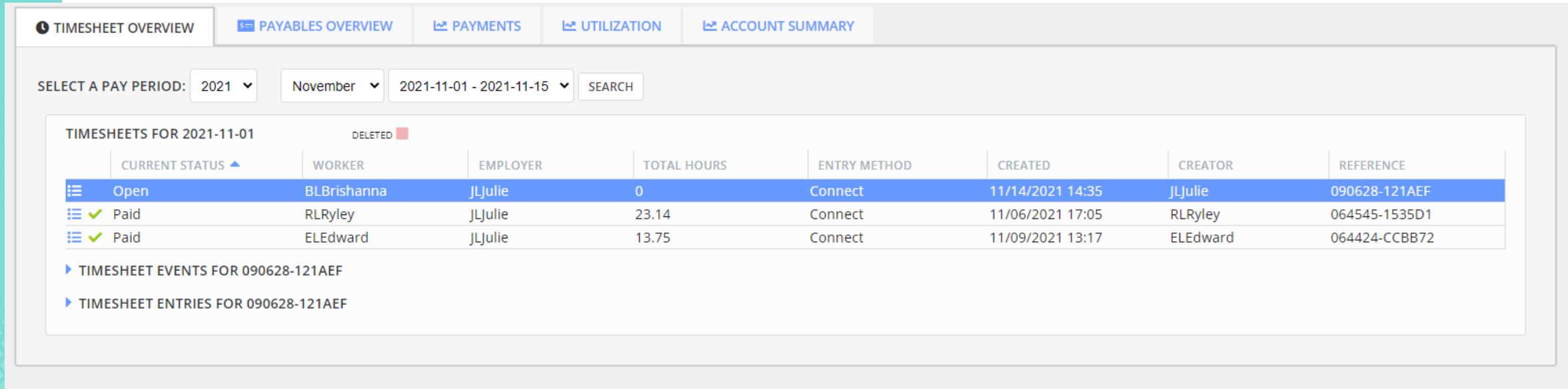
Viewing Time

- All time entries that are in Connect (via Electronic Visit Verification- EVV or a manual entry) as well as paper timesheets that have been keyed by Conduent are visible under the **Account Info → Timesheet Overview** tab.
  - This information can be accessed from the Participant record.
- To view the timesheet data, you must select the pay period you wish to see and then select SEARCH.

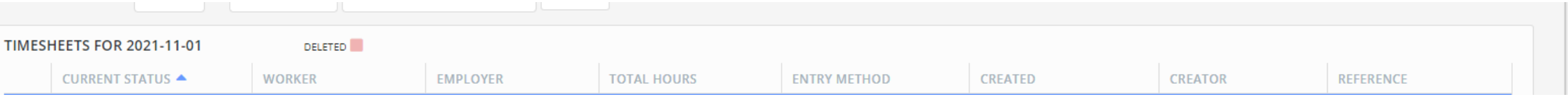


Account Info → Timesheet Overview

- Once you select the pay period, all the time entries will display for that period.



Account Info → Timesheet Overview



Current Status	Worker	Employer	Total Hours	Entry Method	Created	Creator	Reference
This field will display what status the timesheet is in currently.	This field displays the first initial+ last name of the worker.	This field displays the first initial+ last name of the employer.	This field displays the total hours currently recorded on that timesheet.	This field indicates how the timesheet was entered. The system with either display “Connect” for online and EVV time or “CMP” for paper.	This field indicates the date when the timesheet was first started.	This field indicates who entered the timesheet. If it was keyed manually the name of the Conduent staff who entered it will display.	This provides a reference key unique to that timesheet.

Timesheet Events

- To view the timesheet events, click on the blue down arrow when you have the timesheet you wish you see details on highlighted.
- Timesheet Events will display every stage and status change the timesheet has gone through as well as the date/time that change occurred and who initiated the change.

TIMESHEET EVENTS FOR 064424-CCBB72 SHOW ALL TIMESHEET EVENTS

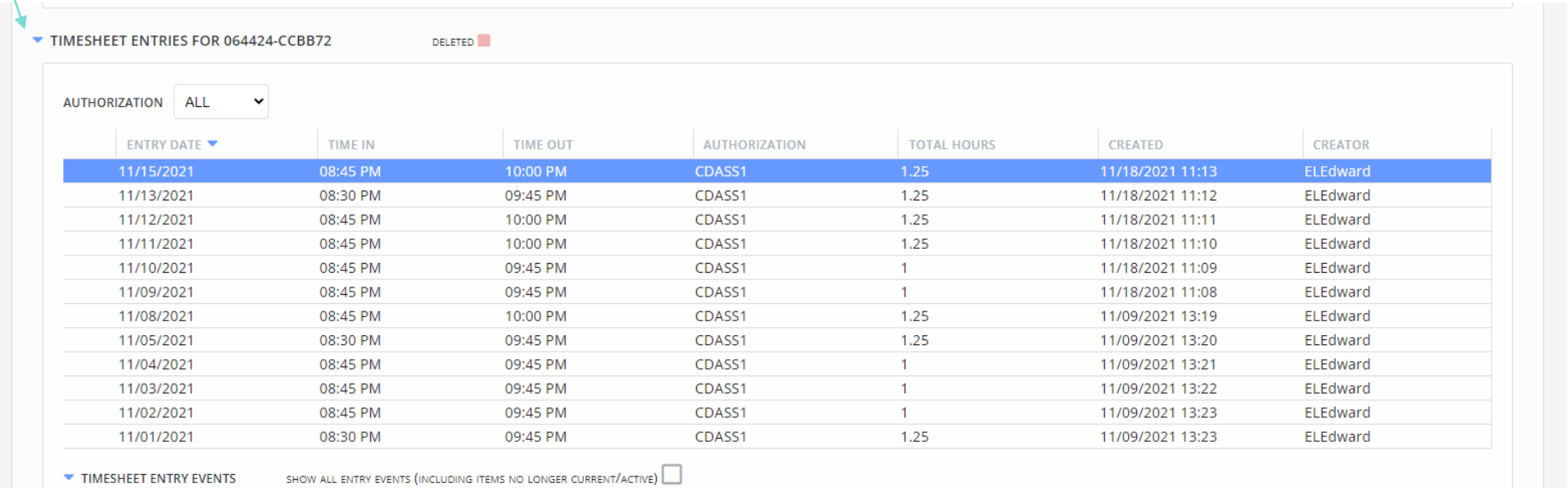
EVENT	CREATED	CREATOR
Status Changed: Paid	11/21/2021 17:00	JLJeff
Status Changed: Approved for Payment	11/19/2021 11:40	JLJennifer
Status Changed: Pending Palco Review	11/18/2021 11:28	JLJulie
Status Changed: Pending Employer Review	11/18/2021 11:14	ELEdward
Status Changed: Open	11/09/2021 13:17	ELEdward

Pay Statuses

Status	Description
Open	Data has been received from EVV system and is ready for worker review. Changes can be made to the time at this stage.
Under Employer Review	Time has been submitted to the Employer for approval.
Needs Resolution	The Employer has rejected the time and sent it back to the worker for correction. Changes can be made to the time at this stage.
Under Palco Review	Time has been submitted by the Employer to Palco. Palco is performing validations on the time to ensure it is payable and there are no issues.
Approved for Payment	Time has passed all Palco checks and validations. It is going through the final step of billing before it can be paid.
Paid	The timesheet is closed and paid.
Rejected	Palco rejected the timesheet for the reason listed in the portal. No changes can be made. To correct, a new timesheet must be started via Connect and will be recorded as an edited timesheet facing the same warnings as listed above.

Timesheet Entries

- To view the individual timesheet entries, click on the down arrow when you have the timesheet you wish to see details on highlighted.
- A full list of time entries with date, time in, time out, service code, total hours, entry date and creator will display.



TIMESHEET ENTRIES FOR 064424-CCBB72 DELETED

AUTHORIZATION ALL

ENTRY DATE	TIME IN	TIME OUT	AUTHORIZATION	TOTAL HOURS	CREATED	CREATOR
11/15/2021	08:45 PM	10:00 PM	CDASS1	1.25	11/18/2021 11:13	ELEdward
11/13/2021	08:30 PM	09:45 PM	CDASS1	1.25	11/18/2021 11:12	ELEdward
11/12/2021	08:45 PM	10:00 PM	CDASS1	1.25	11/18/2021 11:11	ELEdward
11/11/2021	08:45 PM	10:00 PM	CDASS1	1.25	11/18/2021 11:10	ELEdward
11/10/2021	08:45 PM	09:45 PM	CDASS1	1	11/18/2021 11:09	ELEdward
11/09/2021	08:45 PM	09:45 PM	CDASS1	1	11/18/2021 11:08	ELEdward
11/08/2021	08:45 PM	10:00 PM	CDASS1	1.25	11/09/2021 13:19	ELEdward
11/05/2021	08:30 PM	09:45 PM	CDASS1	1.25	11/09/2021 13:20	ELEdward
11/04/2021	08:45 PM	09:45 PM	CDASS1	1	11/09/2021 13:21	ELEdward
11/03/2021	08:45 PM	09:45 PM	CDASS1	1	11/09/2021 13:22	ELEdward
11/02/2021	08:45 PM	09:45 PM	CDASS1	1	11/09/2021 13:23	ELEdward
11/01/2021	08:30 PM	09:45 PM	CDASS1	1.25	11/09/2021 13:23	ELEdward

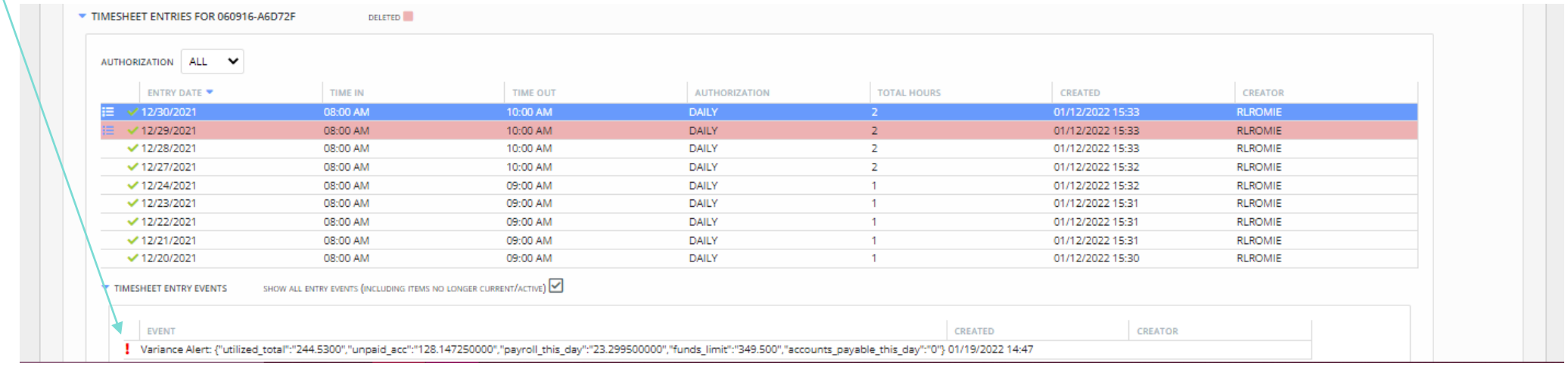
TIMESHEET ENTRY EVENTS SHOW ALL ENTRY EVENTS (INCLUDING ITEMS NO LONGER CURRENT/ACTIVE)

Failures and Rejections

- At times, a timesheet may **fail** validations- meaning it cannot be paid or **reject** meaning the timesheet cannot be processed.
  - An example of why a timesheet may fail is if there are not enough funds in the budget to pay it.
  - An example of why a timesheet may be rejected is if it is missing a signature and date by the Employer or Worker.
- When a failure or rejection happens, it will be indicated in the system so that professional users can view this information.

Failures and Rejections

- Any timesheet entries with a failure or rejection event will display a red exclamation mark next to the event.
- By clicking on that shift, the details will display at the bottom of the page under Timesheet Entry Events.



TIMESHEET ENTRIES FOR 060916-A6D72F DELETED

AUTHORIZATION ALL

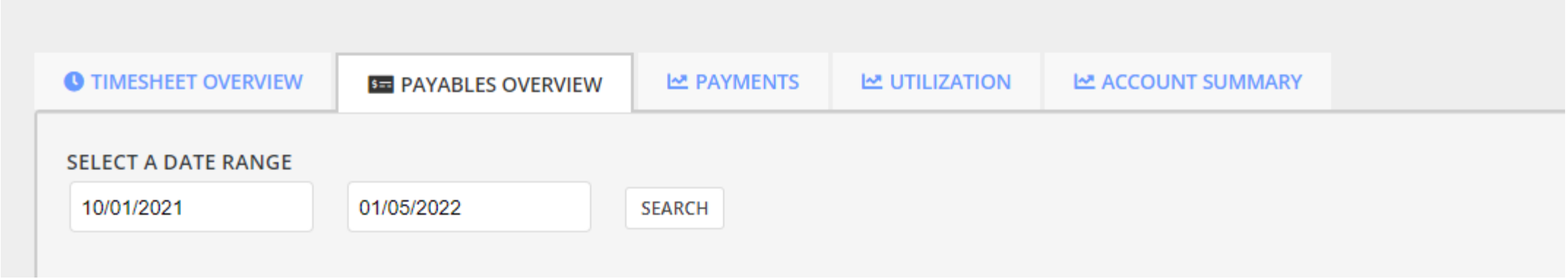
ENTRY DATE	TIME IN	TIME OUT	AUTHORIZATION	TOTAL HOURS	CREATED	CREATOR
12/30/2021	08:00 AM	10:00 AM	DAILY	2	01/12/2022 15:33	RLROMIE
12/29/2021	08:00 AM	10:00 AM	DAILY	2	01/12/2022 15:33	RLROMIE
12/28/2021	08:00 AM	10:00 AM	DAILY	2	01/12/2022 15:33	RLROMIE
12/27/2021	08:00 AM	10:00 AM	DAILY	2	01/12/2022 15:32	RLROMIE
12/24/2021	08:00 AM	09:00 AM	DAILY	1	01/12/2022 15:32	RLROMIE
12/23/2021	08:00 AM	09:00 AM	DAILY	1	01/12/2022 15:31	RLROMIE
12/22/2021	08:00 AM	09:00 AM	DAILY	1	01/12/2022 15:31	RLROMIE
12/21/2021	08:00 AM	09:00 AM	DAILY	1	01/12/2022 15:31	RLROMIE
12/20/2021	08:00 AM	09:00 AM	DAILY	1	01/12/2022 15:30	RLROMIE

TIMESHEET ENTRY EVENTS SHOW ALL ENTRY EVENTS (INCLUDING ITEMS NO LONGER CURRENT/ACTIVE)

EVENT	CREATED	CREATOR
Variance Alert: {"utilized_total":"244.5300","unpaid_acc":"128.147250000","payroll_this_day":"23.299500000","funds_limit":"349.500","accounts_payable_this_day":"0"}	01/19/2022 14:47	

Viewing Vendor Payment Requests

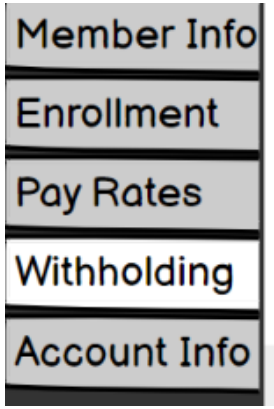
- Vendor Payment Requests (VPR) are previously known as Payroll Request Forms (PRFs)
- Like Timesheets, VPRs can be viewed in the **Payables Overview** section of the **Account Info tab**.
- Access the Participant record and navigate to



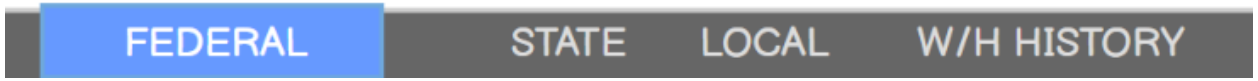
Quick Question Check In

Enter your questions in the CHAT box, we will answer as many as we can.

Withholdings



- The **Withholdings tab** is located within the Worker record of CMP
- This tab is split among four subtabs, including Federal, State, Local, and W/H (Withholding) History



- These will correspond with what the worker has indicated on the Payroll Information Worksheet, W-4, and their New Mexico W-4.

Withholdings - Federal

- Federal Withholdings can be viewed from the Federal subtab.
- These taxes include FICA (Social Security and Medicare) and FIT (Federal Income Tax).

FEDERAL | STATE | LOCAL | W/H HISTORY

FICA

☑ Exempt Effective Date: 12/14/21

FEDERAL INCOME TAX

☐ Exempt ☑ Excluded - Difficulty of Care

W-4:

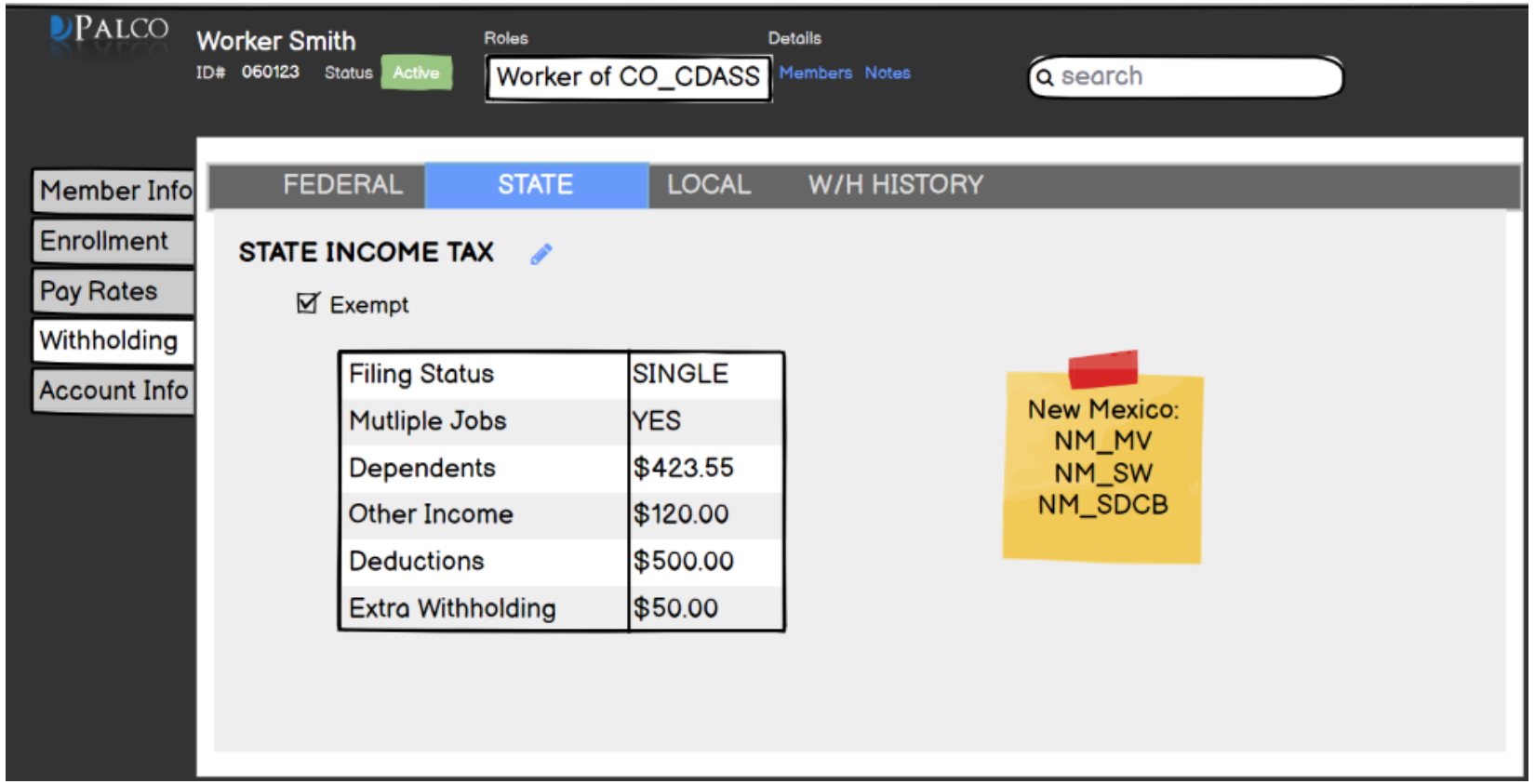
Filing Status	SINGLE
Mutliple Jobs	YES
Dependents	$423.55
Other Income	$120.00
Deductions	$500.00
Extra Withholding	$50.00

Pre-2020:

Filing Status	SINGLE
Dependents	2
Extra Withholding	$50.00

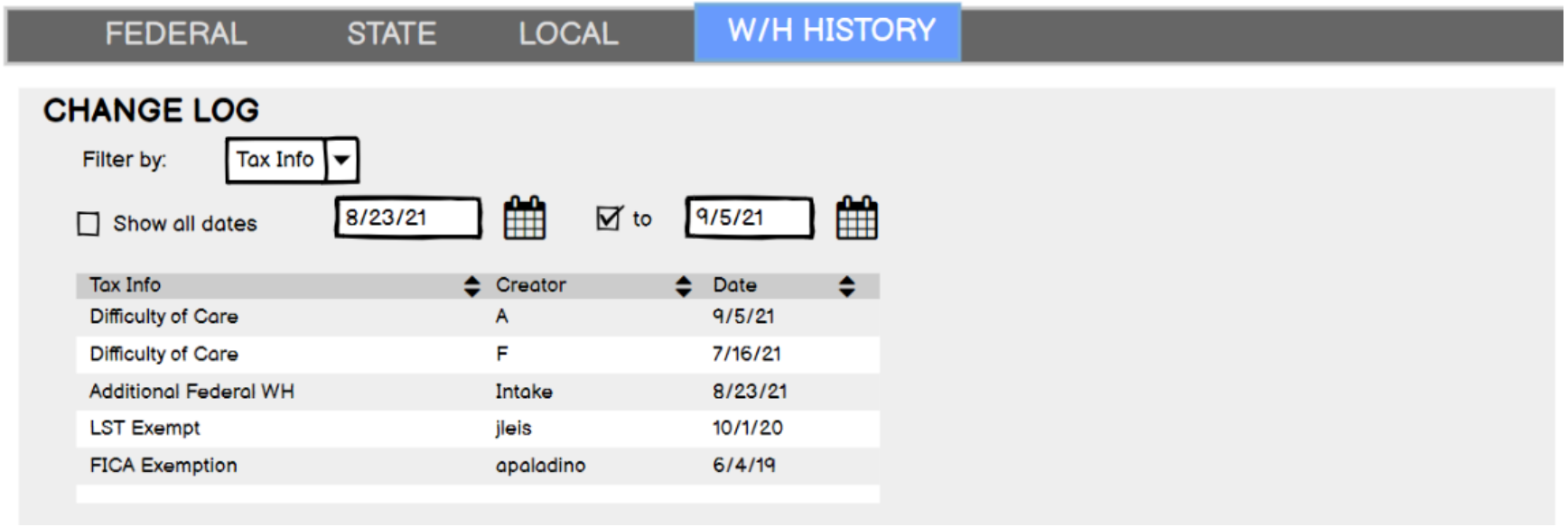
Withholdings - State

- State Withholdings can be viewed from the State subtab.
- These taxes include SIT (state income tax)



Withholdings - History

- The W/H History subtab includes history of changes made to the state, local, and federal withholding.
- These results can be filtered by tax account or by date. Information will include who made the edit and the date the edit was made.



Updating Withholdings

- Self-Directing Employees can update their withholdings by submitting a form to Conduent.
  - W4- Changes your Federal/State tax withholdings.
  - Payroll Information Worksheet- Used to indicate exemptions and tax situations that an individual may qualify for.
- Forms can be found on the Palco website **www.palcofirst.com/new-mexico**

Pay Selection

- A Workers pay selection designation can be viewed in CMP under the Member Info tab.
- Changes to pay selection can be done by submitting a new Pay Selection Form to Conduent.
- Everyone is encouraged to sign up for Direct Deposit or a free Money Network Card to avoid standard mail delays associated with paper checks.
- Forms can be found on the Palco website www.palcofirst.com/new-mexico

Notifications

Palco provides a set of standard automatic notifications that are triggered by certain events in the system. Some of those timesheet events include:

- Timesheet notifications for status changes and failures
- Enrollment notifications when an enrollee becomes good-to-go status
- Budget event notifications when a change occurs with a budget

Validations

When timesheets and payment requests are submitted, Palco will run validations to ensure a request is payable based on a standard set of criteria. Some of these items include:

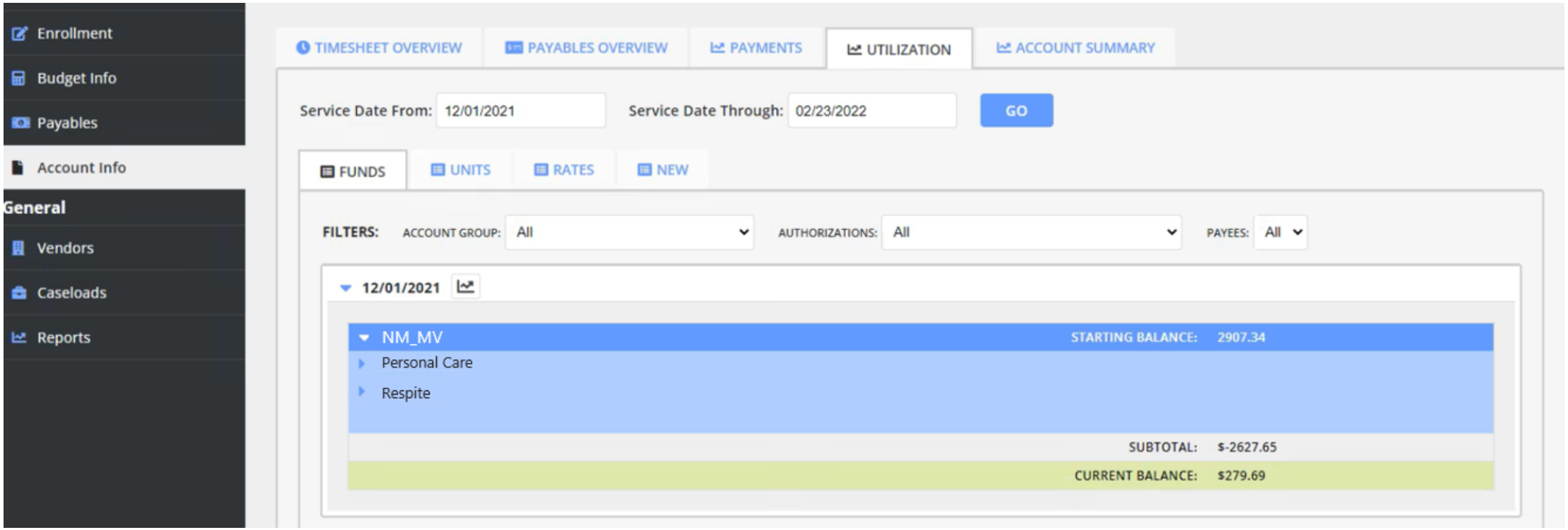
- ✓Budget Checks
- ✓Active Case Status for all parties
- ✓Medicaid Eligibility
- ✓Unallowable overlapping shifts
- ✓Invalid Rates of Pay

Viewing Utilization

- Utilization (or spending) can be accessed from the Account Info → Utilization tab under the Participant.
- The system will display all services used during a designated time frame and the impact to the overall budget.
- Individual service utilization can be dug into further by expanding those sections.

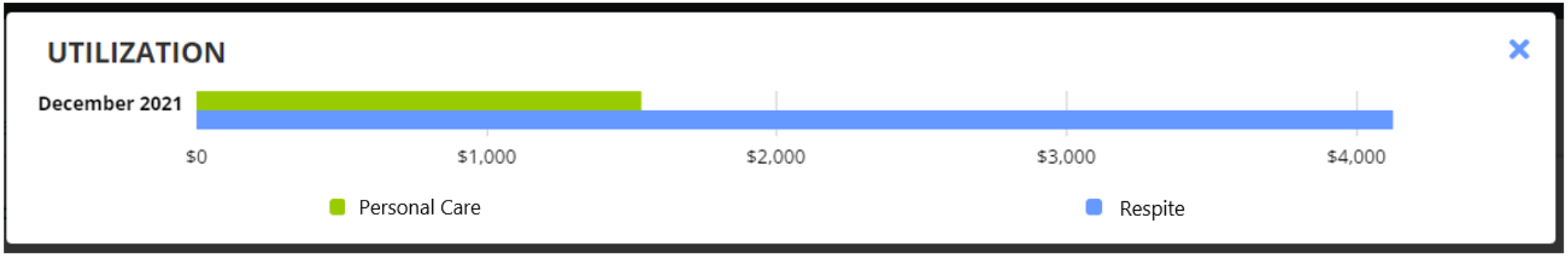
Viewing Utilization

- To view, enter the date span you would like to see and hit “Go”
- Each service can be expanded to display more details by clicking the blue arrow icon next to that service.



Viewing Utilization

- By clicking on the widget icon, , the analytics screen will pop up providing a visual display of utilization for the month.

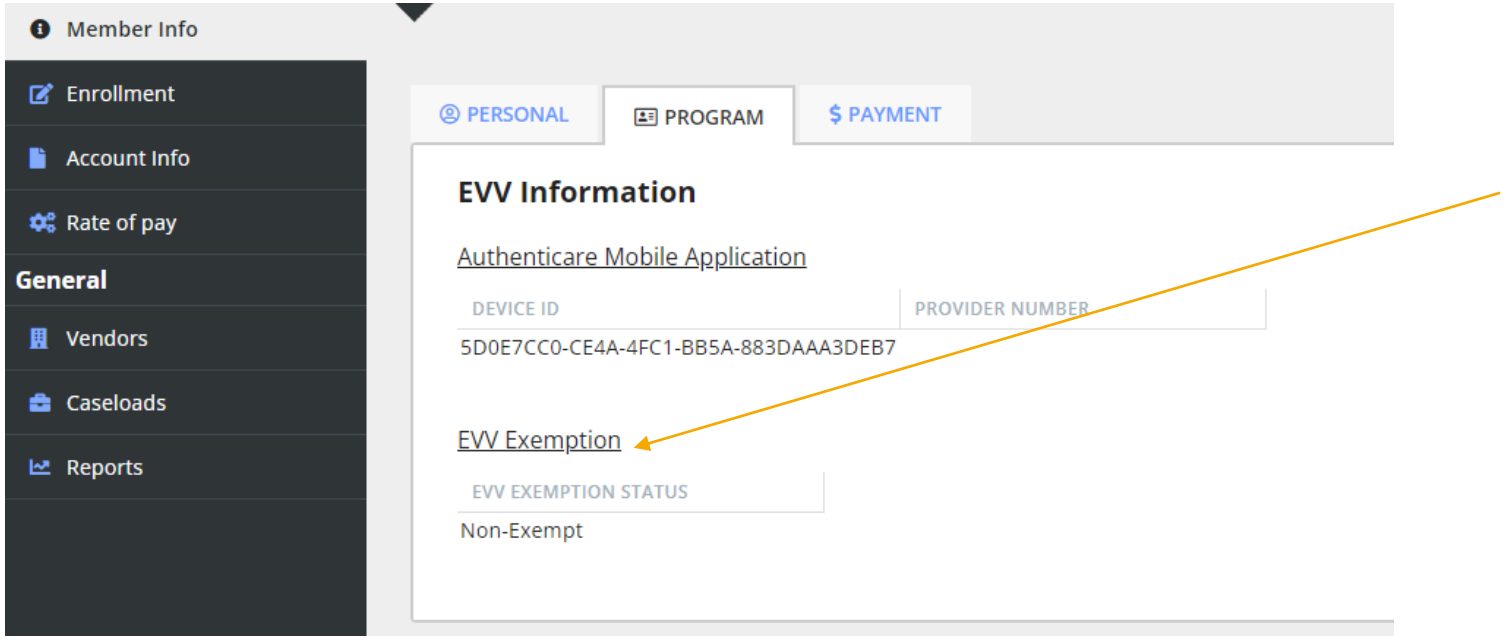


Electronic Visit Verification (EVV) Exemptions

- If a Participant is approved for an EVV / Online time entry exemption, they will be allowed to submit a paper timesheets.
  - Consultants/Support Brokers can provide more information.
- Anyone else without an approved exemption is required to use EVV and Connect.

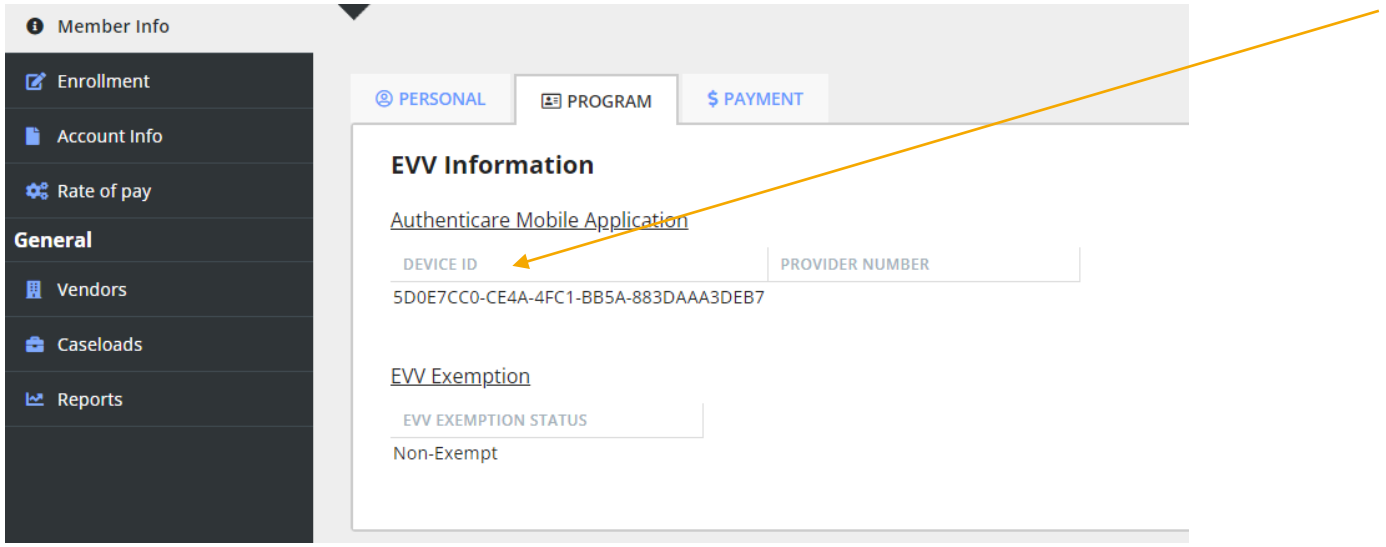
EVV Exemptions

- Support Brokers/CSC/Consultants can view this information on who is exempt from the Workers profile.
  - Member Info → Program → EVV Exemption



EVV

- Consultants and CSC for Mi Via and Supports Waiver will also be able to view Device ID being used with the EVV Mobile App for the worker, if they are using the mobile app.
  - Not applicable for SDCB!



QUESTIONS

Enter your questions in the CHAT box, we will answer as many as we can.

Break- 30 min

Long Lunch Break

Next- Budgets and Reports Training will provide an overview of how to read and understand budgets in CMP and how reports can be run.

Part Four

Budgets and Reports- CMP Application

Recipe for Budget Utilization

Authorized Budget
Includes approved services and good, including taxes and fees, to meet the Participant's needs.

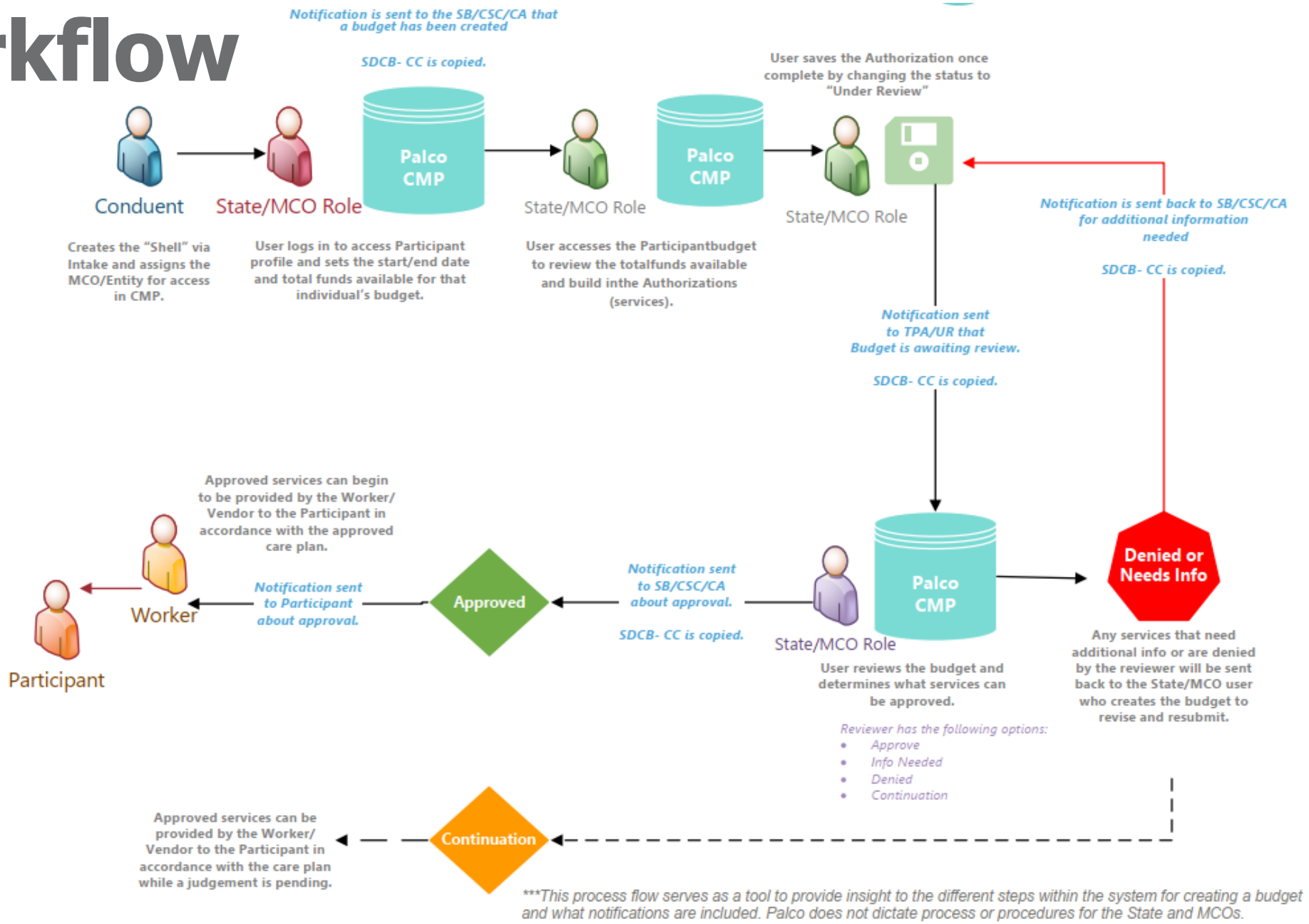
Employer Cost
Taxes and Fees associated with the services that must be collected from the budget for all services utilized.

Worker Rates of Pay
Hourly wages paid to self-directing workers for the services they provide.

Features and Components of CMP Budget Tool

- Budget information can be found within CMP within the Participant profile.
  - You can access this by Searching for the Participant via the CMP search bar.
  - Click on the “Budget Info” tab located on the left side.
  - CMP allows the user to easily navigate to any role that is associated to the Member. Whereas with FOCoS, you may need to search for each Role/Person associated to the Member.
- Palco Budget tool features:
  - System guided input for each required field in the budget
  - Cost calculator where multiple workers can be input
  - Justifications/notes and statuses for every Authorization (service)
  - Widgets and visuals for quick answers

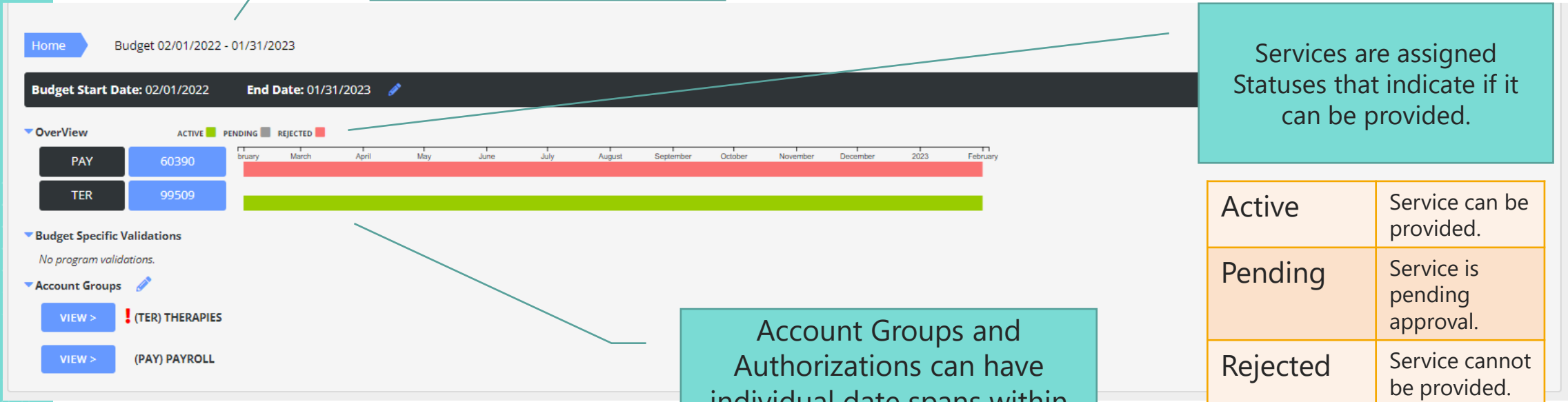
Workflow



***This process flow serves as a tool to provide insight to the different steps within the system for creating a budget and what notifications are included. Palco does not dictate process or procedures for the State and MCOs.

Viewing and Understanding a Participant Budget

Every budget will have a Start Date and End Date that indicates the lifespan of the budget.



Services are assigned Statuses that indicate if it can be provided.

Active	Service can be provided.
Pending	Service is pending approval.
Rejected	Service cannot be provided.

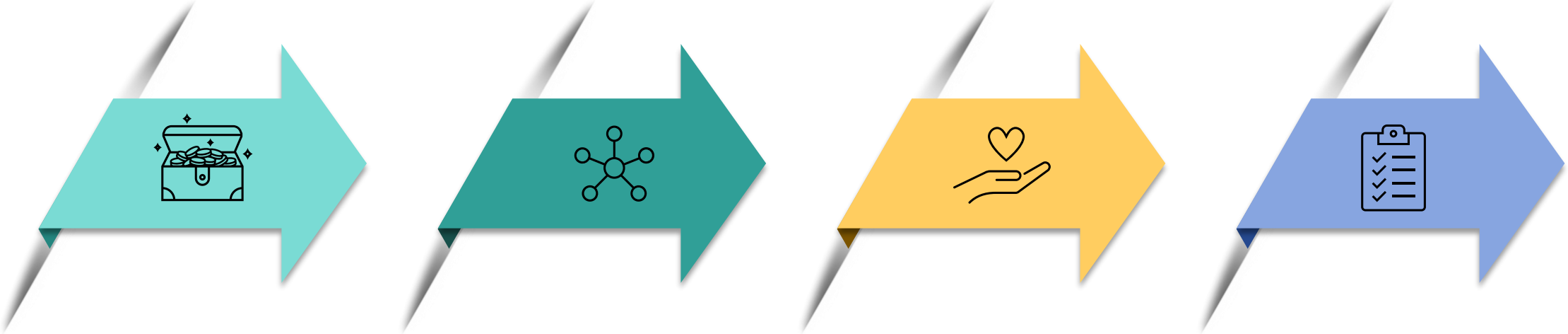
Account Groups and Authorizations can have individual date spans within the overall Start and End Date for which they are authorized.

Budget History & Analytics

- Budget History will display all budgets for the history of that Participant (created within CMP)

- Budget Analytics will provide an overview of all services available in the budget as well as their status and date spans.

Account Groups & Authorizations



Overall Budget

Budget is the all-encompassing mechanism for authorizing services the Participant needs.

Account Groups

Categories to designate and separate services based on funding types.

Authorizations

Individual Services underneath each Account Group.

Configurations

Limits and requirements unique to each service (Examples: Is it an EVV required service, does it have a Max rate.)

Account Groups & Authorizations- Mi Via

PAYROLL				
Code	**Modifier**	**Alias**	**Payee**	**EVV**
99509	-	Homemaker/Direct Support	Worker	SD
T1005	-	Respite	Worker	SD
T2007	-	Transportation Time	Worker	-
T2019	-	Employment Supports	Worker	-
H2021	-	Community Direct Support	Worker	-
AGENCY-BASED CARE				
Code	**Modifier**	**Alias**	**Payee**	**EVV**
99509	AC	Homemaker/Direct Support	Vendor	AGENCY
T1005	AC	Respite Agency	Vendor	AGENCY
T1005	TD	Respite - RN	Vendor	AG-2023
T1005	TE	Respite - LPN	Vendor	AG-2023
T2007	AC	Transportation Time	Vendor	-
T2019	-	Employment Supports	Vendor	-
T2033	-	In-Home Living Supports	Vendor	AGENCY
T1002	TD	Private Duty Nurse - RN	Vendor	-
T1002	TE	Private Duty Nurse - LPN	Vendor	-
S9122	-	Home Health Aide	Vendor	-
GOODS AND SERVICES				
Code	**Modifier**	**Alias**	**Payee**	**EVV**
H2019	-	Behavior Support Consultation	Vendor	-
H2021	AC	Community Direct Supports	Vendor	-
S5100	-	Group Customized Community Supports	Vendor	-
T2049	-	Transportation Mile	Vendor, Worker	-
T2004	-	Non-Medical Transportation - Other	Vendor, Worker	-
S9470	-	Nutritional Counseling	Vendor	-
T1007	-	Personal Plan Facilitation	Vendor	-
S5160	-	Emergency Response	Vendor	-
T1999	U1	Nutritional Supplements	Vendor	-
T1999	X1	Over the Counter Medications	Vendor	-
T1999	X4	Household Related Goods and Services Item/Invoice General	Vendor	-
T1999	U5	Health Related Services, Exercise Equipment and Related Items	Vendor	-
T1999	U6	Conference/Class Fees for Recipient or Unpaid Caregiver	Vendor	-

THERAPIES				
Code	**Modifier**	**Alias**	**Payee**	**EVV**
97129	-	Cognitive Rehab Therapy	Vendor	-
S8940	-	Hippotherapy	Vendor	-
97124	-	Massage Therapy	Vendor	-
G0152	-	Occupational Therapy	Vendor	-
G0151	-	Physical Therapy	Vendor	-
H2032	-	Play Therapy	Vendor	-
97810	-	Accupucture	Vendor	-
98940	-	Chiropractic	Vendor	-
90901	-	Biofeedback	Vendor	-
S8990	-	Naprapathy	Vendor	-
G0153	-	Speech/Language Pathology	Vendor	-
ASSISTIVE TECHNOLOGY, EQUIPMENT, & SUPPLIES FOR SAFETY AND INDEPENDENCE				
Code	**Modifier**	**Alias**	**Payee**	**EVV**
T1999	U2	Adaptive Equipment and Supplies	Vendor	-
T1999	X2	Adaptive Furniture Item/Invoice	Vendor	-
T1999	UA	Cell Phone Service	Vendor	-
T1999	U3	Cell Phone and Related Equipment Purchase	Vendor	-
T1999	U7	Computer	Vendor	-
T1999	U8	Fax Machine	Vendor	-
T1999	U4	Internet Service	Vendor	-
T1999	X5	Office Supplies	Vendor	-
T1999	U9	Printer	Vendor	-
T1999	UG	Technology and Services for Safety and Independence: Ge	Vendor	-
MODIFICATIONS				
Code	**Modifier**	**Alias**	**Payee**	**EVV**
S5165	-	Environmental Modifications	Vendor	-

Account Groups & Authorizations- Supports Waiver

PAYROLL					
Code	Modifier	Alias	Payee	EVV	Timesheet
99509	-	Personal Care Services	Worker	SD	As-is (Hour)
T1005	-	Respite	Worker	SD	As-is (Hour)
H2021	-	Individual Customized Community Supports	Worker	-	15-min
T2007	-	Transportation Time	Worker	-	As-is (Hour)
GOODS AND SERVICES					
Code	Modifier	Alias	Payee	EVV	PRF
99509	AC	Personal Care Services	Vendor	AGENCY	Hour
T1005	AC	Respite	Vendor	AGENCY	15-min
T2007	AC	Transportation Time	Vendor	-	Hour
T2019	-	Employment Supports	Vendor	-	15-min
H2019	-	Behavior Support Consultation	Vendor	-	15-min
T2025	-	Community Supports Coordinator	Vendor	-	Units
S5100	-	Group Customized Community Supports	Vendor	-	15-min
T2049	-	Transportation Mile	Vendor, Worker	-	Units
T2003	-	Non-Medical Transportation - Other	Vendor, Worker	-	Units
ASSISTIVE TECHNOLOGY, EQUIPMENT, & SUPPLIES FOR SAFETY AND INDEPENDENCE					
Code	Modifier	Alias	Payee	EVV	PRF
T1999	UG	Technology and Services for Safety and Independence	Vendor	-	Units
T1999	U2	Adaptive Equipment and Supplies	Vendor	-	Units
T1999	U7	Computer	Vendor	-	Units
T1999	U3	Cell Phone and Related Equipment Purchase	Vendor	-	Units
T1999	X3	ATD Voice Controlled Device ex: Alexa	Vendor	-	Units
S5160	-	Emergency Response Install/Test	Vendor	-	Units
S5161	-	Emergency Response Monthly Fee	Vendor	-	Units (Mont
MODIFICATIONS					
Code	Modifier	Alias	Payee	EVV	PRF
S5165	-	Environmental Modifications	Vendor	-	Units
T1999	V1	Vehicle Modifications	Vendor	-	Units
MONTHLY GOODS AND SERVICES					
Code	Modifier	Alias	Payee	EVV	PRF
T1999	UA	Cell Phone/Landline Service	Vendor	-	Units

Account Groups & Authorizations- SDCB

PAYROLL				
Code	Modifier	Alias	Payee	EVV
99509	-	Self-Directed Personal Care	Worker	Y
T1005	-	Respite	Worker	Y
T2019	-	Employment Supports	Worker	-
VENDOR-BASED CARE				
Code	Modifier	Alias	Payee	EVV
99509	AC	Self-Directed Personal Care	Vendor	-
T1005	AC	Respite Agency	Vendor	-
T1005	TD	Respite - RN	Vendor	-
T1005	TE	Respite - LPN	Vendor	-
T1005	U1	Respite - Home Health Aide	Vendor	-
S9122	-	Home Health Aide	Vendor	-
T1002		Private Duty Nurse - RN	Vendor	-
T1003		Private Duty Nurse - LPN	Vendor	-
GOODS AND SERVICES				
Code	Modifier	Alias	Payee	EVV
T2019	-	Employment Supports	Vendor	-
H2019	-	Behavior Support Consultation	Vendor	-
S5100	-	Customized Community Supports	Vendor	-
T2049	-	Transportation Mile	Vendor, Worker	-
T2004	-	Non-Medical Transportation - Other	Vendor	-
S9470	-	Nutritional Counseling	Vendor	-
S9445	-	Native American Healers	Vendor	-
S5160	-	Emergency Response	Vendor	-
S5161	-	Emergency Response Monthly Fee	Vendor	-
T1999	U6	Coaching Education for Parents, Spouse, Other Item	Vendor	-
T1999	U1	Nutritional Supplements	Vendor	-
T1999	X1	Over the Counter Medications	Vendor	-
THERAPIES				
Code	Modifier	Alias	Payee	EVV
97129	-	Cognitive Rehab Therapy	Vendor	-
S8940	-	Hippotherapy	Vendor	-
97124	-	Massage Therapy	Vendor	-
G0152	-	Occupational Therapy	Vendor	-
G0151	-	Physical Therapy	Vendor	-
97810	-	Accupucture	Vendor	-
98940	-	Chiropractic	Vendor	-
90901	-	Biofeedback	Vendor	-
S8990	-	Naprapathy	Vendor	-
G0153	-	Speech/Language Pathology	Vendor	-

ASSISTIVE TECHNOLOGY FOR SAFETY AND INDEPENDENCE				
Code	Modifier	Alias	Payee	EVV
T1999	U3	Cell Phone and Related Equipment Purchase	Vendor	-
T1999	UA	Cell Phone Service	Vendor	-
T1999	UB	Cell Phone/Landline Service	Vendor	-
T1999	U7	Computer	Vendor	-
T1999	U4	Internet Service	Vendor	-
T1999	UC	Internet/Cell Phone Service	Vendor	-
T1999	UH	Internet/Cell Phone/Landline Service	Vendor	-
T1999	UE	Internet/Landline Service	Vendor	-
T1999	UF	Landline Service	Vendor	-
T1999	UG	Technology and Services for Safety and Independence General	Vendor	-
MODIFICATIONS, STARTUP				
Code	Modifier	Alias	Payee	EVV
S5165	-	Environmental Modifications	Vendor	-
T2028	-	Startup Goods	Vendor	-
ASSISTIVE EQUIPMENT AND SUPPLIES FOR SAFETY AND INDEPENDENCE				
Code	Modifier	Alias	Payee	EVV
T1999	U2	Adaptive Equipment and Supplies	Vendor	-
T1999	X2	Adaptive Furniture Item/Invoice	Vendor	-
T1999	X3	Appliances for Independence Item/Invoice	Vendor	-
T1999	U5	Exercise Equipment and Related Items	Vendor	-
T1999	U8	Fax Machine	Vendor	-
T1999		Fees and Memberships	Vendor	-
T1999	UJ	Health Related Services, Equip, Supplies Item/Invoice	Vendor	-
T1999	X4	Household Related Goods and Services Item/Invoice Ger	Vendor	-
T1999	X5	Office Supplies	Vendor	-
T1999	U9	Printer	Vendor	-

T1005 RESPITE T1005

OverView

ACTIVE PENDING REJECTED

PAY T1005

Link Payees

No payees linked.

Revisions

Begin Authorization By: KLKaitlyn At: 02/21/2022 18:52

Revision Status: Pending By: KLKaitlyn At: 02/21/2022 18:52

Actions

Change Status

EFFECTIVE DATE 2023-01-01

STATUS Active

Calculate Cost

COST LINE ITEMS

THIS AUTH HAS A MAX RATE OF $13.52

UNITS 0.00 RATE $0.00 TAX %0.00 LINE ITEM TOTAL $0.00

COST TOTAL $0.00

Response Show: All

KLKaitlyn 02/21/2022 18:52

Status Changed to Pending

Link Payees: Identifies which Workers can provide the selected service.

Change Status: Allows the Authorization to be submitted to the TPA/UR

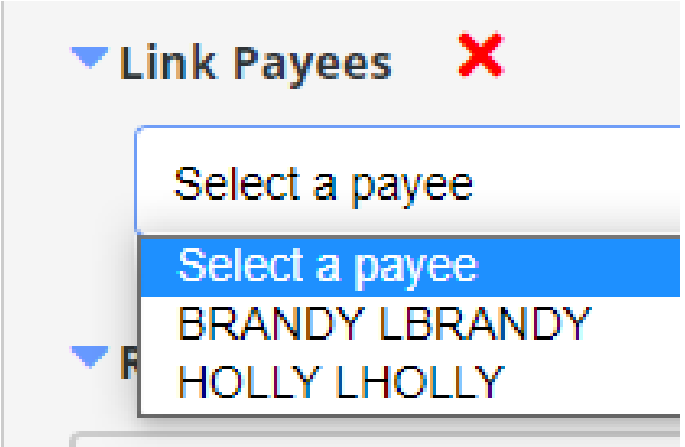
Calculate Cost: Allows the SB/CSC/CA to determine how much funds are needed for the service.

Response: Provides a history of all communications and changes associated with this Authorization.

Justifications: Allows for notes, communication, and justifications to be added for that Authorization.

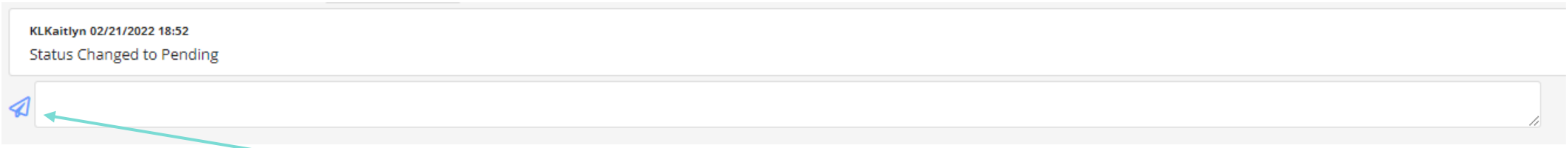
Linking Payees to Budgets

- Linking Payees (or Workers) to each Authorization (service) tells the time entry application (Connect) who is allowed to provide what service.
- This linking is done by Conduent, for initial budgets during the enrollment process, and by the Consultant/Support Broker, during renewals.
  - Consultants/SB/CSC can link payees who were previously approved to provide that service during the annual budget renewal process.



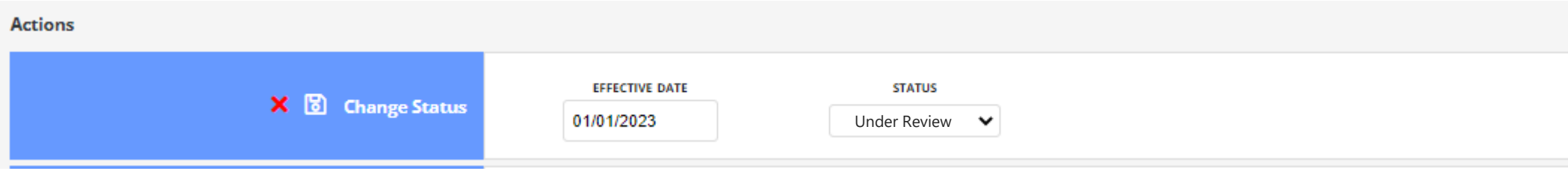
Budget Justifications

- The Justifications feature within the Budget Tool provides a space for the Consultant/Support Broker to justify the Authorization (service) amount and enter important notes about that service.
- This provides a mechanism for communication between the Utilization Reviewer (UA) and the Third-Party Assessor(TPA) regarding the budget approval.
- Limited to essential info and communication only.
- Box is an open text field, to save the note click the blue icon to the left.



Budget Statuses

- Every Authorization can be assigned its own individual status.
- When an Authorization is initially added to the budget, it is assigned a “Pending” status which is a none status, it allows for building and play with the service line.
- What statuses a user has access to is limited based on their role.
- Once an Authorization is ready to be submitted to the TPA/UR, the status can be changed to “Under Review” and click the Save icon.



- Once saved, a notification is sent to the TPA/UR. It is important you do not change the status until you are ready to submit.

Notifications- Status Changes

If the status changed to…	Then send to…
Pending	No Notification – This is a nothing status where they can build and play
Under Review	TPA/UR
Approved	Support Broker (SDCB)/Consultant (MV)/Community Supports Connector (SW)
Needs Info	Support Broker (SDCB)/Consultant (MV)/Community Supports Connector (SW)
Continuation	Support Broker (SDCB)/Consultant (MV)/Community Supports Connector (SW) & TPA/UR
Denied	Support Broker (SDCB)/Consultant (MV)/Community Supports Connector (SW)

Care Coordinators will be copied on all notifications for SDCB.

Notifications- Other

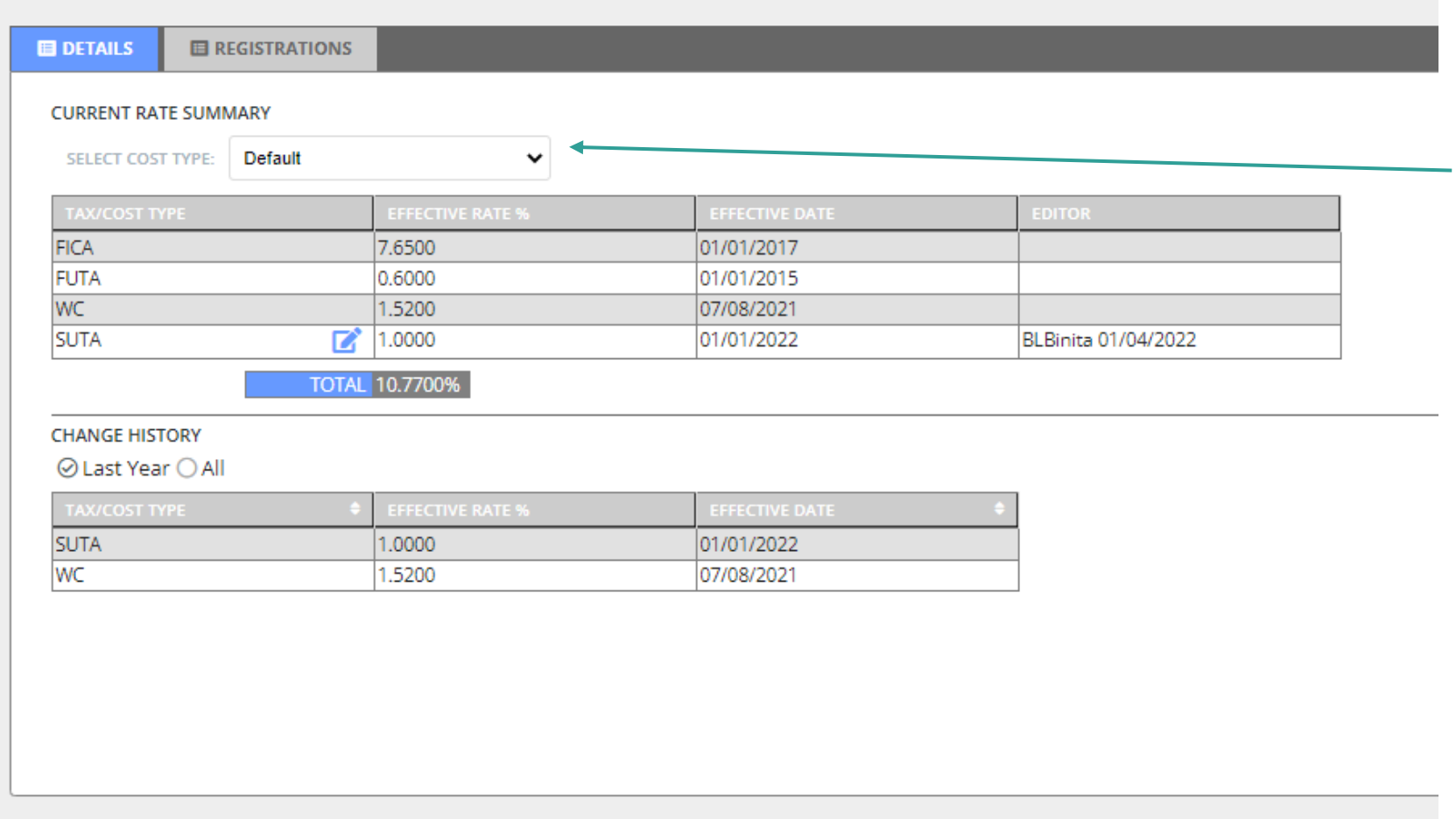
Action	Notification
Budget Created	Notification sent to Support Broker (SDCB)/Consultant (MV)/Community Supports Coordinator (SW) letting them know that a new budget was created.
Budget Expiration 60 days out	Notification sent to Support Broker (SDCB)/Consultant (MV)/Community Supports Connector (SW) reminding them a budget is expiring in 60 days.
Budget Expiration 30 days out	Notification sent to Support Broker (SDCB)/Consultant (MV)/Community Supports Connector (SW) reminding them a budget is expiring in 30 days.

Care Coordinators will be copied on all notifications for SDCB.

Employer Cost

- Employer Cost is the added expense that an employer must account for being added to every hour worked by their employee.
  - Employer Cost currently includes FICA, FUTA, SUTA, and Workers Comp.
- Employer Cost Rates are individualized for every employer based on their individual State Unemployment Rate and Tax Exemptions.
- Employer Cost Rates can also vary by Worker based on that individuals tax exemptions and relationship to the Employer.
  - Example: If a Worker is a spouse employed by a spouse, they are exempt from FICA, FUTA, and SUTA tax. The Employer Cost Rate would also be exempt for that worker.
- Employer Cost for each employer (and the individual workers) can be viewed by accessing the Employer Cost Tab under the Employer Profile.
- A report is not necessary for this, you can toggle between everyone associated with that Participant/Employer and view each percentage.

Employer Cost



Via the drop down, you can toggle between seeing a default rate for the Employer as a whole or an individual worker's tax rate which may vary due to exemptions.

Worker Rate of Pay

- The Worker rate of Pay is the base rate that each employee is paid (pre-tax) for every hour worked.
- Rates of Pay are designated for every individual Authorization (service) the Worker is approved to provide.
- Rates of Pay must be established via the submission of a Rate of Pay form signed by both the Worker and the Employer.
- Rates of Pay can only be entered and updated by Conduent staff.
- Worker Pay Rates can be viewed by accessing the “Pay Rates” tab under the Worker profile in CMP.

Worker Rate of Pay

PALCO Case Management Portal

Mary Ann Walter
ID#: 080467 ACTIVE

PROGRAM: NM_SDCB
ROLES Worker for Richard Baker

NOTES | MEMBERS

v0.0.1 ADMIN

Search...

- Member Info
- Enrollment
- Pay Rates
- Account Info

General

- Vendors
- Caseloads
- Reports

CURRENT RATES | RATE HISTORY

PAY RATES

Overtime Pay: Allowed

Download CSV

	Authorization	Code	Base Rate	Overtime Rate	Start Date	End Date
ACTIVE	EMPLOYMENT SUPPORTS T2019	T2019	$20.00	$30.00	01/01/2022	

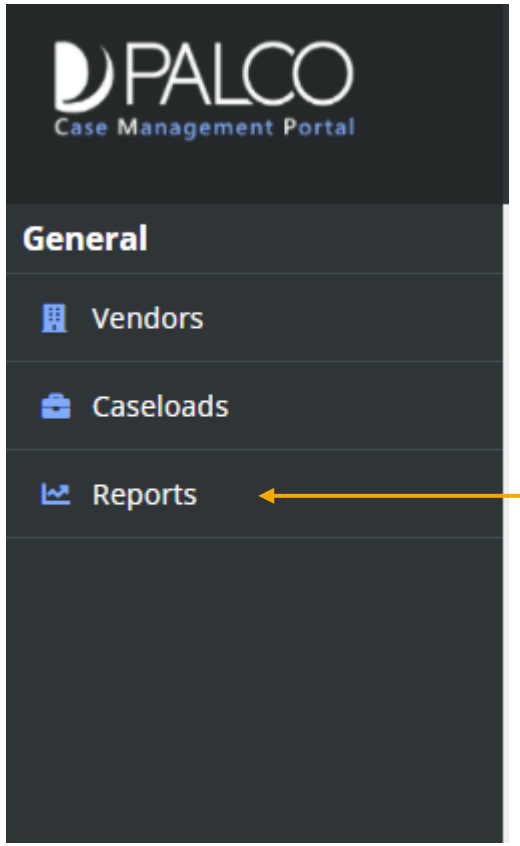
Quick Question Check In

Enter your questions in the CHAT box, we will answer as many as we can.

Reports Overview

- The Reports module in CMP is designed to allow users access to data for a large group of individuals.
  - Example: Mailing addresses for everyone on the SDCB program.
- Individual data elements and specific user details should be gathered from that individual's profile rather than reports.
  - Example: If you want to know the address for Participant Bob Smith on SDCB you would search and get his address from his profile rather than running a report.
- The Reports Module is organized with Categories and then Individual Reports to help narrow the report users are seeking to run.
- Report access is managed by permission sets. Not everyone will have access to every report or level of reports.

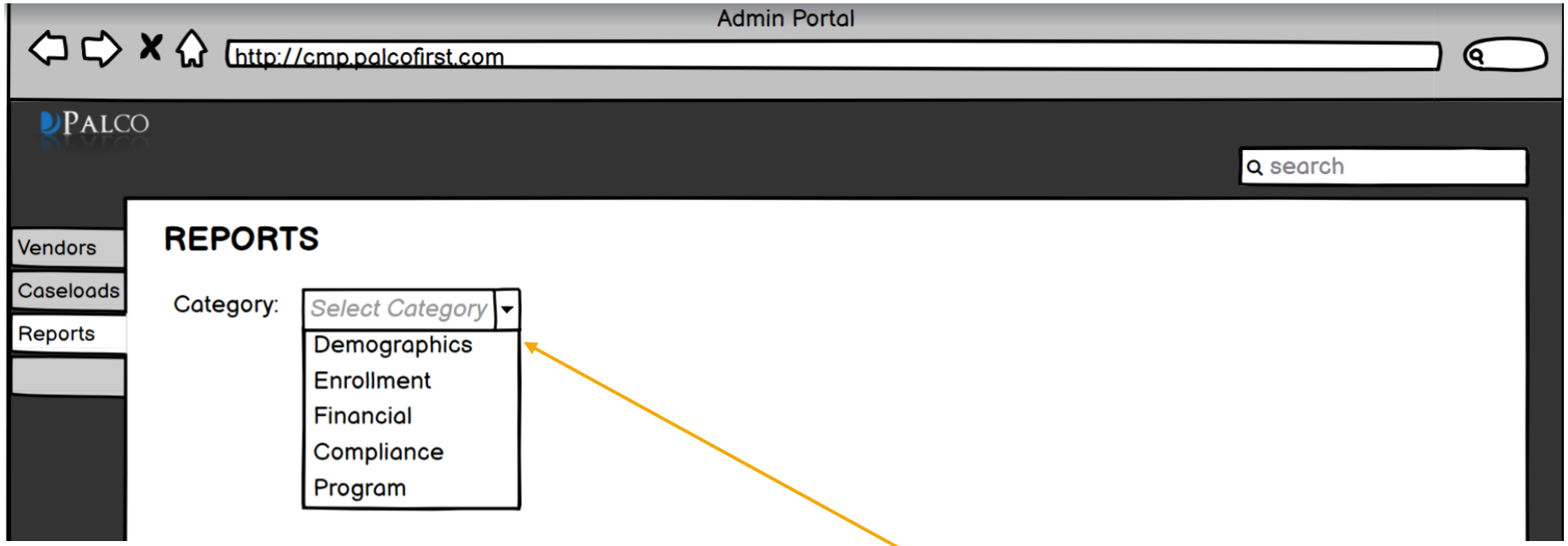
Running Reports



Once you log in to CMP, you will see a “General” menu on the left-hand side.

To access the reports module, click “Reports”

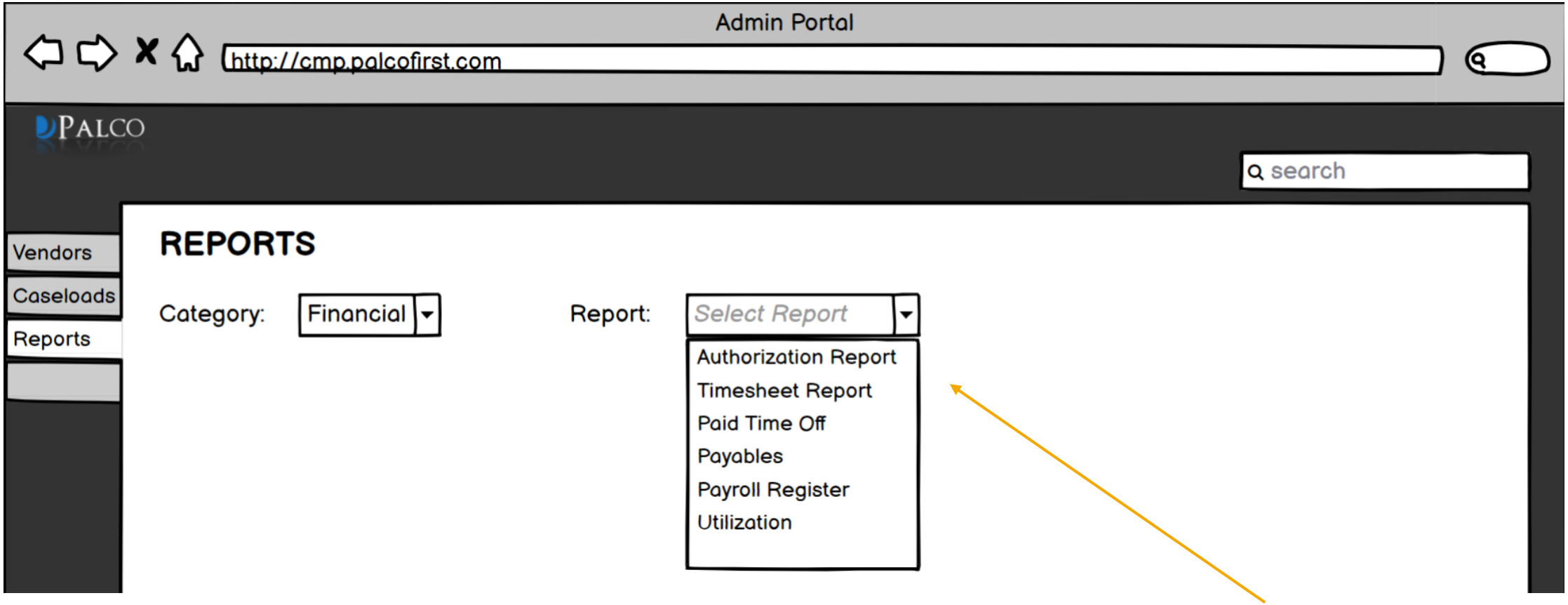
Running Reports



Use the drop down to select the Report Category for the report you would like to run.

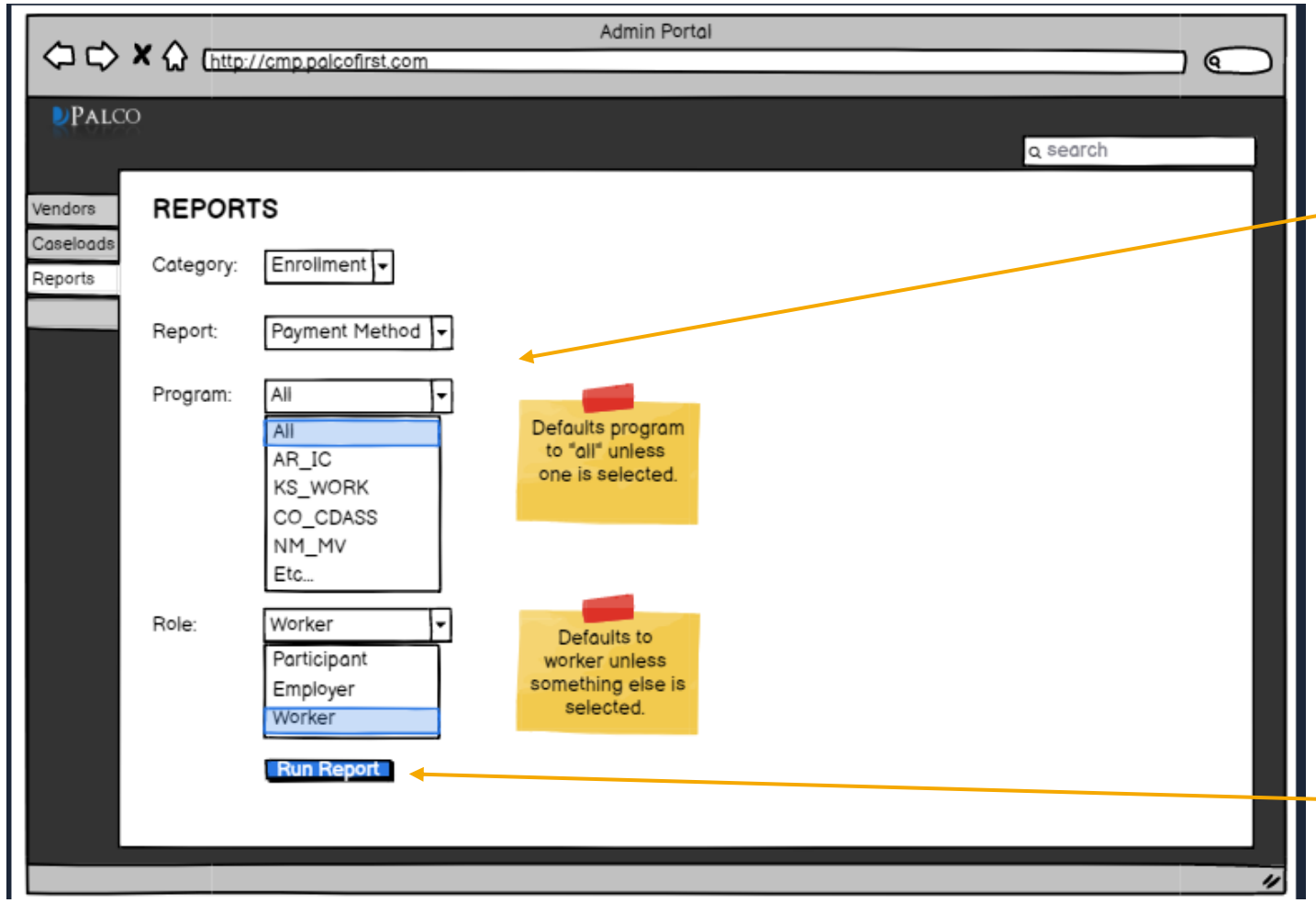
You can reference the CMP Master User Guide for a full list of reports and data contained in each category.

Running Reports



Once you have selected the category, you will be able to select the Report you would like to run.

Running Reports



Once you choose the report you would like to run, you may need to enter additional details to filter down your results.

After you have filled in all the required fields, select "Run Report"

Running Reports

- The report will begin to run once you have tap/click on the “run report” button.
- Depending on the specific report and volume of data contained in it, the report may take several minutes to generate.
- Once complete, the report will run, and results will display on the screen.
- You will then be able to export the report by clicking “download CSV” button in blue.

Report Library Core Reports

Member Status (Demographics)

Member statuses produces a list of participants, employers of record, and workers with their Case Status as of the date selected by CMP End User. Member statuses helps CMP users understand which Members are currently active, inactive, or pending. It shows how long a Case status has been in effect and helps CMP users review historical statuses.

Member Contact (Demographics)

The Member Contact report shows current contact information for Participants, Workers, or Employers of Record. Palco maintains physical and mailing addresses, email addresses, and phone numbers.

Participant Support (Demographics)

The Participant Support report lists all participants within a Program and their immediate support within that Program, be that a Case Manager, Support Broker, or other support role.

User Demographics (Demographics)

The User Demographics report shows essential and basic information about Participants, Employers of Records, and Workers. This report identifies the name, relevant IDs, current Case Status in CMP, gender, zip code, and date of birth of the Member listed. Workers on the list also show their relationship and shared dwelling status with participant.

Report Library Core Reports

Start Date Report (Enrollment)

The Start Date Report shows two types of Start Dates. It shows the original date that a Member (Participant, Employer, Worker) started in a Program, and it also shows a 'Restart' date, which is the most recent date the Member became active again. The Restart date is shown whenever a Participant, Employer, or Worker's profile has changed from Active to Inactive and back to Active.

Active Enrollment (Enrollment)

The Active Enrollment report identifies CMP Members (Participant, Worker, or Employer of Record) active during the date range specified along with their current Case Status. Users enter a role and a date range to see Members active during that time.

Payment Method (Enrollment)

The Payment Method report identifies how Workers, Participants, and Employers are paid, if they receive paper checks or electronic deposits for funds sent to them. Account details are not displayed.

Report Library Core Reports

Authorizations (Budgeting)

Authorizations in CMP are specific services and goods budget categories. The Authorization Report allows end users to pull both broad and refined lists of Authorizations from CMP. Congruent with the User's Role and scoped permissions, users may search for data across entire programs and with widely defined budget date time frames.

Report Library Core Reports

Employer Rate & Registration (Payroll)

The Employer Rate & Registration report lists Federal and State tax rates, unemployment insurance costs, and worker's compensation costs for Employers. These rates are applied to worker wages based on program, state, and federal requirements.

Payroll & Tax Info (Payroll)

The Payroll and Tax Info report displays rates, exemptions and other statuses that affect a worker's Payroll and Tax withholdings. The report includes factors affecting pay, such if the worker is exempt from Overtime pay and Difficulty of Care.

Timesheet Status (Payroll)

The Timesheet Status report gives CMP users the ability to see the bigger picture and overall progress of timesheets within a Program. It also gives CMP users shift level specifics across a range of workers, employer, and participants. This report lets the user narrow down results listed by Timesheet status. In doing so, the user can isolate timesheets with concerns or that need action such as Worker or Employer review. If the timesheet failed, the reason for that failure is identified.

Payroll Register (Payroll)

The Payroll Register report shows information about what was paid to workers on a given pay period, including deductions and exemptions and the payment method. CMP Users can specify a date range for inclusion, as well as limit results to a specific Participant or Worker. This report produces summarized pay information and calculates gross wages overall.

Report Library Core Reports

Vendor Info (Payables)

The Vendor Info report is a demographic report containing active, complete Vendors in CMP. Vendors are individuals and companies that produce an invoice or bill for payment, or where reimbursement is needed. Importantly, this report also lists the Vendor's tax ID.

Payables Register (Payables)

The Payables Register lists payments and reimbursements to Vendors for services and goods different than timesheet and timecard entries. It includes all payments within the service date range selected, including those in progress and rejected. The report includes Participant, Employer, and Payee IDs and Names, the service and cost, the Payable's present status, and additional reference information.

EVV Registration (EVV)

The EVV Registration report provides a list of workers and details about the worker's EVV compliance. It shows if the worker is required to use EVV, and if so, how they submit their time. It is particularly useful in gauging overall compliance and narrowing down workers who are out of EVV compliance.

Employee Missing Timecard (Payroll)

The Employee Missing Timecard report provides a list of active workers who did not submit a time-card for a specific pay period.

Report Library NM Program Reports

MCO Assignment (Program Specific)

The MCO Assignment report provides the specific Managed Care Organization a Participant is associated with.

Eligibility & Plan Info (Program Specific)

The Eligibility & Plan Info report includes basic budget information such as start and end dates, a budget ID allowing the user to tie it to other data, total funds and total funds with adjustments, Medicaid eligibility assessments and waiver.

Budget Report (Program Specific)

This report identifies budget specifics on a participant-by-participant basis for each of their Authorizations. It includes principal Participant information, including Level of Care, Category of Eligibility, Participant Waiver, Support Staff assignments, contact information, MCO, and status. It also includes overall budget information, such as approval information, dates, and amounts.

Utilization (Program Specific)

Includes Service Code, total funds authorized, auth status, utilization to date, and utilization to date as a percentage.

Data

- As an alternative to running full reports that will provide data for an entire set of data/program, consider gathering data for individual Participants directly from their profile.
  - Demographic information for every individual can be found on the Member Info tab of their record.
  - Utilization data can be found within the Account Info tab of the Participant record.
  - Rates of Pay for every Worker can be found on the Workers profile under the Pay Rates tab.

QUESTIONS

Enter your questions in the CHAT box, we will answer as many as we can.

Break- 10 min

Next- General Training review all of the system aspects Conduent is responsible for and some troubleshooting tips for CCSC staff assisting callers

Part Five

General- Troubleshooting and Tips

Conduent Functions – General

Below is a list of things Conduent is responsible for updating within the Palco CMP system:

- Enrollment Processing and all Enrollment Functions
  - Updating EOR Cost Tab during Enrollment
  - Linking qualified and enrolled workers to budget authorizations
- Changes of Information- Address, Contact Info
  - Must have a Change of Information Form in order to update (posted on the Palco website)
- Payment Info- Changes to direct deposit, withholdings, exemptions
  - Must have a corresponding form in order to update (posted on the Palco website)
- Case Status Changes

Conduent Functions – Continued

- Processing EVV Forms / Entering EVV Registrations (Mi Via and Supports Waiver)
- Must have a corresponding form in order to update (posted on the Palco website)
  - Must have a corresponding form in order to update (posted on the Palco website)
- Entering Rates of Pay for Workers
  - Must have a corresponding form in order to update (posted on the Palco website)

Any calls or issues related to these items should be directed through the existing Conduent support process.

Troubleshooting

- There are a variety of items CCSC staff should be aware of when assisting an Employer / Worker with troubleshooting issues (especially related to EVV and time entry).

- Often times, an issue with a Worker/Employer logging in or navigation can be tied to an issue in their CMP profile or record.

- CCSC should review each of the items covered next to help resolve the user's issue and before escalating the issue to the next tier.

Troubleshooting

User cannot login to CMP: (Professional Users Only)
Have they logged in previously?

- If Yes, please input a support ticket for Conduent to contact Palco for a password reset. (Tier III process)
- If No, New Users must register with Palco to access CMP. Please visit the Palco website for the Palco Case Management Portal Access Request Form.

Cannot Change Password:
The Password must include a capital letter and a number. Enter the password with these criteria and the password will be changed.

Search results not pulling up record:

- The participant, employer, or worker has not been initiated for enrollment.
- The participant is not a part of your caseload. If this is incorrect, please contact Conduent.
- Check for any misspellings and other entry errors in the search field. Once changed, search again.

Troubleshooting

Worker does not know how to check in/out:

- If EVV, provide them with the EVV user guide for their program- mobile app or telephony – located on the Palco website.
- If using Connect, provide them with the New Mexico Time Entry User Guide located on the Palco website.

Employer cannot log in to the EVV Mobile App:

- Employers do not have credentials for the mobile app, it is for workers only. Provide them with the user guide and remind them of this.

User logged in to Connect and does not see their EVV time:

- Time should be visible in Connect the following business day. They should check back later. If that does not resolve the issue, see the next item “user does not see a specific shift in Connect”

Troubleshooting

User does not see a specific shift in Connect:
At times, a shift may fail being imported from EVV (Authenticare) to Connect. Some of these reasons include:

- **Participant/Worker not active:** If either worker was not active for the date of service, they should not have been worked and should not have been clocked in for that time. Check the CMP Case Status and inform them they cannot be paid for that date. If they have a dispute about their active enrollment date you can escalate to Conduent.
- **Service Not Authorized:** This means they selected a service that they were not authorized to provide. This can be viewed from the budget and rate of pay screens in CMP. Remind them they need to ensure they select the correct service code when clocking in and provide them the NM Time Entry User Guide for instructions on how to enter a manual shift in Connect.

Ultimately, it is the responsibility of the Worker and the Employer to review their shifts in Connect before they approve it! If they see a shift is missing the Worker should manually enter the shift in Connect when the timesheet is in “open” status and submit it to the employer for Approval. They can reference the NM Time Entry User Guide for instructions.

Troubleshooting

User receives a “automatic time setting error” code when checking in:
This is often due to the settings on their device related to date and time. They need to ensure their device settings are set to automatic.
To correct it:

- **Android** this is found under Settings → System → Date & Time → Set Automatically
- **iPhone** this setting is under Settings → General → Date & Time → Set Automatically

Ultimately, it is the responsibility of the Worker and the Employer to review their shifts in Connect before they approve it! If they see a shift is missing the Worker should manually enter the shift in Connect when the timesheet is in “open” status and submit it to the employer for Approval. They can reference the NM Time Entry User Guide for instructions.

Troubleshooting

User cannot log in to EVV app:

Device IDs

- CCSC can view the device ID that is registered from the Connect “program" tab for the Worker as we covered earlier.
- Device IDs will never contain a letter “O” it is always a Zero (0)
- iPhone users will always have a device ID with a series of capital letters and numbers with dashes. Every character must be correct!
    - If they cannot see every character in the long string they may need to check their display settings to adjust their font size.
- Device IDs are never the name of the phone, serial number, IMEI number or anything else! It will <u>always</u> come directly from the Authenticare Application.
- It will always take 1 day for data like the device ID to push to AuthentiCare from CMP.

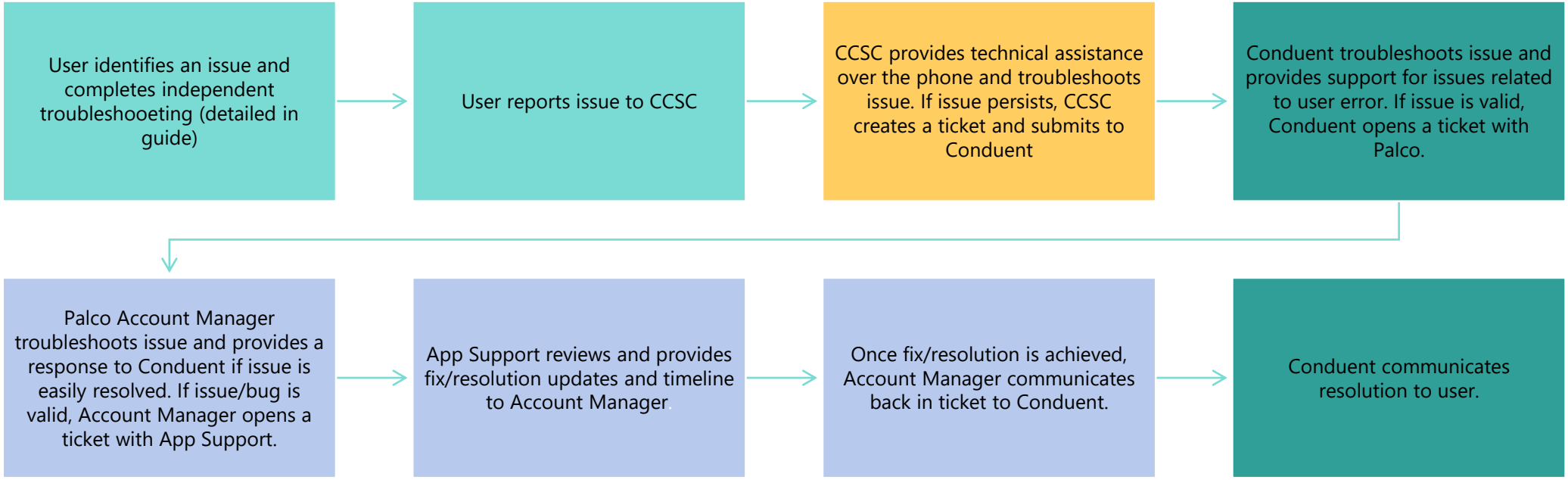
Passwords

- Palco will always set a default password of Palco123
- If they need to reset their password for the app they should follow the instructions from the app home screen.

Remember- only Mi Via and Supports Waiver Device ID information is in CMP. SDCB workers should work with their Employer / Support Broker to troubleshoot issues directly in AuthentiCare website.

Palco System Support Process

When navigating within CMP Admin, a situation may occur where the access or outcome is not what the user expected it to be. If that happens, the user(s) should follow the process outlined below for support.



QUESTIONS – Final Q&A

Enter your questions in the CHAT box, we will answer as many as we can.

User Guide

A **CMP Master User Guide** will be available post go-live within the Palco CMP System for professional users.

Resources

Visit www.palcofirst.com/new-mexico to access the full list of training recordings and resources.

PALCO

Thank You for your time!