PALCO

Palco New Mexico Phase II Training

CMP

Webinar Training Guidelines

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

- We will use the chat feature for your questions and pause at designated times to answer you.
  - 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

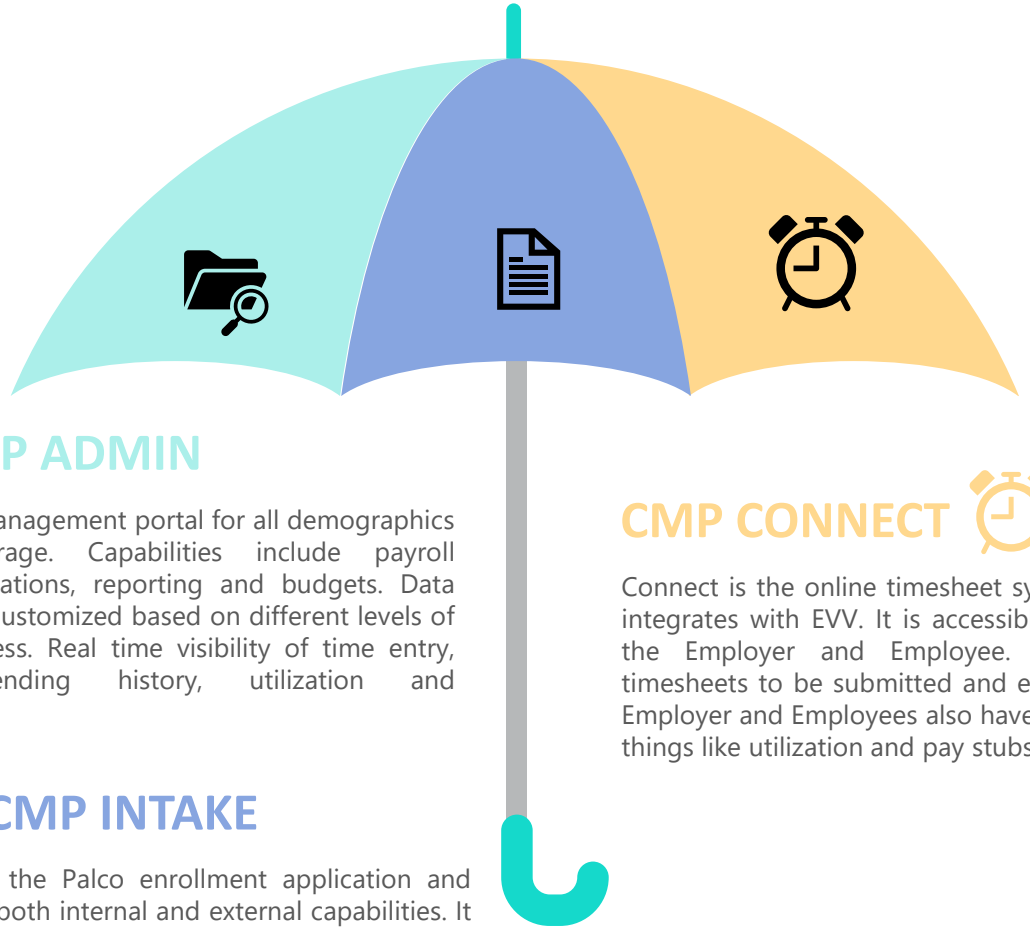
Today's training is for **DOH and HSD Staff** who will be utilizing the Palco system and assisting self-directed participants.

Training Agenda

Payments/Utilization (CMP Application)

- Viewing time in CMP
- Viewing Vendor Payment Requests (VPR)
- Pay statuses- The various statuses available, what they mean, and how to use them
- Failures/Rejections -How to view and understand failures
- Withholdings -Where to view and update a worker's withholdings
- Pay selection (Direct Deposit, Paper, Money Network Card) 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
- Viewing Electronic Visit Verification (EVV) information in CMP

Palco Case Management Portal (CMP)



CMP ADMIN

The main case management portal for all demographics and data storage. Capabilities include payroll processing, validations, reporting and budgets. Data permissions are customized based on different levels of professional access. 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

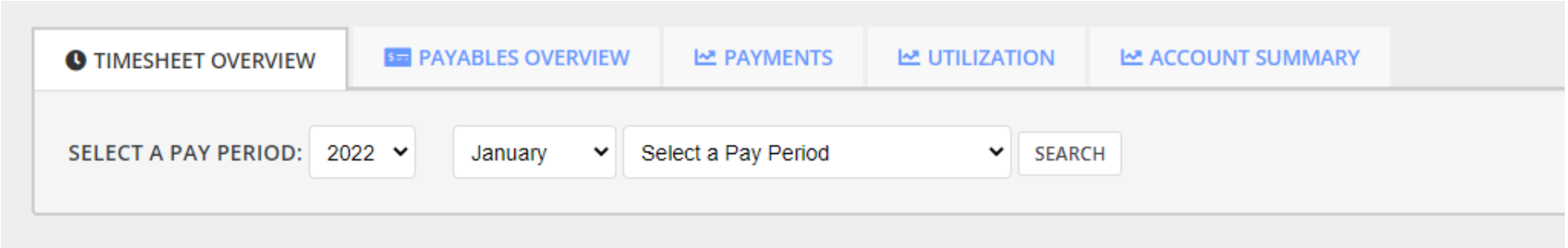
Connect is the online timesheet system that integrates with EVV. It is accessible only by the Employer and Employee. It allows timesheets to be submitted and edited. The Employer and Employees also have access to things like utilization and pay stubs.

Time Entry – Payables Tab

- The **Payables Tab** located within the Participant record of CMP is where paper timesheets and Payment 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.

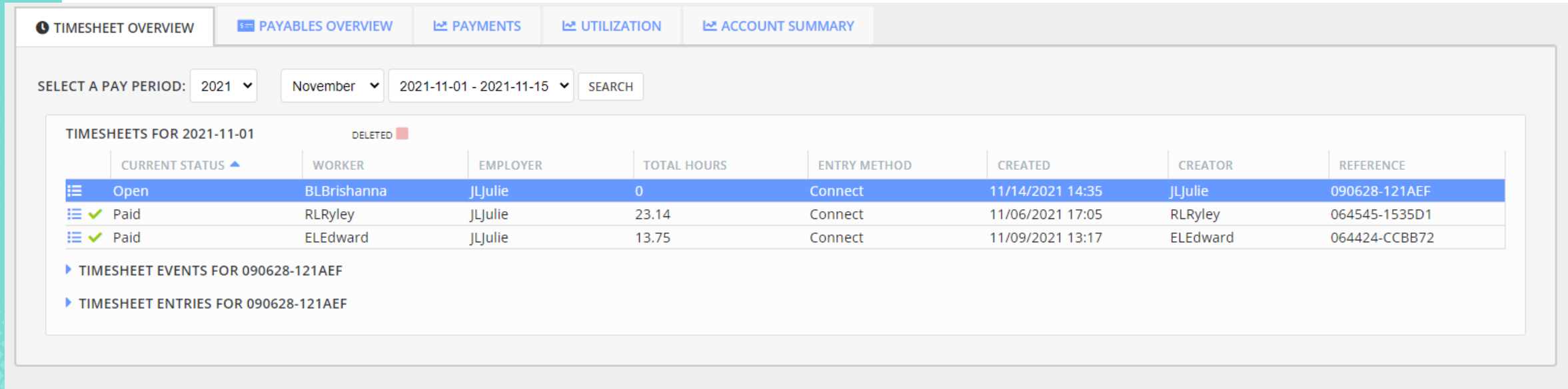
Viewing Time

- 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.

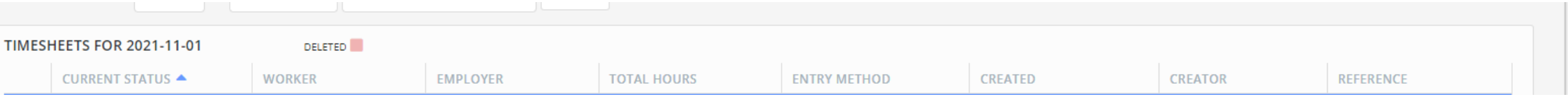


Account Info → Timesheet Overview

- 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

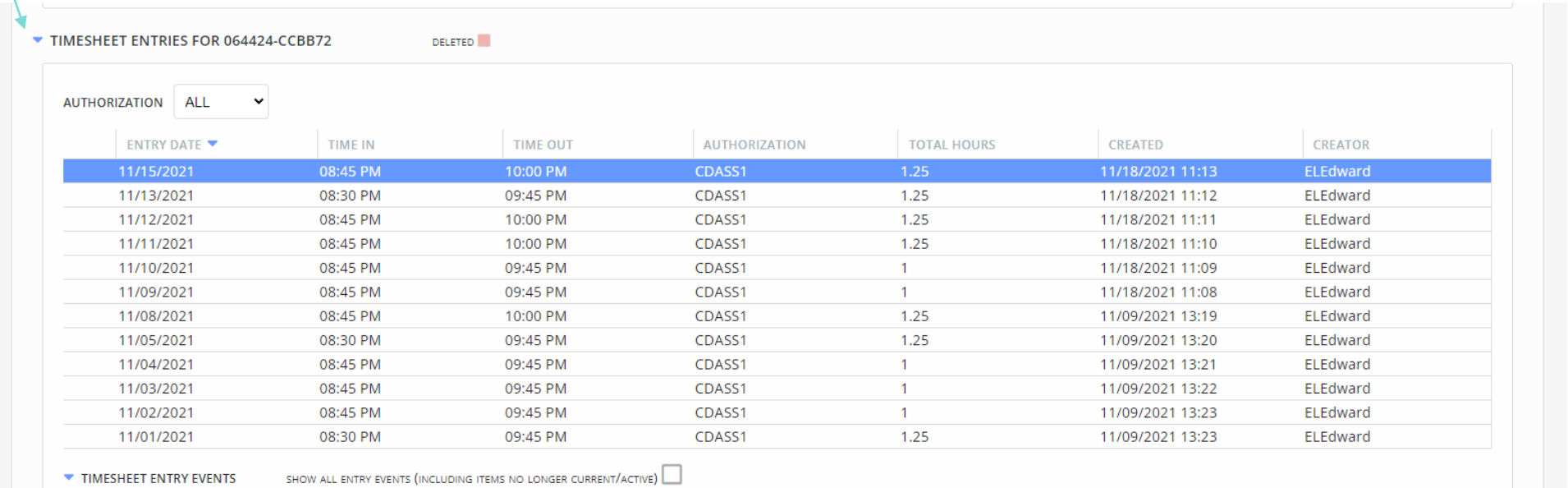
EVENT	CREATED	CREATOR
Status Changed: Paid	11/21/2021 17:00	JLJeff
Status Changed: Approved for Payment	11/19/2021 11:40	JLJennifer
Status Changed: Pending Palco Review	11/18/2021 11:28	JLJulie
Status Changed: Pending Employer Review	11/18/2021 11:14	ELEdward
Status Changed: Open	11/09/2021 13:17	ELEdward

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

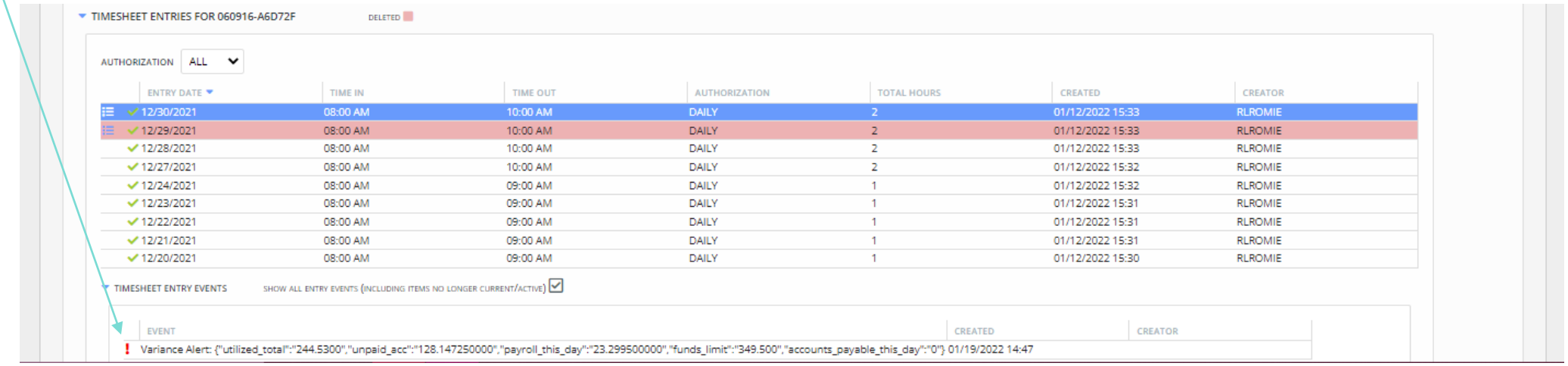
TIMESHEET ENTRY EVENTS SHOW ALL ENTRY EVENTS (INCLUDING ITEMS NO LONGER CURRENT/ACTIVE)

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

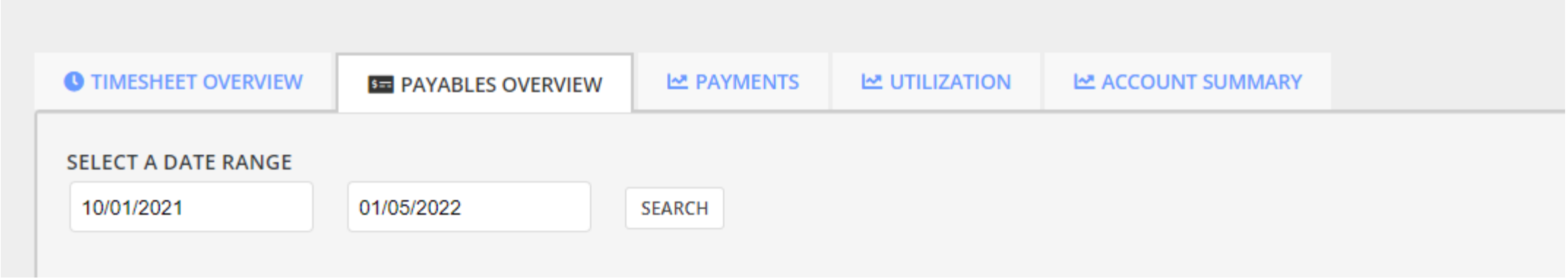
ENTRY DATE	TIME IN	TIME OUT	AUTHORIZATION	TOTAL HOURS	CREATED	CREATOR
12/30/2021	08:00 AM	10:00 AM	DAILY	2	01/12/2022 15:33	RLROMIE
12/29/2021	08:00 AM	10:00 AM	DAILY	2	01/12/2022 15:33	RLROMIE
12/28/2021	08:00 AM	10:00 AM	DAILY	2	01/12/2022 15:33	RLROMIE
12/27/2021	08:00 AM	10:00 AM	DAILY	2	01/12/2022 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)

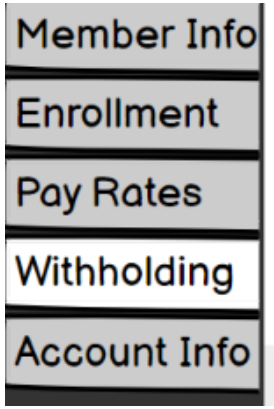
EVENT	CREATED	CREATOR
Variance Alert: {"utilized_total":"244.5300","unpaid_acc":"128.147250000","payroll_this_day":"23.299500000","funds_limit":"349.500","accounts_payable_this_day":"0"}	01/19/2022 14:47	

Viewing Vendor Payment Requests

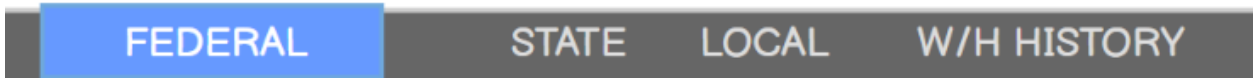
- Vendor Payment Requests (VPR) are previously known as Payment Request Forms (PRFs)
- Like Timesheets, VPRs can be viewed in the **Payables Overview** section of the **Account Info tab**.
- Access the Participant record and navigate to



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:

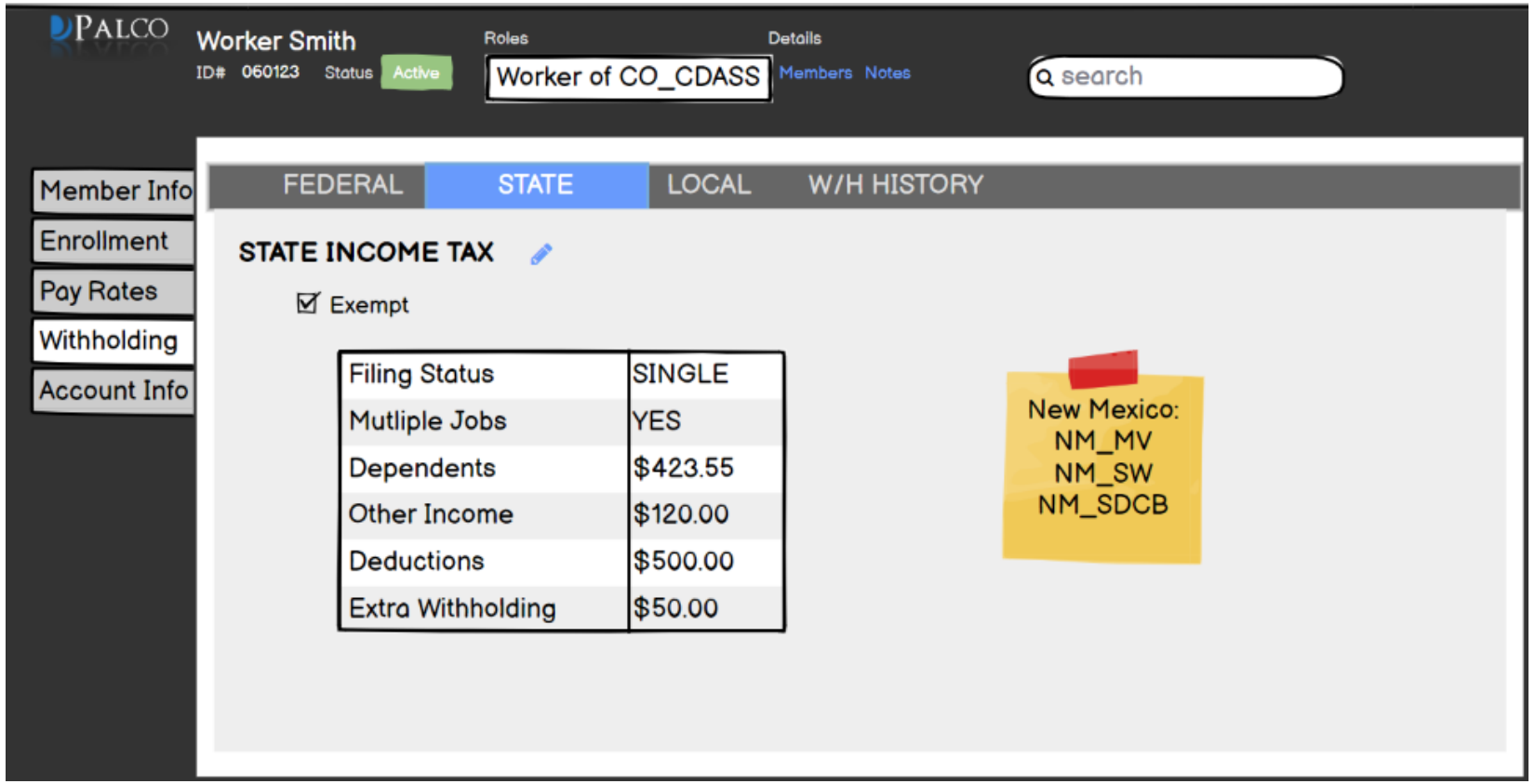
Filing Status	SINGLE
Mutliple Jobs	YES
Dependents	$423.55
Other Income	$120.00
Deductions	$500.00
Extra Withholding	$50.00

Pre-2020:

Filing Status	SINGLE
Dependents	2
Extra Withholding	$50.00

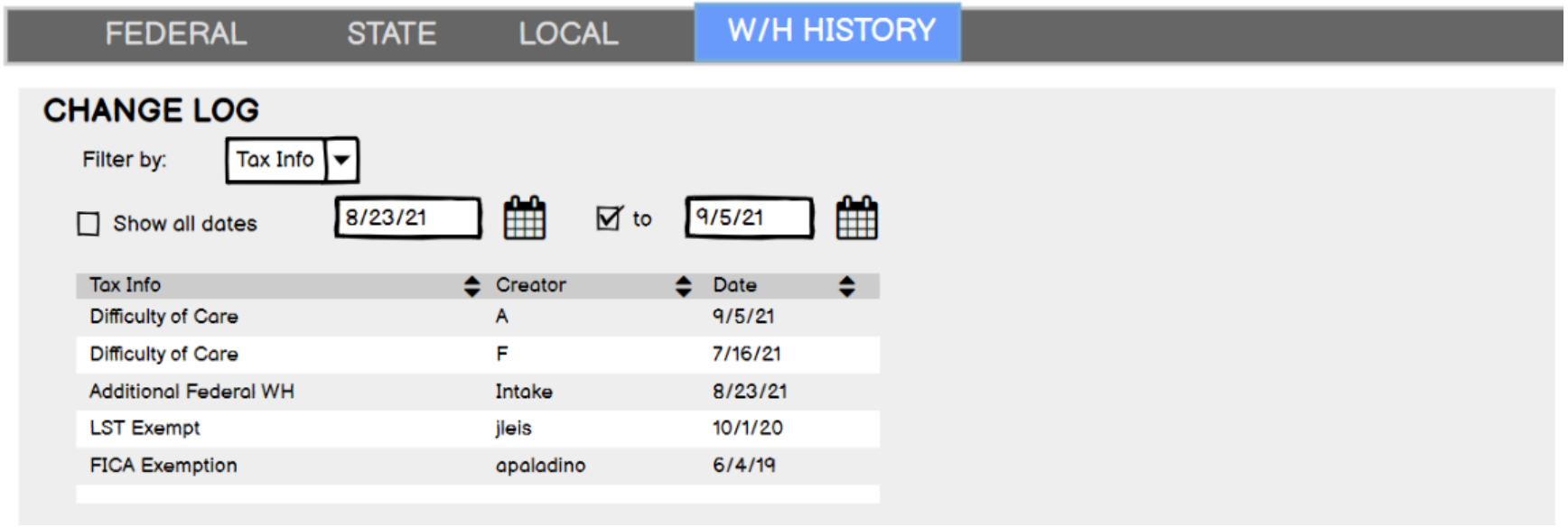
Withholdings - State

- 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 and sent to the Employer. 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:

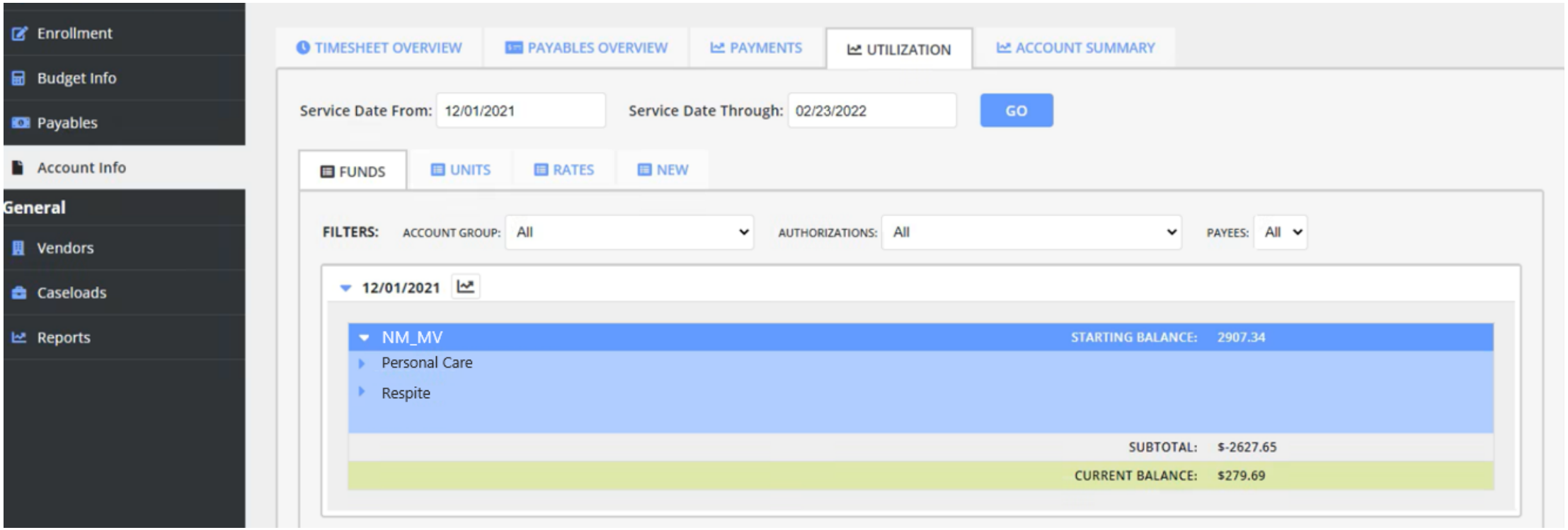
- ✓Budget Checks
- ✓Active Case Status for all parties
- ✓Medicaid Eligibility
- ✓Unallowable overlapping shifts
- ✓Invalid Rates of Pay

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.

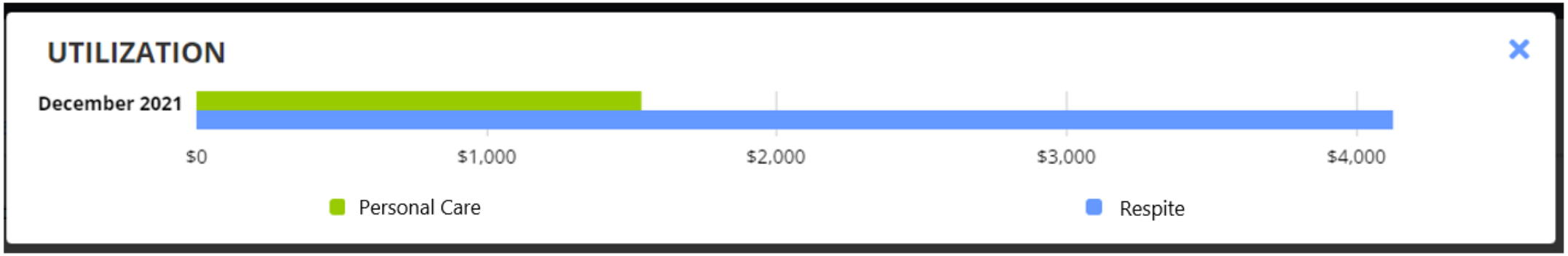
Viewing Utilization

- 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.

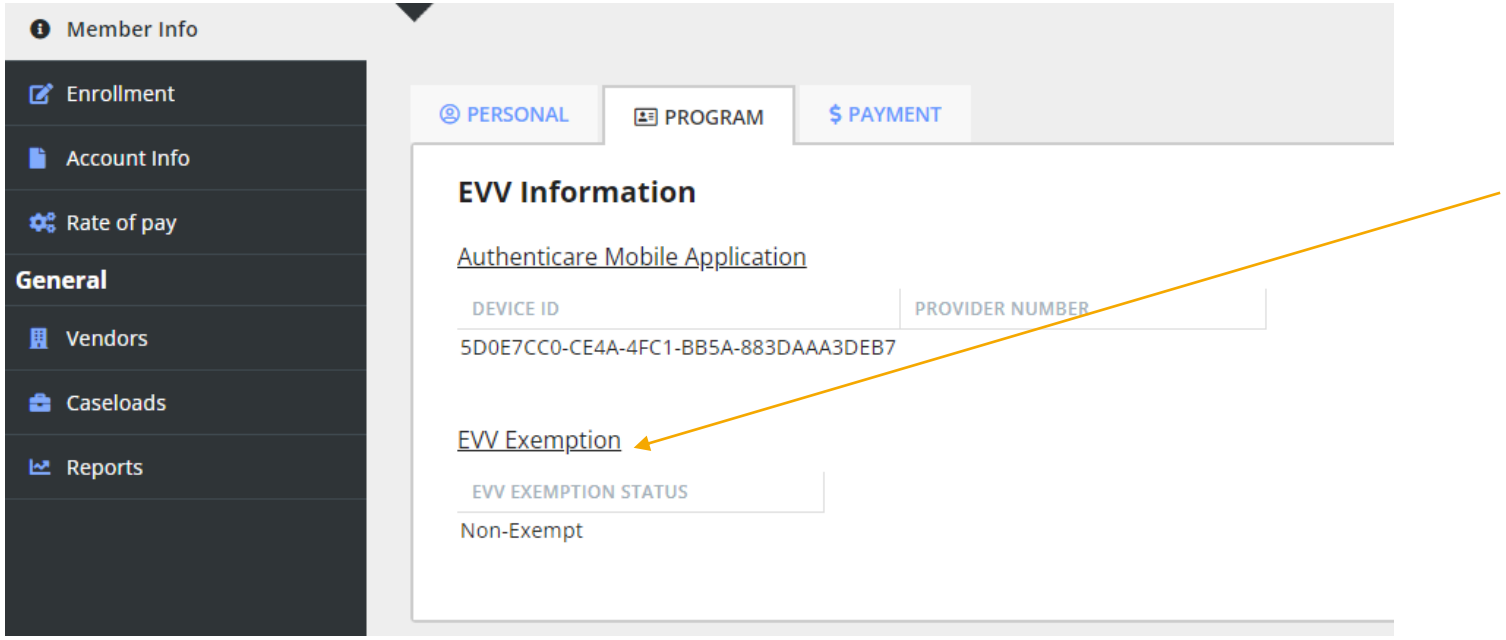


Electronic Visit Verification (EVV) Exemptions

- 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.

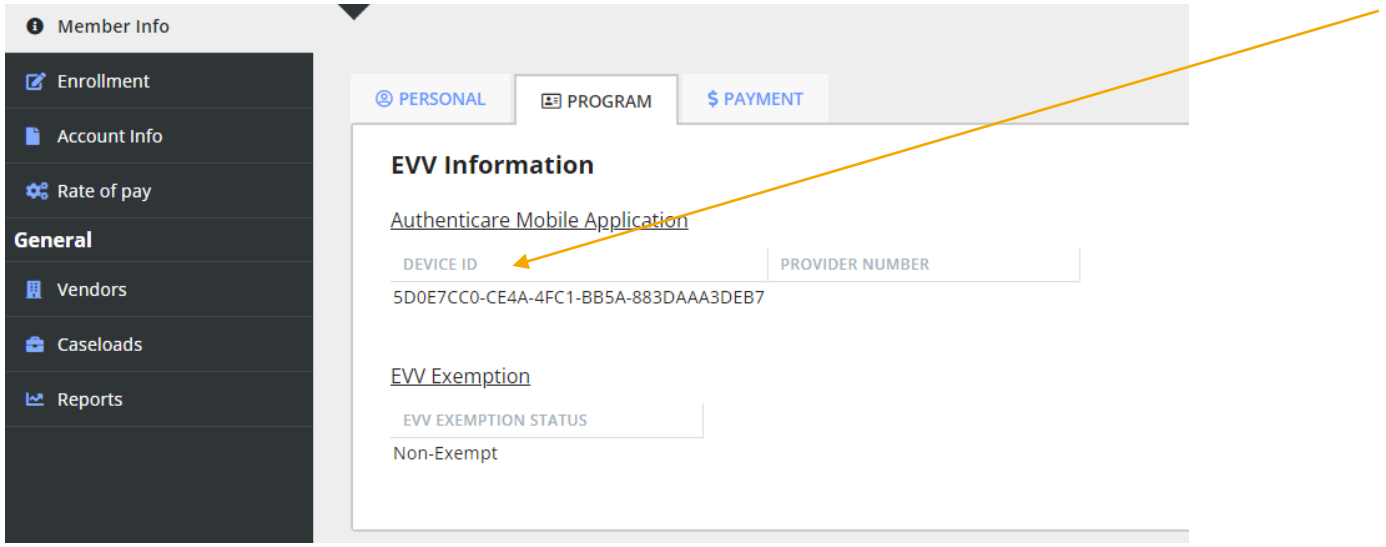
EVV Exemptions

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



EVV

- Although Consultants and CSCs do not play a role in EVV setup, Consultants and CSC for Mi Via and Supports Waiver will 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



User Guide

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

QUESTIONS

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

Resources

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

PALCO

Thank You for your time!