PALCO

Palco New Mexico Phase II Training

Miscellaneous

MISC

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 **MCO-UR / FFS-TPA 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

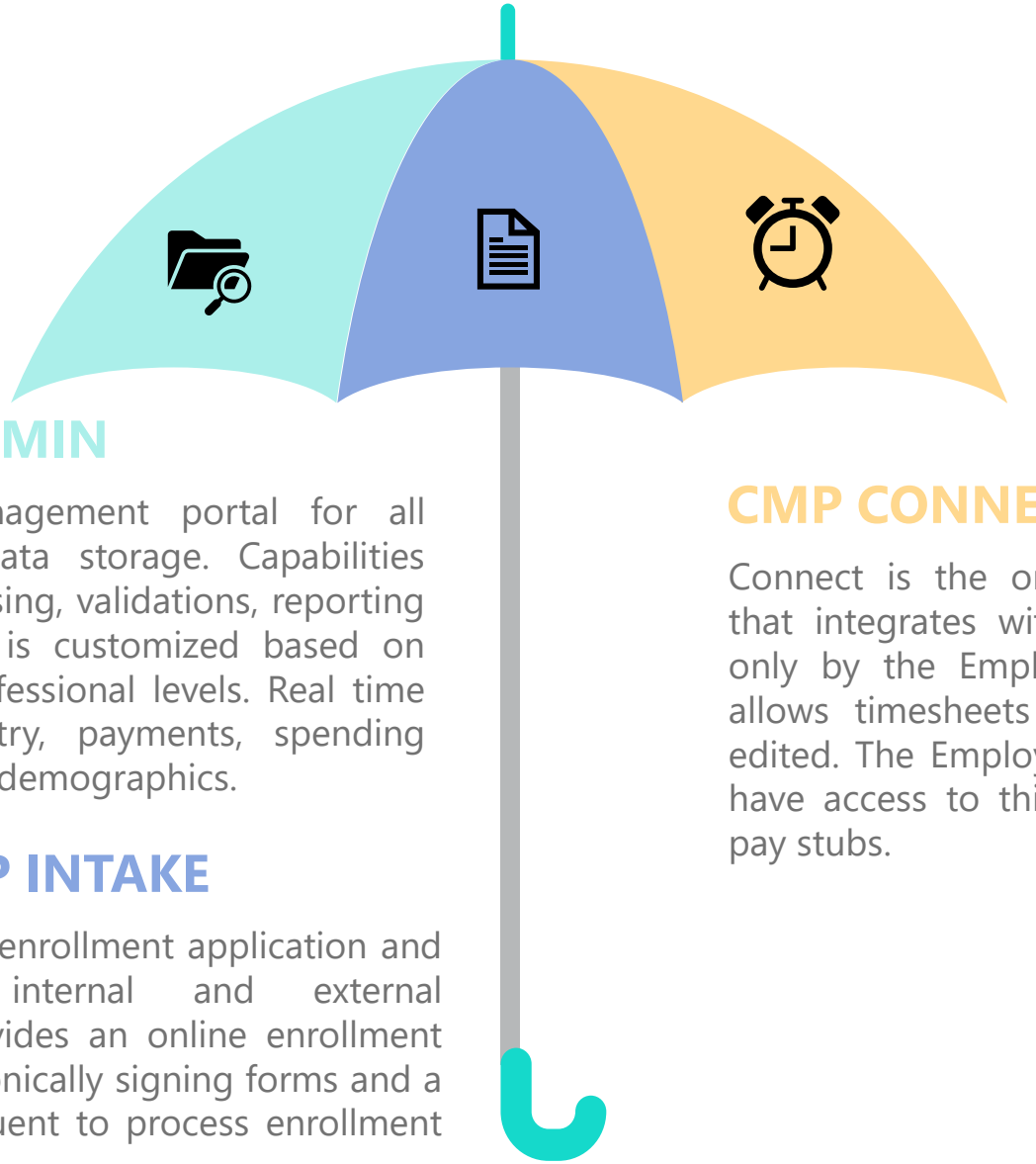
INSERT INDIVIDUAL TRAINER SLIDE

Training Agenda

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

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.

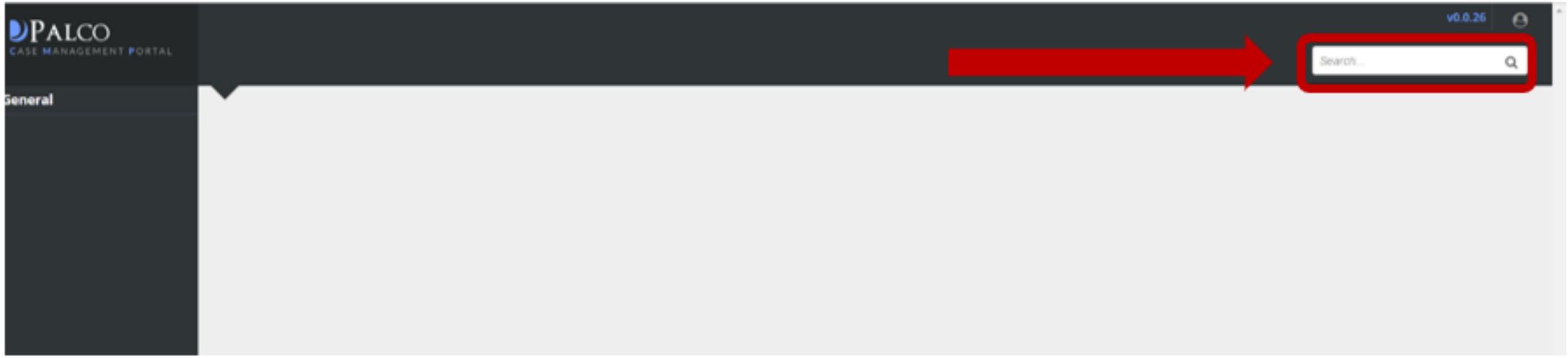
Today’s Focus

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 access. Real time visibility of time entry, payments, spending history, utilization and demographics.

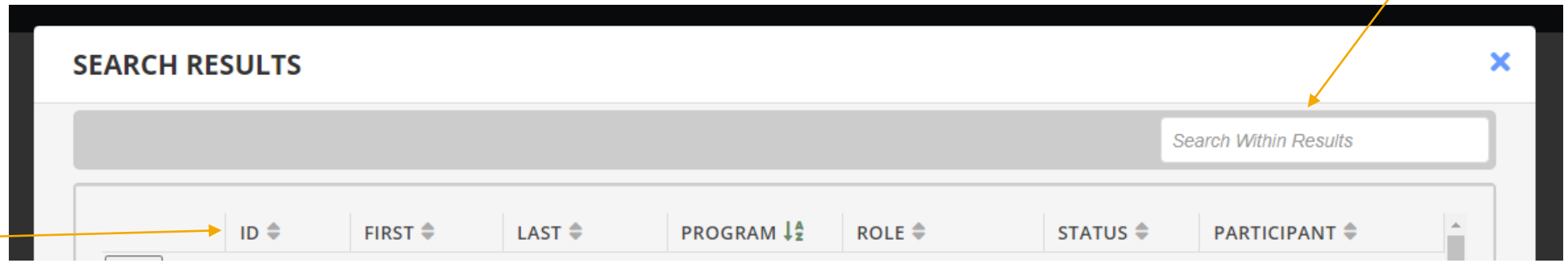
Searching

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

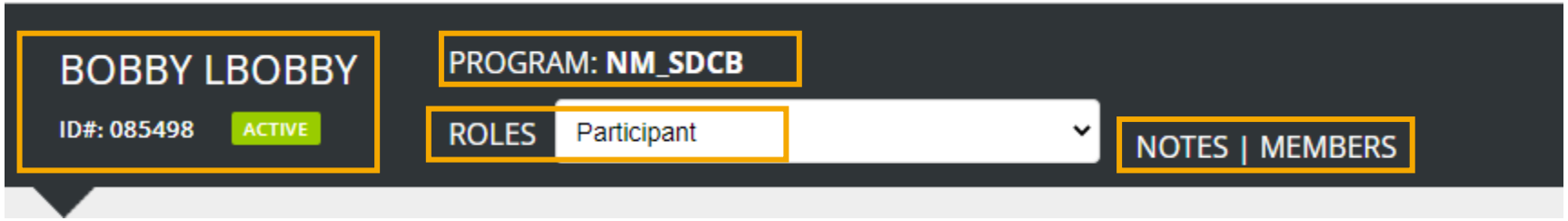
Once your search results display you can sort and filter the results to help narrow down the record you are looking for. You can also search again within the results to help make the results more specific.



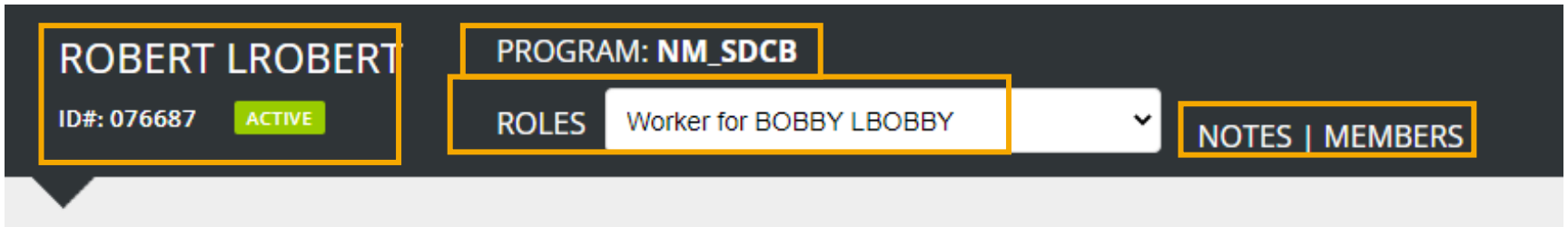
For example, if you typed in the last name Martinez and received many results, you can then type the first name into the “search within results” box to narrow your search.

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.

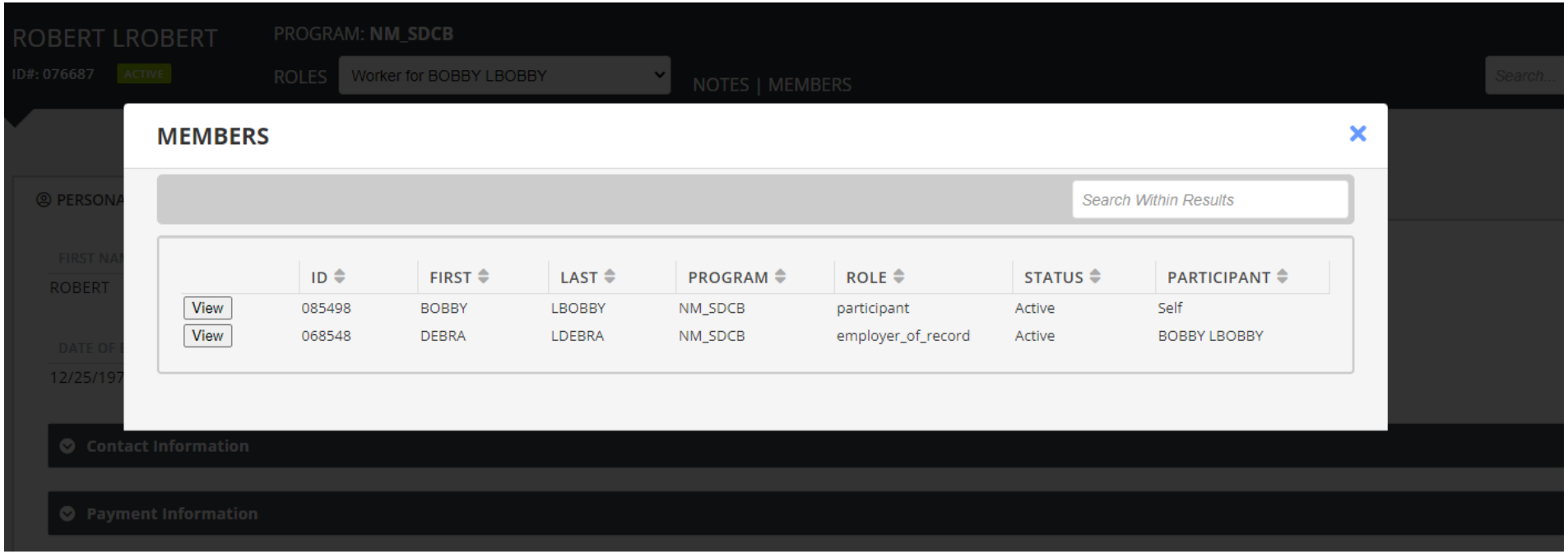


If an individual is associated with multiple people (for example, a worker who is employed by multiple Participants) you can switch between associations by using the ROLES drop down.



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.

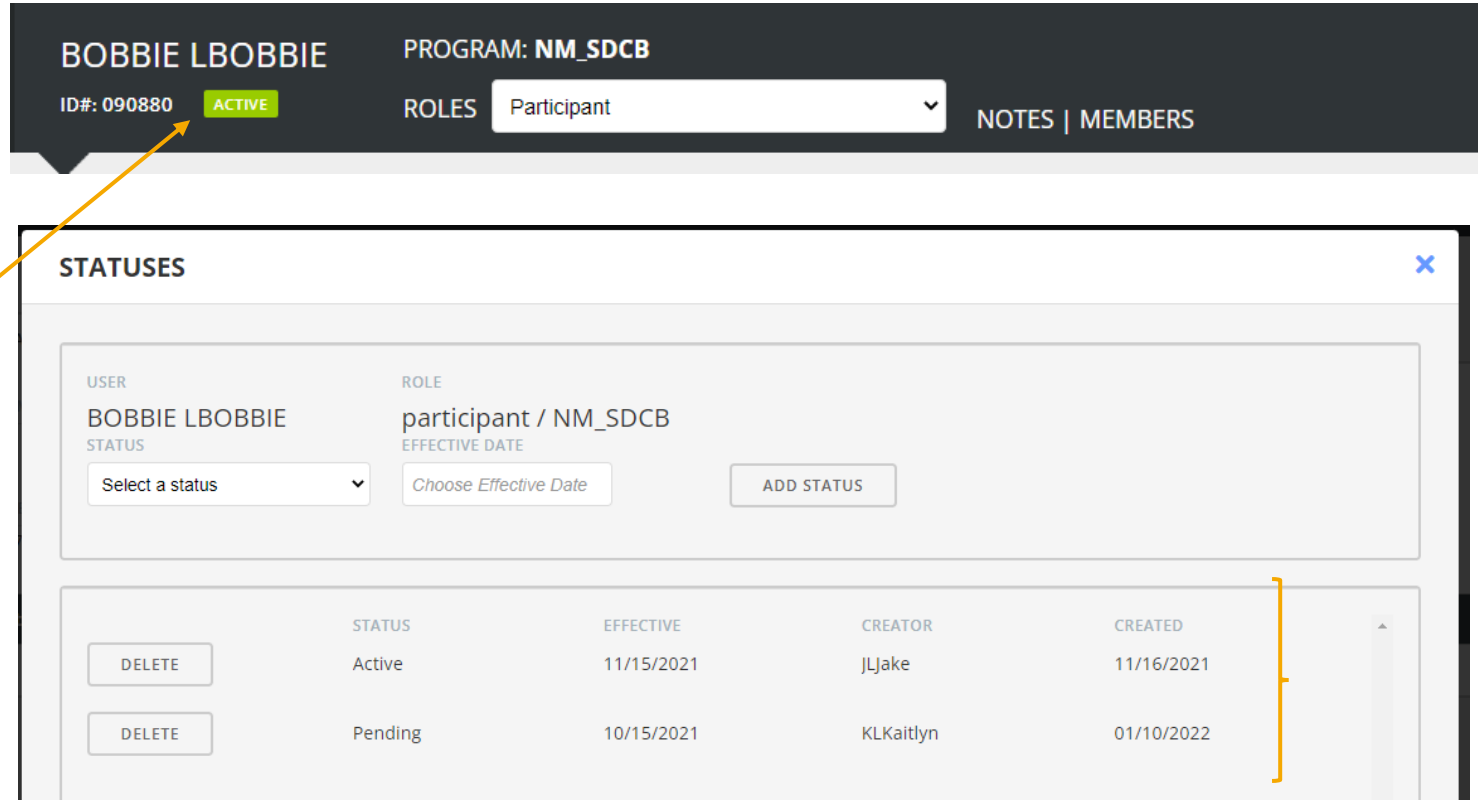
Tab	Function
Member Info	This tab will allow users to see the demographic data for each participant/employer/employee.
Enrollment	This tab will allow users to view the status of the participant/employer/employee enrollment with PALCO.
Budget	This tab is where designated users will enter the participant's 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.

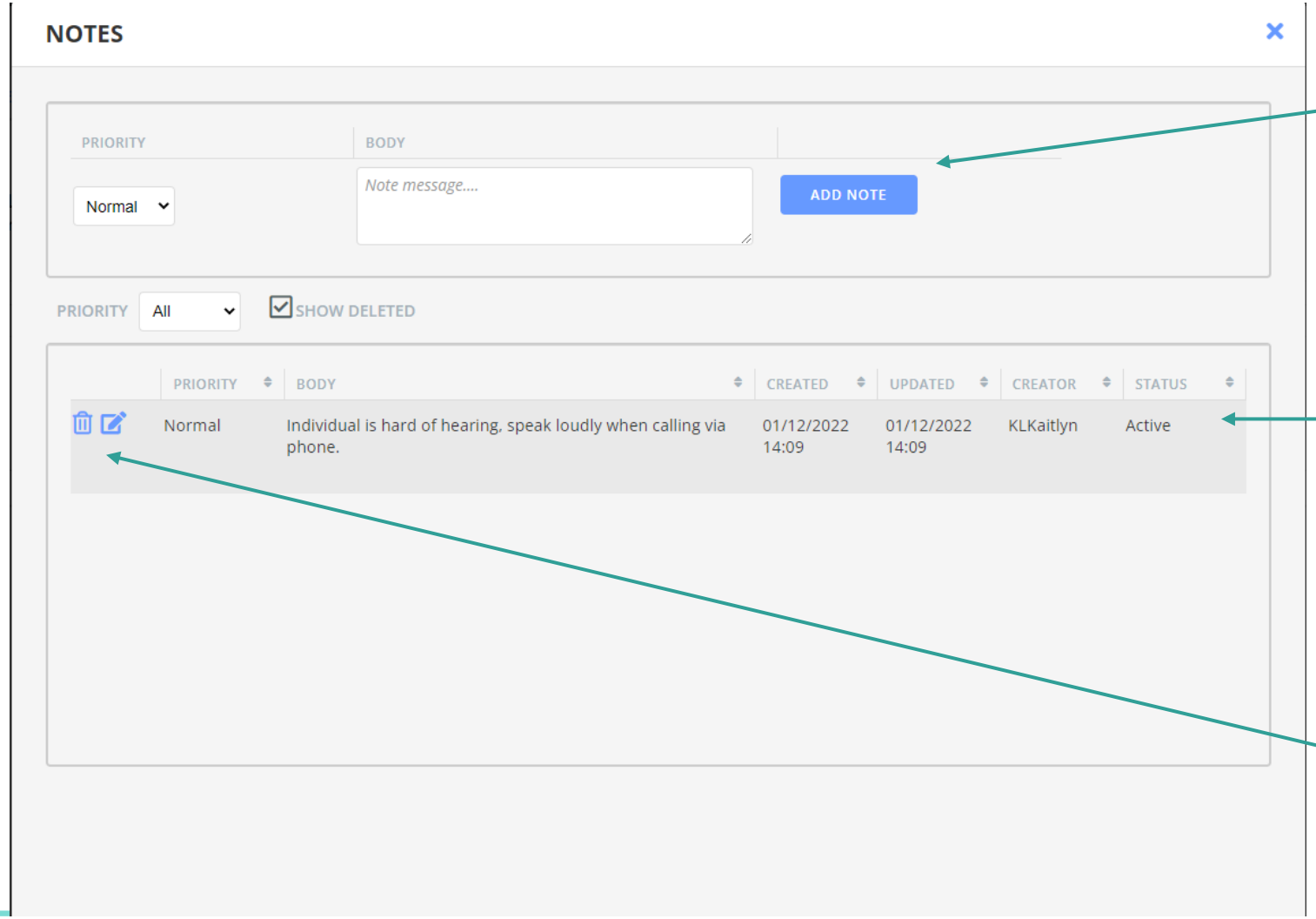
List of Statuses

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 a 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

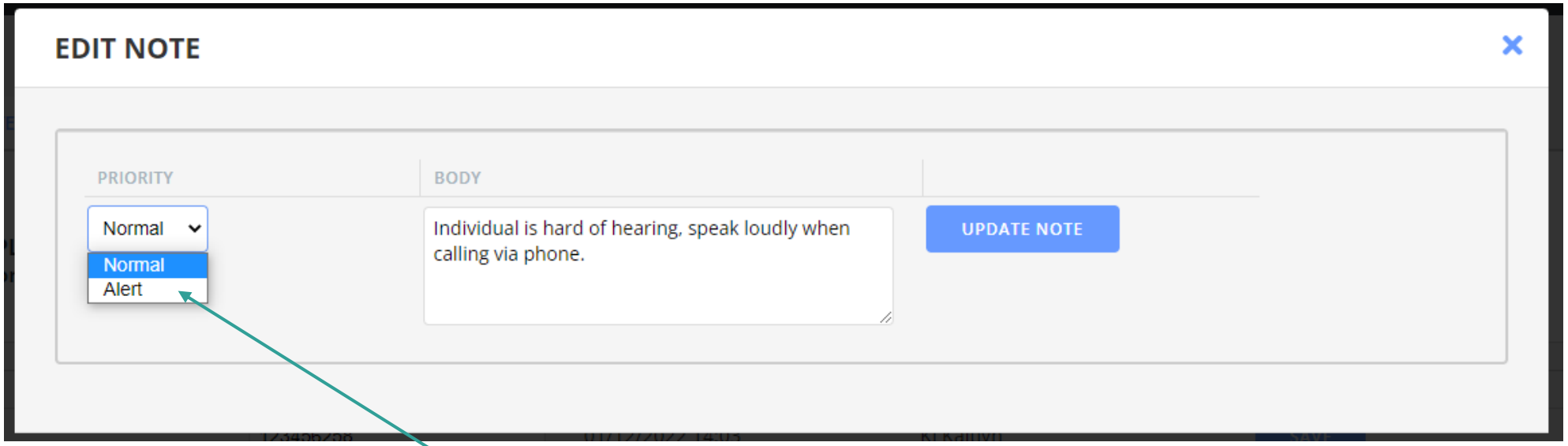


The first section of the Notes screen is for adding new case notes and alerts.

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

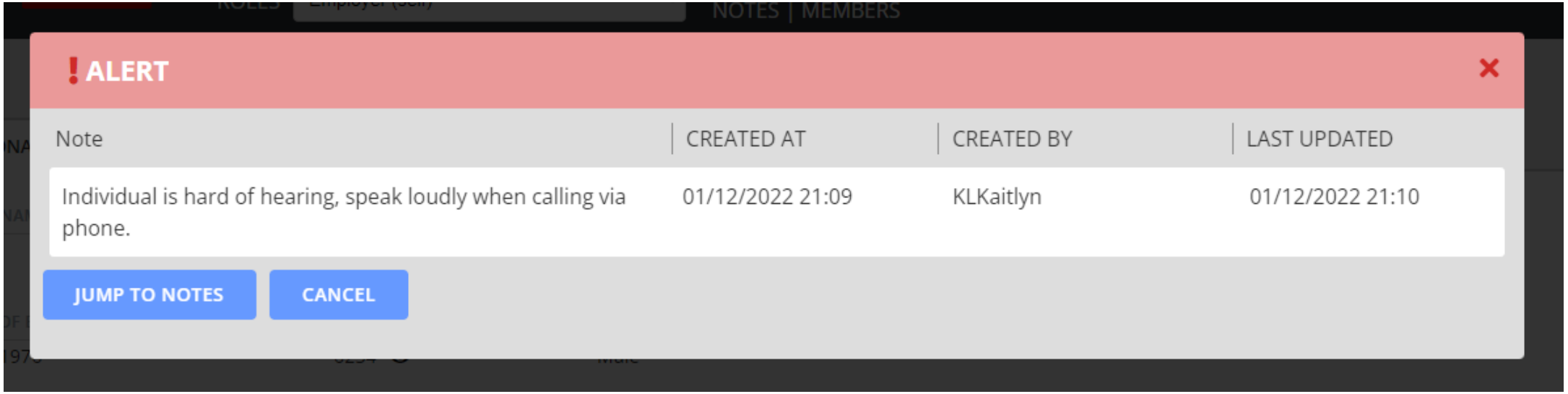
Notes can be deleted or edited if a users has access to that functionality.

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.

Resources

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

PALCO

Thank You for your time!