NM Frequently Asked Questions –Sandbox Testing

This document will provide a log of questions that have been asked and answered in the Sandbox testing Q&A sessions. The Sandbox testing will take place from 5/3-5/13 for designated users to learn the system and provide feedback to Palco. Daily Q&A sessions are being hosted by Palco to provide support. For training resources specific to your user role, visit https://palcofirst.com/new-mexico-training-announcement/ and access your training recording page. You can also find training handouts on the Palco New Mexico website under Phase II Training Resources.

Commonly Used Acronyms:

- CCSC – Consolidated Customer Service Center
- CC – Care Coordinator (MCO)
- CSC – Community Supports Coordinator
- DDW – Developmental Disability Waiver
- FFS – Fee for Service
- MCO – Managed Care Organization
- SB – Support Broker
- SW – Supports Waiver
- UR – Utilization Reviewer (MCO)
- TPA – Third Party Assessor (FFS)

Date	Question	Answer
5/4/2022	Will authorizations be automatically shown based on whatever is approved by the MCO or TPA, or will the menu always show all options within a certain category?	The authorization menu will always include all the options available in the program.
5/4/2022	When setting up a payroll item, like 99509, since we often don't have worker set up or available for a new participant/member, can we just estimate the taxes and revise later?	The default rate in the Employer Cost tab (from the employer record) should be used.
5/4/2022	For annual plans, is there an option to start with a copy of the previous plan?	This is not currently a copy feature in CMP but the previous plan will be visible (if created/migrated to CMP).

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5/4/2022	Does passing the COR still enable a worker to start work, even if it takes a week or two longer for the EE packet to be processed?	A worker's full enrollment must be completed before they can begin work. There is no backdating.
5/4/2022	I don't see any exception codes in the system yet. Will these be added prior to the go-live date?	The "E codes" such as 99509E are no longer used. When a rate is entered over the allowed rate, a red exclamation point shows up for that budget line, alerting UR/TPA that the request is over the rate limit.
5/4/2022	Will Palco be able to complete the enrollment prior to the start date? Currently on FOCOS there is that "inactive" period after a budget is approved but before the start date when no one was being linked...which has required numerous calls to CCSC to get the FMA to actually link them...will this still be an issue?	Workers can enroll prior to the participant being active. They can complete this enrollment online and then it is reviewed and approved by Conduent. At that point, Conduent would link them to the plan. Having the EEs complete their enrollment electronically online will help ensure they have submitted their paperwork correctly and there will be fewer errors and less missed coverage.
5/4/2022	Will the Employer packet have to be processed completely prior to the Worker packets being submitted?	No, all packets can be processed at the same time. Once enrollment is complete for participant, EOR and worker, the worker can begin providing services.
5/4/2022	There is not a calendar breakdown in CMP on the goal page like there is on FOCOS, does this exist somewhere?	No, this feature does not exist in CMP. You do not need to "distribute" funds or figure out in which monthly bucket to place the funds.
5/4/2022	Once the budget goals are all written where is the actual "submit" button?	There is no "submit" button. As you go through the process of entering your goals and saving, it will not be "submitted" until you change the status to "under review" and save (that will trigger the notification to the UR/TPA). Please review the Advanced Budget Tool Quick Reference for more detail.

Date	Question	Answer
5/5/2022	Should each of our consultants only choose 1 participant name from our agency's list to creates the budgets and tasks to send to the TPA? We noticed if 1 consultant started working on a particular name, anyone else who also chose that name would see that the 1st consultant did or was working on.	The same login can be used by multiple people and more than one person can be working on a participant. It may get confusing if more than one person is doing this so it may be beneficial to start with another participant if you are seeing recent updates from another user/tester. *<THIS ANSWER IS ONLY RELATED TO SANDBOX TESTING AND NOT THE PRODUCTION ENVIORMENT>*
5/5/2022	When entering in the justification, I noticed it only allowed a few sentences. I know we were told we had 5,000 characters. Will we be able to enter more when the system goes live?	This is a known bug in the sandbox environment that is being fixed by development. The production environment will allow 5,000 characters to be entered for each justification. If you need more, you can add another note.
5/5/2022	What does the sandbox testing end?	The Sandbox has been extended to a date to be determined.
5/6/2022	Where can a user find the crosswalk for service codes.	It is available at https://palcofirst.com/wp-content/uploads/2022/03/FOCoS-to-Palco-Service-Code-Crosswalk.pdf
5/9/2022	All the information I entered last week (in Sandbox) is gone. Is the information held in the Sandbox temporarily?	The Sandbox is a temporary environment that many are using right now. Since there are multiple users, it could be that someone else changed it or it may have been deleted by an update to the system.
5/9/2022	Is the data in sandbox accurate?	No. It is a testing environment, and it was not designed to hold accurate information that parallels the live environment.
5/9/2022	When you accidently choose an Account Group and select the wrong authorization is there a way to delete the incorrect authorization?	Until it is saved, you can click the red delete button. Once saved, it cannot be deleted.

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5/13/2022	Will we be able to print reports?	You will be able to download reports and then print them.
5/13/2022	Where is the SSP?	This will be a fillable PDF at go-live.
5/13/2022	Is there a general notes tab for communication that is not about a specific goal	There is a notes and alerts section for every user profile, but this is not used for back-and-forth communication. The justification section is where SB/CA/CSC and UR/TPA will be exchanging notes.
5/13/2022	If notes cannot be edited, how will they be revised if in error? Notes populating with the current note on the bottom seems backwards.	If a note is entered and saved in error, an additional note can be added to explain the error. Our development team is working to put the most-recent notes on top.
5/13/2022	Computer, printer and office supplies are listed separately in the assistive tech section but not in a start-up good section. So, we would need to put each start up good that was being requested into the comment section and then the amount for this would be one unit, maybe?	Our system allows the flexibility to enter these separately or as one unit lump sum. You can also add additional notes in the justifications section for each element of the start-up goods.
5/13/2022	Will the Palco system generate a (V1) care plan that can be printed and sent to the member?	The plan can be downloaded and printed.

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5/17/2022	For MI Via there is a Declaration of Relationship that a Worker can be exempt from FUTA and Medicare. In the demonstration, I see someone was exempt from FUTA, but I see SUTA. How does that work? Does this call for a new Declaration of Relationship with that specifies whether an worker is exempt, or in this case, partially exempt?	The Declaration of Relationship captures the relationship. Depending on the relationship, the worker may qualify for certain tax exemptions like FICA (Social Security, Medicare) FUTA and SUTA. If the Worker is exempt, the EOR taxes would also be exempt from those taxes when utilizing that worker. All employers must pay a tax for workers compensation insurance.
5/17/2022	Who has access to enter the IBA? This should only be TPA. What are those drop downs when editing amount, and what do they mean? How is IBA added to? Where can IBA calculation be shown	The consultant/CSC enters the IBA in CMP which is verified by the TPA. Amounts can be added to the IBA by using the blue "plus" sign to make an adjustment. The drop downs are for EMODs which are separate from the IBA, adjustments to the amount of the IBA and to correct errors in the amount of the IBA. Please Note: Palco does not dictate process, speak to your supervisor if you need more information on who is entering information at what stage in the process. The workflow shared by Palco is a resource that was developed with the State and MCO leadership team.
05/19/2022	How can the previous years of additional funding (AF) be documented and found? Is there a way to do this without opening each service?	The prior budget in Palco can be accessed from the "Budget info" tab and the specific goal/service can be reviewed to see if additional funding was approved (and also the specific details of what was approved). Only the imported budget and budgets created in Palco CMP will be visible. Additional Funding notes can be included in the "justifications" section so it can be shared with CA/SB/CSC and TPA/UR.

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05/19/2022	What if a budget has multiple items that need to be reviewed (internet, diapers, etc.)?	When the budget is built, the account groups are selected first and then the service code. With the drill-down on the service code, the TPA/UR can see the cost/calculations that were used. In our trainings and Sandbox Q&A sessions, we are showing basic functionality for the system. We understand that in a live environment, the notes would be much more detailed. When the CA/CSC/SB changes and save the status to "under review," the TPA/UR will receive a notification to alert them. There is also a report in development that will show the status of all goals. Palco does not dictate process for how the TPA/UR completes their review.
05/19/2022	During the web trainings and Sandbox Q&A, the "questions" box is very small. Is there a way to make it bigger?	Yes, you can "undock" the questions section. This will move it out into its own space and will be much larger space to view. The "undock" feature is on the right-hand side of the blue "questions" bar (next to the "X"). It looks like a small square with a diagonal line through it.
05/19/2022	How can units be specified (for example hours, days, sessions, etc.)?	Our system allows for the flexibility for someone to enter hours, days, months, etc. as the unit in the "Cost Calculator" section. They can also enter 1 unit if they want to enter a lump sum. If they would like to provide additional information specific to the unit type, this can be included in the justifications/notes section.
05/19/2022	Is it possible to edit a note after it has been saved?	Once the note is saved, it is not possible to edit. Another note can be added to explain the error and the correction.

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05/19/2022	If there are multiple workers (for example, for homemaker/PCS), how can this be documented? What if the TPA/UR only wants to approve one worker and request additional information for the others (may be for a rate higher than the max rate, additional funding, or other details needed)?	On each line in the cost calculator, the SB/CSC/CA can indicate a different hourly rate as well as different tax rates according to the individual worker. If the UR/TPA requires additional information for any reason, this can be sent back to the SB/CA/CSC by selecting and saving the "info needed" status. Specific instructions of what is needed can be indicated in the justifications/notes section as this is passed from CA/SB/CSC and TPA/UR. Once the SB/CA/CSC has the authorization returned to them, they can make the requested changes in the "Cost Calculator" section and provide any further explanation if needed in the justifications/notes section.
05/19/2022	How can a rate be requested that is higher than the maximum allowed for that service? For example, if homemaker/PCS provider should be paid $17 per hour and the maximum rate is $14.60.	The red exclamation mark next to a rate that exceeds the maximum rate is meant to draw attention to the "exception" rate. Even though it has the exclamation mark, it can still be submitted and approved at this rate as deemed appropriate by the TPA/UR.
6/2/2022	How can it be determined when the last computer or other electronic item was purchased?	Reports will be able to be run to determine when a certain service code was last paid for budgets in the Palco system. Access to FOCoS will also be extended for some time to provide visibility of plans that did not exist in the Palco system.
6/2/2022	How can someone open up and view all goals and compare the information/details in all goals at the same time?	The main budget page shows all services in a summary. To see specific information for a certain goal, you must click on the blue line for that service and drill-down to see all the details.

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6/2/2022	How do we close out a budget?	The CA/SB/CSC would submit a revision that would account for funds already utilized as well as what the CA/SB/CSC knows may be in process (i.e., pending data entry with Conduent). This revision would be reviewed by the TPA/UR and need approval for the budget to be "closed out."
6/2/2022	Who enters the LOC and other information in the "eligibility" tab in CMP?	The LOC and eligibility information will come to Palco in an automatic file feed. The information will be displayed in CMP on the Participant eligibility tab (in development).
6/2/2022	In looking at the main budget page, how can you tell which services and amounts have been approved?	Only approved amounts will show on the main budget plan. If you are seeing a goal/service with $0.00, that goal has not been approved.
6/2/2022	How is the difference between the IBA and the goals shows?	The IBA is listed at the top of the main budget page (Budget Info tab). As goals are approved, these dollar amounts will be listed and subtracted from the IBA. At the bottom of the screen, there will be a red or green bar showing whether the approved goals are higher or lower than the IBA. We have received feedback on having other totals/sub-totals displayed and have passed that information to our Development Team for review.
6/2/2022	Who enters the original budget allocation with the start/end dates when the budget is being created?	Per the workflows created by program leadership, the following process exists. For SDCB, the care coordinator will enter the Start/End Dates and the “Total Funds Provided”. For MV/SW, this is entered by the Consultant/CSC and then available to be verified by the TPA.