

Types of Connect Reports:

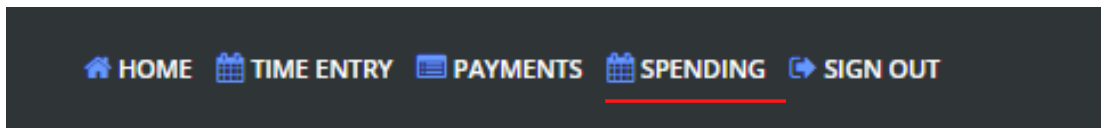
In addition to being Palco's time entry system, the Connect Portal also provides valuable reports for supporting the journey of self-directed services and supports. Two of those features are Spending Summaries and Payment Details. Both of these reports can be accessed by logging in to the Connect Portal: <https://connect.palcofirst.com/>.

Spending Summaries provides quick information to help you easily track your utilization.

Payment Detail provides both the employer and employees with access to pay stub information and history.

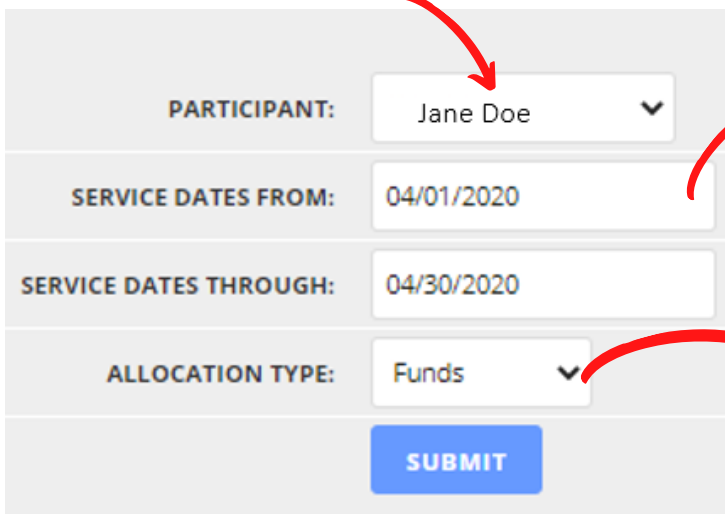
Spending

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.



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

If you are an employer for multiple participants, choose the participant you want to see utilization for.

A light grey form with four rows. Row 1: 'PARTICIPANT:' label, a dropdown menu showing 'Jane Doe' with a downward arrow. Row 2: 'SERVICE DATES FROM:' label, a date input field with '04/01/2020'. Row 3: 'SERVICE DATES THROUGH:' label, a date input field with '04/30/2020'. Row 4: 'ALLOCATION TYPE:' label, a dropdown menu showing 'Funds' with a downward arrow. Below the rows is a blue 'SUBMIT' button. Three red arrows point from the explanatory text to the Participant, Service Dates, and Allocation Type fields.

Enter the start and end date for the span you would like to see, you can focus on one specific month or pull your entire certification period if you want to see more info.

*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- continued

Once you click Submit, the details will display.

PALCO CONNECT

HOME TIME ENTRY PAYMENTS SPENDING SIGN OUT

PARTICIPANT: Josefo valverde

SERVICE DATES FROM: 06/01/2021

SERVICE DATES THROUGH: 06/30/2021

ALLOCATION TYPE: Funds

SUBMIT

Period Spending

Starting Allocation will display your full monthly budget amount.

PERIOD: 2021-05-25 - 2021-06-07

PR PAYROLL		Starting Allocation: 518.98
S5125U2 Attendant Care Service		
Date Of Service		Amount:
Prior To 2021-06-01		-60.26
2021-06-02		-60.67
T1019U3 Personal Care Service		
Date Of Service		Amount:
Prior To 2021-06-01		-177.16
2021-06-01		-44.29
2021-06-03		-45.30
2021-06-04		-44.09
2021-06-07		-44.29
	Spent:	-476.06
	Remaining:	42.92
	Utilized:	91.73%

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.

If you spent more than your allocated budget the bar will display red. Example:

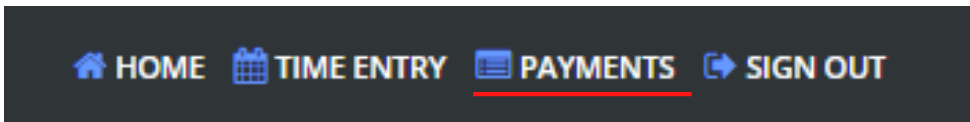
Spent: -7811.13
Remaining: -206.87
Utilized: 102.72%

If you want to see multiple months or your entire certification period, enter those dates and multiple months will display. At the bottom of the results you will see a section called **Period Totals**. This section will total up all of the months within your search criteria and give you a overall snap shot of spending.

PERIOD TOTALS: 2021-06-01 - 2021-06-30		
PR PAYROLL		Total Allocation: 1556.94
S5125U2 Attendant Care Service		Total Spent: -242.07
T1019U3 Personal Care Service		Total Spent: -711.05
		Total Remaining: 603.82
		Total Utilized: 61.22%

Payments

Payment details are available to both the Employer and the Employees. To access, login to Connect and select "Payments" from the tool bar in the top right of the screen.



Once on the payment screen there are many options and things you can do.

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

If you are an employer with multiple employees, you can select the employee 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).

The screenshot shows the 'Payments' interface. At the top, there are filters: 'History from: Last 90 Days' and 'For: Jane Doe'. Below this is a list of payment stubs. Each stub is a row with a black triangle on the left, followed by columns for 'PAYMENT ISSUED', 'NET TOTAL', 'PAID TO', and 'Check No.'. The first stub is for June 8, 2020, with a net total of \$1432.96 and check number 8417. There are 'view stub' links at the end of each row.

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

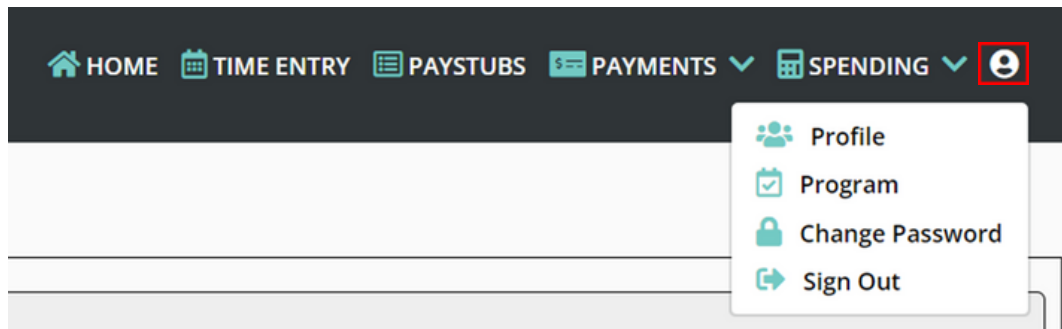
The screenshot shows an expanded payment stub for 'JANE DOE' from 'Last 90 days'. The main row shows 'PAYMENT ISSUED' on Jun 30, 2021, with a net total of \$327.45 and check number 7025634. Below this is a detailed breakdown table:

DESCRIPTION	THIS PAYROLL	YEAR TO DATE
EARNINGS		
Attendant Care	\$117.50	\$1444.57
Personal Care Services	\$345.26	\$4213.88
	\$462.76	\$5658.45
DEDUCTIONS		
	-\$135.31	-\$1520.68
NET PAY	\$327.45	

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

Update Profile

To make Connect more self-service, Palco has added a feature where users are able to make changes to their information by navigating to their profile by clicking on the icon in the top left corner and clicking "Profile."



Employers will be directed to the Profile page directly where they will be able to edit their contact information. To make changes, the employer will click on "Make Changes." This will allow the users to edit their contact information which includes phone number, Email, mailing address, and physical address. Once they are finished with any edits, the user will click on the "Save" option to update their information or the "Cancel" option to discard any changes they do not wish to make.

Profile

[MAKE CHANGES](#)

Phone 1: (111) 111-1111

Phone 2:

Email: kelly.l@arpalco.33mail.com

Mailing Address	Physical Address
123 Test St. LAWRENCE, KS 66044 Douglas	123 Test St, LAWRENCE, KS 66044 Douglas

Profile

[CANCEL](#) [SAVE](#)

Phone 1: (111) 111-1111

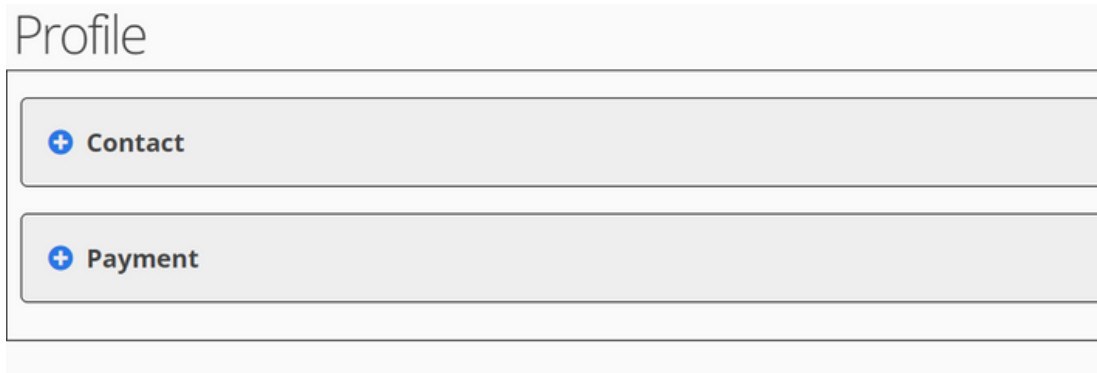
Phone 2:

Email:

Mailing Address	Physical Address
<input type="text" value="123 Test St."/>	<input type="text" value="123 Test St."/>
<input type="text" value="Mailing Street 2"/>	<input type="text" value="Physical Street 2"/>
<input type="text" value="LAWRENCE"/>	<input type="text" value="LAWRENCE"/>
<input type="text" value="Kansas"/>	<input type="text" value="Kansas"/>
<input type="text" value="66044"/>	<input type="text" value="66044"/>
<input type="text" value="Douglas"/>	<input type="text" value="Douglas"/>

Update Profile (cont.)

Employees will be directed to a page where it gives the option to change their contact information or their payment information. To edit the contact information, the employee will click on the "+" icon next to "Contact." Once they do that, the employee will be able to change the information as seen in the instructions above.



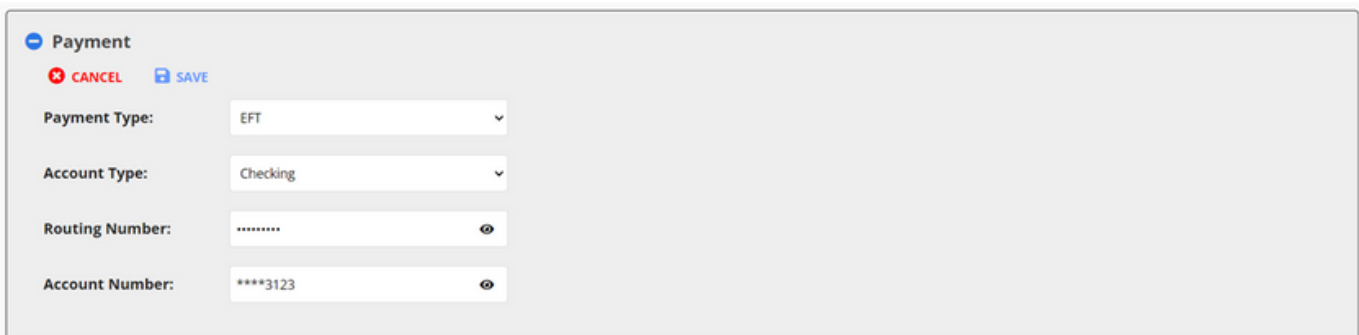
The screenshot shows a 'Profile' section with two main options: 'Contact' and 'Payment'. Each option is preceded by a blue plus sign icon. The 'Contact' option is highlighted with a light gray background.

To make changes to the payment information, the employee will click the "+" icon next to "Payment." To make changes to the payment information, the employee will click on "Make Changes."



The screenshot shows the 'Payment' section of the profile. At the top, there is a blue minus sign icon and the word 'Payment'. Below this is a blue link with a pencil icon labeled 'MAKE CHANGES'. The 'Payment Type:' field is highlighted with a red box and contains the value 'EFT'. Other fields include 'Account Type: Checking', 'Routing Number: *****' (with an eye icon), and 'Account Number: ****3123' (with an eye icon).

The employee can then change their payment information by inserting the information in the fields listed. To save the changes, the employee must click "Save" or to discard the information, the employee can click "Cancel" at any time. When updating payment info, please allow five business days for the change to take effect.



The screenshot shows the 'Payment' section of the profile. At the top, there is a blue minus sign icon and the word 'Payment'. Below this are two buttons: a red 'CANCEL' button and a blue 'SAVE' button. The 'Payment Type:' field is a dropdown menu with 'EFT' selected. Other fields include 'Account Type: Checking' (dropdown), 'Routing Number: *****' (with an eye icon), and 'Account Number: ****3123' (with an eye icon).

**Questions? Contact Palco! Phone: 1-866-710-0456 or
Email: customersupport@palcofirst.com**