ACCESSING REPORTS IN THE CONNECT PORTAL

Types of Connect Reports:

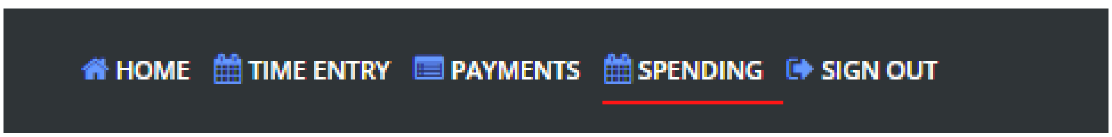
In addition to being Palco's time entry system, the Connect Portal also provides valuable reports for supporting the journey of self-directed services and supports. Two of those features are Spending Summaries and Payment Details. Both of these reports can be accessed by logging in to the Connect Portal: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

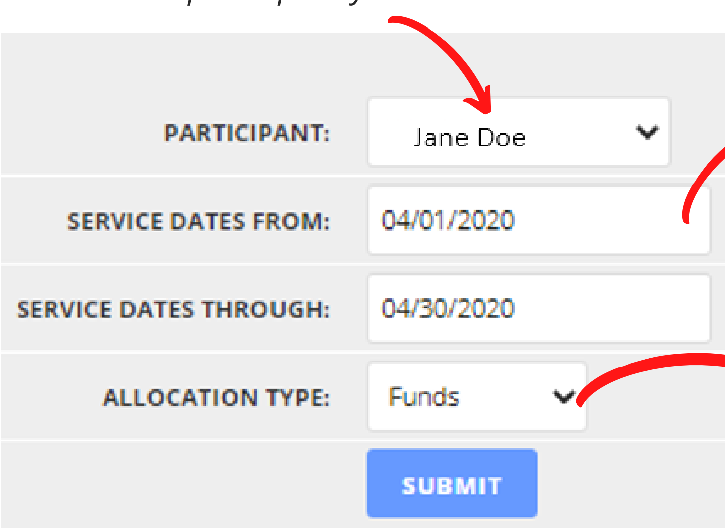
Spending

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.



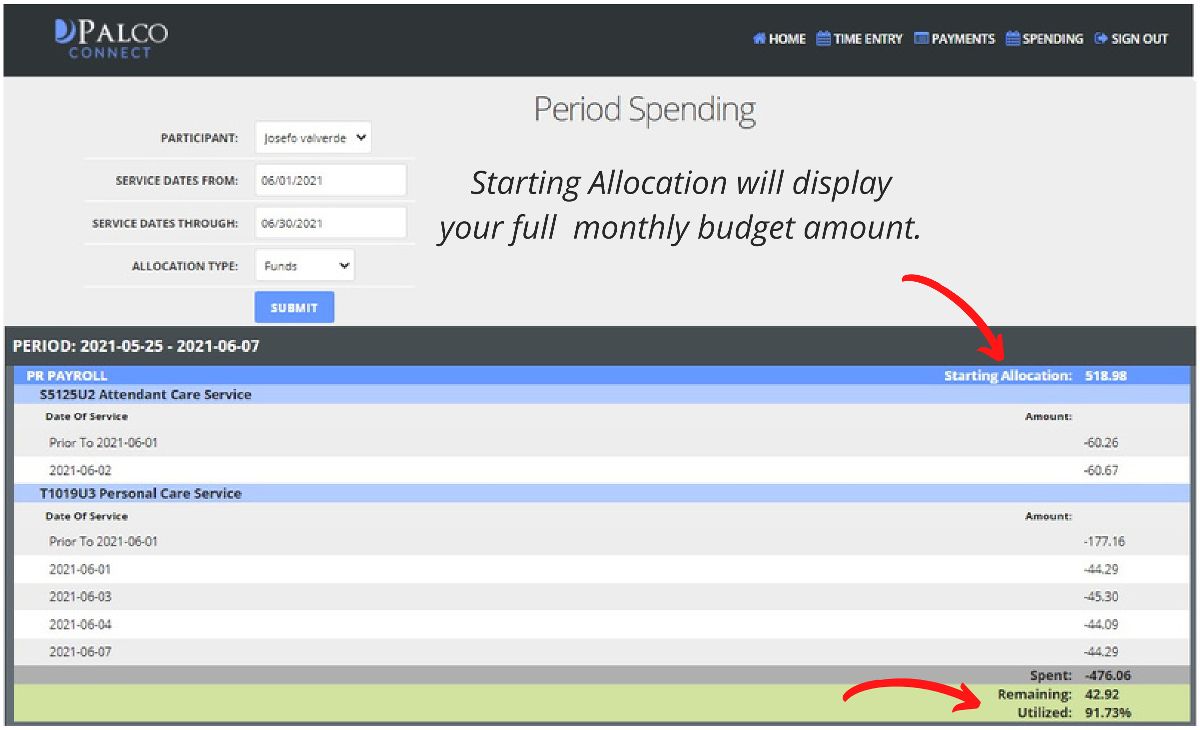
Enter the start and end date for the span you would like to see, you can focus on one specific month or pull your entire certification period if you want to see more info.

*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**.*

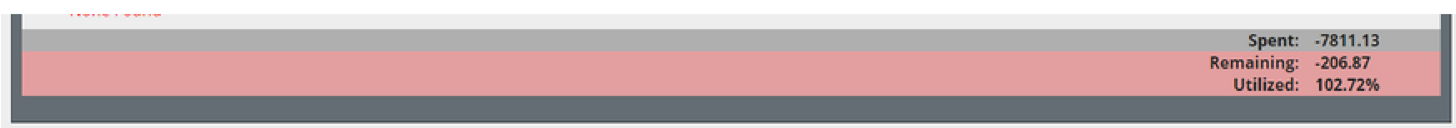
Spending- continued

Once you click Submit, the details will display.

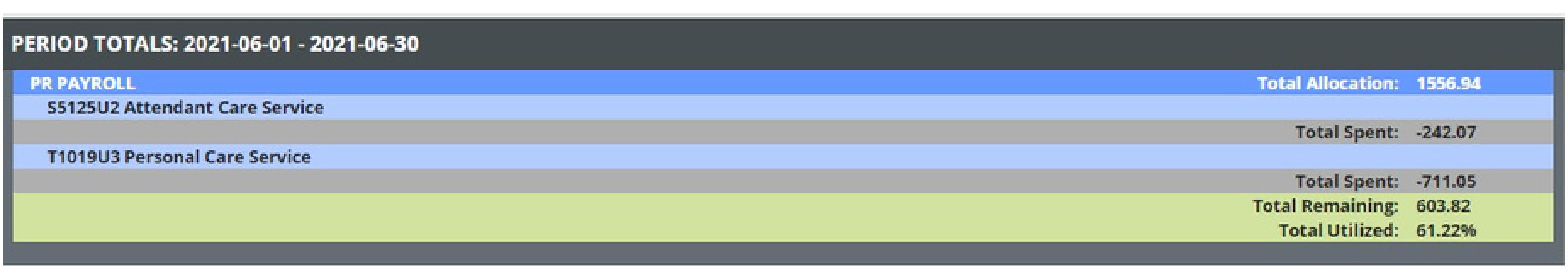


The bottom bar will display the total amount spent and total amount remaining for the month. You will also see the percentage of the budget that was utilized.

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



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.



Payments

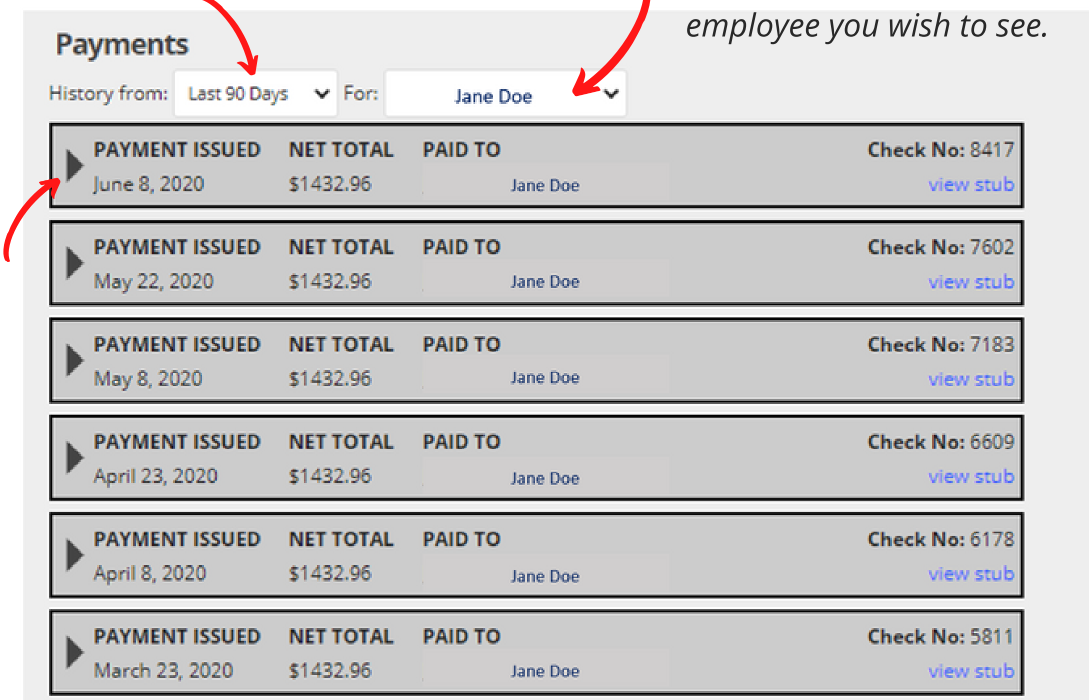
Payment details are avaliable to both the Employer and the Employees. To access, login to Connect and select "Payments" from the tool bar in the top right of the screen.

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

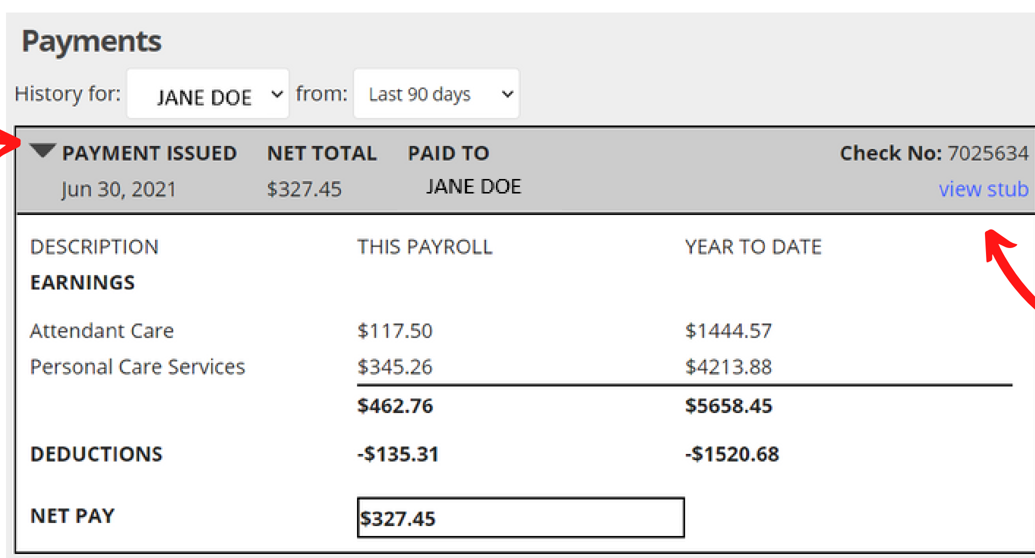
Select the time frame for what stubs you would like to see

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).



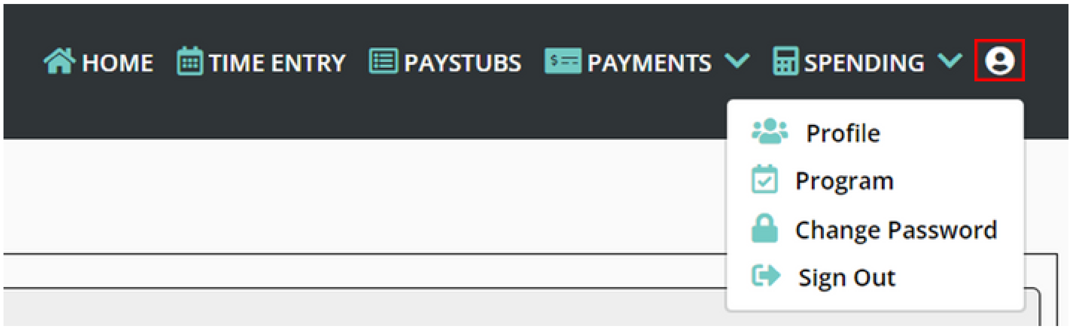
Within the expanded display more details on the payment can be seen



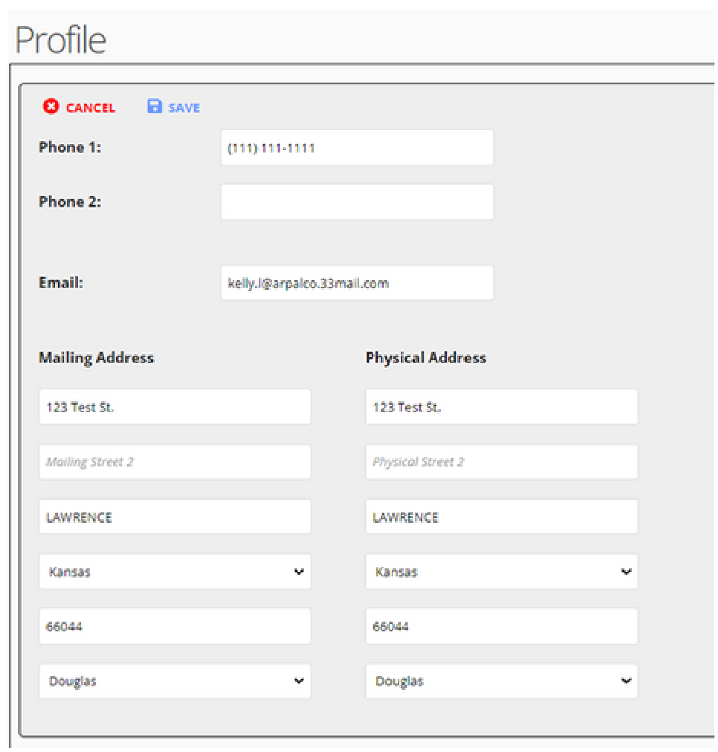
By clicking on the blue "View Stub" link, a pop up will open with full stub details and ability to print.

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."

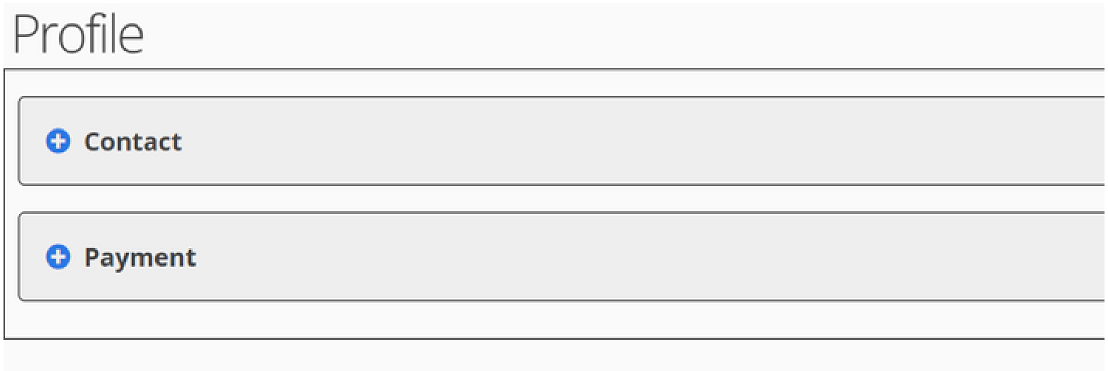


Employers will be directed to the Profile page directly where they will be able to edit their contact information. To make changes, the employer will click on "Make Changes." This will allow the users to edit their contact information which includes phone number, Email, mailing address, and physical 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.

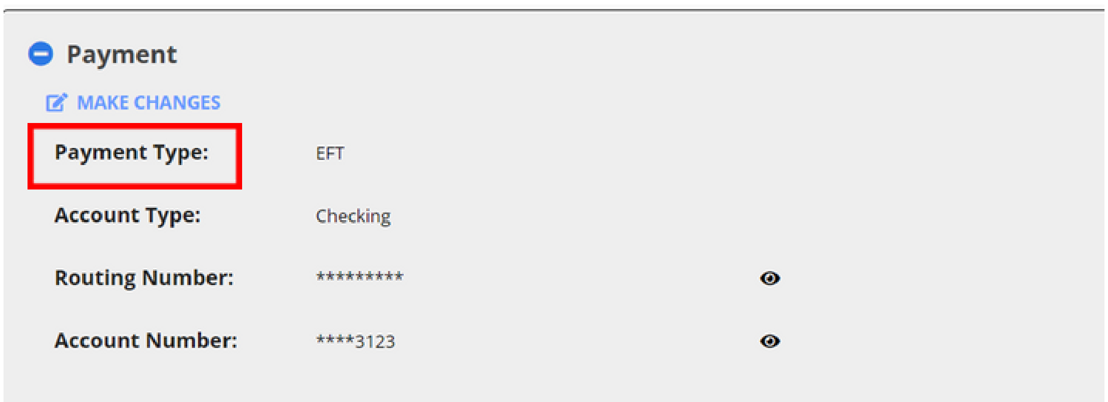


Update Profile (cont.)

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.



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 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.

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