

## Types of Connect Reports:

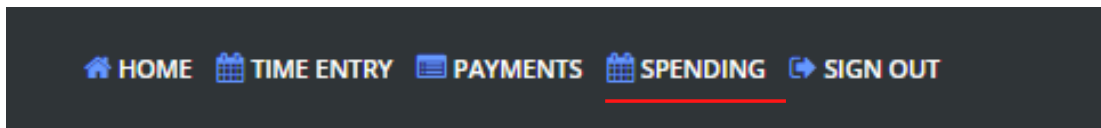
In addition to being Palco's time entry system, the Connect Portal also provides valuable reports for supporting the journey of self-directed services and supports. Two of those features are Spending Summaries and Payment Details. Both of these reports can be accessed by logging in to the Connect Portal: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

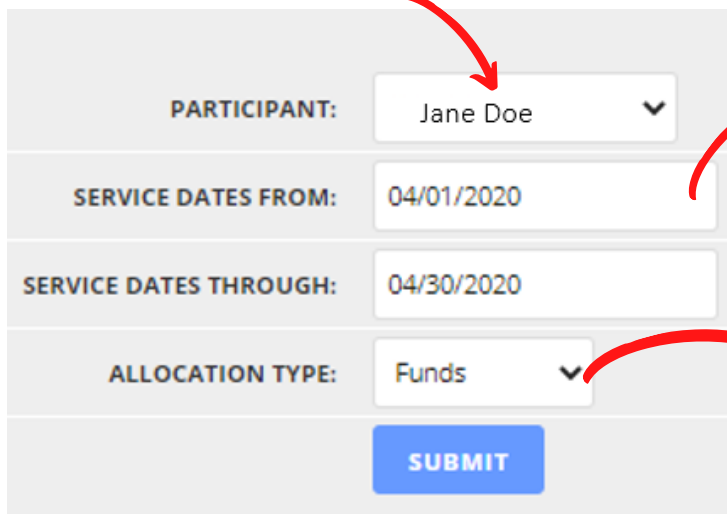
### Spending

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 input fields and a submit button. The fields are: 'PARTICIPANT:' with a dropdown menu showing 'Jane Doe'; 'SERVICE DATES FROM:' with a date input '04/01/2020'; 'SERVICE DATES THROUGH:' with a date input '04/30/2020'; and 'ALLOCATION TYPE:' with a dropdown menu showing 'Funds'. A blue 'SUBMIT' button is at the bottom. Three red arrows point from the explanatory text to the participant, date, 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" **Funds** should be selected which will display dollar amounts*

*Once you have set up all of your search criteria, hit **Submit**.*

## Spending- continued

Once you click Submit, the details will display.

SERVICE DATES FROM: 02/01/2020

SERVICE DATES THROUGH: 02/29/2020

ALLOCATION TYPE: Funds

PERIOD: 2020-02-01 - 2020-02-29

Category	Starting Allocation
<b>UNFD Undesignated Funds</b>	7.37
Date Of Service	Amount:
2020-02-01	-7.37
	Spent: -7.37
	Remaining: 0.00
	Utilized: 100.00%
<b>KSPR KS WORK - Payroll</b>	1373.63
DAILY IADLs / ADLs	Amount:
2020-02-01	-1373.63
NIGHT Night Support	
None Found	
SUPEM Supported Employment	
None Found	
	Spent: -1373.63
	Remaining: 0.00
	Utilized: 100.00%

Starting Allocation will display your full monthly budget amount for each category.

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: 2020-02-01 - 2020-04-30

Category	Total Allocation
<b>UNFD Undesignated Funds</b>	12.19
	Total Spent: -7.37
	Total Remaining: 4.82
	Total Utilized: 60.46%
<b>KSPR KS WORK - Payroll</b>	5628.81
DAILY IADLs / ADLs	Total Spent: -5612.61
NIGHT Night Support	Total Spent: 0.00
SUPEM Supported Employment	Total Spent: 0.00
	Total Remaining: 16.20
	Total Utilized: 99.71%

## Spending- continued

To view Carryover Funds, employers should select the current month to display the Carryover Fund balance. However, if this shows a zero balance and the participant has a budget starting the next month, the employer could change the start date to the next month to see the balance.

### Period Spending

PARTICIPANT: Carlos Beltran

SERVICE DATES FROM: 03/10/2023

SERVICE DATES THROUGH: 03/10/2023

SUBMIT

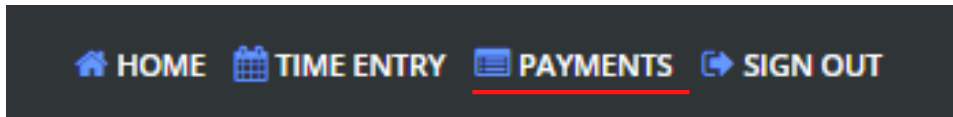
ALLOCATION TYPE: Funds

PERIOD: 2023-01-01 - 2023-12-31	
COF Carry-Over Funds	Starting Allocation: \$3889.76
None Found	Remaining: \$3889.76 Utilized: 0.00%

PERIOD: 2023-03-01 - 2023-03-31

## 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).

### Payments

History from: Last 90 Days For: Jane Doe

PAYMENT ISSUED	NET TOTAL	PAID TO	Check No:
June 8, 2020	\$1432.96	Jane Doe	8417 <a href="#">view stub</a>
May 22, 2020	\$1432.96	Jane Doe	7602 <a href="#">view stub</a>
May 8, 2020	\$1432.96	Jane Doe	7183 <a href="#">view stub</a>
April 23, 2020	\$1432.96	Jane Doe	6609 <a href="#">view stub</a>
April 8, 2020	\$1432.96	Jane Doe	6178 <a href="#">view stub</a>
March 23, 2020	\$1432.96	Jane Doe	5811 <a href="#">view stub</a>

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.

The screenshot shows the 'Payments' section of the Palco Connect interface. It features a table of payment records for Jane Doe, with columns for 'PAYMENT ISSUED', 'NET TOTAL', 'PAID TO', and 'Check No.'. A red arrow points to the 'view stub' link for the payment issued on June 8, 2020. To the right, a browser window displays the expanded stub details for Check Number 8417, including earnings, deductions, and a net pay of \$1432.96. A 'Print' button is visible in the top right corner of the stub view.

DESCRIPTION	THIS PAYROLL	YEAR TO DATE
<b>EARNINGS</b>		
	\$1600.00	\$19520.00
	<b>\$1600</b>	<b>\$19520.00</b>
<b>DEDUCTIONS</b>		
	-\$167.04	-\$2158.63
<b>NET PAY</b>	<b>\$1432.96</b>	

STUB/WITHHOLDING/PAYMENT INFO	Check No: 8417
<b>EARNINGS</b>	
	This Payroll Year to Date
	\$1600.00 \$19520.00
<b>DEDUCTIONS</b>	
	This Payroll Year to Date
CO State Income Tax	-\$51.00 -\$651.00
Federal Income Tax	-\$116.04 -\$1507.63
	<b>-\$167.04 -\$2158.63</b>
EFT Direct Deposit	-\$1432.96 -\$17470.18
<b>NET PAY</b>	<b>Net Pay: \$1432.96</b>



## Other Questions? Contact Palco!

Phone: 1-866-710-0456

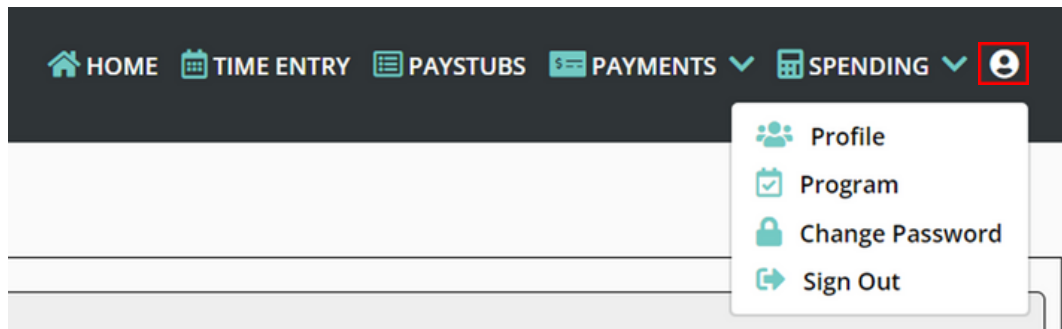
Fax: 501-821-0045

Email: [info@palcofirst.com](mailto:info@palcofirst.com)

Mail: Palco, Inc.  
P.O. Box 242930  
Little Rock, AR 72223

## 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](mailto: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:**

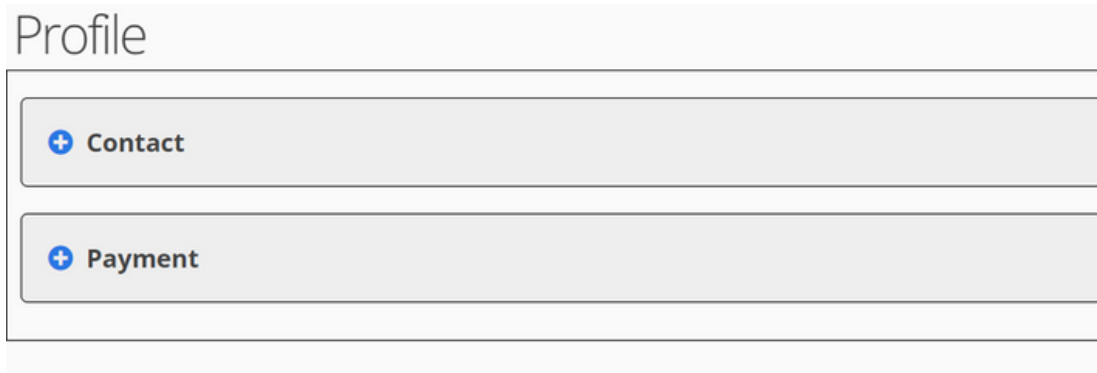
**Phone 2:**

**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.



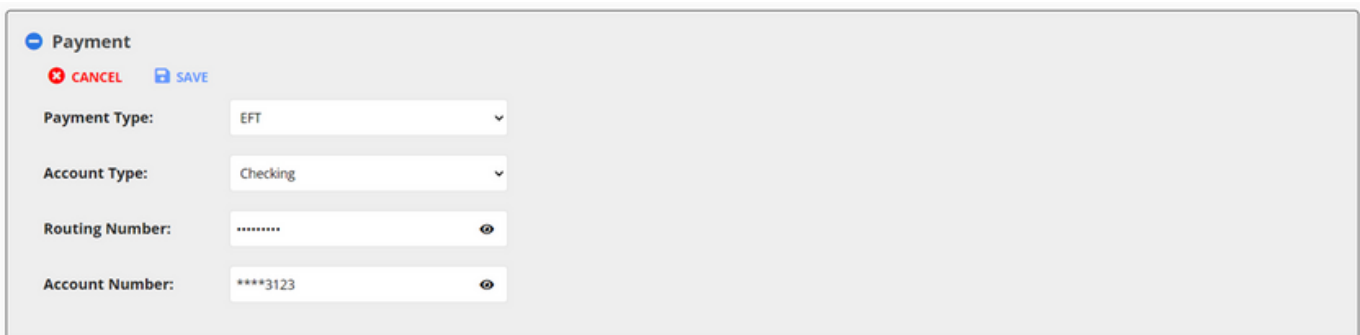
The screenshot shows a 'Profile' section with two main options: 'Contact' and 'Payment'. Each option is preceded by a blue plus sign icon. The 'Contact' option is in a light gray box, and the 'Payment' option is in a white box.

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: \*\*\*\*\*' (text input with eye icon), and 'Account Number: \*\*\*\*3123' (text input with eye icon).

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