

DON'T SETTLE FOR SUBPAR

Changing your Financial Management Service (FMS) provider in self-direction can feel like a daunting task, but it does not have to be with a qualified vendor. Partnering with a vendor who is seasoned in FMS work and has successfully transitioned many large programs can make a world of difference. Palco knows that the most critical part of transition is having no impact to member services, and together, we can ensure that.

OVERVIEW

Experience leveraged alongside our resources for change management are part of the keys to success we employ to execute a smooth transition. Our Transition Change Management tool kit includes robust and tested policies and practices for implementation planning, data transition, training, communication, and post-transition testing. When you partner with Palco, you gain access to all of these resources.

IMPLEMENTATION PLANNING

When you begin your partnership with Palco, you will be delivered a customized implementation plan that outlines all key deliverables and milestones for success. Palco will engage in an extensive requirement gathering session schedule to understand all the nuances of the program and necessary system configurations to ensure proper set up. We ensure all requirements have multiple sign offs to ensure the program and stakeholder needs will be met and that everyone is expectant for the good to come. Some elements of quality service you get with a Palco implementation include:

- Skilled CPAs and attorneys on staff to understand tax and labor rules in the state.
- A company culture dedicated to ensuring every single caregiver and vendor gets paid.
- A dedicated transition team focused on every detail with the ongoing support team also involved to ensure there are no setbacks.
- Access and involvement to the executive team who are focused on ensuring successful transitions.

DATA TRANSITION

No impact to member services is always at the forefront of our planning. That is why our process to transition members is focused on data sharing between FMS vendors, rather than forcing members to absorb the burden. We realize our skilled modern technology to ingest data and utilize a data transfer method for enrollment from the exiting vendor rather than forcing all participants to re-enroll. This has proven to alleviate the burden on the state and families by removing the pressure for in-person meetings and enrollments. Some of the mechanisms we use to ensure success are:

- Proper planning - A set schedule to ensure data is delivered timely and updated to data while the exiting vendor is still in place ensure all timelines are met in conjunction with the implementation plan.
- Data governance - Palco employs internal standards for data gathering, storage and retention to ensure the highest quality governance of accessibility and safety
- Data mapping - Our skilled technical and data analysts have thoroughly planned and mapped data during transitions to ensure every file is properly filled and accounted for.

TRAINING

Palco approaches training with one key objective—accessibility. Because we know that life happens, we offer trainings in a variety of methods and at a variety of dates and times. Training is offered live in person, via webinars, pre-recorded videos, short instructional videos, print, and via 1-1 support. Our regional approach to every implementation ensures we will have support for stakeholders in the community where they reside. We know that support in the community can expand the local relationships and access to services desired. Furthermore, our easy-to-understand applications that are built for self-direction make navigation simple.

COMMUNICATION

With an FMS transition, there can never be enough communication. Through our experience, we have developed best practices for a variety of communications. We know that communications must be clear and tailored to the audience, which is why we always use standards for plain language and 508 compliance for people with disabilities. More than just written communication via email and mail, Palco can deliver in-person information sessions and town hall style call-ins for stakeholders to ask questions and get information. Our customer support leadership becomes involved on day one to open a queue for support and perform outbound calls as requested to ensure robust communication.

CONCLUSION

Change doesn't have to be scary, and here at Palco, we make sure it's not! Make sure you are not settling for a subpar FMS out of convenience. When you partner with Palco, the benefits you gain access to are unparalleled by competitors. Some of those benefits include:

- Cloud-based web portal for self-directing stakeholders and MCO staff.
- On-demand reporting and key performance indicator (KPI) dashboards.
- Online enrollment in less than 3 minutes.
- Notifications and automatic messaging for members, workers, and professional users.
- Training and support staff.
- On-demand pay for workers after every shift.
- Self-direction workforce tools and PalCare job board.
- Electronic Visit Verification (EVV) configuration built with self-direction in mind.
- Fully integrated billing with EVV aggregation.
- Scalable interoperability to integrate seamlessly with a variety of data feeds.
- Quality customer support with live and local agents, chat, and technical support.
- Cost savings.