

PO Box 242930 Little Rock, AR 72223 Toll Free 866.710.0456

Online: PalcoFirst.com

Worker Employment Packet

Welcome to self-direction! This packet contains all the forms you need to enroll as a worker and begin providing services to your participant. Please follow all directions in this packet. You will not be paid for services until all forms are completed, Palco verifies all information and clears you for hire, and you are notified that you are ready to provide service.

You m	ust complete and return:		
	Applicant Worker Intake		IRS Form W-4
	Worker Information & Qualification		New Mexico State W-4
	U.S.CIS Form I-9		Direct Deposit Agreement
	I-9 supporting documentation		Direct Deposit supporting documentation
	Copy of Social Security Card		Worker Rate Information
	Payroll Information Worksheet		
above ncludii	as a final review before you return t ng information on how to complete for	he fo	We encourage you to use the checklist orms to Palco. The other documents, the payroll schedule, Palco's Notice of are for informational purposes only and

Fax: 501-821-0045
Email: enrollment@palcofirst.com

do not need to be returned to Palco. Send completed paper forms to Palco at the address

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

Should you need any assistance during this process, please contact the New Mexico Aging and Long-term Services Department (ALTSD). Please visit our website at www.palcofirst.com for more information on forms and frequently asked questions.

We look forward to serving you!

Sincerely, The Palco Team

below:



Notice of Privacy Practices

Palco may receive and create records concerning your medical and individually identifiable information ("PHI") and is required to maintain the privacy and security of your PHI. Please read this notice carefully. If you have questions or concerns, contact the Palco Privacy Officer at privacy@palcofirst.com. Palco will only use and disclose your information as allowed by law and as described below:

- Help manage the health care treatment you receive. We may disclose your information to provide treatment and administer services, including performing assessments, issuing workers' compensation and administering similar programs, and recommending services in some situations. We may disclose information to others who implement your health services. We may correspond with you and/or your designated representative (e.g., surrogate employer or authorized user). All emailed correspondence from Palco is encrypted and secure. By emailing Palco with your personal email account, you accept the risk that your correspondence may not be encrypted, nor secure.
- Run our business, including payment for and administration of your health services. We may use and disclose your information to receive and issue payment on your behalf and bill Medicaid, Medicare, Managed Care Organizations, the Veterans Administration, or other bodies, as required by your program.
- Comply with federal and state law, including investigations by the United States Department of Health and Human Services (U.S. DHHS) and law enforcement. Palco is required by law to comply with investigations by regulatory bodies and issues involving national security. Palco may be required to disclose your information to coroners and other officials at your death.
- Respond to legal actions and health oversight, such as lawsuits or quality assurance reviews. Palco
 may be required to respond to requests, including discovery, subpoenas, audits, and other legal or
 regulatory matters.

You have the right to:

- Authorize the use and disclosure of your PHI for reasons not authorized by federal or state law. Palco will seek your approval to disclose PHI for reasons not required at law, and you may reject disclosure.
- Receive this notice of privacy practices. You can request a copy of this notice or view the posting at
 palcofirst.com, in enrollment packets, and in program manuals, as applicable. Palco can change the terms
 of this notice at any time. Changes will apply to all of your medical records. Direct complaints to the Privacy
 Officer or the U.S. DHHS.
- Review and receive copies of your records and a list of disclosures. Requests must be on a Request for Sensitive Records. We will provide you with a copy or summary within 10 days of receiving your request. We may charge a reasonable, cost-based fee for collection of the records, including postage and labor. Palco may reject some requests if required by law.
- Request amendments to your records. Requests must be on a Request to Amend Sensitive Information. We will provide you with a copy or summary or a rejection within 15 days of receiving your request.
- Request information in an alternate format or restrict access on your records. Requests must be in
 writing on a Request for Additional Privacy. We will provide you with a copy or summary within 15 days of
 receiving your request. We may reject or terminate the request in certain limited cases and will notify you of
 rejections and terminations.
- Be notified in case of a breach of your sensitive information. You will be notified within 60 days by the Privacy Officer.
- Choose someone to act on your behalf with regard to your records. You must complete the appropriate forms and information to designate Authorized Users in order for those individuals to communicate with Palco on your behalf.



PALCO SEMI-MONTHLY PAYMENT SCHEDULE - 2024

New Mexico Veterans-Directed HCBS Program

Service Period

Timesheets Due to Palco By 12 PM

Payment Date

Start Date December 16, 2023 January 1, 2024 January 16, 2024 February 1, 2024 February 16, 2024 March 1, 2024 March 16, 2024 April 1, 2024 April 16, 2024 May 1, 2024 May 16, 2024 June 1, 2024 June 16, 2024 July 1, 2024 July 16, 2024 August 1, 2024 August 16, 2024 September 1, 2024 September 16, 2024 October 1, 2024 October 16, 2024 November 1, 2024 November 16, 2024 December 1, 2024 December 16, 2024

End Date
December 31, 2023
January 15, 2024
January 31, 2024
February 15, 2024
February 29, 2024
March 15, 2024
March 31, 2024
April 15, 2024
April 30, 2024
May 15, 2024
May 31, 2024
June 15, 2024
June 30, 2024
July 15, 2024
July 31, 2024
August 15, 2024
August 31, 2024
September 15, 2024
September 30, 2024
October 15, 2024
October 31, 2024
November 15, 2024
November 30, 2024
December 15, 2024
December 31, 2024

Deadline
January 2, 2024
January 17, 2024
February 2, 2024
February 17, 2024
March 1, 2024
March 17, 2024
April 2, 2024
April 17, 2024
May 2, 2024
May 17, 2024
June 2, 2024
June 17, 2024
July 2, 2024
July 17, 2024
August 2, 2024
August 17, 2024
September 2, 2024
September 17, 2024
October 2, 2024
October 17, 2024
November 2, 2024
November 17, 2024
December 2, 2024
December 17, 2024
January 2, 2025

Paid On
January 8, 2024
January 23, 2024
February 8, 2024
February 23, 2024
March 8, 2024
March 25, 2024
April 8, 2024
April 23, 2024
May 8, 2024
May 23, 2024
June 10 2024
June 24, 2024
July 8, 2024
July 23, 2024
August 8, 2024
August 23, 2024
September 9, 2024
September 23, 2024
October 8, 2024
October 23, 2024
November 8, 2024
November 25, 2024
December 9, 2024
December 23, 2024
January 8, 2025

Late time submissions and mistakes may result in late payment!

2024 Bank & Palco Office Holidays

New Year's Day - Monday, January 1*
Martin Luther King, Jr. Day - Monday, January 15
President's Day - Monday, February 19
Memorial Day - Monday, May 27*
Juneteenth Day – Wednesday, June 19
Independence Day - Thursday, July 4*

Labor Day - Monday, September 2*
Columbus Day - Monday, October 14
Veterans Day - Monday, November 11
Thanksgiving - Thursday-Friday, November 28-29*
Christmas - Tuesday-Wednesday, December 24-25*

* Palco Office Closures



PO Box 242930 Little Rock, AR 72223 Toll Free 866.710.0456 Online: PalcoFirst.com

Instructions for Worker Forms

Please use the instructions below to complete the attached Palco forms in order to become a worker through the self-directed program.

- The **Applicant Worker Intake** is used to enroll the worker in the program and associate him or her with the employer and participant. Complete the entire form. Sign and date the highlighted fields. Please make sure your employer signs and dates as well.
- The Worker Information & Qualification notifies you of your duties associated
 with being a worker on the self-direction program. Please read this form carefully
 and initial where indicated to make sure that you understand and will comply with
 the information therein. Sign and date all the highlighted fields.

Complete the Worker (Applicant) Information box at the top of page 1.
Initial in the bottom right corner of page 1.
Sign and date on page 2.





Applicant Worker Intake

Complete this form entirely to begin the enrollment process as a worker in the self-direction program. Completion of this form does not constitute a hiring by the employer.

	PAF	RTICIPANT	INFO	RMATI	ON				
Full Name		ID/Last 4 of	SSN		Program/Plan:				
						NM VD H	CBS		
	WORKE	R (APPLIC <i>A</i>		INFORI	MATION				
First Name		Middle Nam	ie		Last Name	е			
Social Security Number	n autiniu aut h			Birth (mm/d	d/yyyy)		er ale emale		
Is the worker-applicant No Yes. I am	related to the the participa		-			(specif	v relatio	nship)	
Do you share a residen		articipant?							
Physical Address (Stree	et Address, In	cluding Apt. #	#)						
City	State		Zip			County			
Mailing Address (Street	Address, Inc	luding Apt. #)) — if c	lifferent t	han the phy	ysical addr	ess		
City	State		Zip			County			
Phone1	Phone2			Preferred Email	d Method of Mail		ication ne / Voic	email	
Worker Printed Name		_		Em	ployer Printe	d Name			
Worker Signature	_		Em	oloyer Signatu	ure				
Date				Date	9				



Worker Information & Qualification

WORKER (APPLICANT) INFORMATION								
Full Name	ID/Last 4 of SSN	Program/Plan NM VD HCBS						

As a worker in self-direction, you must agree to the following terms of employment:

- You understand that the participant, or his or her surrogate, is your employer. Neither Palco, nor program/state administrators, is your employer.
- This position is paid as an employee and not as an independent contractor.
- This document does not create an anticipation of, nor a contract of, employment.
- To adhere to all federal, state, local, and program laws, regulations, policies, and requirements throughout my employment. This includes staying current on information provided to me about the program throughout my employment.
- To accurately complete all enrollment documentation to ensure that you meet the program's eligibility requirements for providing services and is not prohibited in any manner from providing services.
- That my employment is contingent upon many factors, including successful completion and/or passing of required background checks, training, and credentialing.
- To report any changes in my ability to deliver services, including changes in my background history or qualifications required to perform services under this program.
- Being paid for services through the program is contingent upon the participant's eligibility for the program. Once eligibility terminates, you may no longer be paid through this program.
- Your employer is responsible for payment of services for activities not authorized in or exceeding the limitations established by the budget.
- Funds to pay for services are from public sources, and financial accountability and liability applies to the use of the funds. You understand that submitting false or fraudulent timesheets or submitting timesheets for tasks other than those approved on the authorized budget will be reported to the appropriate authorities for investigation and possible prosecution as fraud.
- That medical and personal information and data about the participant and the worker is confidential. In addition, you have read and agree to Palco's Privacy Practices.
- That neither Palco nor program/state administrators are responsible or liable for any negligent acts, work-related injuries, or omissions by me, the employer, participant, other workers or service providers, or authorized representatives.
- To report all critical incidents relating to the participant's health, safety, and welfare, including suspicion of fraud, abuse, or neglect.

Worker Initials





By signing below, you acknowledge that you have read this agreement and accept responsibility as a worker in self-direction, understand their responsibilities and duties associated with that role, and will comply with program policies and requirements. The information provided herein is true and accurate to the best of your knowledge. You further understand and agree that violation of this agreement will result in termination.

Worker Printer Name	Worker Signature	



Instructions for I-9

The United States Department of Homeland Security, Citizenship, and Immigration Services (CIS) department, requires all U.S. employers and workers to complete the I-9. The purpose is to verify that the applicant worker can be legally employed in the United States. Palco verifies all workers through the U.S. CIS online system.

Use the instructions and checklist below to guide you through completing this form. The applicant worker should complete all fields highlighted in blue. The employer should complete all fields highlighted in yellow.

Section 1. Employee Information and Attestation: Employees must complete and sign Section 1 of F day of employment, but not before accepting a job offer.	
	t Names Used (if any)
Address (Street Number and Name) Apt. Nu nuar (if Lay) City or Town	State ZIP Code
Date of Birth (mm/dd/yyyyy) U.S. Social Security Milmber Employee's Email Address	Employee's Telephone Number
If you select box 4, supply your work expiration date and come the three fields that follow. Check one of the following boxes to attest to your citizenship or immigration that (See page 2 and the desired States). A third part of the United States.	
A citizen of the United States A noncitizen national of the United States (See Instructions.)	
A lawful permanent resident (Enter USCIS or A-Lumber)	
4. A noncitizen (other than Item Numbers 2. angle above) authorized to work until (exp. date	e. if anv)
If you check Item Number 4., enter one of these.	



2.	Complete Section 2 at the bottom of	page	1. Must be com	pleted b	y the employer.
----	-------------------------------------	------	----------------	----------	-----------------

□ One d	ocument from Lis ocument from Lis		ne documen	t from List C	<u>,</u>
Danis A Title 4	List A	OR	List B	AND	List C
Document Title 1					
Issuing Authority Document Number (if any)			X		
Expiration Date (if any)					
Document Title 2 (if any)		Additional	h forma ion		
Issuing Authority					
Document Number (if any)					
Expiration Date (if any)		1			
Document Title 3 (if any)					
Issuing Authority					
Document Number (if any)					
Expiration Date (if any)		Check h	ere if you used an alternat	tive procedure authorize	d by DHS to examine documents.
	oloyee's first day			space provic	led. This date mu
	the worker signed	a on pago			
natch the date	the worker signed e <mark>'s first day of en</mark>		t (mm/dd/yy	<u>/yy):</u>	
natch the date. The employee Complete the norm.		nploymen formation	in Section 2,	including s	Today's Date (mm/dd/y)

For more information and assistance on how to complete this form, visit https://www.uscis.gov/i-9.



Employment Eligibility Verification

Department of Homeland Security

U.S. Citizenship and Immigration Services

USCIS Form I-9

OMB No.1615-0047 Expires 07/31/2026

START HERE: Employers must ensure the form instructions are available to employees when completing this form. Employers are liable for failing to comply with the requirements for completing this form. See below and the Instructions.

ANTI-DISCRIMINATION NOTICE: All employees can choose which acceptable documentation to present for Form I-9. Employers cannot ask employees for documentation to verify information in **Section 1**, or specify which acceptable documentation employees must present for **Section 2** or Supplement B, Reverification and Rehire. Treating employees differently based on their citizenship, immigration status, or national origin may be illegal.

Section 1. Employee day of employment,	Information but not before	n and a	Attestation epting a job	n: Emp o offer.	loye	es must comp	lete and s	sign Sect	ion 1 of F	orm I-9 n	o latei	r than the first
Last Name (Family Name)			First Name ((Given N	ame)		Middle Init	tial (if any)	Other Las	t Names Us	sed (if ar	ny)
Address (Street Number an	nd Name)		Ap	t. Numbe	er (if a	ny) City or Town	1		I	State		ZIP Code
Date of Birth (mm/dd/yyyy)	U.S. So	cial Sec	urity Number		mploy	ree's Email Addres	s			Employee	s's Telep	hone Number
I am aware that federa provides for imprison fines for false stateme	ment and/or nts, or the		I. A citizen o	f the Unit	ted Sta		· 		status (See	page 2 and	d 3 of the	e instructions.):
				A noncitizen national of the United States (See Instructions.)								
		· ·	permanent resident (Enter USCIS or A-Number.)									
of perjury, that this inf		4	I. A noncitize	citizen (other than Item Numbers 2. and 3. above) authorized to work until (exp. date, if any)					′)			
including my selection attesting to my citizen		If you	check Item N	heck Item Number 4., enter one of these								
immigration status, is		U	SCIS A-Numb			orm I-94 Admissi	on Number		eign Passpo	ort Number	r and Co	ountry of Issuance
correct.					DR -			OR				
Signature of Employee							To	oday's Date	(mm/dd/yyy	y)		
If a preparer and/or to	anslator assis	ted you	in completin	g Sectio	n 1, th	hat person MUST	complete t	the <u>Prepar</u>	er and/or Tr	anslator Co	ertificat	ion on Page 3.
business days after the e	Section 2. Employer Review and Verification: Employers or their authorized representative must complete and sign Section 2 within three business days after the employee's first day of employment, and must physically examine, or examine consistent with an alternative procedure authorized by the Secretary of DHS, documentation from List A OR a combination of documentation from List B and List C. Enter any additional documentation in the Additional Information box; see Instructions.											
		List	A		DR	Lis	st B		AND		List (С
Document Title 1				4	L							
Issuing Authority												
Document Number (if any) Expiration Date (if any)				\dashv	H							
Document Title 2 (if any)				1	Addit	ional Informati	on					
Issuing Authority												
Document Number (if any)												
Expiration Date (if any)												
Document Title 3 (if any)												
Issuing Authority												
Document Number (if any)												
Expiration Date (if any)					Ch	neck here if you us	ed an alterr	native proce	edure author			
Certification: I attest, undo employee, (2) the above-lis best of my knowledge, the	ted document	ation ap	pears to be g	genuine	and to	o relate to the emates.	ployee nan	ned, and (3	3) to the	(mm/dd/		ployment
Last Name, First Name and	Title of Employe	er or Auti	horized Repre	esentative	е	Signature of Em	ployer or A	uthorized R	epresentativ	re)	Today's	s Date (mm/dd/yyyy)
Employer's Business or Orga	anization Name			Employ	er's B	usiness or Organiz	zation Addre	ess, City or	Town, State	, ZIP Code		

Form I-9 Edition 08/01/23 Page 1 of 4

LISTS OF ACCEPTABLE DOCUMENTS

All documents containing an expiration date must be unexpired.

* Documents extended by the issuing authority are considered unexpired.

Employees may present one selection from List A or a combination of one selection from List B and one selection from List C.

Examples of many of these documents appear in the Handbook for Employers (M-274).

LIST A		LIST B	LIST C		
Documents that Establish Both Identity and Employment Authorization	OR	Documents that Establish Identity ANI	D Documents that Establish Employment Authorization		
1. U.S. Passport or U.S. Passport Card		Driver's license or ID card issued by a State or outlying possession of the United States	A Social Security Account Number card, unless the card includes one of the following restrictions:		
2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)	provided it contains a photograph or information such as name, date of birth,		(1) NOT VALID FOR EMPLOYMEN		
Foreign passport that contains a temporary I-551 stamp or temporary		gender, height, eye color, and address 2. ID card issued by federal, state or local	(2) VALID FOR WORK ONLY WITH INS AUTHORIZATION		
I-551 printed notation on a machine- readable immigrant visa		government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color,	(3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION		
4. Employment Authorization Document that contains a photograph (Form I-766)		and address	2. Certification of report of birth issued by the		
5. For an individual temporarily authorized		3. School ID card with a photograph	Department of State (Forms DS-1350, FS-545, FS-240)		
to work for a specific employer because of his or her status or parole:		4. Voter's registration card	3. Original or certified copy of birth certificate		
a. Foreign passport; and		5. U.S. Military card or draft record	issued by a State, county, municipal authority, or territory of the United States		
b. Form I-94 or Form I-94A that has the following:		6. Military dependent's ID card	bearing an official seal		
(1) The same name as the		7. U.S. Coast Guard Merchant Mariner Card	Native American tribal document		
passport; and		8. Native American tribal document	5. U.S. Citizen ID Card (Form I-197)		
(2) An endorsement of the individual's status or parole as long as that period of		Driver's license issued by a Canadian government authority	6. Identification Card for Use of Resident Citizen in the United States (Form I-179)		
endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or		For persons under age 18 who are unable to present a document listed above:	7. Employment authorization document issued by the Department of Homeland Security		
limitations identified on the form.			For examples, see Section 7 and Section 13 of the M-274 on		
6. Passport from the Federated States of		10. School record or report card	uscis.gov/i-9-central.		
Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or		11. Clinic, doctor, or hospital record	The Form I-766, Employment Authorization Document, is a List A, Item		
Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI		12. Day-care or nursery school record	Number 4. document, not a List C document.		
		Acceptable Receipts	1		
May be prese	ented	in lieu of a document listed above for a to	emporary period.		
		For receipt validity dates, see the M-274.			
Receipt for a replacement of a lost, stolen, or damaged List A document.	OR	Receipt for a replacement of a lost, stolen, or damaged List B document.	Receipt for a replacement of a lost, stolen, or damaged List C document.		
 Form I-94 issued to a lawful permanent resident that contains an I-551 stamp and a photograph of the individual. 					
Form I-94 with "RE" notation or refugee stamp issued to a refugee.					

^{*}Refer to the Employment Authorization Extensions page on <u>I-9 Central</u> for more information.

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Last Name (Family Name) from Section 1.

Supplement A, Preparer and/or Translator Certification for Section 1

Department of Homeland Security

U.S. Citizenship and Immigration Services

First Name (Given Name) from Section 1.

USCIS Form I-9 Supplement A OMB No. 1615-0047 Expires 07/31/2026

Middle initial (if any) from Section 1.

Instructions: This supplement must be com of Form I-9. The preparer and/or translator must complete, sign, and date a separate cer completed Form I-9.	ıst enter the employee's name	in the spaces provided above. Eac	ch preparer or translato
I attest, under penalty of perjury, that I have knowledge the information is true and corrections.		of Section 1 of this form and that	t to the best of my
Signature of Preparer or Translator		Date (mm/dd/yyyy	<i>(</i>)
Last Name (Family Name)	First Name (Given I	Name)	Middle Initial (if any)
Address (Street Number and Name)	City or Town	State	ZIP Code

Signature of Preparer or Translator

Last Name (Family Name)

First Name (Given Name)

Middle Initial (if any)

Address (Street Number and Name)

City or Town

State

ZIP Code

I attest, under penalty of perjury, that I have assisted in the completion of Section 1 of this form and that to the best of my knowledge the information is true and correct.

Signature of Preparer or Translator				Date (mm/dd/yyyy)			
Last Name (Family Name)	First I	Name (Given Name)			Middle Initial (if any)		
Address (Street Number and Name)		City or Town		State	ZIP Code		

I attest, under penalty of perjury, that I have assisted in the completion of Section 1 of this form and that to the best of my knowledge the information is true and correct.

Signature of Preparer or Translator	Date (mr	n/dd/yyyy)			
Last Name (Family Name)	First I	Name (Given Name)			Middle Initial (if any)
Address (Street Number and Name)		City or Town		State	ZIP Code

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Supplement B, Reverification and Rehire (formerly Section 3)

Department of Homeland Security

U.S. Citizenship and Immigration Services

USCIS Form I-9 Supplement B OMB No. 1615-0047 Expires 07/31/2026

Last Name (Family Name) from Section 1. First Name (Given Name) from Section 1. Middle initial (if any) from Section 1.

Instructions: This supplement replaces Section 3 on the previous version of Form I-9. Only use this page if your employee requires reverification, is rehired within three years of the date the original Form I-9 was completed, or provides proof of a legal name change. Enter the employee's name in the fields above. Use a new section for each reverification or rehire. Review the Form I-9 instructions before completing this page. Keep this page as part of the employee's Form I-9 record. Additional guidance can be found in the Handbook for Employers: Guidance for Completing Form I-9 (M-274)

	p this page as part of the e Guidance for Completing F		d. Additional guidance can b	e found in the_	
Date of Rehire (if applicable)	New Name (if applicable)				
Date (mm/dd/yyyy)	Last Name (Family Name)		First Name (Given Name)		Middle Initial
	ree requires reverification, you prization. Enter the documen		present any acceptable List A opelow.	or List C documenta	tion to show
Document Title		Document Number (if any)		Expiration Date (if an	y) (mm/dd/yyyy)
I attest, under penalty of employee presented doc	perjury, that to the best of umentation, the documenta	my knowledge, this emplo ition I examined appears t	yee is authorized to work in to be genuine and to relate to	the United States, the individual who	and if the presented it.
Name of Employer or Authoriz	ed Representative	Signature of Employer or Aut	horized Representative	Today's Date	(mm/dd/yyyy)
Additional Information (Initi	al and date each notation.)				rou used an cedure authorized mine documents.
Date of Rehire (if applicable)	New Name (if applicable)				
Date (mm/dd/yyyy)	Last Name (Family Name)		First Name (Given Name)		Middle Initial
	ree requires reverification, you prization. Enter the documen		present any acceptable List A opelow.	or List C documenta	tion to show
Document Title		Document Number (if any)		Expiration Date (if an	y) (mm/dd/yyyy)
			yee is authorized to work in to be genuine and to relate to		
Name of Employer or Authoriz	ed Representative	Signature of Employer or Aut	horized Representative	Today's Date	(mm/dd/yyyy)
Additional Information (Initi	al and date each notation.)				ou used an cedure authorized mine documents.
Date of Rehire (if applicable)	New Name (if applicable)				
Date (mm/dd/yyyy)	Last Name (Family Name)		First Name (Given Name)		Middle Initial
	ree requires reverification, you prization. Enter the documen		present any acceptable List A opelow.	or List C documenta	tion to show
Document Title		Document Number (if any)		Expiration Date (if an	y) (mm/dd/yyyy)
			yee is authorized to work in to be genuine and to relate to		
Name of Employer or Authoriz	ed Representative	Signature of Employer or Aut	horized Representative	Today's Date	(mm/dd/yyyy)
Additional Information (Initi	al and date each notation.)	1			ou used an cedure authorized mine documents.



Instructions for Worker Payroll Forms

Please complete the appropriate IRS, state withholding, and additional forms in order to become a worker on the self-directed program. Follow the instructions listed below. All areas highlighted must be signed.

- The **Payroll Information Worksheet** is used to determine any exemptions you qualify for in order for Palco to calculate the proper payroll and payroll tax for you and your employer. Please remember to complete all fields in the Required Information section and sign and date the form. Any missing information could cause a delay in enrollment.
- The **IRS Form W-4** is used by Palco to withhold the proper amount of federal income tax from your paycheck. Complete Steps 1-4, then sign and date the bottom of the form. Additional instructions are included on page two of this form.
- The **New Mexico State Withholding W-4** tells Palco the correct amount of state income tax to withhold from your paycheck. Complete Steps 1-4, then sign and date the bottom of the form. Additional instructions are included on page two of this form.

T	The Direct Deposit Authorization Agreement gives Palco the authority to pay you via
e	electronic funds transfer.
	\square Select an option for Request Type at the top of the form.
	\square Complete all fields in the Account Information section.
	☐ Attach one of the following forms of validating documentation:
	✓ A voided check (no temporary checks or deposit slip).
	✓ A typed letter from your bank on the bank's letterhead with your name, account number and routing number.
	✓ For a pre-paid card, send a pre-paid card statement from the card company showing
	the card is activated and registered. This statement must have your name printed on
	the card. Generally, you can log into the card company's website and print this form,
	or if you purchase your pre-paid card directly from a bank, the bank can provide the
	necessary documentation. A copy of your card is NOT valid documentation.
	\square Sign and date at the bottom where highlighted.
_	The Waykey Date Information is used to determine the initial new rate of the weyker or to
	The Worker Rate Information is used to determine the initial pay rate of the worker or to document any changes to the worker's pay rate. It also explains other factors that affect the
	cost of hiring a qualified worker.
	☐ The employer completes this form.
	☐ The worker signs and dates the bottom of the form.
	☐ The employer signs and dates the bottom of the form.
	The employer signs and dates the bottom of the form.



Payroll Information Worksheet

As a home care worker in self-direction, your payroll tax withholdings are subject to special tax rules, and your residency may impact your benefits under labor laws. Completing this form accurately will ensure that your taxes and benefits are calculated properly.

REQUIRED INFORMATION					
Employee Name	ID				
Employer Name	Participant Name (If different from Employer)				

Select the following box that applies:
☐ This form is part of your first-time enrollment with Palco.
☐ You are already enrolled with Palco and need to change your information
Part A: FICA (Social Security and Medicare) Taxes
The IRS exempts some employers and workers from paying FICA (Social Security and Medicare taxes.
Select the appropriate response:
\square Non-Exempt. None of the selections apply.
☐ Exempt. I am under 18 and a fulltime student.
\square Exempt. I am a non-resident alien holding a visa for household services.
\square Exempt. I am the spouse of my employer.
☐ Exempt. I am the child of my employer and under 21.
☐ Exempt. I am the parent of my employer who is an adult. This includes adoptive and stepparents.
Exception: If you are the parent of the employer and select any of the following you are nor
exempt
 I am the parent of the employer and I also provide care for my grandchild or step-grandchil in my child's home.
☐ I am the parent of the employer, and my grandchild or step-grandchild is under 18 or has physical or mental condition that requires personal care of an adult for at least four weeks in row during the calendar quarter in which services are performed.
☐ I am the parent of the employer, and my child (son or daughter) is widowed, divorced, not remarried or living with a spouse who has a mental or physical condition so the spouse cannot care for my grandchild for at least four weeks in a row during the calendar quarter in the calendar quarter is a spouse of the calendar quarter in the calendar quarter is a spouse of the calendar quarter

which services are performed.



Part B: Unemployment Tax Exemption

The IRS and State tax agencies exempt some wages from FUTA (Federal Unemployment) or SUTA (State Unemployment) taxes.

Select the appropriate response:
 □ Exempt. I am the child of my employer and under 21. □ Exempt. I am the parent of my employer who is an adult. This includes adoptive and stepparents.
 Check this box if you live in the state of Colorado: □ By choosing this, you will be exempt from paying federal unemployment taxes. However, you will be paying state unemployment taxes. □ Exempt. I am the spouse of my employer. □ Exempt. I am a non-resident alien holding a visa for household services. □ Non-Exempt. None of the selections apply.
Part C: Overtime Payments There are several factors that may qualify you as being exempt from overtime payments or ineligible foovertime based on program specific rules. Please check the box that applies below:
□ Exempt from overtime pay for any reason, including program rules or that I meet the DO Home Care Rule Exclusion qualifications, which means that I am a live-in caregiver or I resident the participant's residence at least 5 days per week. (See 29 CFR §552.102 and DOL Face Sheet #79B). By checking this box, I understand that, if my employer or the program allows me to work more than 40 hours per week, any hours that I do work over 40 in a work week, will NO be paid at overtime rates.
☐ Non-Exempt. I do not qualify for any exemptions and understand that I will be paid overtim rates for time worked beyond 40 in a work week.
If any of the information in this document changes at any time, please complete a new document and submit to Palco immediately. Failure to notify Palco may result in a tax bill to you or other employment-related matters from your employer. Palco is not responsible for incorrectly calculating or withholding pay due to your failure to complete and submit a new Payroll Information Worksheet. By signing below, you certify that the information in this document is correct and understand that you have the burden to notify Palco immediately of any changes in this information, and you hold Palco harmless for any incorrect information supplied herein.
Employee Printed Name
Employee Signature Date

Please return this form to Palco via email to enrollment@palcofirst.com or via fax to 501-821-0045.

Employee's Withholding Certificate

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Give Form W-4 to your employer.

OMB No. 1545-0074

Department of the Treasur					<u> </u>	
Internal Revenue Se			g is subject to review by the IF	RS.	1 1 2	
Step 1:	(a) ⊦	irst name and middle initial	Last name		(b) S	ocial security number
Enter	Addre	ee e			Doos	your name match the
Personal	Addie	33			name	on your social security
Information	City	r town, state, and ZIP code				If not, to ensure you get for your earnings,
	Oity C	town, state, and 2n oode			contac	ot SSA at 800-772-1213
	(c)	Single or Married filing separately			or go t	to www.ssa.gov.
	(0)	Married filing jointly or Qualifying surviving s	enouse			
		Head of household (Check only if you're unmai	•	of keeping up a home for vo	ourself ar	nd a qualifying individual.)
	l					
		4 ONLY if they apply to you; otherwis m withholding, and when to use the est			n on e	ach step, who can
Step 2: Multiple Job	s	Complete this step if you (1) hold moralso works. The correct amount of wi				
or Spouse		Do only one of the following.				
Works		(a) Use the estimator at www.irs.gov/ or your spouse have self-employn	• •		and	Steps 3–4). If you
		(b) Use the Multiple Jobs Worksheet	on page 3 and enter the resu	It in Step 4(c) below;	or	
		(c) If there are only two jobs total, you	. •			other iob. This
		option is generally more accurate higher paying job. Otherwise, (b) is	than (b) if pay at the lower pa	aying job is more thar		
		4(b) on Form W-4 for only ONE of the you complete Steps 3–4(b) on the Form If your total income will be \$200,000 or	n W-4 for the highest paying j	job.)	os. (You	ur withholding will
Claim		•	•	3 , ,		
Dependent		Multiply the number of qualifying of	children under age 17 by \$2,0	5	-	
and Other		Multiply the number of other depe	-	. \$	-	
Credits		Add the amounts above for qualifying this the amount of any other credits. I		ents. You may add to		\$
Step 4		(a) Other income (not from jobs).				
(optional):		expect this year that won't have w				
Other		This may include interest, dividend	ds, and retirement income .		4(a)) \$
Adjustments	3	(b) Deductions. If you expect to claim	deductions other than the st	andard deduction and	, l	
		want to reduce your withholding, u				
		the result here			4(b)	\$
		(c) Extra withholding. Enter any addi	tional tax you want withheld e	each pay period	4(c)) \$
Step 5: Sign Here	Unde	er penalties of perjury, I declare that this cert	ificate, to the best of my knowled	dge and belief, is true, c	orrect, a	and complete.
	Em	ployee's signature (This form is not va	alid unless you sign it.)	Da	ite	
Employers Only	Emp	oyer's name and address		First date of employment	Employ numbe	ver identification r (EIN)

For New Mexico State Withholding Only

Form **W-4**

Employee's Withholding Certificate

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.

Give Form W-4 to your employer.

2024

OMB No. 1545-0074

Department of the Treasury

Your withholding is subject to review by the IRS.

nternal Revenue Sei	rice Your withholdin	g is subject to review by the in	15.				
Step 1:	(a) First name and middle initial	Last name		(b) So	cial security number		
Enter Personal nformation	ddress Does your name match the name on your social security card? If not, to ensure you get						
	City or town, state, and ZIP code			credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.			
	(c) Single or Married filing separately						
	Married filing jointly or Qualifying surviving s	•		16			
	Head of household (Check only if you're unmar	ried and pay more than hair the costs	or keeping up a nome for you	urseit and	a qualifying individual.)		
-	os 2–4 ONLY if they apply to you; otherwise from withholding, and when to use the est			n on ea	ch step, who can		
Step 2: Multiple Job	Complete this step if you (1) hold mor also works. The correct amount of with						
or Spouse	Do only one of the following.						
Norks	(a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3–4). If you or your spouse have self-employment income, use this option; or						
	(b) Use the Multiple Jobs Worksheet	on page 3 and enter the resu	It in Step 4(c) below; c	or			
	(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is generally more accurate than (b) if pay at the lower paying job is more than half of the pay at the higher paying job. Otherwise, (b) is more accurate						
pe most accur	os 3–4(b) on Form W-4 for only ONE of the ate if you complete Steps 3–4(b) on the Form			s. (You	withholding will		
Step 3:	If your total income will be \$200,000 of	or less (\$400,000 or less if ma	rried filing jointly):				
Claim Dependent	Multiply the number of qualifying of	children under age 17 by \$2,0	00 \$				
and Other	Multiply the number of other depe	-	. \$				
Credits	Add the amounts above for qualifying children and other dependents. You may add to this the amount of any other credits. Enter the total here				\$		
Step 4 optional): Other	(a) Other income (not from jobs). expect this year that won't have w This may include interest, dividend	rithholding, enter the amount		4(a)	\$		
Adjustments	want to reduce your withholding, u			4(b)	¢		
	tne result nere			7(0)	Ψ		
	(c) Extra withholding. Enter any addi	tional tax you want withheld e	each pay period	4(c)	\$		
Step 5:	Under penalties of perjury, I declare that this cert	ificate, to the best of my knowled	lge and belief, is true, co	rrect, ar	nd complete.		
Sign Here							
	Employee's signature (This form is not va	ılid unless you sign it.)	Dat	te			
Employers Only	Employer's name and address			Employe number	er identification (EIN)		
-							

Cat. No. 10220Q

Form W-4 (2024) Page **2**

General Instructions

Section references are to the Internal Revenue Code.

Future Developments

For the latest information about developments related to Form W-4, such as legislation enacted after it was published, go to www.irs.gov/FormW4.

Purpose of Form

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. If too little is withheld, you will generally owe tax when you file your tax return and may owe a penalty. If too much is withheld, you will generally be due a refund. Complete a new Form W-4 when changes to your personal or financial situation would change the entries on the form. For more information on withholding and when you must furnish a new Form W-4, see Pub. 505, Tax Withholding and Estimated Tax.

Exemption from withholding. You may claim exemption from withholding for 2024 if you meet both of the following conditions: you had no federal income tax liability in 2023 and you expect to have no federal income tax liability in 2024. You had no federal income tax liability in 2023 if (1) your total tax on line 24 on your 2023 Form 1040 or 1040-SR is zero (or less than the sum of lines 27, 28, and 29), or (2) you were not required to file a return because your income was below the filing threshold for your correct filing status. If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file your 2024 tax return. To claim exemption from withholding, certify that you meet both of the conditions above by writing "Exempt" on Form W-4 in the space below Step 4(c). Then, complete Steps 1(a), 1(b), and 5. Do not complete any other steps. You will need to submit a new Form W-4 by February 15, 2025.

Your privacy. Steps 2(c) and 4(a) ask for information regarding income you received from sources other than the job associated with this Form W-4. If you have concerns with providing the information asked for in Step 2(c), you may choose Step 2(b) as an alternative; if you have concerns with providing the information asked for in Step 4(a), you may enter an additional amount you want withheld per pay period in Step 4(c) as an alternative.

When to use the estimator. Consider using the estimator at *www.irs.gov/W4App* if you:

- 1. Expect to work only part of the year;
- Receive dividends, capital gains, social security, bonuses, or business income, or are subject to the Additional Medicare Tax or Net Investment Income Tax; or
- 3. Prefer the most accurate withholding for multiple job situations.

Self-employment. Generally, you will owe both income and self-employment taxes on any self-employment income you receive separate from the wages you receive as an employee. If you want to pay these taxes through withholding from your wages, use the estimator at www.irs.gov/W4App to figure the amount to have withheld.

Nonresident alien. If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Specific Instructions

Step 1(c). Check your anticipated filing status. This will determine the standard deduction and tax rates used to compute your withholding.

Step 2. Use this step if you (1) have more than one job at the same time, or (2) are married filing jointly and you and your spouse both work.

Option (a) most accurately calculates the additional tax you need to have withheld, while option (b) does so with a little less accuracy.

Instead, if you (and your spouse) have a total of only two jobs, you may check the box in option **(c)**. The box must also be checked on the Form W-4 for the other job. If the box is checked, the standard deduction and tax brackets will be cut in half for each job to calculate withholding. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld, and this extra amount will be larger the greater the difference in pay is between the two jobs.



Multiple jobs. Complete Steps 3 through 4(b) on only one Form W-4. Withholding will be most accurate if you do this on the Form W-4 for the highest paying job.

Step 3. This step provides instructions for determining the amount of the child tax credit and the credit for other dependents that you may be able to claim when you file your tax return. To qualify for the child tax credit, the child must be under age 17 as of December 31, must be your dependent who generally lives with you for more than half the year, and must have the required social security number. You may be able to claim a credit for other dependents for whom a child tax credit can't be claimed, such as an older child or a qualifying relative. For additional eligibility requirements for these credits, see Pub. 501, Dependents, Standard Deduction, and Filing Information. You can also include other tax credits for which you are eligible in this step, such as the foreign tax credit and the education tax credits. To do so, add an estimate of the amount for the year to your credits for dependents and enter the total amount in Step 3. Including these credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return.

Step 4 (optional).

Step 4(a). Enter in this step the total of your other estimated income for the year, if any. You shouldn't include income from any jobs or self-employment. If you complete Step 4(a), you likely won't have to make estimated tax payments for that income. If you prefer to pay estimated tax rather than having tax on other income withheld from your paycheck, see Form 1040-ES, Estimated Tax for Individuals.

Step 4(b). Enter in this step the amount from the Deductions Worksheet, line 5, if you expect to claim deductions other than the basic standard deduction on your 2024 tax return and want to reduce your withholding to account for these deductions. This includes both itemized deductions and other deductions such as for student loan interest and IRAs.

Step 4(c). Enter in this step any additional tax you want withheld from your pay **each pay period**, including any amounts from the Multiple Jobs Worksheet, line 4. Entering an amount here will reduce your paycheck and will either increase your refund or reduce any amount of tax that you owe.





Direct Deposit Authorization Agreement

Request Type (check one):							
New Account Setup	Change in Existing Acco	ount C	Cancellation				
Please allow up to five (5) business days for your request to be processed. The change will be effective on the on the next scheduled service period following the date the request is processed.							
	RECT DEPOSIT ACCOUNT IN						
Account Holder's Full Nar	ne	ID or Last 4 of SSN					
Financial Institution	Routing Number	Account Number					
Type of Account (select o	ne): Checking	Savings	Pre-paid card				
REQUIRED. The following	ng validating documentation	is attached:					
Voided check with account holder name printed on the check. Check cannot be a temporary check. OR Official documentation from financial institution listing account holder name, account, and routing number. This includes letters from banks and paperwork from pre-paid cards							
I authorize Palco, Inc. to initiate deposits and debit entries for the purpose of correcting an erroneous deposit to the account indicated herein. In the event Palco is unable to initiate debit entries, I authorize the repayment to Palco from future amounts owed to me. I understand Palco is not responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution or due to an error on the part of my financial institution in depositing funds to my account. I understand that it is my responsibility to verify the crediting of funds by my financial institution prior to initiating debits against my account. I understand the risks of sharing an account with others, including my employer or worker. Palco is not responsible for any charges I incur from my financial institution. Any changes to my account must be submitted to Palco immediately. This authorization will remain in full force and effect until Palco has received written cancellation in such time and in such manner as to afford Palco and all appropriate financial institutions a reasonable opportunity to act on it. Printed Name							
Signature Signature Signature		Date					

Please return this form to Palco via email: enrollment@palcofirst.com or via fax to 1.877.859.8757.



PO Box 242930 Little Rock, AR 72223 Toll Free 866.710.0456 Online: PalcoFirst.com

Worker Rate Information

Select the appropriate reason	for this form:	
Initial Setup	New Service for Worker	Change Existing Rate
REQUIRED INFORMATION		
Employer Name		ID/Last 4 SSN
Worker Name		ID/Last 4 SSN
Participant Name		ID/Last 4 SSN
The employer and worker must complete this form together. Changes requested on this form will be accommodated as allowed in the budget and within the appropriate wage range. The minimum and max rates for your program are reflected below. Please allow five (5) days for processing. Once processed, the change will take effect the next service period. Changes will not be applied retroactively to payments already made. As an employer, the cost of hiring workers does not only include wages. By law, you are required to pay payroll taxes and other applicable benefits. Generally, this means that for every \$1 you pay to your worker, it costs you between \$1.09 and \$1.14.		
SERVICE TYPE	SERVICE CODE	HOURLY RATE*
*The State of New Mexico minimum hourly rate is \$7.50, Albuquerque is \$8.95 and Bernalillo County is \$8.70. By signing below, the employer and worker certify that the information in this form is correct and was agreed to by both parties.		
Worker Signature	Date Date	
Employer Signature		