

A person in a wheelchair is seated on the back of a blue van, looking out at a scenic mountain landscape. Another person is visible in the background. The scene is set in a grassy field with mountains in the distance.

WELCOME!

West Virginia Personal Options Transition Training



TODAY'S TOPICS

2023



- ➔ Palco Overview
- ➔ Transition Details
- ➔ EVV & Time Entry
- ➔ Customer Support & Resource Consultants
- ➔ Questions

PALCO

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A background image of a diverse group of people in a meeting room. A woman in a blue shirt and patterned skirt is standing and pointing at a laptop on a table. Other people are seated around the table, some looking at the laptop and others talking. The room has a wooden ceiling and fluorescent lights.

COMPANY OVERVIEW

PALCO'S CORE VALUES

- ➔ Independence
- ➔ Innovation
- ➔ Expertise
- ➔ Trust
- ➔ Diversity
- ➔ Advocacy

OUR MISSION

Empowering Independence.

Sharpened by experience and amplified by modern technology, Palco advocates for people to live independent lives.





COMPANY HIGHLIGHTS

Palco has
**OVER
25**
years of direct
F/EA experience

1ST
F/EA in the
country

Our ownership
team is
100%
Certified Public Accountant
(CPA) and **privately owned**



Women owned and
operated

12
YEARS

of Support Broker
Experience



National and state
program subject-matter
experts on self-direction



**Palco, Inc. is excited to be
your new Financial
Management Agency (FMA)
for the WV Waiver Personal
Options program starting in
April 2024.**



TRANSITION
DETAILS



AGING AND DISABLED WAIVER (ADW)

Date	Activity	Important Notes
Monday, 3/11/24	First Pay Period with Palco begins.	
Tuesday, 3/12/24	Time submitted to PPL for dates of service 2/26/24-3/10/24.	Pay Day Friday 3/22/2024
Thursday, 3/21/24	Last day to submit any late time to PPL.	PPL will not process any time after 3/21 so be sure you have submitted everything!
Monday, 3/25/24	Timesheets due to Palco.	Palco will process all timesheets going forward.
Friday, 4/5/24	First Pay Day with Palco.	Dates of service 3/11-3/24.



INTELLECTUAL/DEVELOPMENTAL DISABILITIES WAIVER (IDDW) AND TRAUMATIC BRAIN INJURY WAIVER (TBIW)

Date	Activity	Important Notes
Monday, 3/18/24	First Pay Period with Palco begins.	
Tuesday, 3/19/24	Time submitted to PPL for dates of service 3/4/2024-3/17/2024.	Pay Day Friday 3/29/2024
Thursday, 3/21/24	Last day to submit any late time to PPL.	PPL will not process any time after 3/21 so be sure you have submitted everything!
Monday, 4/1/24	Timesheets due to Palco for 3/18/2024 - 3/31/2024 pay period.	Palco will process all timesheets going forward.
Friday, 4/12/24	First Pay Day with Palco.	Dates of service 3/18-3/31.



TRANSITION CHECKLIST

4 KEY TASKS TO COMPLETE!

Task #1:

- ✓ Make sure Palco has contact Info for all Participant, Program Representatives and Workers. We have created an online form.

<https://www.surveymonkey.com/r/PALCOWVDATA>

Task #2:

- ✓ Enroll with Palco! Every Participant (Employer) must complete a transition Enrollment with Palco. Once we have your email, we will be sending out links to complete enrollment online. Quick and Easy!

Task #3:

- ✓ Register for EVV and submit a Device ID to Palco (included in Enrollment). More info covered later in this training.

Task #4:

- ✓ Attend a Training! 😊 YOU CAN CHECK THAT ONE OFF SINCE YOU ARE HERE!



ELECTRONIC VISIT
VERIFICATION (EVV)

WHAT IS EVV?

Electronic visit verification (EVV) is a technology solution which electronically verifies that home and community-based services are actually delivered to people needing those services by documenting the precise time service begins and ends. EVV is a federal requirement that is a part of section 12006 of the 21st Century Cures Act.

Palco has partnered with Fiserv to provide our clients with one of the best EVV platforms that exists nationwide. **AuthentiCare**® by Fiserv is compliant with the Cures Act, user friendly, and secure. **AuthentiCare**® by Fiserv offers the choice of EVV Via:

- The AuthentiCare Mobile application or
- Telephony / IVR (Interactive Voice Recognition) via a touchtone phone.

If you are exempt from EVV you will still be exempt with Palco!



EVV MOBILE APPLICATION



The **AuthentiCare**® mobile application is a smart phone application that uses the cellular GPS capabilities on your phone to capture location as well as the 6 points of data require to comply with EVV.

To Download the AuthentiCare App:

Step 1: Go to the App Store on your mobile device.

Step 2: Tap on **Search**.

Step 3: In the search bar, type "**AuthentiCare**"

Step 4: Download the app, "**AuthentiCare 2.0**".

Step 5: Complete the download and tap to open.

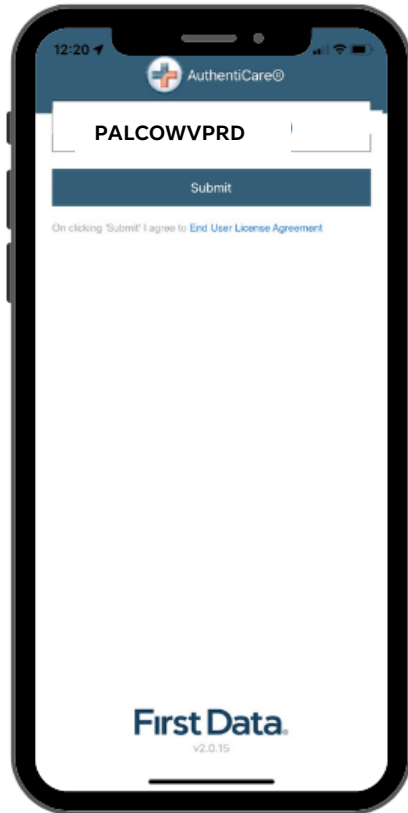
Tap Allow to access this device's location and Allow to make and manage phone calls.



Google play

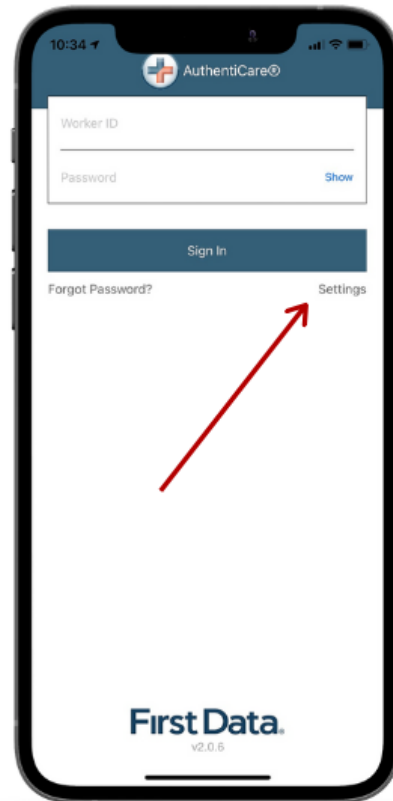


MOBILE APPLICATION INITIAL SETUP

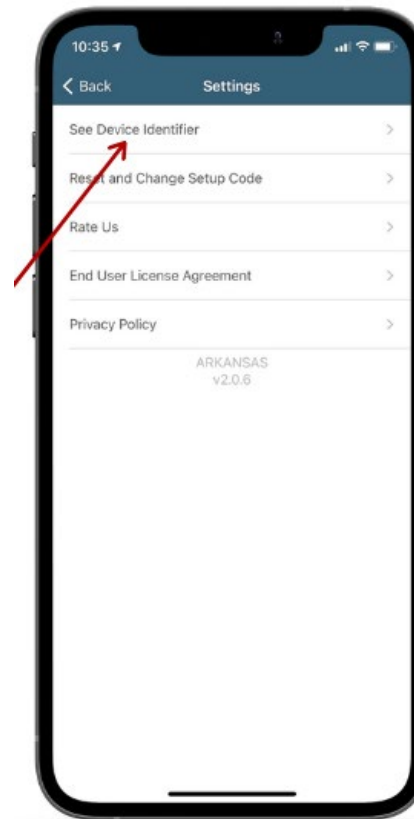


Once downloaded, enter the **Setup Code** provided to you by Palco.

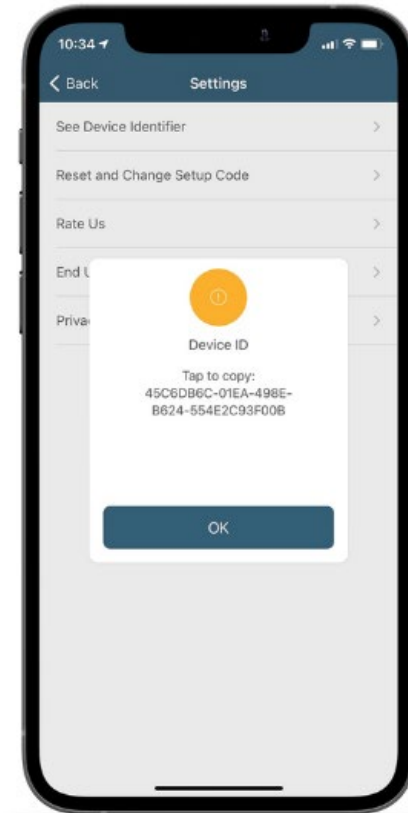
The Setup Code is **PALCOWVPRD**



Next, obtain your device ID. Click **Settings** at the bottom right of the login screen.

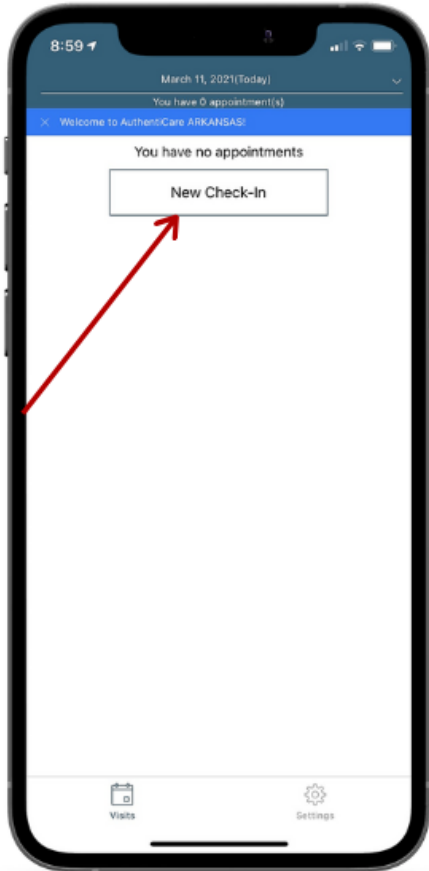


Click **See Device Identifier** from the menu options.



Write down your **Device ID** as shown on the screen and provide to Palco via the **EVV Registration Form** for setup.

MOBILE APPLICATION: CLOCKING IN



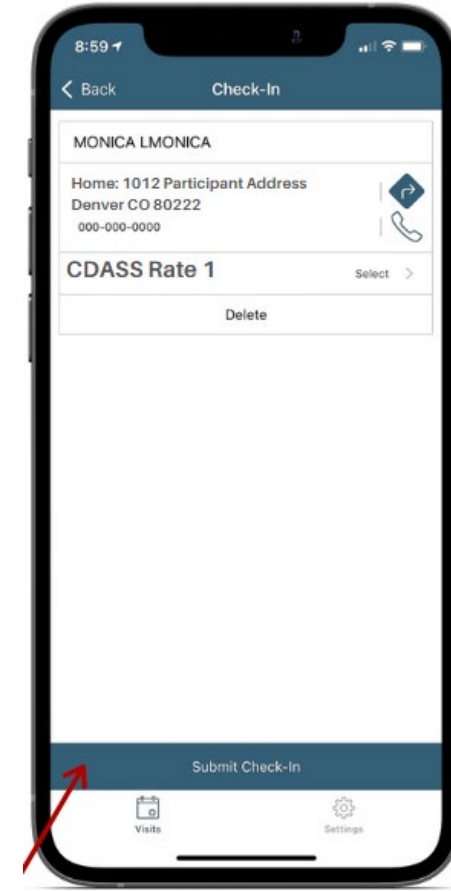
1. Click on **"New Check-In"**.



2. Choose the client from the list of clients. If the client is not found, click **"Lookup Client"** and follow the steps.

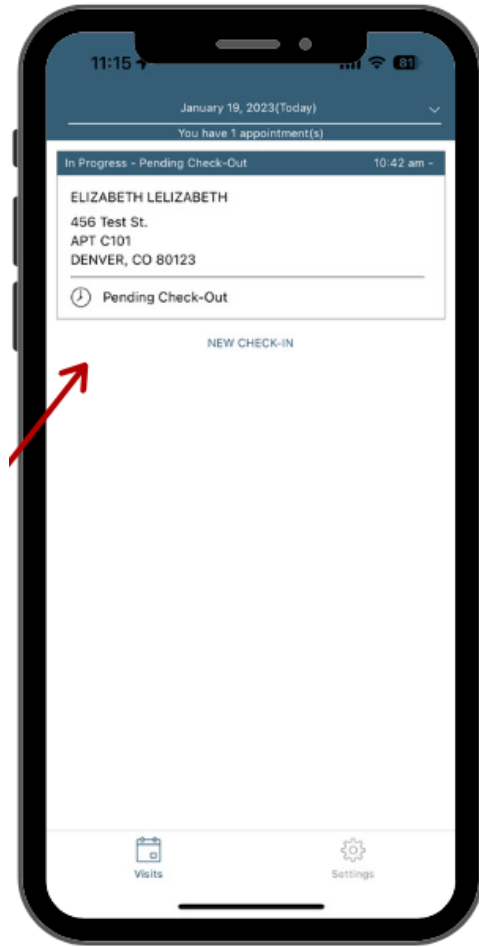


3. Click on **"Service"** and select the service you are providing for that shift.

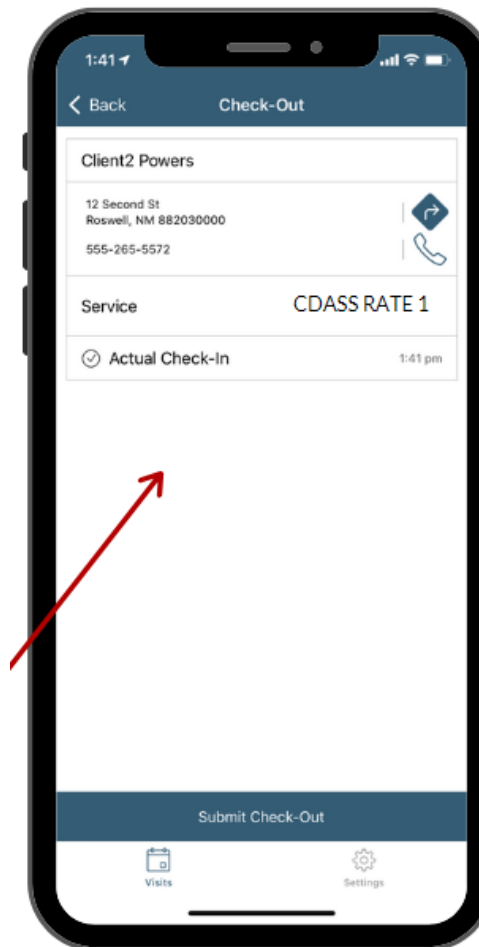


4. Once all the details are complete, click **"Submit Check-in."**

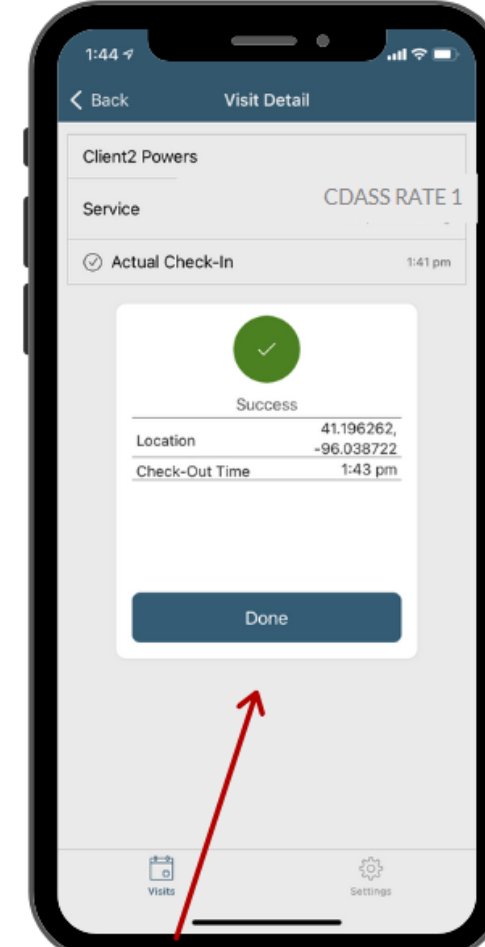
MOBILE APPLICATION: CLOCKING OUT



1. At the end of the shift, login to the app again and select the visit indicated as "**Pending Check-Out**".



2. Click "**Submit Check Out**" at the bottom of the screen.



3. The check-out success screen will appear. Click "**Done**" to clear.

TELEPHONY/IVR



For those who do not wish to use the mobile application, AuthentiCare allows workers to use Telephony or IVR (Interactive Voice Recognition) using a touchtone phone.

Using a landline phone or cell phone, follow the IVR instructions to dial the toll-free number at the beginning and the end of the visit.

Start of visit:

Step 1: Dial toll free number, enter your PALCO ID.

Step 2: Follow the prompts to clock in.

End of visit:

Step 1: Dial toll free number, enter your PALCO ID.

Step 2: Follow the prompts to clock out.



EVV



Once time is recorded via EVV, the shift is uploaded to Palco's online timesheet portal called **Connect**.

All program participants and their workers must be registered in Connect to review and submit their shifts or timesheet(s) for payment to Palco. Any edits to time entries will happen in Connect.





AUTHENTICARE MOBILE APP - WEST VIRGINIA



Electronic Visit Verification (EVV) User Guide

AuthentiCare® by First Data is Palco's first choice for meeting the federal mandate for EVV. EVV is a system which electronically verifies that home or community-based service visits occur by capturing and documenting six points of data: type of service, individual receiving services, individual providing service, location of the service and the time the service begins and ends. This user guide will walk you through the functionality and features of the mobile app which can be used on any smart device. For more information on EVV visit our website at www.palcofirst.com

Download the Application

Download the Authenticare App

Step 1: Go to the App Store on your mobile device.

Step 2: Tap on Search

Step 3: In the search bar, type "Authenticare"

Step 4: Download the app- "Authenticare 2.0".

Step 5: Complete the download and tap to open.

Tap Allow to access this device's location and Tap Allow to make and manage phone calls.



Initial Set UP



Once downloaded, enter the Setup Code provided to you by Palco.

Setup code for the CO CDASS Program is **PALCOWVPRD**

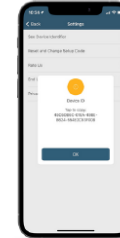
WWW.PALCOFIRST.COM



Next, obtain your device ID. Click Settings at the bottom right of the login screen.



Click See Device Identifier from the menu options



Write down your Device ID as shown on the screen and provide to Palco via the EVV Registration Form for setup.

You must provide your name, employer name and device ID to Palco for set up via the EVV Registration Form to receive your temporary password.

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FREQUENTLY ASKED QUESTIONS

I am trying to register for Connect but I don't have my Palco ID.

For assistance with registering for Connect or verifying data elements for registering, contact Palco. You can also check your email to see if you received a notification from Palco containing your six digit Palco ID.

How do I know when my timesheet will be paid or if it is payable?

Refer to the payment schedule located on the Palco website to determine when the specific pay period is scheduled to be paid. You can monitor the timesheet status to tell you where it is at in the process at any time by accessing the timesheet record in Connect.

For Questions? Contact Palco!

Phone: 1-866-710-0456

Fax: 501-821-0045

Email: customersupport@palcofirst.com

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

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PALCO'S EVV TRAINING RESOURCES

- ➔ Mobile App User Guide
- ➔ Telephony User Guide
- ➔ EVV Registration Form
- ➔ Videos

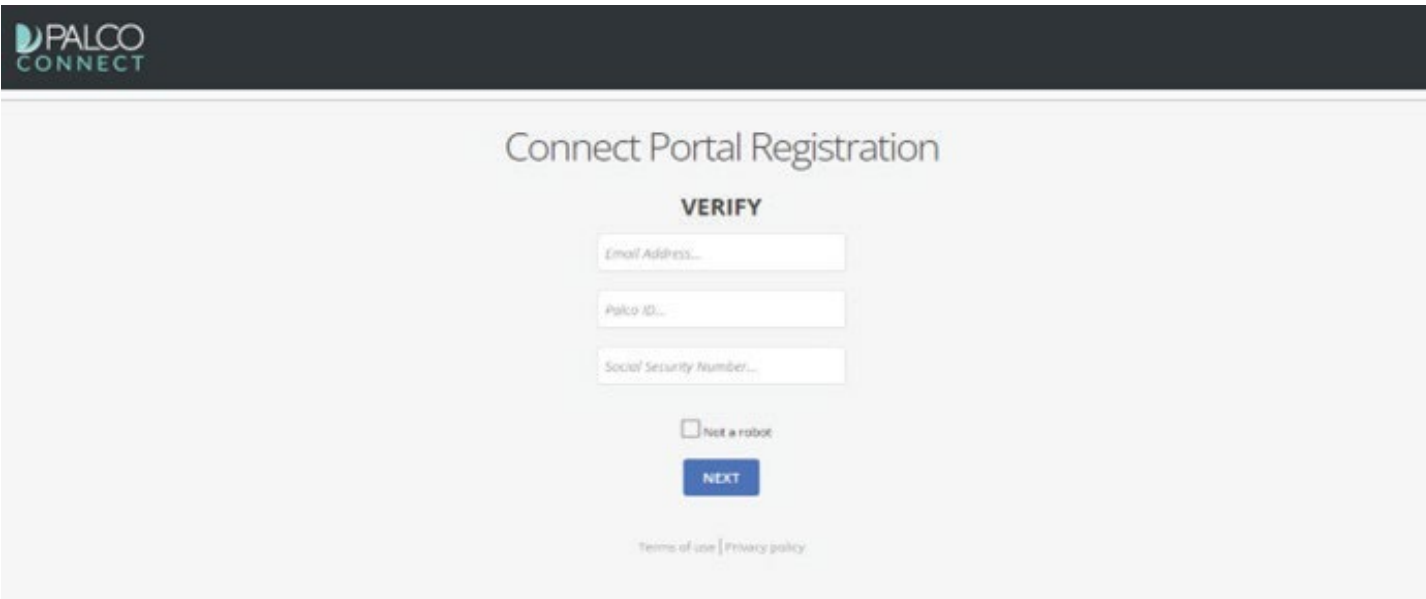
EVV Resources

A woman with short dark hair, wearing a white sleeveless top, is smiling and looking down at a black smartphone she is holding in her hands. The background is a blurred outdoor setting with green trees and a white building.

TIME ENTRY

CONNECT

Connect is Palco's online timesheet portal for Employers and Workers. Connect provides everything a self-directing employer or worker may need right at their fingertips! Accessible 24/7, some features of Connect include the ability to enter time, integration with Electronic Visit Verification (EVV), ability to track and monitor spending, ability to update your personal contact information, and ability to access W-2s and paystubs.

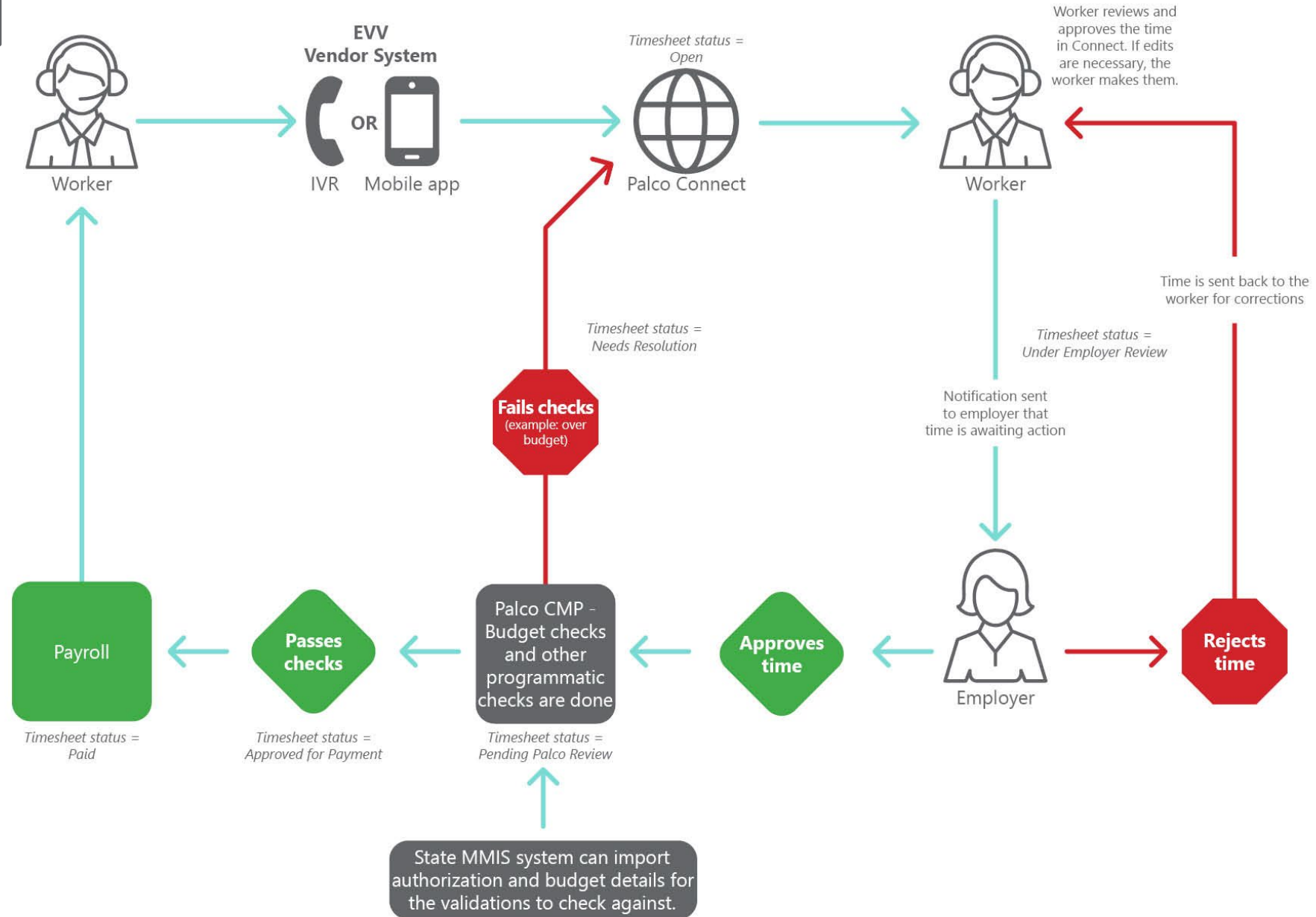


The screenshot shows the Palco Connect Portal Registration page. At the top left is the Palco Connect logo. The main heading is "Connect Portal Registration". Below this is a "VERIFY" section with three input fields: "Email Address...", "Palco ID...", and "Social Security Number...". There is a checkbox labeled "Not a robot" and a blue "NEXT" button. At the bottom, there are links for "Terms of use" and "Privacy policy".



CONNECT

Here is how the process works:



TIMESHEET STATUS



Timesheet Statuses are available so you can quickly and conveniently see the payment processing stage of a timesheet. An employer can see the status of all timesheets for their workers and workers can see the status of any timesheet they have submitted in the Connect application's "Timesheet Overview" screen.

Status	Description
Open	A timesheet has been started by the Employer or Worker and is being edited. Only the person who started the timesheet can edit.
Under Employer Review	Time has been submitted to the Employer for approval.
Needs Resolution	The Employer has rejected the time and sent it back to the worker for correction. Changes can be made to the time at this stage.
Under Palco Review	Time has been approved and submitted by the Employer to Palco. Palco is performing validations on the time to ensure it is payable.
Approved for Payment	Time has passed all Palco checks and validations. It is going through the final step of billing before it can be paid.
Paid	The timesheet is closed and paid.
Rejected	Palco rejected the timesheet for the reason listed in the portal. No changes can be made. To correct, a new timesheet must be started via Connect and will be recorded as an edited timesheet facing the same warnings as listed above.

ENTERING TIME IN CONNECT



1. Login to the Connect portal, <https://connect.palcofirst.com/>, with your username and password.
2. At the top of the screen, select the "Time Entry" tab by clicking on it.
3. If you are the employer and have more than one worker, or if you are the worker for more than one participant, select the worker or participant for whom services were provided.

The screenshot displays two side-by-side panels from the PALCO CONNECT application. The left panel, titled "SELECT A WORKER", features a "Current Status" dropdown menu set to "Active". Below this are two input fields containing the names "April LApril" and "Liliana LLiliana". The right panel, titled "SELECT A PARTICIPANT", includes a "< BACK" link and two input fields containing the names "Rachel Green" and "Jill Green". Both panels have the PALCO CONNECT logo at the top.

CALCULATOR TOOL



The screenshot shows the PALCO CONNECT web application interface. At the top, there is a navigation bar with the PALCO CONNECT logo and several menu items: HOME, TIME ENTRY, ENTER PAYMENTS, PAY HISTORY, SPENDING, WORKER INFO, and DOCUMENTS. A dropdown menu is open under SPENDING, showing 'Period Spending' and 'Cost Estimation Calculator'. The main heading is 'Cost Estimation Calculator'. Below this is a text box explaining the tool's purpose: 'Our interactive calculator is a tool to assist with managing the self-directed budget. To arrive at a cost for the budget, enter the pay rate, cost percentage (inclusive of tax, Workers' Compensation, and other benefits, if appropriate), and hours worked in the time span you are planning. If you are entering non-taxable wages (e.g., there is no employer tax associated with hiring this worker; for more information on why this might happen, visit IRS Publication 15), or vendor payments, please enter "0" in the Employer Cost section. Specific rates and costs associated with workers can be found in Worker Info.' Below the text is a table with four columns: Pay Rate, Employer Tax Cost %, Hours, and Total. An example row shows a pay rate of \$10.00, an employer tax cost of 5.25%, 3 hours, and a total of \$31.58. There is an 'ADD ENTRY' button and an 'Estimated Total' field showing \$0.00.

Our interactive calculator is a tool to assist with managing the self-directed budget. To arrive at a cost for the budget, enter the pay rate, cost percentage (inclusive of tax, Workers' Compensation, and other benefits, if appropriate), and hours worked in the time span you are planning. If you are entering non-taxable wages (e.g., there is no employer tax associated with hiring this worker; for more information on why this might happen, visit [IRS Publication 15](#)), or vendor payments, please enter "0" in the Employer Cost section.

Specific rates and costs associated with workers can be found in [Worker Info](#).

Pay Rate	Employer Tax Cost %	Hours	Total
Example \$10.00	5.25%	3	\$31.58

ADD ENTRY

Estimated Total

The Cost Estimation Calculator is an interactive calculator tool that employers can use to estimate and plan timesheet expenditures. Users can insert multiple pay rates, cost percentages, and hours worked in each field to gather an estimated total of funds. This calculator can help in determining pay raises, employer cost, work scheduling, and overall budget maintenance.

REPORTS



In addition to being Palco's time entry system, the Connect Portal also provides valuable reports to keep track of the budget and employee payments. Two of those features are Spending Summaries and Payment Details. Both of these reports can be accessed by logging into the Connect Portal: <https://connect.palcofirst.com/>.

Spending Summaries provide the employer quick information to help you easily track your utilization.

ALLOCATION TYPE: Funds	
PERIOD: 2022-01-01 - 2022-01-31	
EBD/SCI/BI/CMHS-PR CO_CDASS - EBD/SCI/BI/CMHS	Starting Allocation: \$5885.18
CDASS1 CDASS Rate 1	
Date Of Service	Amount:
2022-01-01	-\$100.43
2022-01-02	-\$100.43
2022-01-03	-\$120.52
2022-01-04	-\$120.52
2022-01-05	-\$120.52
After 2022-01-05	-\$4461.95
CDASS2 CDASS Rate 2	
None Found	
CDASS3 CDASS Rate 3	
None Found	
	Spent: -\$5024.37
	Remaining: \$860.81
	Utilized: 85.37%

REPORTS



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

Payments

History for: Manolo Valverde Jr from: Last 90 days

▼ PAYMENT ISSUED	NET TOTAL	PAID TO	Check No: DEMO-1758090568
Nov 14, 2021	\$116.00	Manolo Valverde Jr	view stub

DESCRIPTION	THIS PAYROLL	YEAR TO DATE
EARNINGS		
T2049 Transportation Miles	\$116.00	\$927.28
	\$116	\$927.28
DEDUCTIONS		
	\$0.00	\$0.00
NET PAY	\$116.00	

▶ PAYMENT ISSUED	NET TOTAL	PAID TO	Check No: TEST-1454090568
Nov 13, 2021	\$601.79	Manolo Valverde Jr	view stub

Check Number DEMO-1758090568 - Google Chrome

connect-demo-dev.palcofirst.com/#/view_stub_b8e67efb-465f-11ec-9395-42010a80002e

PALCO
[Print](#)

PO BOX 242930
LITTLE ROCK, AR 72211

Manolo Valverde Jr
P.O. BOX 1103-87539
La, Madera, NM 87539

Employer	Employee ID	Employee Name	SSN	Payroll Date	Direct Deposit #	Amount
090567 Emma Ginevra	090568	Manolo Valverde Jr	501-77-0052	11/14/2021	DEMO-1758090568	\$116.00

Description	Service Dates	Hours	Rate	This Payroll	Year to Date
EARNINGS					
T2049 Transportation Miles	Pay Period 09/01/21	290.00	0.4000	\$116.00	\$927.28
				\$116.00	\$927.28
TAX DEDUCTIONS					
				\$0.00	\$0.00
NET DEPOSIT				\$116.00	\$927.28



TIME ENTRY USER GUIDE

Connect is Palco's online portal for Employers and Workers. Connect provides everything a self-directing employer or worker may need right at their fingertips! Accessible 24/7, some features of Connect include the ability to enter time, integration with Electronic Visit Verification (EVV), ability to track and monitor spending, ability to update your information and ability to access W-2s and paystubs. This user guide will detail every feature in Connect and how to use it. It is important to note that not all features apply to every program. For example, if your program does not allow for vendor payments, you will not see the vendor payment tab. If you have questions, speak to a Palco Customer Support Representative at 1-866-710-0456.

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Have Questions? Contact Palco!

Phone: 1-866-710-0456

Fax: 501-821-0045

Email: customersupport@palcofirst.com

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

PALCO'S TIME ENTRY TRAINING RESOURCE

- ➔ Connect Registration
- ➔ Time Entry and Approval
- ➔ EVV
- ➔ Reports
- ➔ Calculator Tool
- ➔ Viewing Paystubs
- ➔ FAQ

TIME ENTRY USER GUIDE

A young woman with blonde hair, wearing a blue and white striped shirt, is sitting on a couch and smiling as she shows something on a tablet to an elderly woman with grey hair. The elderly woman is wearing a red cardigan over a pink top and is looking at the tablet with interest. The background is a softly lit room with a window and curtains.

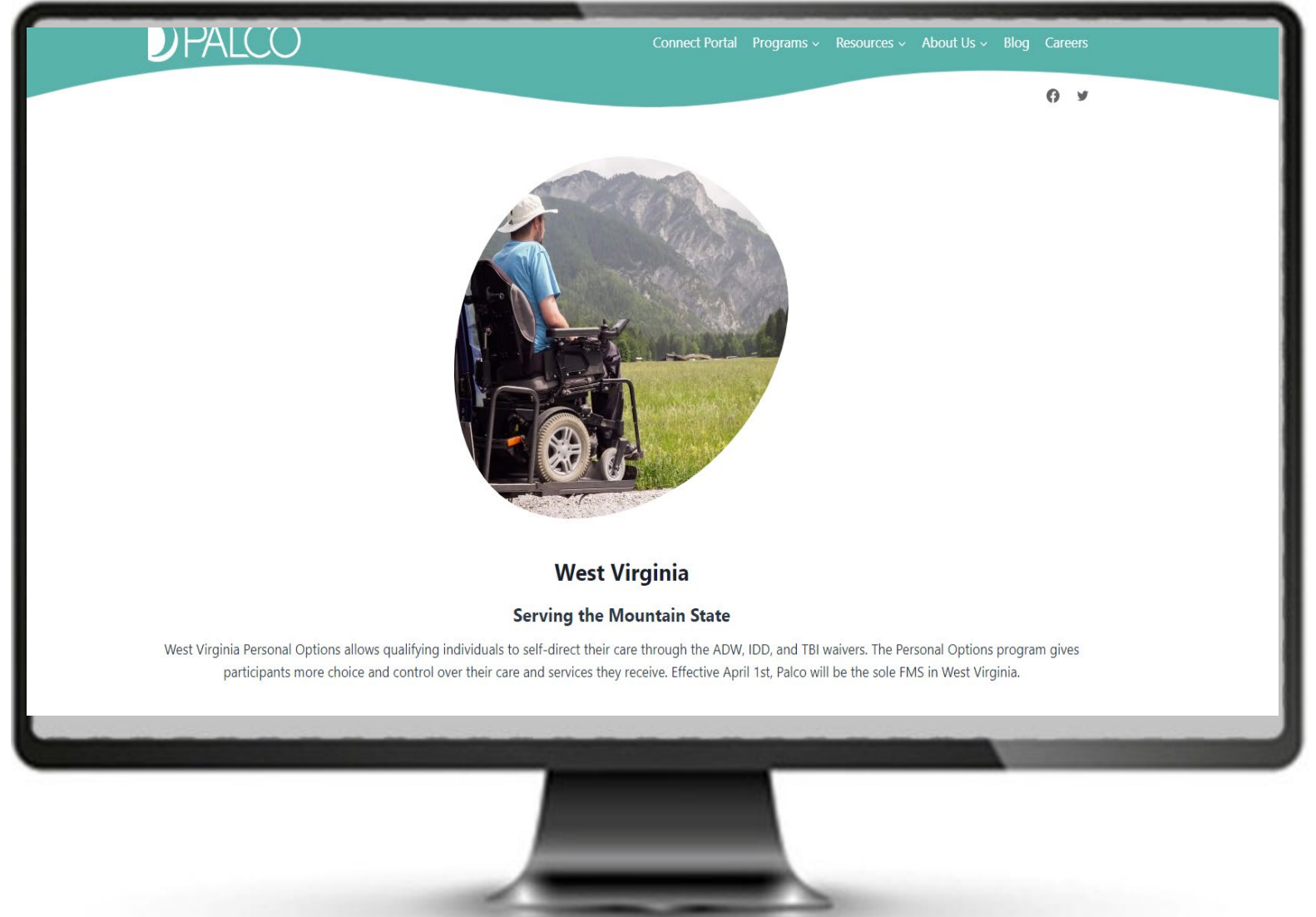
CUSTOMER
SUPPORT &
RESOURCE
CONSULTANTS



RESOURCES

You can find many helpful resources, training documents, forms, and videos on the Palco website!

<https://palcofirst.com/west-virginia/>





CUSTOMER SUPPORT



Palco is in the process of hiring Resource Consultants (RC) who will be able to support you every step of the way. Rest assured, many of these staff are the same ones you have known and worked with for years. You will receive information on RC assignments as they are hired and trained.

You can contact the Palco Customer Support team Monday-Friday between 9:00am and 6:00pm EST. Phone: **1-866-710-0456**

Email: **customersupport@palcofirst.com**

A blurred background image of a diverse group of people in a meeting or conference, with several individuals raising their hands, suggesting an interactive session or a Q&A period.

QUESTIONS



THANK YOU
FOR YOUR TIME!

For more information about Palco, visit:

<https://www.palcofirst.com>

Email: westvirginia@palcofirst.com

Contact: 1-866-710-0456