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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REGISTERING FOR CONNECT

In order to approve timesheets, both the employer and worker must be registered in Palco's Connect application. In order to do this, they must be assigned an ID number by Palco. The ID number is issued via email after the enrollment process is complete. If you need assistance or do not know your ID number, contact the Palco Customer Service Team for assistance.

Follow the steps below to register for Palco Connect.

Step One: Visit the Connect Registration Page:
https://connect.palcofirst.com/#/registration/data_verification

Connect Portal Registration

VERIFY

Email Address...

Palco ID...

Social Security Number...

☐ Not a robot

NEXT

Step Two: Once here, enter your email address, Palco ID, and Social Security number. These must be the exact email address and social security number that were provided during enrollment and the same Palco ID you obtained after becoming enrolled. If you are having trouble, make sure you have no spaces before or after any of the data elements. If that still does not work, contact Palco to verify that the data in the Palco system is correct.

Step Three: After clicking "Next," the user will be asked to create their own password. Once a password has been created, the user will be registered for Connect.

To use Connect in the future, use the main landing page and log in. https://connect.palcofirst.com/

Passwords

You can change your password at any time by clicking on "Forgot Password" from the main Connect landing page.

SECTION ONE: TIME ENTRY AND SUBMISSIONS

AddNAide

This section will provide valuable information and a process flow for Workers and Employers who use the COA AddnAide application. Once that time is recorded via the app, the Employer can review and approve the time directly in the app. For payroll, Palco will export the time that is approved by the employer in the app and perform necessary validations and determine if the shift is payable. The Palco Connect system will perform two important functions for AddnAide App Users: 1.) Provide a space for edits/corrections 2.) Provide visibility to reporting and pay stubs. Let's start by reviewing the time entry and payment process.

Here is how the process works:
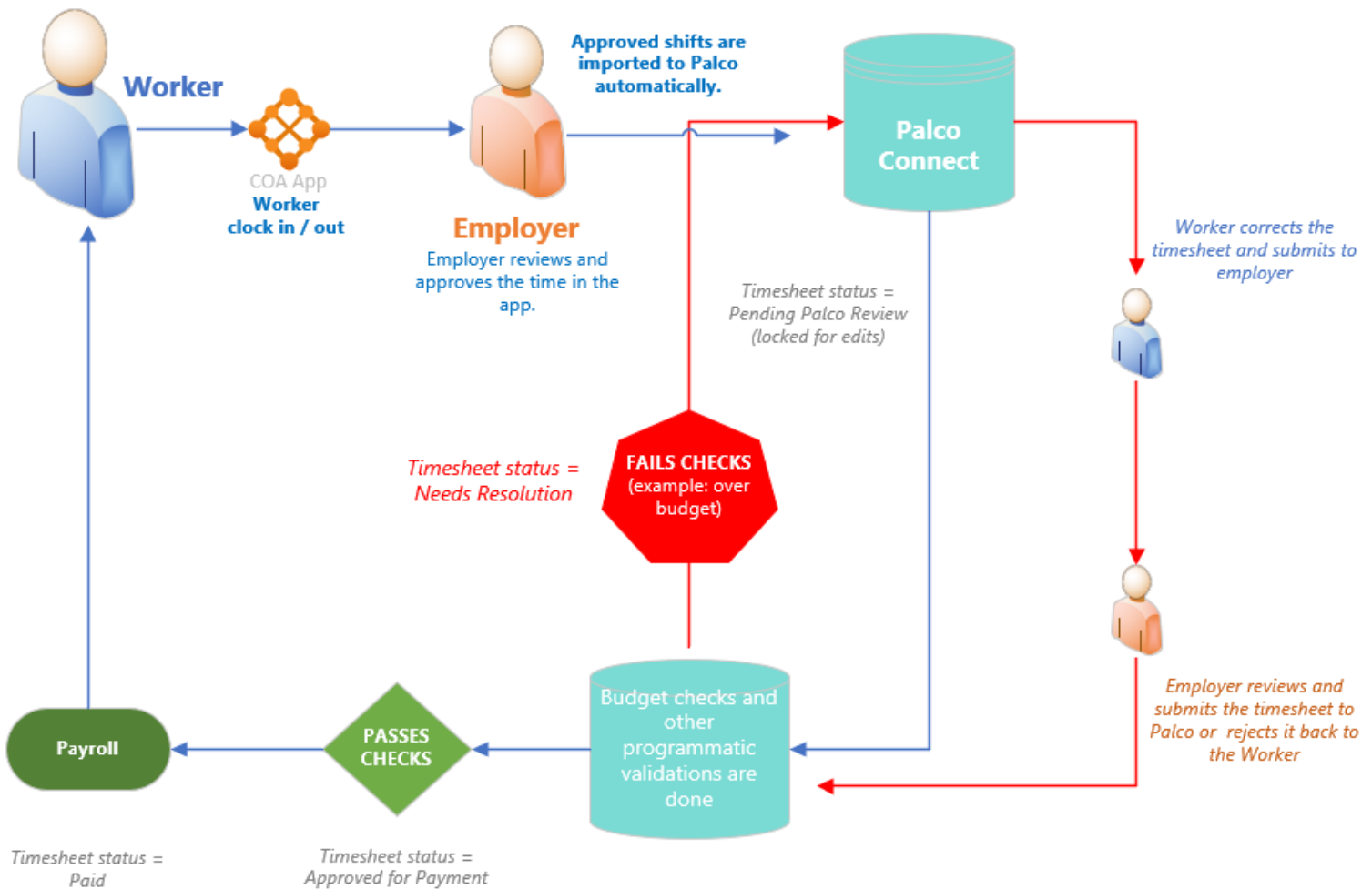
Assuming the time passes all validations and checks that Palco performs, logging in to Connect will be optional for the Employer and Workers.

If a timesheet fails the validation process and requires the Employer/Worker to make corrections, both parties will need to access the Connect system to do so. The rejection will be sent via email to the Employer. The Worker will then log in to Connect, correct the timesheet, and resubmit to the Employer. Visit Section One of this user guide for information on registering for Connect. If you need assistance, you can contact Palco. Instructions for editing a timesheet in Connect is covered on the following pages.

Accessing Timesheets in Connect- Worker

1. All time entries will be open under the worker's Connect account for initial review. Workers will access the Connect website **https://connect.palcofirst.com/** and login using their credentials.

2. Click "Time Entry" located at the top right of your screen.

3. Select the Participant for which you are submitting time. You may see multiple options here if you are associated with more than one person.

4. Select the pay period for which you intend to review time for. You can do this from the center of the screen, or the drop down in the top right.

Editing Time in Connect- Worker

5. Select the shift you would like to edit. Review the service type drop down and time entry. Use the drop downs and time selections to enter the correct start and end time for the shift. Ensure you have selected the correct AM and PM selections. Once done, save the shift.

6. Review all of the shifts for accuracy and make any edits if necessary. Once you have ensured everything on the screen is correct, click "Submit for Approval."

Approving Time in Connect

Once the worker has submitted their time, the next and final step is for the employer to review and submit. The employer will follow the same 1 - 4 steps outlined above to access their Connect account and review the time entry. Once on the time entry screen there are a few options.

NAME	STATUS	PAY PERIOD	TOTAL HOURS
Ross Gellar at NM_MV for Rachel Green	🔒 under employer review	2021-11-06 - 2021-11-19 (Current)	2

WEEK 1 - 2 hrs

11/06/2021 Saturday					Status does not allow entry
11/07/2021 Sunday					Status does not allow entry
11/08/2021 Monday					Status does not allow entry
11/09/2021 Tuesday					Timesheet is not open

SERVICE	START	END	STATUS	EXCEPTION REASON	ACTION
CDC Blended Service (15 Min) - T2041	10:00 AM	12:00 PM	⚠Under Employer Review Forgot to Check in/out		

11/10/2021 Wednesday	Timesheet is not open
11/11/2021 Thursday	Timesheet is not open

APPROVE   **REJECT**   **CANCEL**
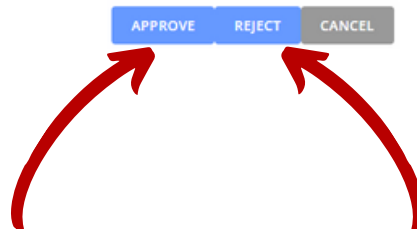
Approve:
Selecting "Approve" is your attestation as an employer that all of the shifts are correct and true. It is important for you to review the shifts for accuracy because you are the employer and responsible for all aspects of scheduling and managing your worker(s). Once you approve, the timesheet will be submitted to Palco for processing and payment. Palco will complete the necessary checks and validations to ensure payment is approved.

Reject:
Selecting "Reject" will deny the timesheet and send it back to the worker for corrections. You should only reject a timesheet if it is incorrect and requires an edit. Make sure the updates are done timely and resubmitted to you so you do not miss the payroll deadlines for pay day.

Please ensure you have reviewed the published payroll schedule including the date/time when all time must be submitted in order for workers to receive timely payment. **https://palcofirst.com/ohio/**

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. Consult the chart below for status definitions.

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.

SECTION TWO: VENDOR PAYMENTS

This section will provide valuable information for programs that authorize vendor payments. Connect grants employers the ability to create their own payment requests and view the payable history.

Entering Payment Requests

1. Login to the Connect portal, https://connect.palcofirst.com/, with your username and password
2. Click on "Enter Payments" at the top of the screen and select "Payment Request."
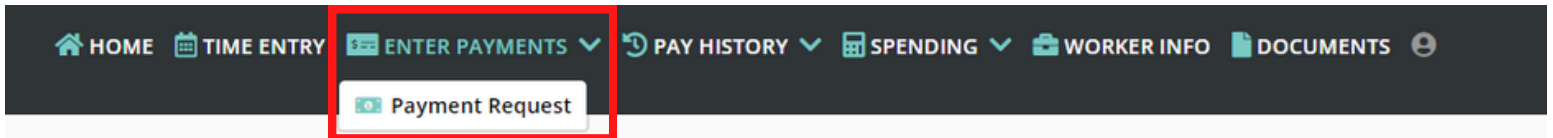
3. To create the payment request, the employer will select the Participant, Budget, the Service Authorization, Payee Type, and Payee from the drop-down boxes. The employer will only see options that are appplicable to the Participant and the Participant's budget.

4. Once the employer completes the necessary fields, they can complete the payment request by adding the date of service, units, and the rate.

DETAILS	REFERENCE	SERVICE DATE	UNITS	RATE	TOTAL COST
⊕	12234	01/08/2024	1	150.00	$ 150.00

ALL TOTAL: $ 150.00

CREATE   CANCEL

5. Before being submitted, one final prompt will appear to finalize the payment request and determine if the employer wants to move forward.

By hitting create, you will no longer be able to edit this payment request. You also agree that your request is valid and accurate and that you are required to keep copies of all necessary documentation to support this expenditure. You will be required to produce such documentation in an audit. In the case that you cannot support the payment, you will be required to return the funds to Palco and/or the Program

AGREE   **CANCEL**

6. Once submitted, the employer will see the payment request in the "Payment History" section. They will be able to follow the status as it goes through program checks and validation to determine if payment can be issued. Once issued, the status will change to "Paid."

PALCO CONNECT

🏠 HOME 📅 TIME ENTRY 💳 ENTER PAYMENTS ⌄ 🕐 PAY HISTORY ⌄ 📊 SPENDING ⌄

Request Payment

▼ CREATE PAYMENT REQUEST

PARTICIPANT: Select Participant ⌄

▼ PAYMENT HISTORY

FROM: *Select a date*   TO: *Select a date*   FILTER: ALL AUTHORIZATIONS ⌄   ALL PARTICIPANTS ⌄

Reference⇕	Participant ⇕	Payee ⇕	Service Date ⇕	Authorization⇕	Total Cost ⇕	Status ⇕
12234	Dionissio Avelar	NOTE-ABLE MUSIC THERAPY SERVICE	2024-01-08	THR	150.00	Pending Palco Review

SECTION THREE: VIEWING AND UPDATING INFORMATION

Updating 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."
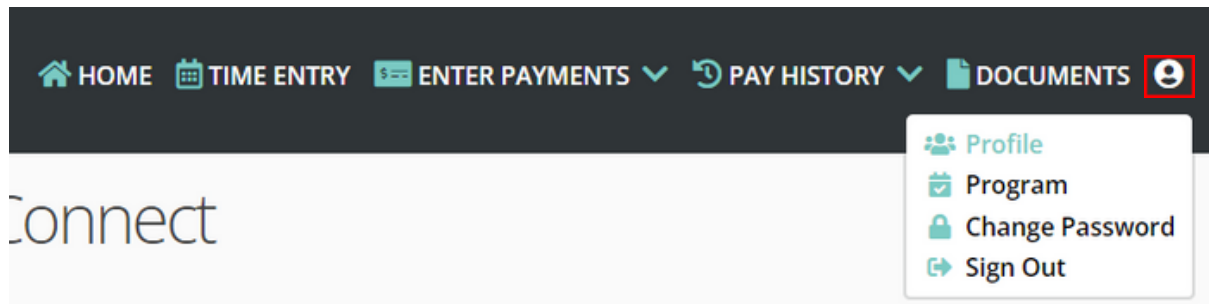
Employers will be directed to the Profile page directly where they will be able to edit their contact information. To make changes, the employer will click on "Make Changes." This will allow the users to edit their contact information which includes phone number, Email, mailing address, physical address, and preferred communication. 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.
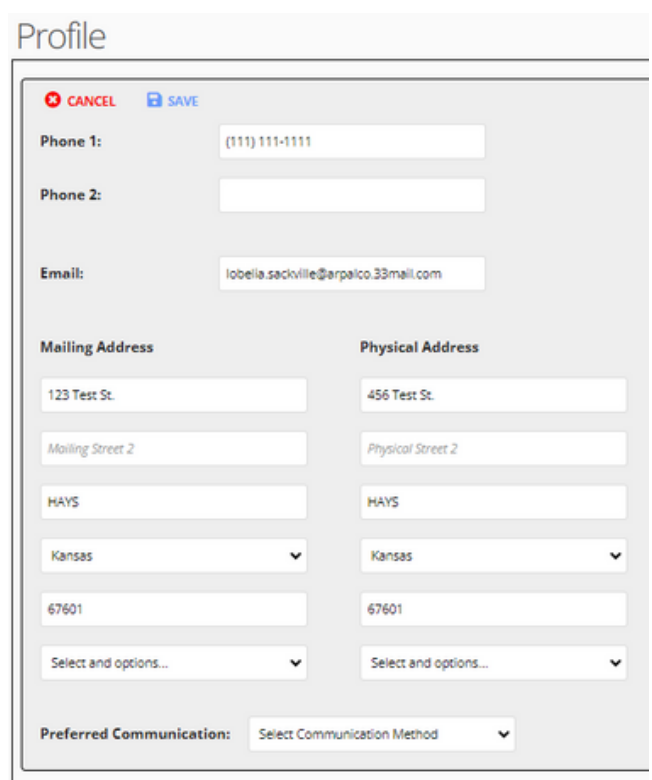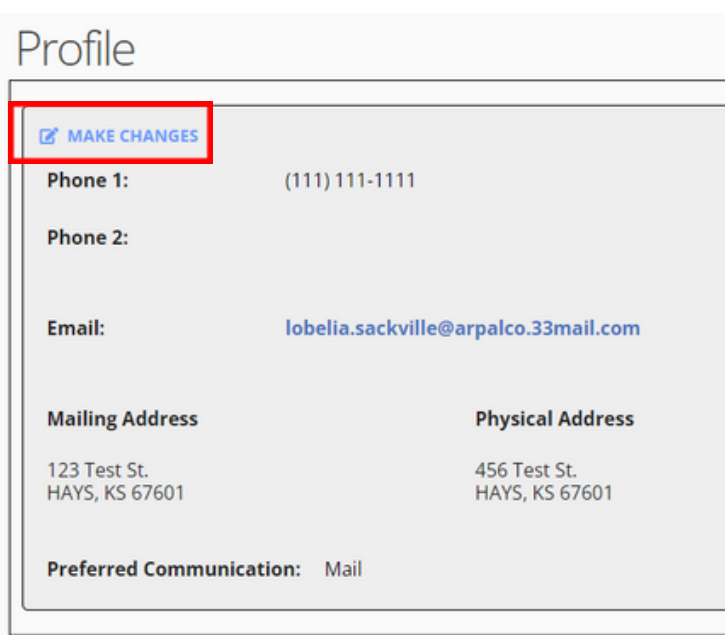
Employees will be directed to a page where it gives the option to change their contact information or their payment information. To edit the contact information, the employee will click on the "+" icon next to "Contact." Once they do that, the employee will be able to change the information as seen in 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.
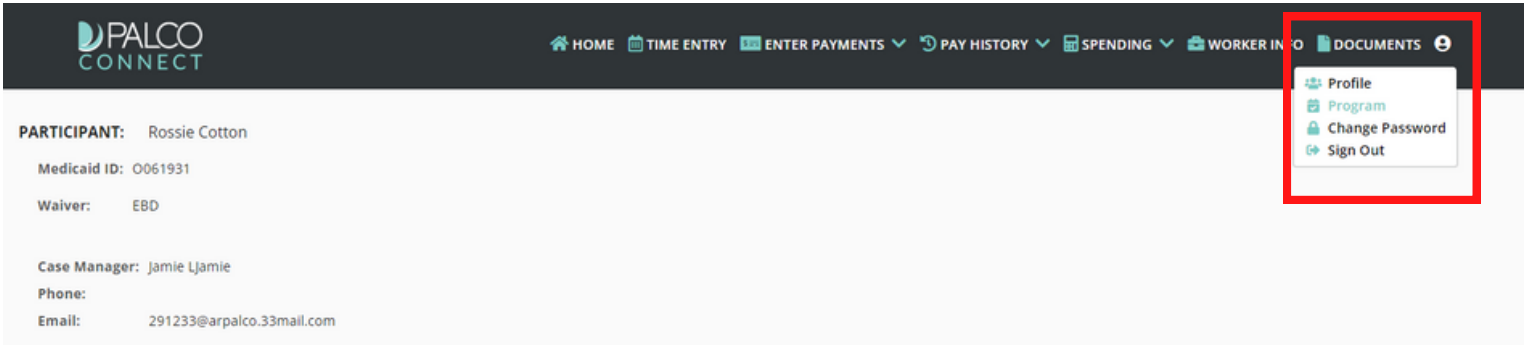
Viewing Program Information

Employers can view program information by clicking the icon in the top left corner and selecting "Program." This feature will give the employer a view of Program details specific to the participant.
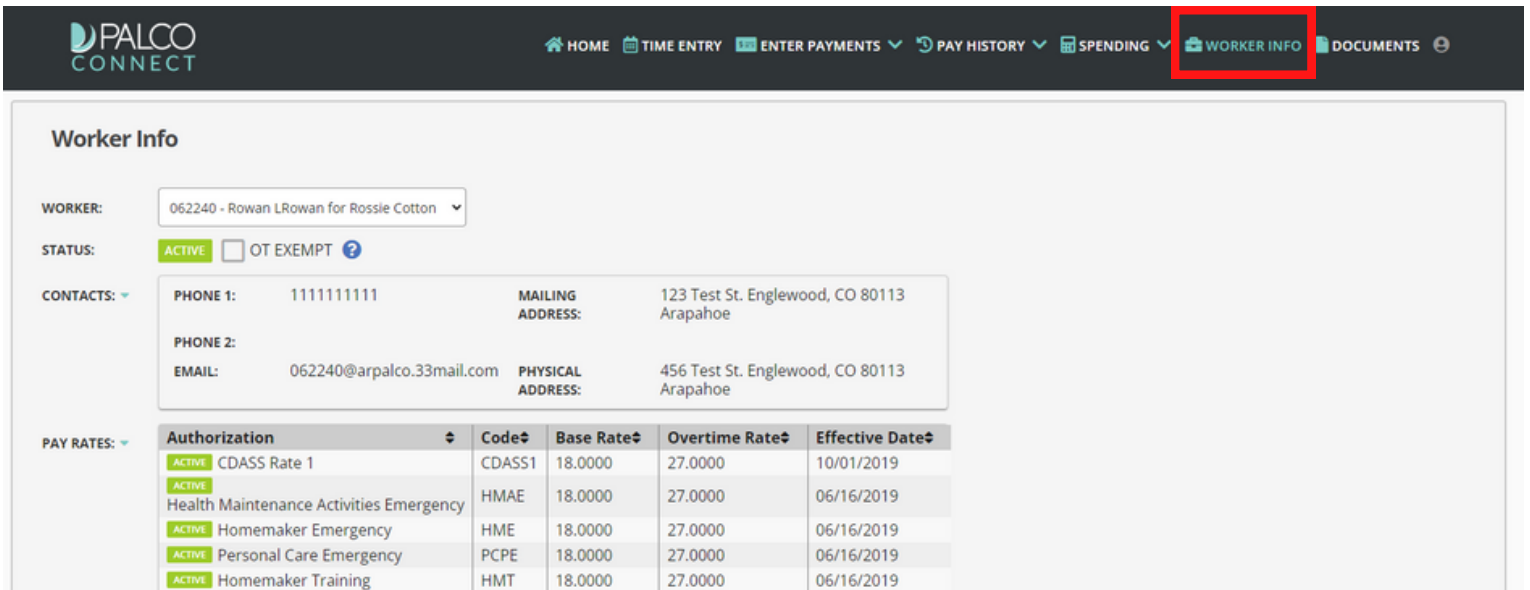
Viewing Worker Info

Employers can view worker information by clicking "Worker Info" from the top menu. If the employer has multiple workers, they can select the workers from a drop down menu. Once a worker has been selected, the employer can view that worker's contact information, status, overtime exemption, and current pay rates.

Viewing Pay Rates

Workers can now view their current pay rates by clicking on the "Pay History" option at the top of the page. If they are a worker for multiple participants, the worker can use the drop down box to choose the participant for which they would like to view their hourly pay rates.

Viewing W-2 Documents

Workers can view and download their past and present W-2 Tax Documents by clicking "Documents" on the top of the page. Once here, the worker can select the tax document they wish to view by clicking the blue link. This will open another window allowing the worker to view, download, and print the document for their records.

Viewing Enrollment Documents

Both Employers and Workers have the ability to view Enrollment Documents by clicking the "Documents" on the top of the page. Once here, the worker can select the tax document they wish to view by clicking the blue link. This will open another window allowing the worker to view, download, and print the document for their records.

SECTION FOUR: CALCULATOR TOOL

The Cost Estimation Calculator is an interactive calculator tool that employers can use to estimate and plan timesheet expenditures. Employers can navigate to the calculator by clicking on "Spending" and clicking "Cost Estimation Calculator."

Instructions are provided to assist the employer while using the tool. Users can insert multiple pay rates, cost percentages, and hours worked in a 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.
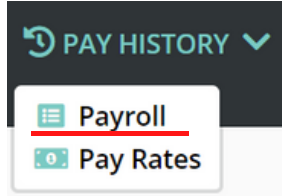
Example:

Each new line can be deleted, edited, or excluded from the estimated total by using the tools shown here.

SECTION FIVE: VIEWING PAYSTUBS

Payment details are available to both the Employer and the Worker. To access, login to Connect and select "Pay History" from the tool bar in the top right of the screen. Then, select "Payroll" from the options.

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

If you are an employer with multiple workers, you can select the worker 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).

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

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

SECTION SIX: FREQUENTLY ASKED QUESTIONS

How can I tell where my timesheet is at in the process?

The timesheet status is visible in Connect and will tell you where your timesheet is at in the process. You can view a list of statuses and their meaning on Page 7 of this user guide.

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.

I went in to Connect to edit my time and it is locked, how come?

Check the status of the timesheet. Once time has been submitted to the Employer, it is locked for editing. The Employer must either reject the timesheet back to the Worker or approve it. A timesheet can only be open under one individual at a time.

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.

Other Questions? Contact Palco!

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