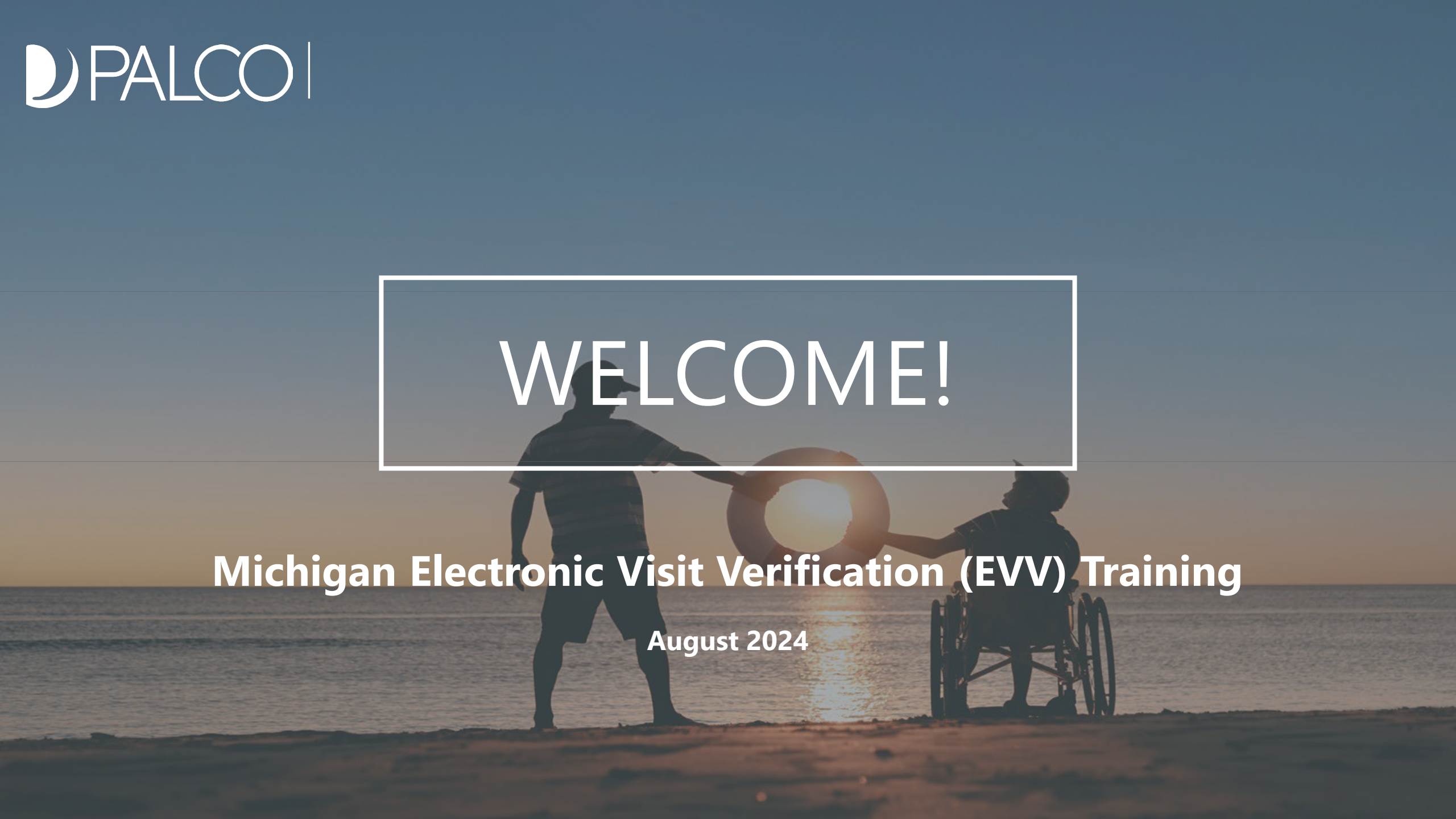


WELCOME!

**Michigan Electronic Visit Verification (EVV) Training**

August 2024





## TODAY'S TOPICS

- ➔ Palco Overview
- ➔ Getting Started with EVV
- ➔ EVV & Time Entry
- ➔ Shift Exceptions
- ➔ Interactive Voice Response (IVR)
- ➔ Activity Codes
- ➔ Resources / Additional Support

**PALCO**



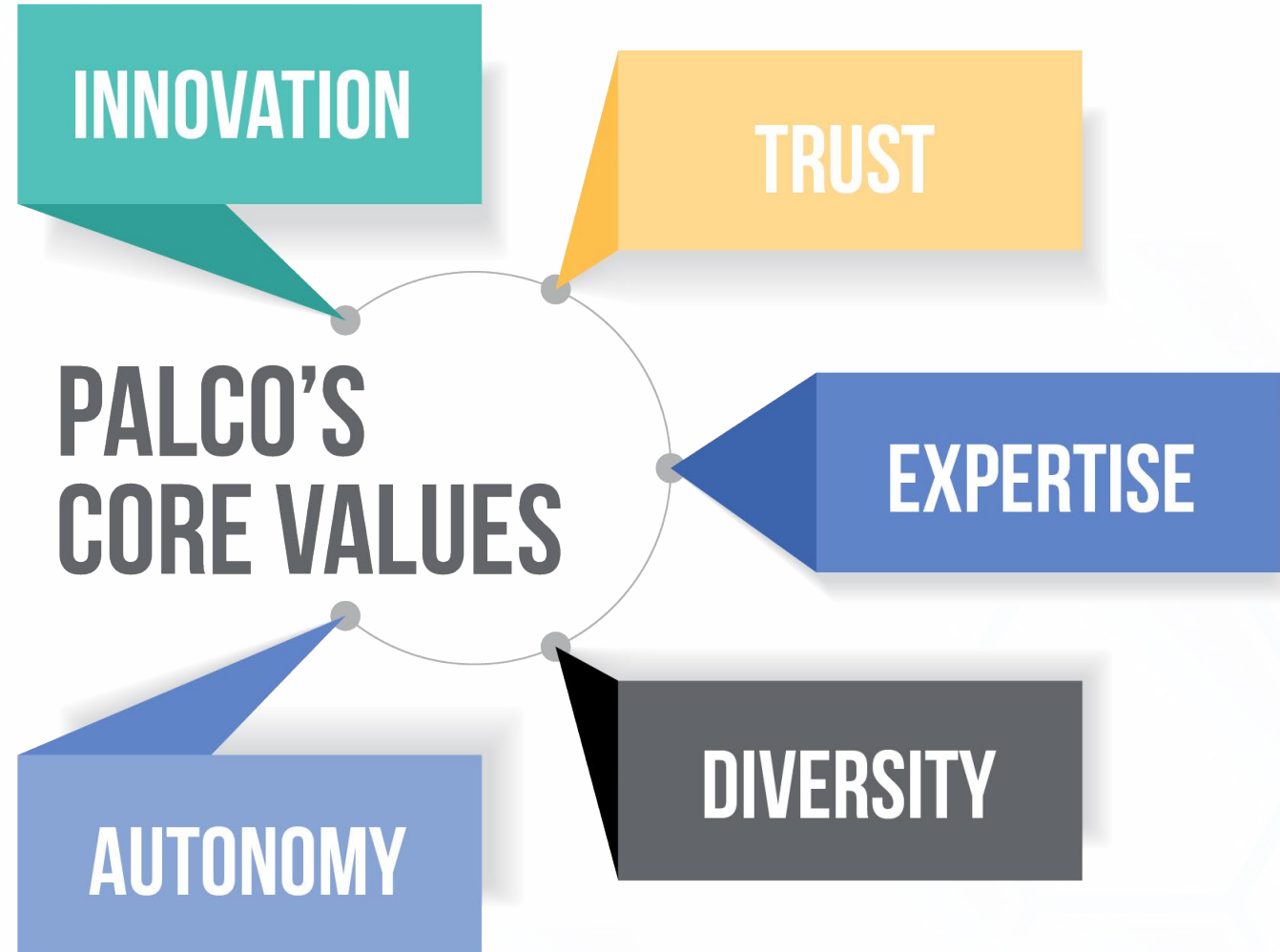
A photograph of a diverse group of people in a meeting room. A woman in a blue shirt and patterned skirt stands on the left, pointing towards a laptop. Other people are seated around a table, some looking at the laptop and others at their own devices. The room has a high ceiling with exposed wooden beams and fluorescent lights.

# COMPANY OVERVIEW

# MISSION & CORE VALUES



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





# COMPANY HIGHLIGHTS

OVER  
**25**

years of FMS  
experience

**1<sup>ST</sup>**

F/EA in the  
country



Nationally-recognized  
thought leaders in self-  
direction

**100%**

Certified Public Accountant  
(CPA) and privately owned



Women owned and  
operated



Programs Served

**13**  
YEARS

of Support Broker  
Experience

**\$580M**

In total payroll and vendor  
payments administered

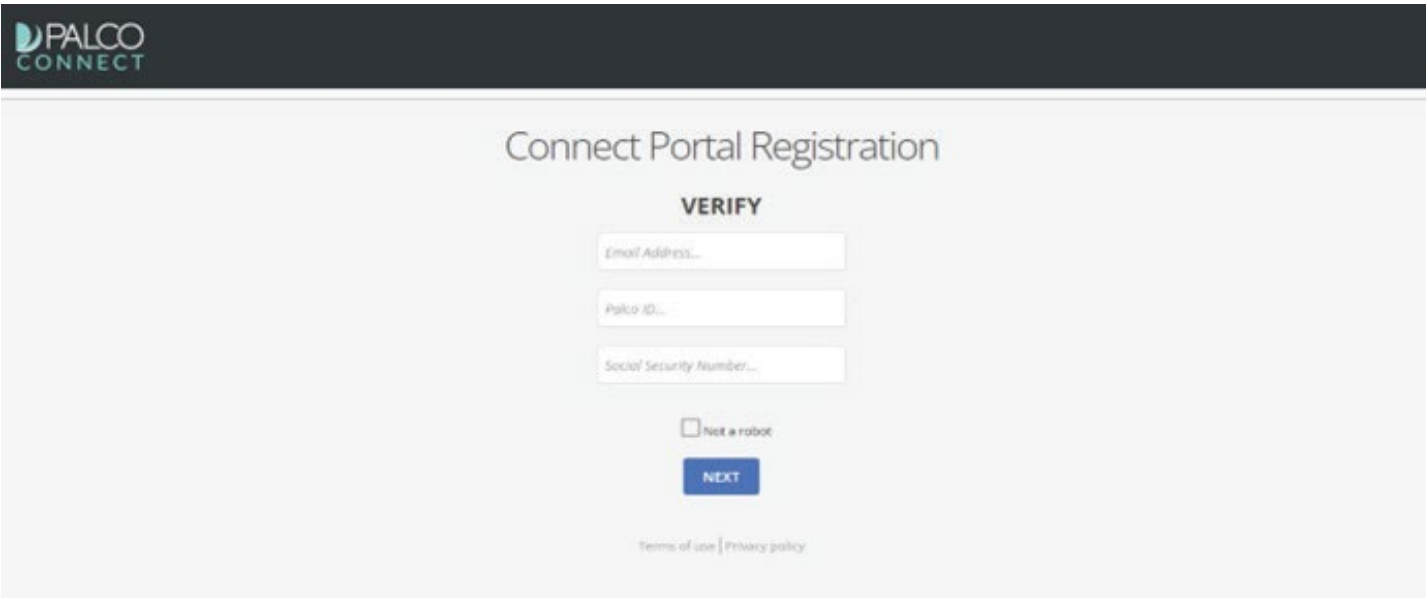


A photograph of an elderly man with glasses and a grey beard, wearing a dark green sweater, sitting on a light-colored sofa. He is looking at a tablet held by a young woman with braided hair, wearing a light green sweater. They are in a bright, modern living room with a wooden side table, a potted plant, and a window in the background. The text 'ELECTRONIC VISIT VERIFICATION (EUV)' is overlaid in a white box in the center of the image.

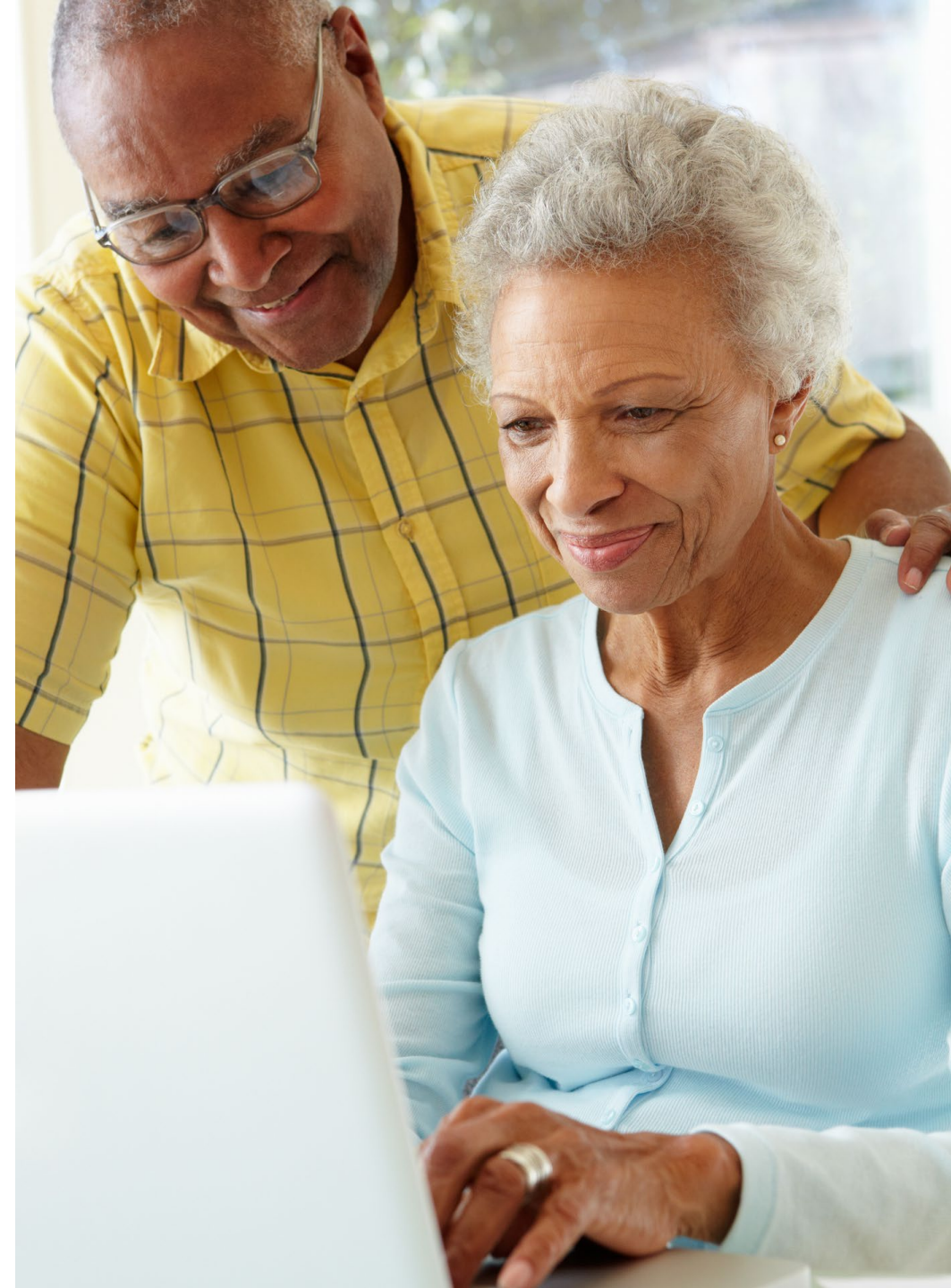
# ELECTRONIC VISIT VERIFICATION (EUV)

# 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), the ability to track and monitor spending, to update personal contact information, and 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".





## WHAT IS EVV?

Electronic Visit Verification (EVV) is a validation of the date, time, location, type of Personal Care or Home Health Care Services being provided, and the individuals providing and receiving services. This information helps to ensure that the Participants receive the expected care. EVV is a federal mandate included in section 12006 of the 21<sup>st</sup> Century Cures Act.

Palco has created a web-based, user-friendly platform to provide our Participants with tools to remain EVV compliant. The two options for using EVV with Palco are:

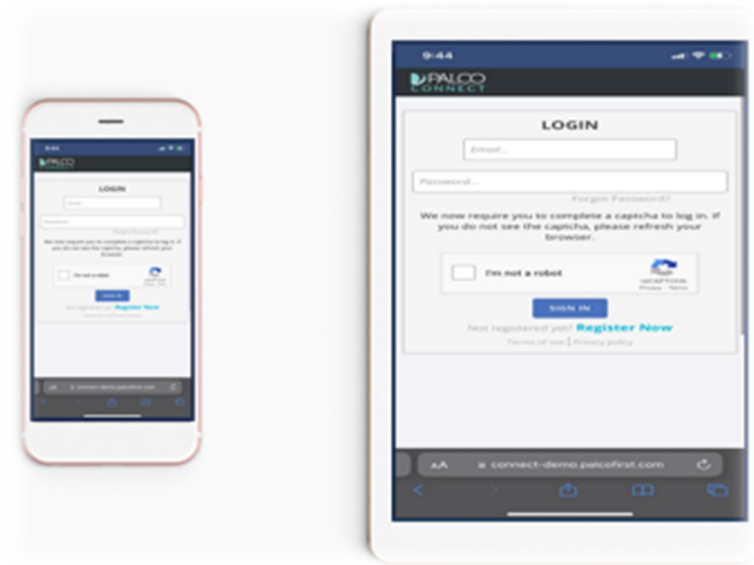
1. Connect
2. Telephony / IVR (Interactive Voice Recognition) via a touchtone phone.





# GETTING STARTED

TO SUBMIT TIME TO PALCO, YOU WILL NEED A MOBILE DEVICE THAT CAN CONNECT TO THE INTERNET, SUCH AS A PHONE OR TABLET. FOLLOW THESE STEPS TO ACCESS PALCO'S EVV APPLICATION.



## Step 1. Open the browser on your internet-connected device

You can use a phone or tablet. Depending on your device, your browser may be called Safari, Chrome, or simply Internet.

## Step 2. Go to [connect.palcofirst.com](https://connect.palcofirst.com)

## Step 3. Sign in to Connect

If you do not already have a Connect account, you will need to create one. Use the **Register Now** button to create an account. Come back to this step once that is done.

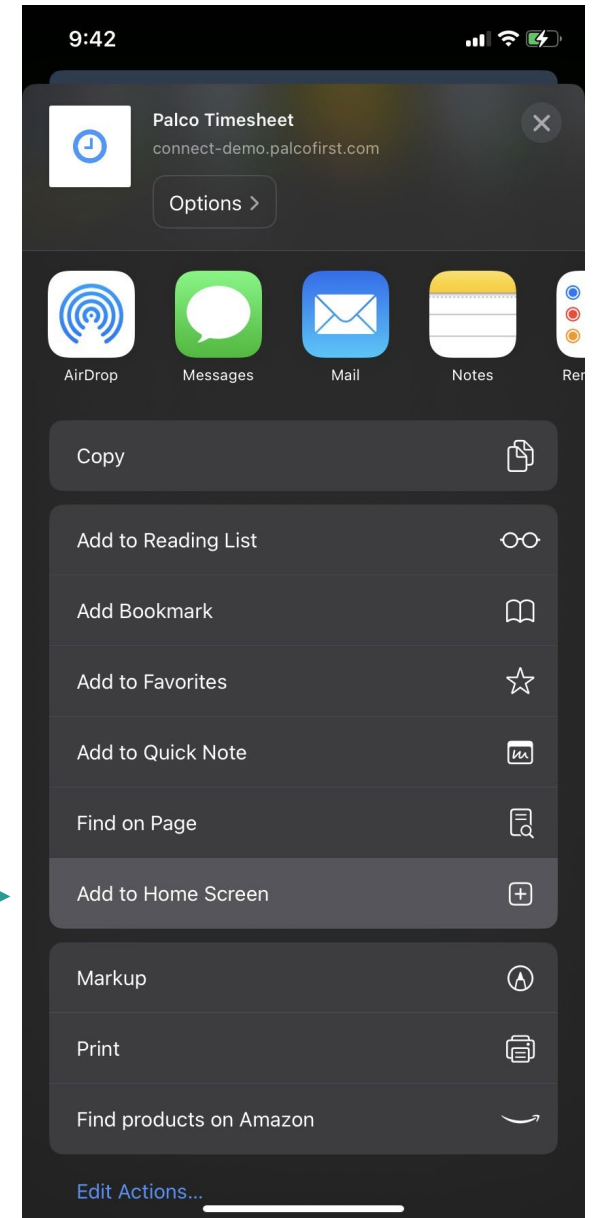
# GETTING STARTED CONTINUED

## Step 4. Install the application on your device

On iPhone, tap the **Share** icon and select **Add to Home Screen**. On an Android phone, click the three dots and then choose **Add to Home Screen**.

## Step 5. Begin using the application

Once downloaded, tap the new EVV app icon. You can now access time entries from the home screen of your device.





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 light-colored building.

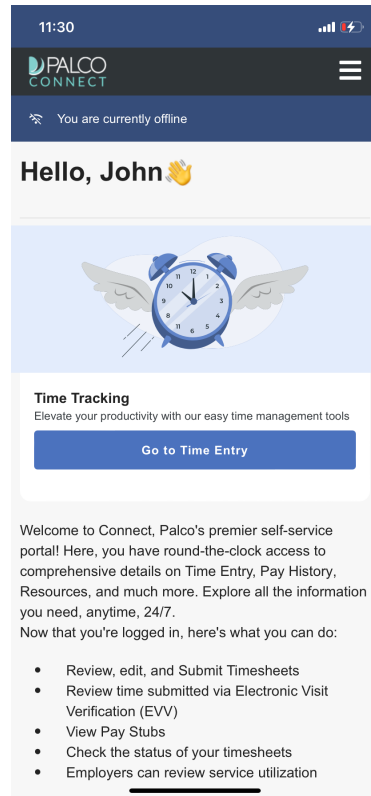
# TIME ENTRY

# WORKER CLOCK IN



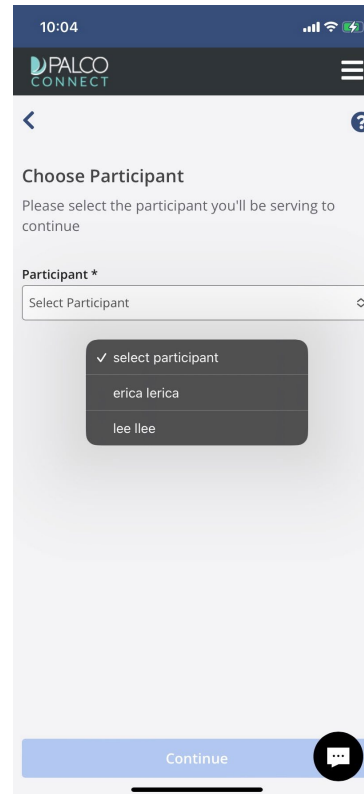
In this section, we will go over how to start an EVV-compliant time entry. Once logged into Connect, follow these steps.

## Step 1. Click on Go to Time Entry



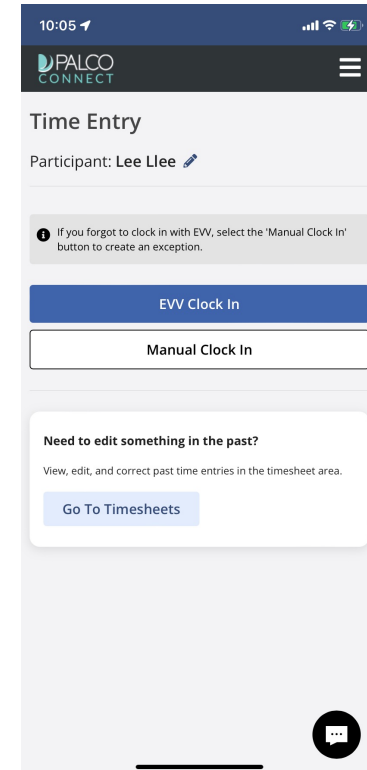
This blue button is on the home screen.

## Step 2. Select a Participant



You will only need to select a Participant if you work for more than one.

## Step 3. Choose EVV Clock In

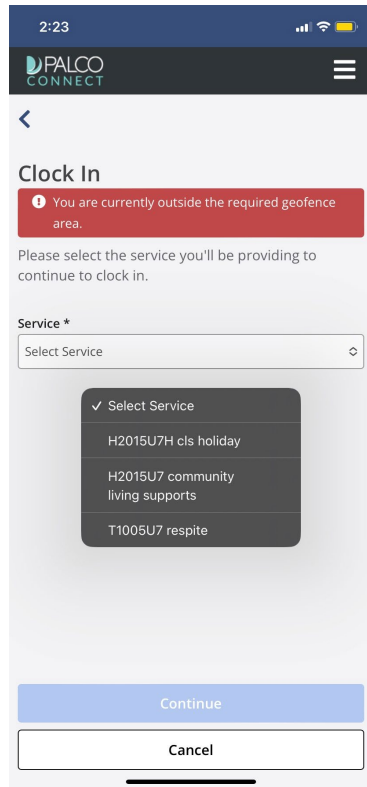




# WORKER CLOCK IN

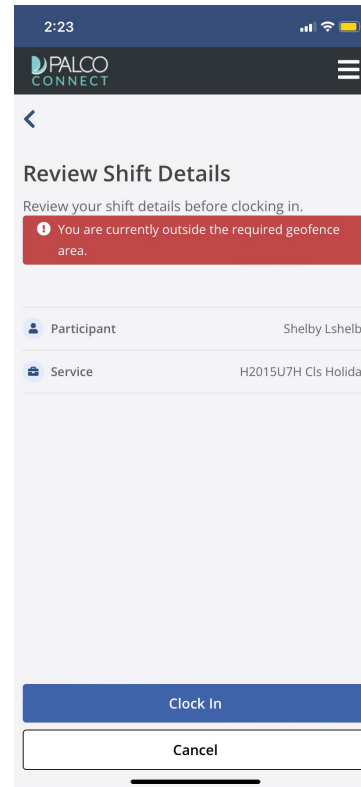


## Step 4. Select a Service to Provide



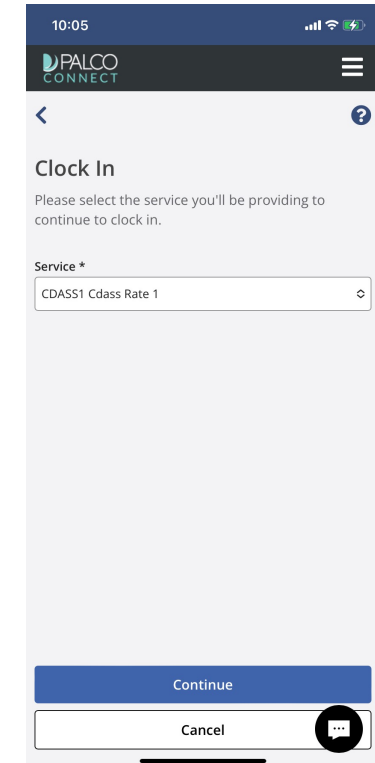
Service code options will be in the drop-down menu.

## Step 5. Review Shift Details



Double-check that everything is right before submitting.

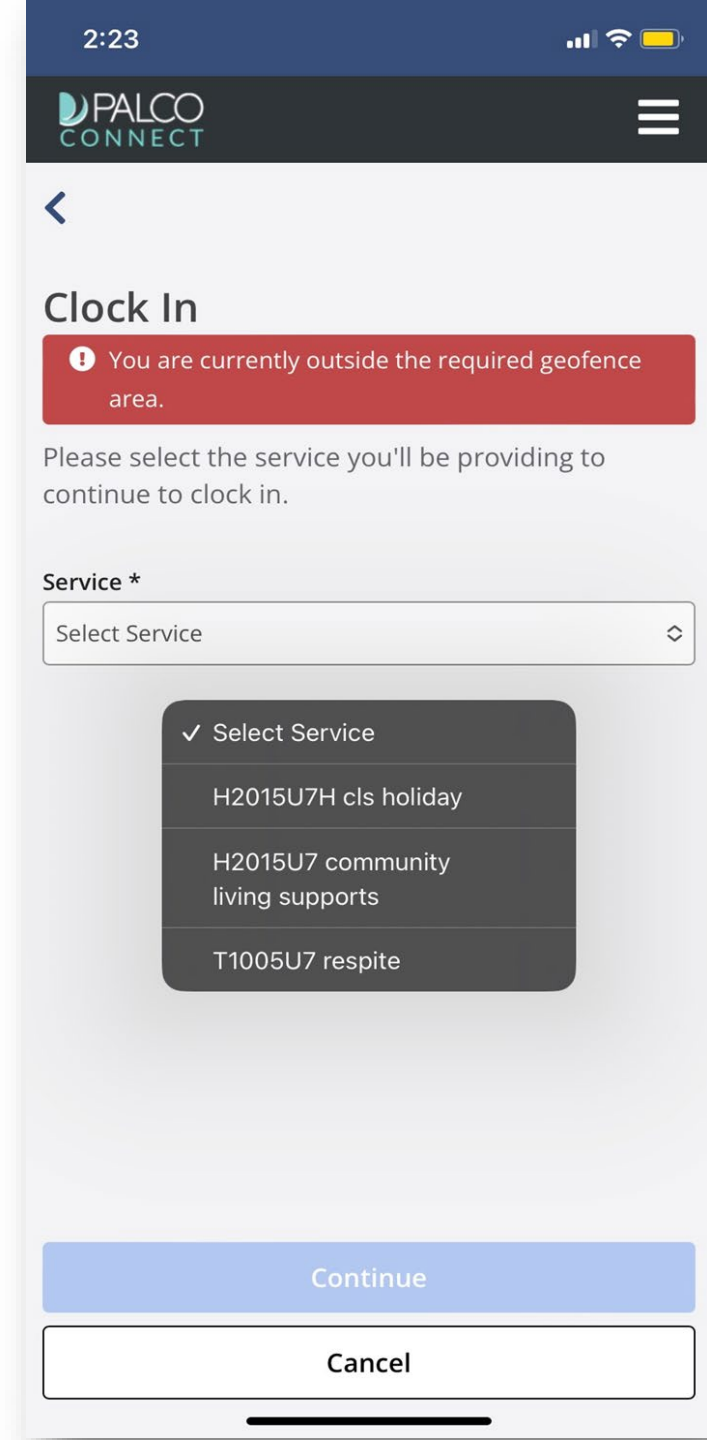
## Step 6. Clock In for the Shift



You are now on the clock for this shift.

## HELPFUL TIP

The area surrounding a worksite location is called a geofence. If you are outside of the geofence when trying to submit a shift, a warning message will appear. If you are not sure why you are seeing this, check your “work locations” on file to ensure you are clocking in and out at a registered work location (covered later in training).



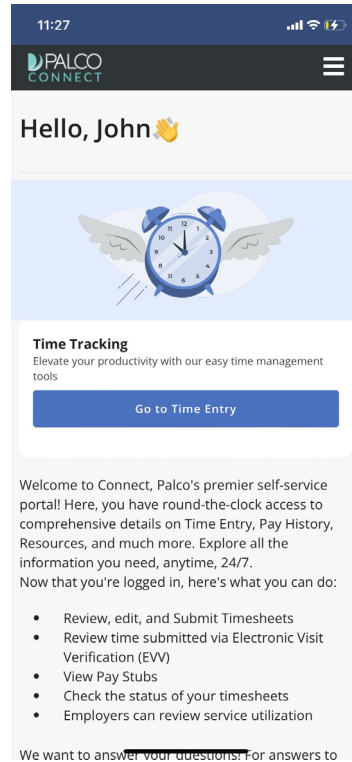


# WORKER CLOCK OUT



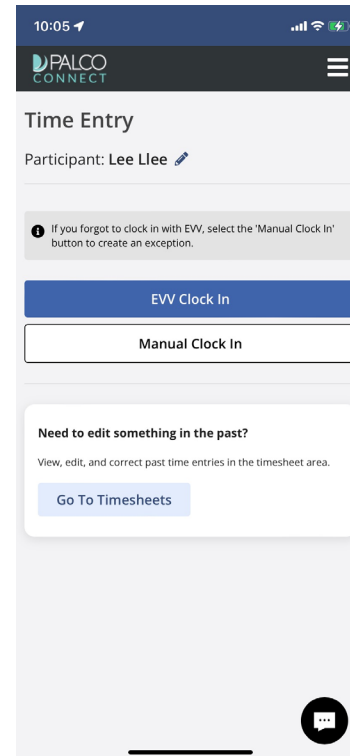
The Clock Out process is very similar to clocking in. Please, do not clock out until you are finished working the shift.

## Step 1. Click on Go to Time Entry



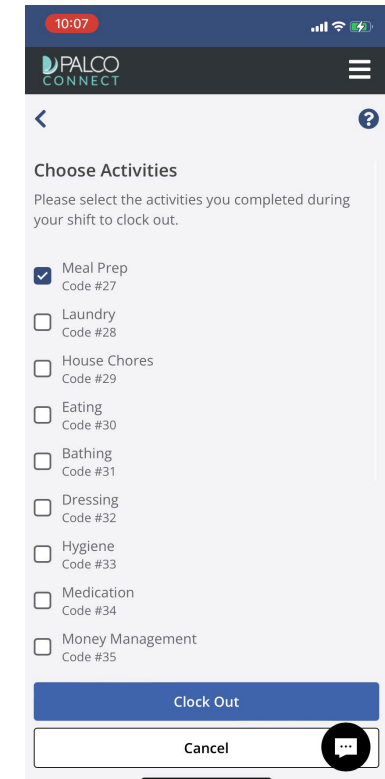
This blue button is on the home screen.

## Step 2. Choose EVV Clock Out



You will see you are currently clocked in for this shift above the blue EVV Clock Out button.

## Step 3. Select Activities

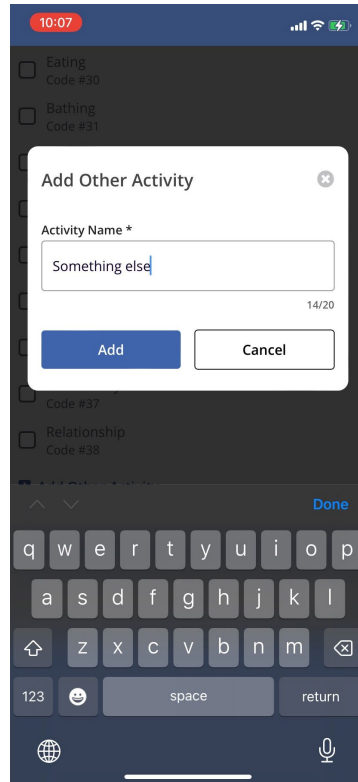


Use the check boxes to select all activities that were performed during the shift.

# WORKER CLOCK OUT

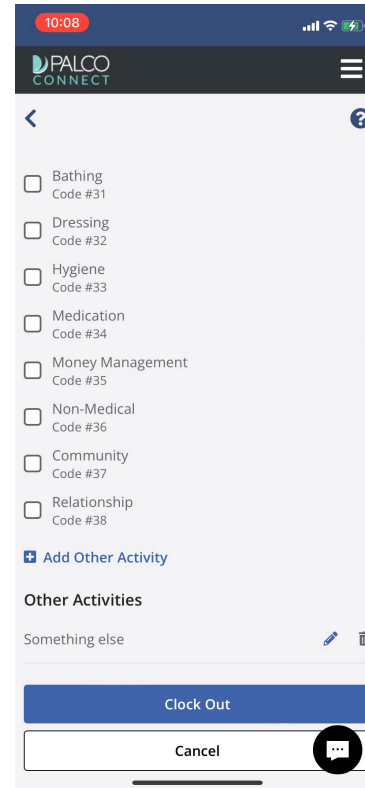


## Step 4. Add Manual Activities



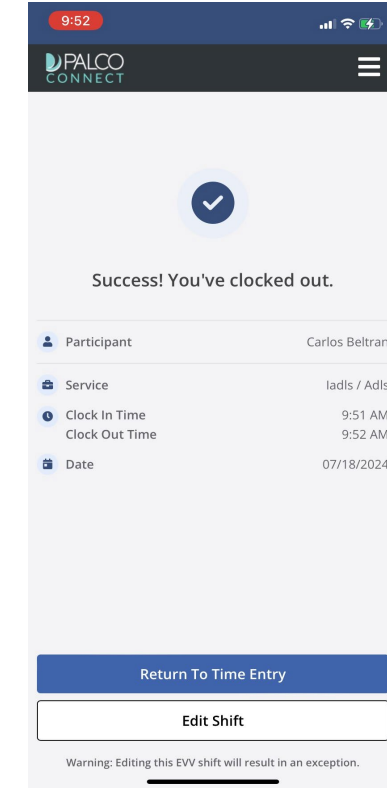
If needed, you can manually add an activity.

## Step 5. Review Shift Details and Clock Out



Double-check all details before tapping Clock Out.

## Step 6. Review Confirmation



A confirmation screen will show that you were successfully clocked out.



## HELPFUL TIP

If your program requires an activity, you won't be able to clock out without selecting one.



10:08



PALCO CONNECT

< ?


- Bathing  
Code #31
- Dressing  
Code #32
- Hygiene  
Code #33
- Medication  
Code #34
- Money Management  
Code #35
- Non-Medical  
Code #36
- Community  
Code #37
- Relationship  
Code #38

+ Add Other Activity

Other Activities

Something else  

Clock Out

Cancel 





### Michigan Service Documentation Log

Employers are responsible for reviewing and approving all worker documentation and ensuring it meets the Medicaid standards. Workers are responsible for ensuring adequate records exist for every shift worked and paid through the self-directed program. Employers should retain copies of all shift documentation and ensure they can provide logs for all shifts to Palco or the Mental Health Center upon request. Logs should also be emailed to Palco at [Michigan@palcofirst.com](mailto:Michigan@palcofirst.com) with every time submission. Employers should make copies of this log or save digital copies.

REQUIRED INFORMATION	
Participant Full Name	Participant ID
Worker Full Name	Worker ID

Date of Service:		Location:	
Service Code:	Time In:	Time Out:	
Goal/Objective:			
Narrative: (Please include references to Individual Plan of Service in descriptive terms.)			
Worker Signature:		Signature Date:	

Date Of Service:		Location:	
Service Code:	Time In:	Time Out:	
Goal/Objective:			
Narrative: (Please include references to Individual Plan of Service in descriptive terms.)			
Worker Signature:		Signature Date:	

Date Of Service:		Location:	
Service Code:	Time In:	Time Out:	
Goal/Objective:			
Narrative: (Please include references to Individual Plan of Service in descriptive terms.)			
Worker Signature:		Signature Date:	

# SERVICE DOCUMENTATION LOG

# MICHIGAN SERVICE DOCUMENTATION

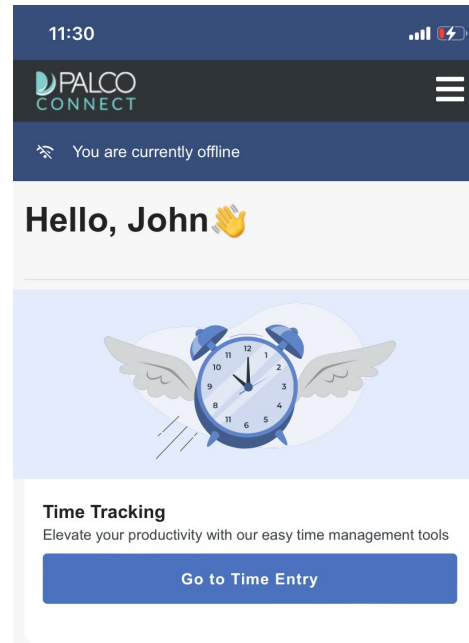
- ➔ The Michigan Program requires all Employers/Workers to complete and submit shift documentation timely.
- ➔ This process is not changing and will still be required on a separate form for EVV.
- ➔ Palco is working on improving this process in the future.



## OFFLINE MODE

***If you are without internet access, you can still clock In and out for shifts. You will follow all the same steps as before. The difference is that you will be in offline mode. Once your internet service is restored, your offline shift data will be synced automatically***

You will know you are offline when you see the blue banner near the top of the screen.



When offline, your menu options will be limited. For full use of the Palco EVV app, connect to the internet.

When offline, you will not be able to manually clock in. You can only record an EVV shift when you are offline.



A man in a wheelchair is shown in profile, looking down at a smartphone he is holding in his left hand. He is also holding a white coffee cup in his right hand. He is wearing a light blue button-down shirt and light blue jeans. The background is a bright, slightly blurred indoor setting with large windows.

# SHIFT EXCEPTIONS



# SHIFT EXCEPTIONS

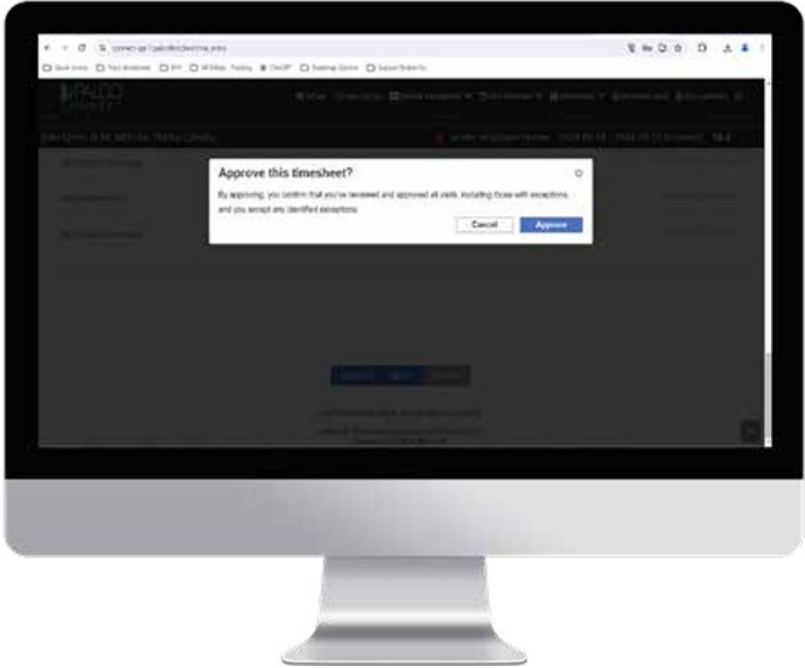
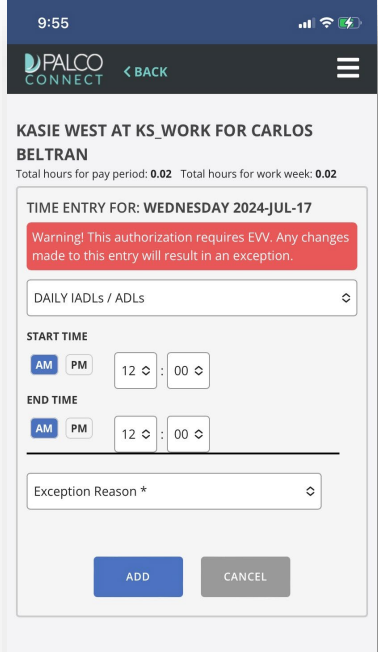
Shift exceptions occur when an EVV shift is edited after it has been completed.

### WORKERS:

If you need to edit a shift, you will be asked for the exception reason. Please choose the reason that best explains why the entry is being edited.

### EMPLOYER:

Please review all time shifts. If a shift has an exception, make sure it is correct. By approving a shift, you are stating that you agree with the date, time, and exception reason being reported by the worker.





# SHIFT EXCEPTIONS



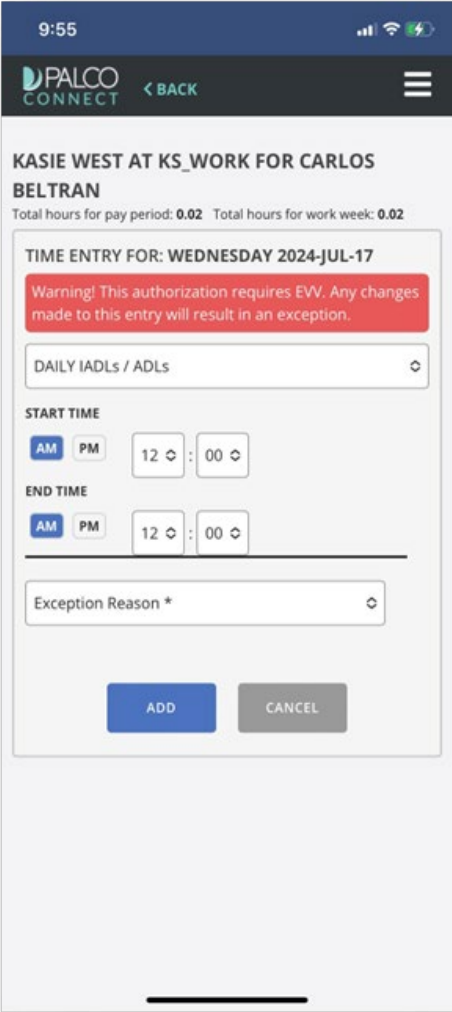
## I'm a worker. How do I avoid shift exceptions?

- Clocking in and out promptly is the easiest way to avoid exceptions. It can also help to double-check all information before selecting Clock In or Clock Out. That way, you do not need to edit a shift later.



## I'm the employer. Why do I need to verify the reason for a shift exception?

- Part of the role of an employer is to manage the workers. The accuracy of your worker's time shift reporting can affect your budget. It could also affect your program eligibility. It is very important that the hours submitted for payment are what was worked.





# EMPLOYER WORKSITE LOCATIONS



One of the most important parts of EVV is location reporting. The system records the worker's geocoordinates when they clock in and out. This is done to verify that the worker is where they should be when providing services.

The employer needs to add these worksite locations to their profile. The area surrounding a worksite location is a geofence. If a worker is reporting time shifts outside of the geofence area, it can be a cause for concern.

## Step 1

Go to the Profile Settings Page and Click Add Location

It is in the Worksite Locations section, which is below the Contact section.

**PALCO CONNECT** HOME TIME ENTRY ENTER PAYMENTS PAY HISTORY SPENDING

Profile Settings Account: Michael LMichael

**Contact** [Edit](#)  
Review and update your contact information.

Phone 1: (111) 111-1111 Phone 2: (201) 673-3836 Email: michaelmileski@palcofirst.com Preferred Communication: Email

**Worksite Locations** [Add Location](#)  
Review, update, and add your worksite locations for Electronic Verification Visits.

**Physical Address**  
3456 Test St.  
Springfield, MI 49037  
Calhoun  
[Edit](#)

# EMPLOYER WORKSITE LOCATIONS



**Edit Location** ✕  
Update the location information below.

<b>Worksite Nickname</b> <input type="text" value="Nickname"/>	<b>Street</b> <input type="text" value="Street"/>	<b>Address Line 2</b> <input type="text" value="Street 2"/>	
<b>City</b> <input type="text" value="City"/>	<b>State</b> <input type="text" value="Select State"/>	<b>Zip Code</b> <input type="text" value="Zip Code"/>	<b>County</b> <input type="text" value="Select County"/>

## Step 2.

### Input the Location Information

When typing the street address, several options may appear. If you see the correct one, you can click it, and the remaining fields will autofill.

## Step 3.

### Verify Information is Correct, then click Save

**The system will make sure the address is valid. If it is not recognized, you will be alerted.**

**Edit Location** ✕  
Update the location information below.

<b>Worksite Nickname</b> <input type="text" value="As-is Address"/>	<b>Street</b> <input type="text" value="123 Jump St"/>	<b>Address Line 2</b> <input type="text" value="Street 2"/>	
<b>City</b> <input type="text" value="Lansing"/>	<b>State</b> <input type="text" value="MI"/>	<b>Zip Code</b> <input type="text" value="12345"/>	<b>County</b> <input type="text" value="Calhoun"/>

# EMPLOYER WORKSITE LOCATIONS



The screenshot shows the 'Profile Settings' page for user Michael LMichael. A notification at the top says 'Worksite location successfully added.' The 'Worksite Locations' section contains two entries: 'Physical Address' (3456 Test St., Springfield, MI 49037, Calhoun) with an 'Edit' button, and '7877 Celosia Drive' (7877 Celosia Dr., Lansing, MI 48917, Eaton) with 'Edit' and 'Delete' buttons.

## Step 5.

### To Make Changes to Existing Locations, Use Edit and Delete

It's easy to make changes to a saved worksite location. Simply click Edit under the location you wish to change. If you will no longer be receiving services at a saved address, you can use the Delete button to remove it from your profile.

## Step 4.

### Make Sure The New Location Appears

If the save was successful, you will see "Worksite location successfully added" pop up. You will also see the address under Worksite Locations.

This screenshot is identical to the one in Step 5, showing the 'Profile Settings' page with the 'Worksite Locations' section. It confirms that the new location '7877 Celosia Drive' is now visible alongside the existing 'Physical Address'.





# EMPLOYER WORKSITE LOCATIONS

## Step 1. Review the Address for Accuracy

**Double-check the spelling of each line. Make sure the house number and ZIP code are also correct.**

## Step 2. Decide to Use As-Is or Edit Address

**If the address is correct, you can choose to "Use address as-is." If a correction is needed, choose Edit Address to make changes.**

### Review Address

Review the recommendation below for best accuracy.

**⚠ EVV Compliance Reminder**

We couldn't verify the accuracy of the address you entered. Ensuring precise location details is essential for EVV compliance. Please review or edit the address to maintain compliance and avoid potential issues during visits.

**What you entered**

As-is Address

123 Jump St  
Lansing, MI 12345  
Calhoun

Please Confirm accuracy before proceeding.

Use address as is

[Edit Address](#) [Cancel](#)

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A close-up photograph of an elderly woman with short, curly grey hair, smiling warmly while talking on a black mobile phone. She is wearing a white t-shirt. The background is a softly blurred kitchen setting with a tiled backsplash and a dark bowl on a shelf.

# INTERACTIVE VOICE RESPONSE (IVR)

# INTERACTIVE VOICE RESPONSE (IVR)

Interactive Voice Response, also known IVR, is another way to report EVV shifts. With IVR, a worker uses the Participant's touchtone phone to clock in and out. They do this by calling a designated number and responding to the prompts. It is also known as Telephony.



**Step 1:** To use Interactive Voice Response, call **877-788-8270** using a touchtone phone



**Step 2:** Use the keypad to enter the worker's Palco ID, then hit # (the pound key) reporting can affect your budget and program eligibility.



**Step 3:** Enter last 4 of worker's SSN, then hit # (the pound key)



**Step 4:** Select the time zone, then hit # (the pound key)



**Step 5:** Enter the participant Palco ID, then hit # (the pound key)

# INTERACTIVE VOICE RESPONSE (IVR) CLOCKING IN/OUT



**Clocking in** You will be asked to select a service. Once done, you'll need to confirm your selection.



**Clocking out** Key in the appropriate activity code, then press # (the pound key) or skip. You will be asked to confirm your selection.





## ACTIVITY CODES

Some programs require you to input an activity code. Below is a list of activities with their corresponding codes used with IVR for the Michigan program.

CODE	ACTIVITY
14	Meal Prep
15	Laundry
16	House Chores
17	Eating
18	Bathing
19	Dressing
20	Hygiene
21	Medication
22	Money Management
23	Non-Medical
24	Community
25	Relationship

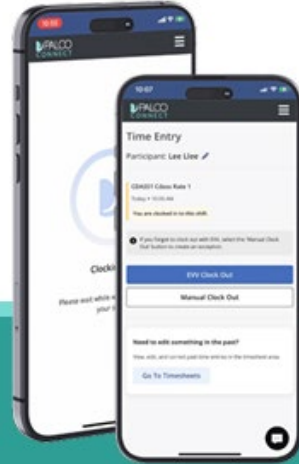


ADDITIONAL  
SUPPORT



## EVV AND IVR USER GUIDE

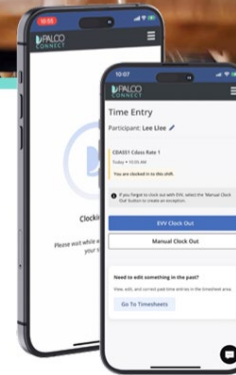
A guide for sending time entries to Palco



## FOR EXTRA HELP, CONTACT PALCO

Do you still have questions? Or, do you need extra help? Our friendly and trained Palco staff are available to assist you.

[www.palcofirst.com](http://www.palcofirst.com) | 866.710.0456 | [partnerships@palcofirst.com](mailto:partnerships@palcofirst.com)



# PALCO'S EVV TRAINING RESOURCES

- User Guide
- Videos

## EVV Resources

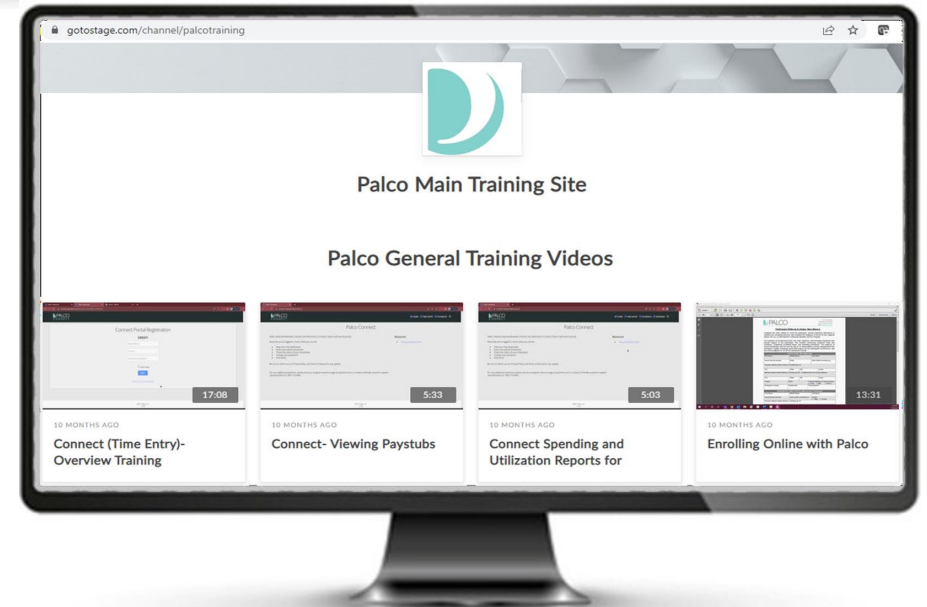
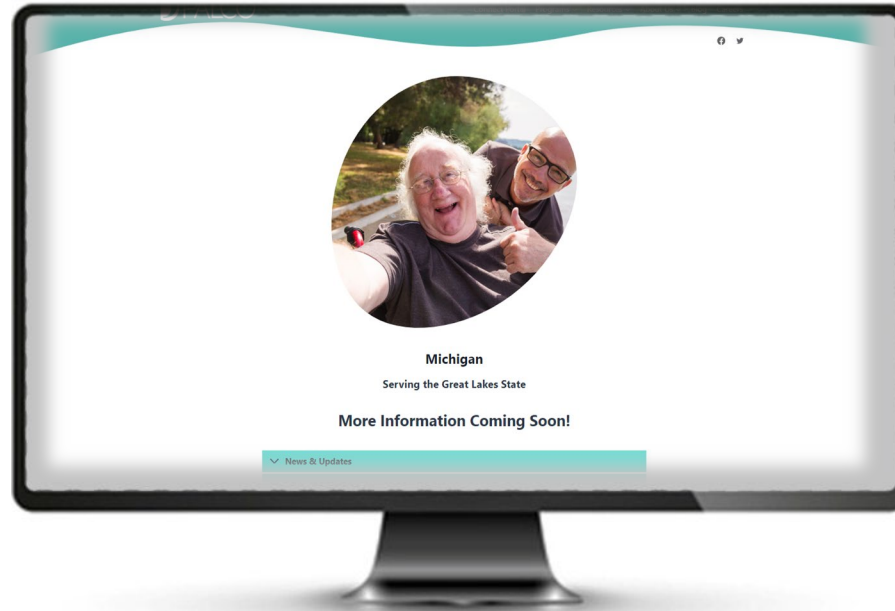




## RESOURCES

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

<https://palcofirst.com/michigan>







## CUSTOMER SUPPORT

You can contact the Palco Customer Support team Monday-Friday between 8:00am and 5:00pm EST.

Phone: **1-866-710-0456**

Email: **[customersupport@palcofirst.com](mailto:customersupport@palcofirst.com)**

Visit our website to chat with a live customer service agent!

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: <https://palcofirst.com/michigan>

Contact: 1-866-710-0456