PALCO

ENROLLMENT GUIDE

This guide provides an overview of Palco's CMP Intake and where to locate Enrollment forms in Palco's CMP Admin.

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Intake Overview

Intake Description

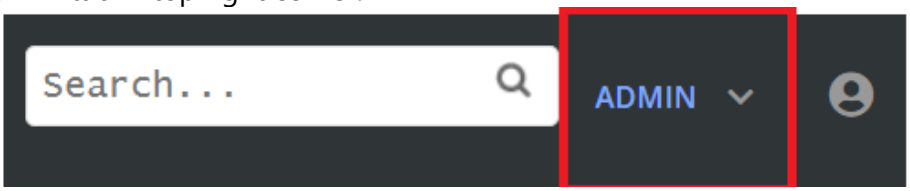
Palco's online enrollment solution, Intake**,** enables internal staff to initiate the enrollment process by adding enrollees to the system and generating a secure online enrollment link for Participants and Workers. This allows them to complete and submit their enrollment electronically.

To access the CMP Intake, use this link https://intake.palcofirst.com/.
To access the CMP Admin, use this link https://cmp.palcofirst.com/.

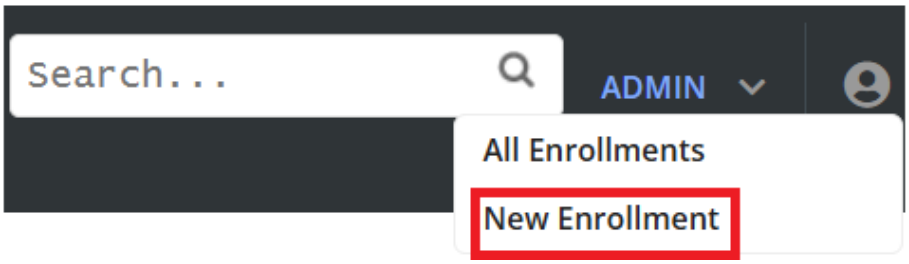
Helpful Hint: For quicker access, consider bookmarking them in your web browser.

Initiating a New Enrollment:

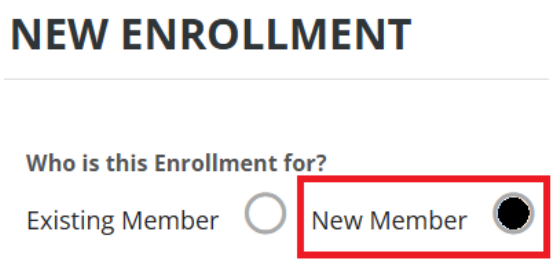
1. Click **Admin** tab in top right corner.



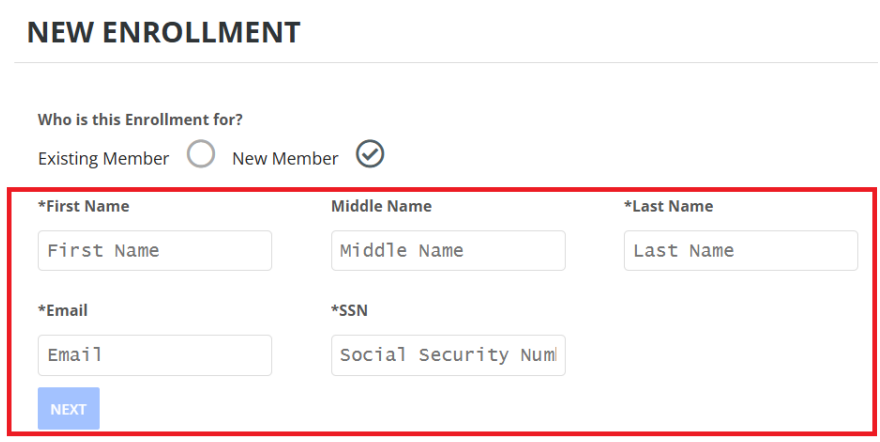
2. Click **New Enrollment**.



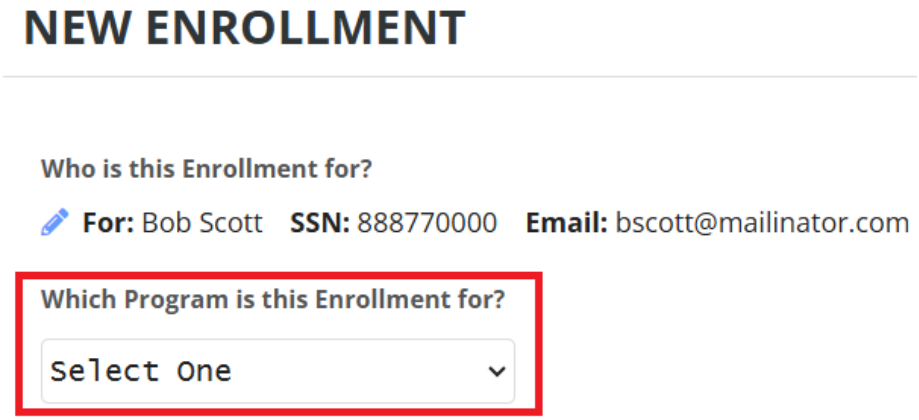
3. Click **New Member** enrollment.



4. Enter the Member's information and click Next.

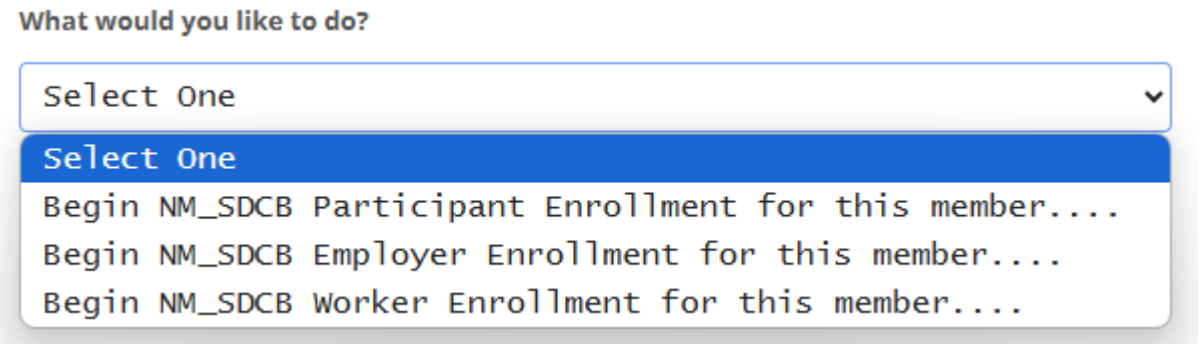


5. Select **Which Program is this Enrollment For?**

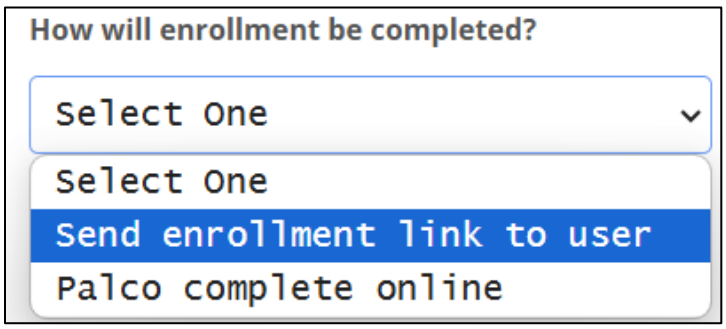


Creating a new Participant Enrollment:

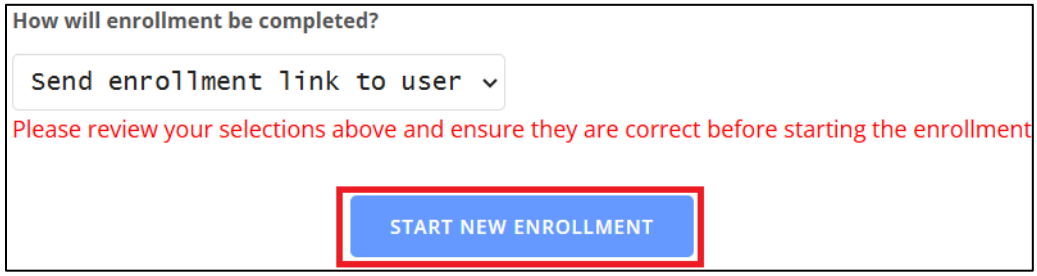
1. Select **What would you like to do**?
   a. Select **Participant Enrollment for this Member.**



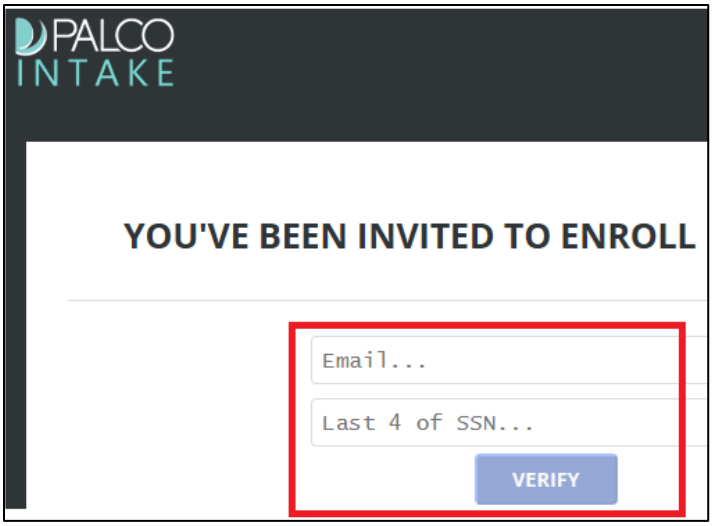
2. Select **How will enrollment be Completed**?
   a. Select **Send enrollment link to user.**



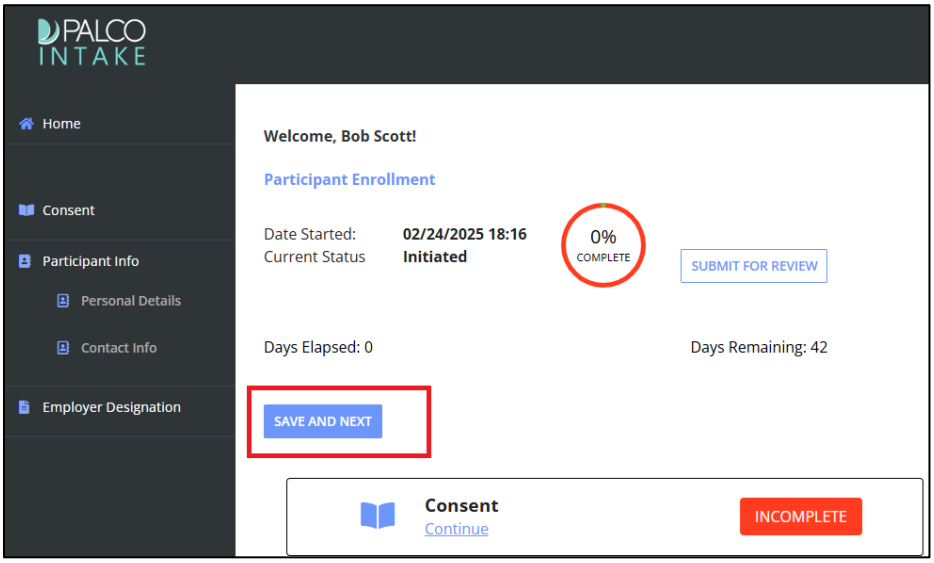
3. Click **Start New Enrollment.**



4. Enter the enrollee's Email and Last 4 of their SSN and click **Verify**.

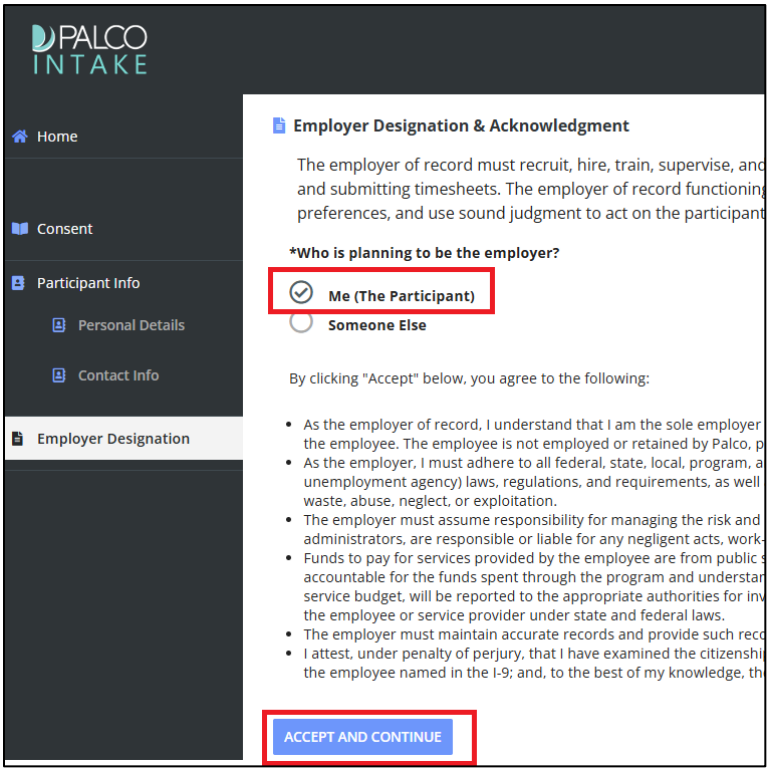

PALCO
INTAKE
YOU'VE BEEN INVITED TO ENROLL
Email...
Last 4 of SSN...
VERIFY

5. To start and complete the enrollee's enrollment, click **Save and Next**.
    a. This will guide you through each section.

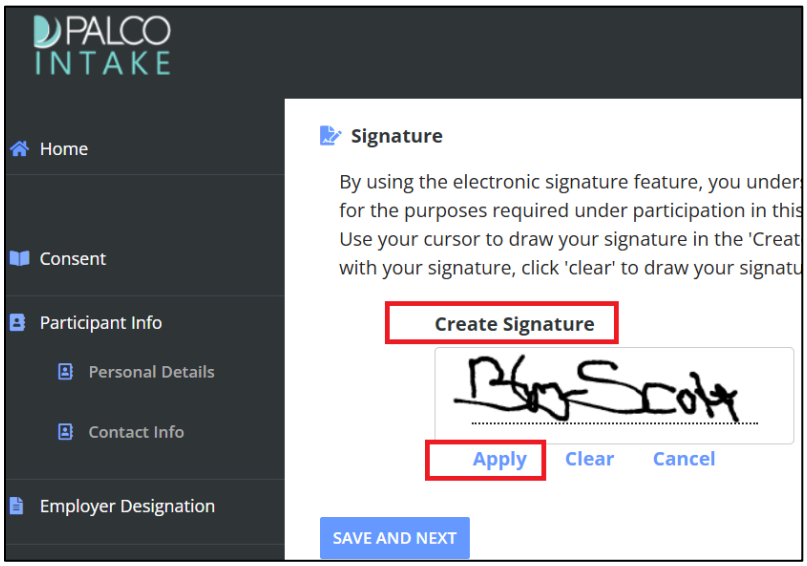


6. Review **Consent** and click **Accept and Continue**.
7. Enter **Personal Details** and click **Save and Next.**
8. Enter **Contact Info** and click **Save and Next**.

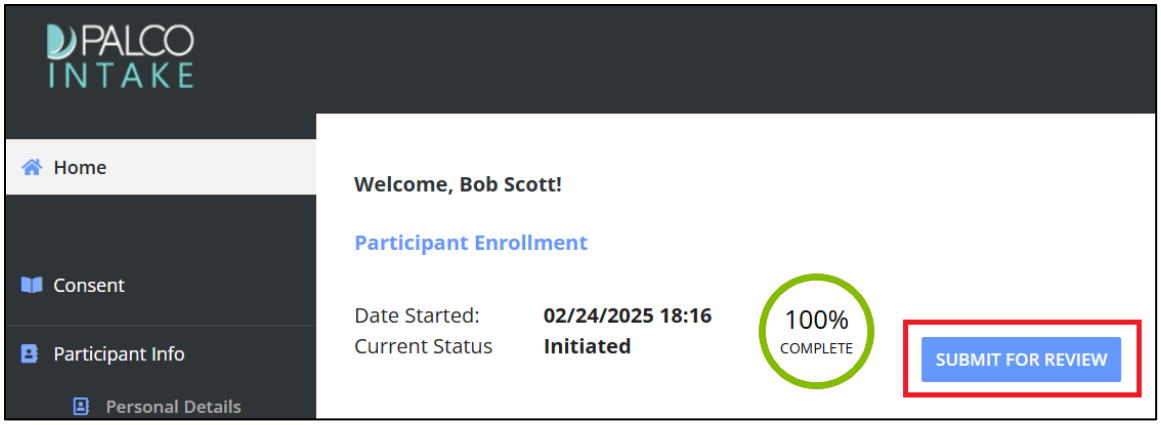
9. In the **Employer Designation** screen, select **Me (The Participant)** and click **Accept and Continue**.



10. Review **Agent Authorization** and **Accept and Continue**.
11. Review **Employer Tax & Labor Costs** screen and click **Save and Next**.
12. Create Signature.
    a. Click Apply
    b. Click Save and Next

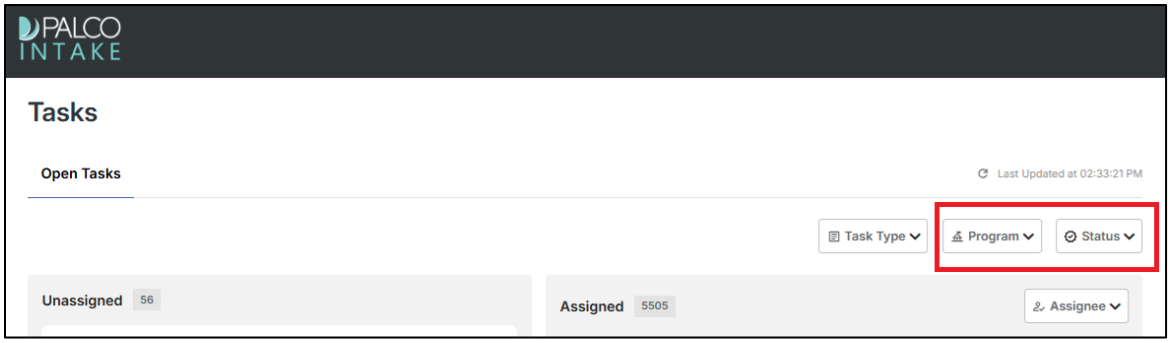


13. Submit the Enrollment.

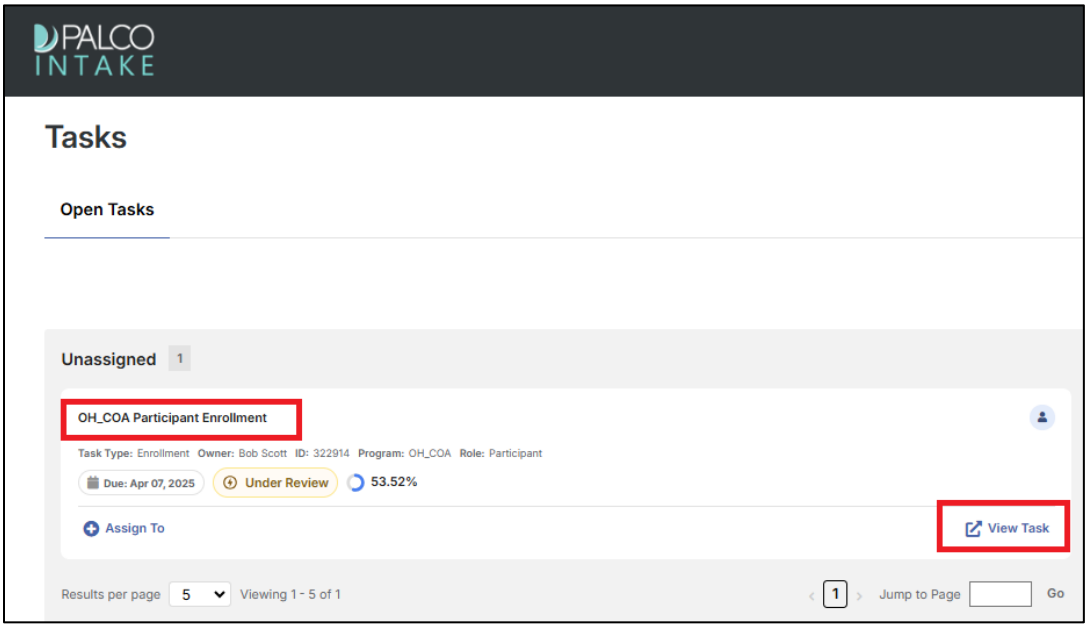


Steps to Complete Participant Enrollment as a Conduent Staff Member

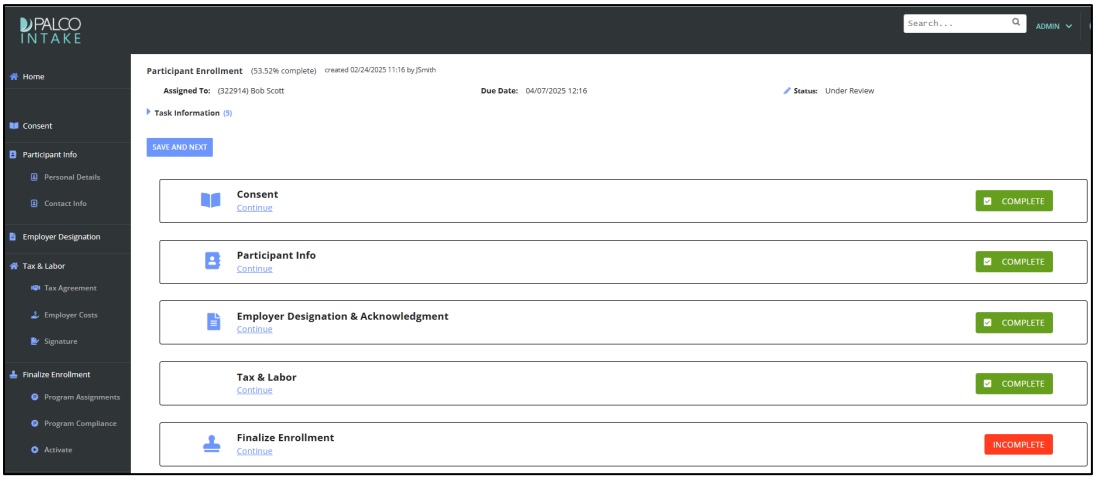
1. In the Enrollment Work Queue screen, filter by:
    a. Program
    b. Status: Under Review



2. Located your participant enrollment and click **View Task.**

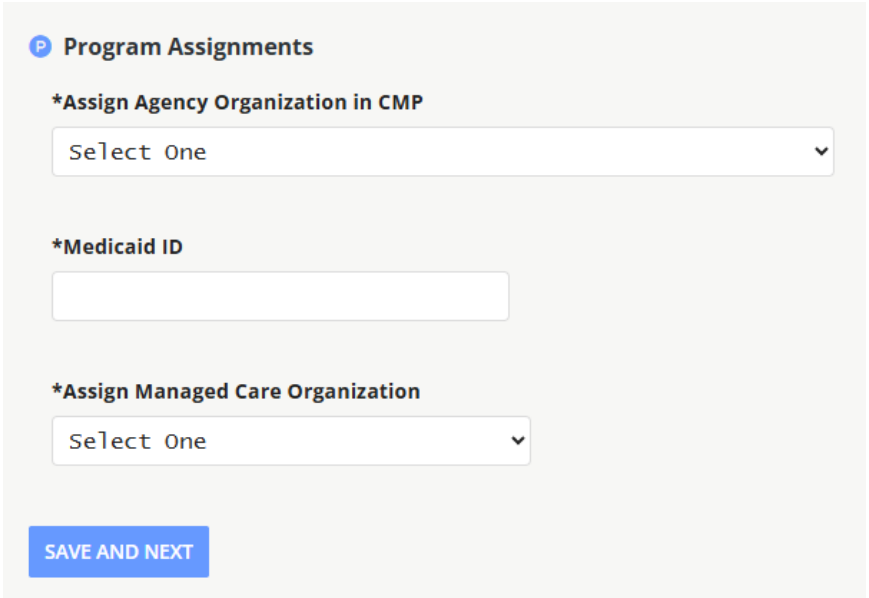


3. Go to **Finalize Enrollment** Incomplete section.

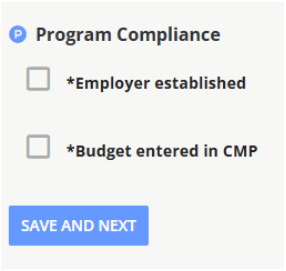


4. Complete the following in Finalize Enrollment:
    a. Program Assignments
    b. Program Compliance
    c. Activate

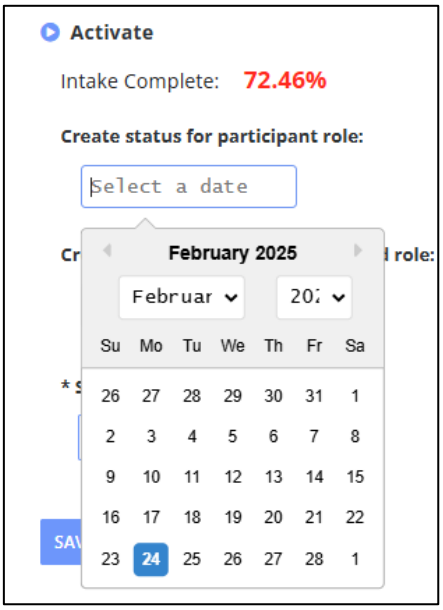
5. **Complete Program Assignments**
    a. Choose the **Agency Organization** from the drop-down menu**.**
    b. Enter **Medicaid ID** number.
    c. Assign **Managed Care Organization** from the drop-down menu**.**



6. **Complete Program Compliance** and check:
    a. Employer Established
    b. Budget Entered in CMP

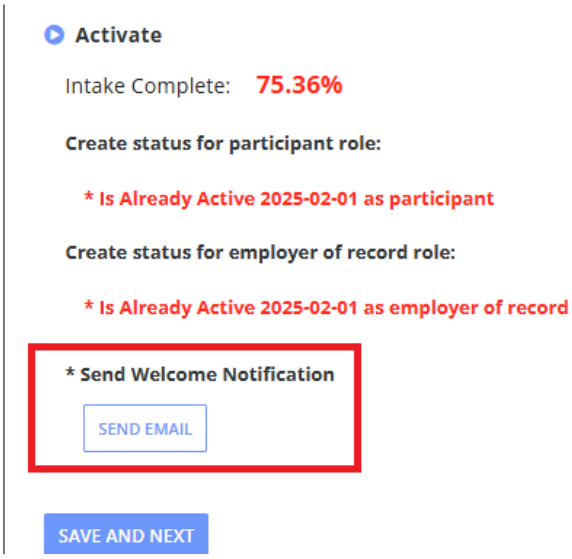


7. Select a start date for Participant and Employer of Record Roles.

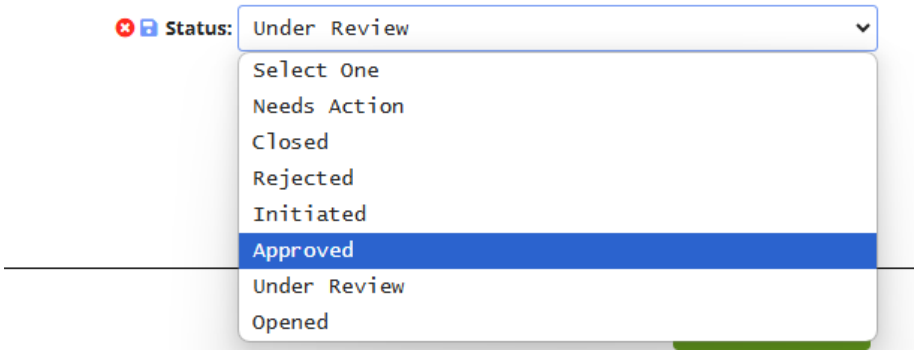


8. Click Set Active Status.
    a. This will make them active in CMP Admin.

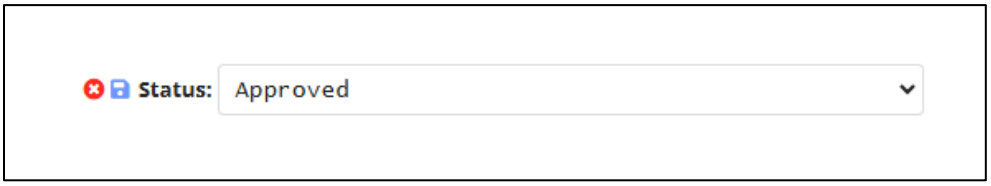
9. Send Welcome Notification and click **Save and Next**.



10. Change Status from Under Review to Approved.

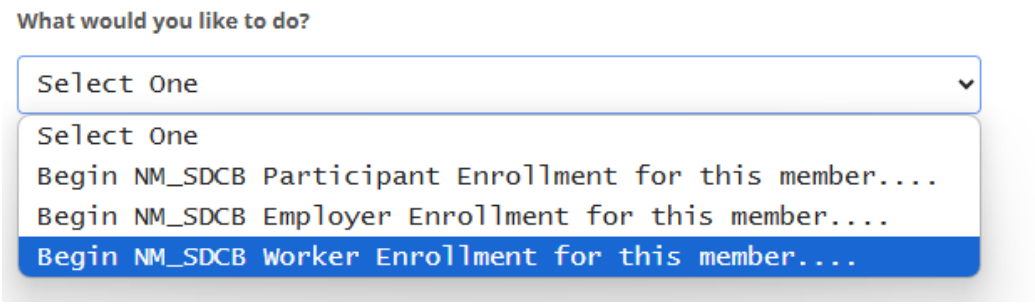


11. Click the Save disk icon.

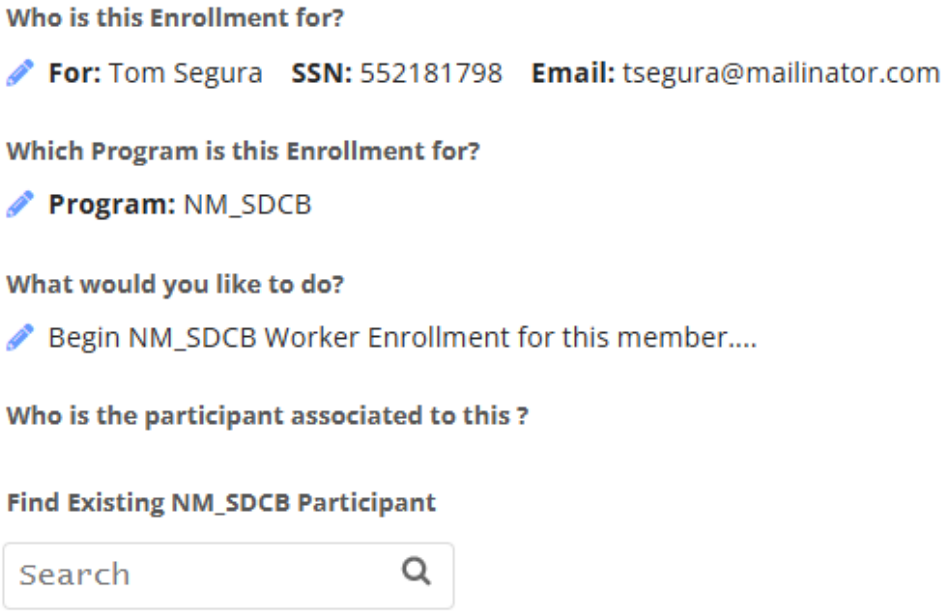


Creating a Caregiver/Worker Enrollment:

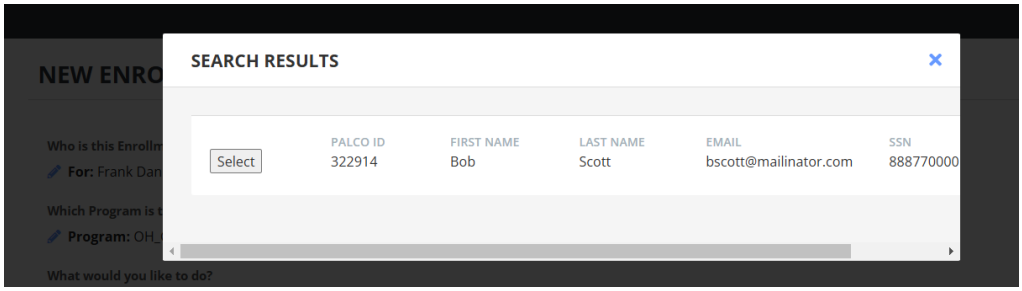
1. Select **What would you like to do**?
    a. Select **Worker Enrollment for this Member.**



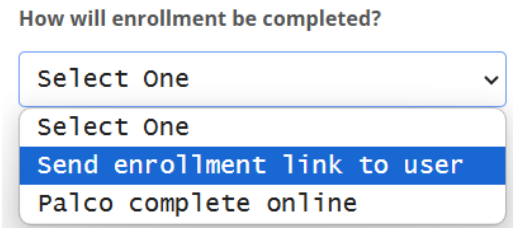
2. Next it will ask you ***Who is the participant associated to this?***
    a. ***In the Search Box, type in the Palco ID of the participant. You can also search by last name, first name, or email address.***



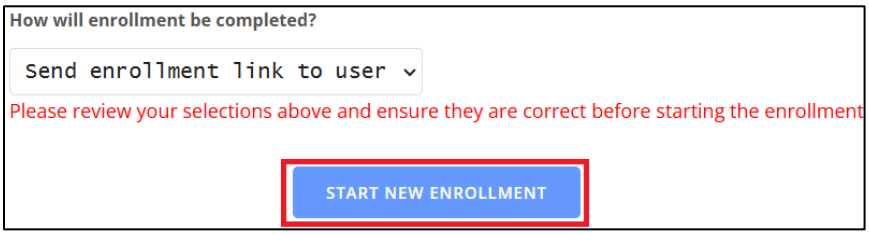
3. Click **Select** for the participant .



4. Select **How will enrollment be Completed**?
   a. Select **Send enrollment link to user.**

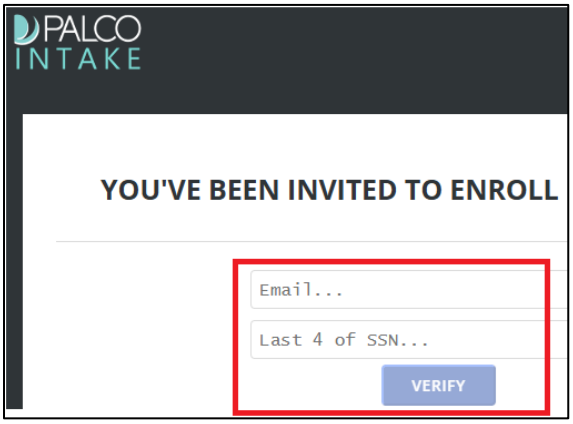


5. Click **Start New Enrollment.**

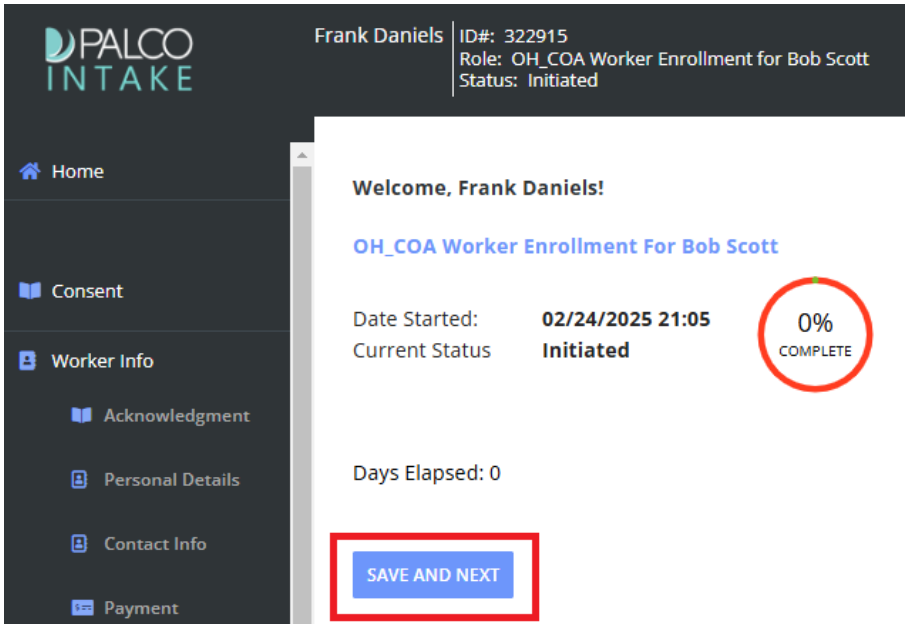


Enrollee Views

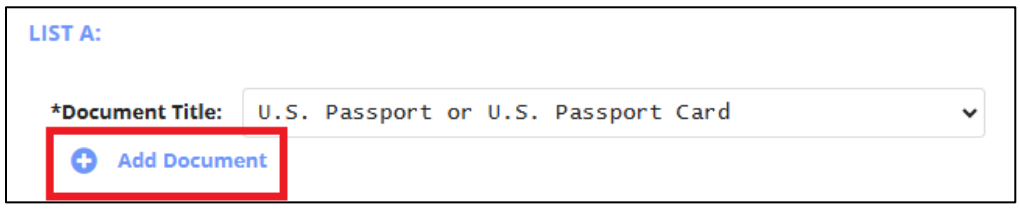
1. When the enrollee accesses the enrollment screen, they will need to validate their information in order to access their enrollment. They will enter the last 4 digits of their social security number and their email address.



2. Once logged in, the enrollee will move through each section in the guided workflow, enter the requested information and click **Save and Next**.

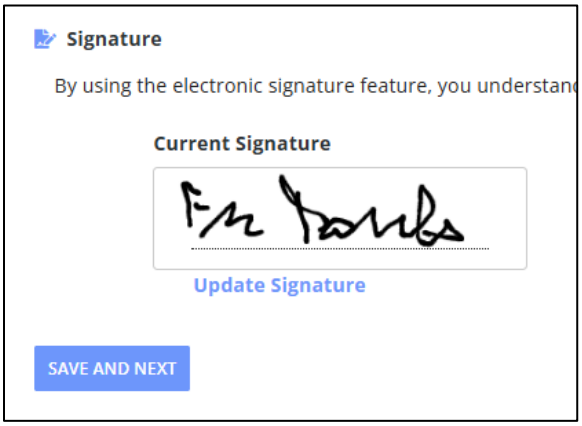


3. Review **Acknowledgement** and click Accept and Continue.
4. Review **Consent** and click Accept and Continue.
5. Enter **Personal Details** and click Save and Next.
6. Enter **Contact Info** and click Save and Next.
7. Enter **Payment Info**
    a. Select Payment Type.
    b. EFT will allow the enrollee to sign up for Direct Deposit through a bank account of their choice. Prepaid Card allows them to request a free Money Network Card.
8. Enter **Additional Info**
9. Select **Citizenship Status and complete your I-9 details**.
    a. Select your I-9 identification list and choose the supporting documentation being provided. The system will guide them in what kind of supporting documentation is allowable.
    b. Add/Upload supporting document. Example:

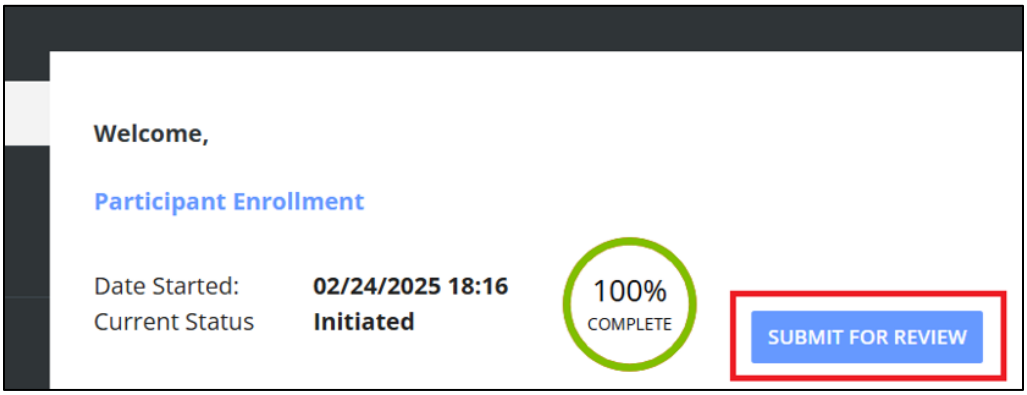


    c. Complete the issuing authority, document number and expiration date as requested.

10. Review Background Info and select **I Accept.**
11. Review Overtime Selections and select **Yes or No**.
12. Complete the Tax Withholdings.
13. Create Signature, Apply and Save and Next

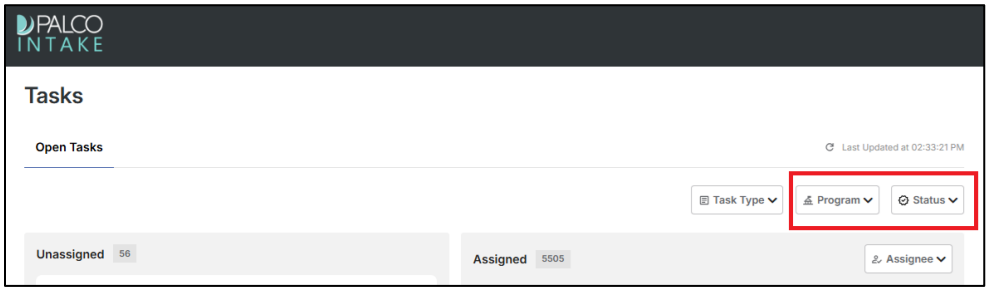


14. Once all information is entered and you reach 100% click **Submit Enrollment**

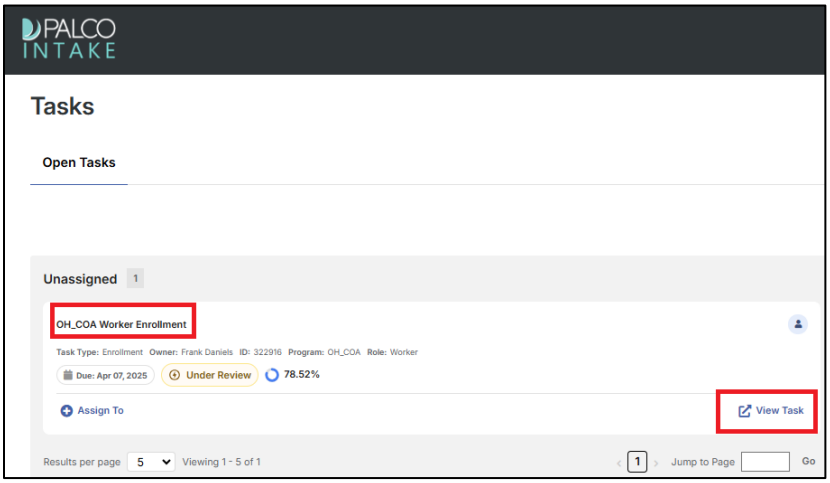


Steps to Complete a Worker Enrollment as a Conduent Staff Member

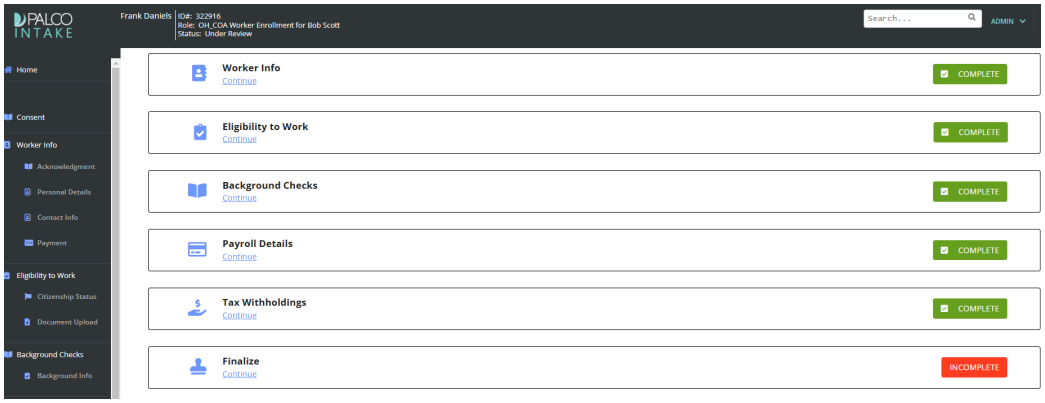
1. In the Enrollment Work Queue screen, filter by:
    a. Program:
    b. Status: Under Review



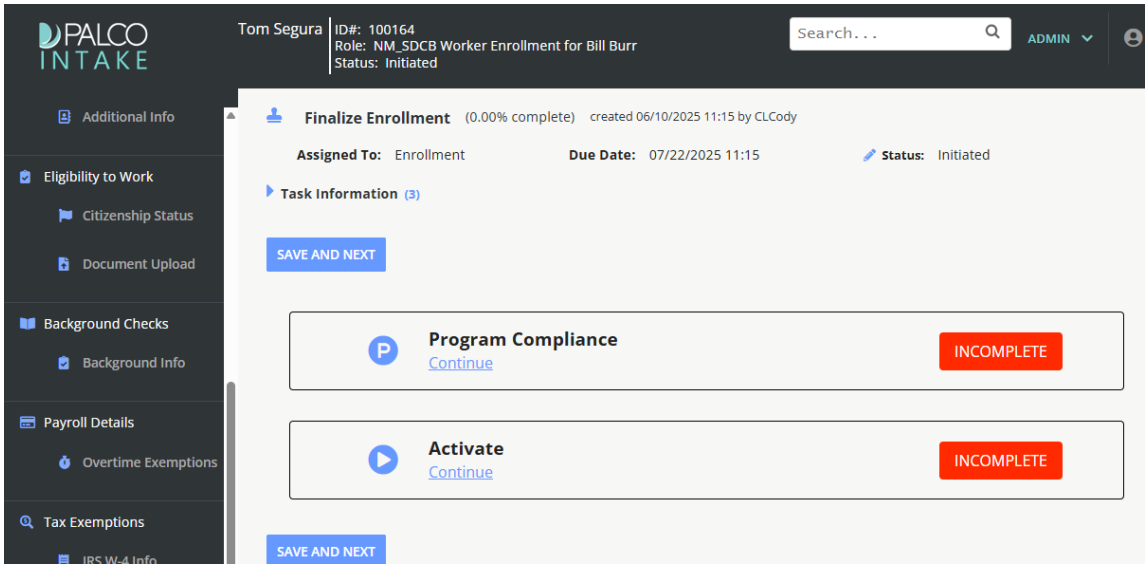
2. Located your participant enrollment and click **View Task.**



3. Go to **Finalize Enrollment** Incomplete section.

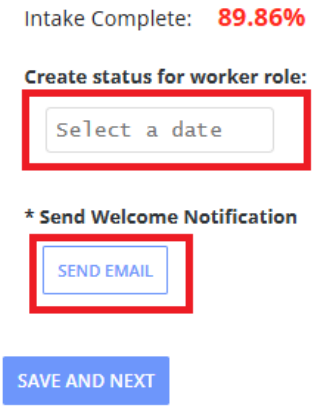


4. Complete the following in Finalize Enrollment:
    a. Program Compliance
    b. Activate

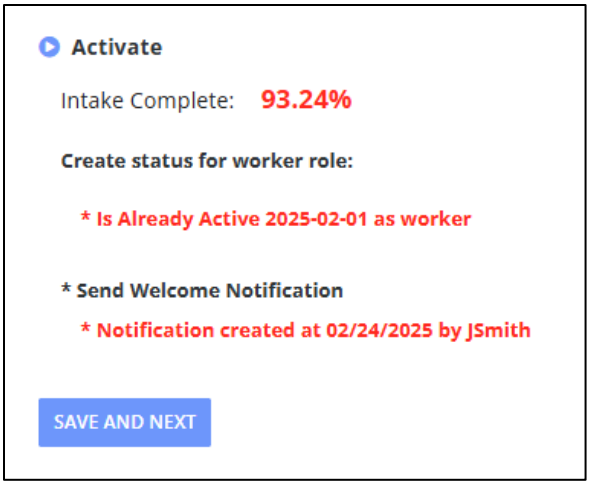


5. **Program Compliance**
    a. Check Proof of Driver's License, Vehicle Insurance, and Registration if applicable

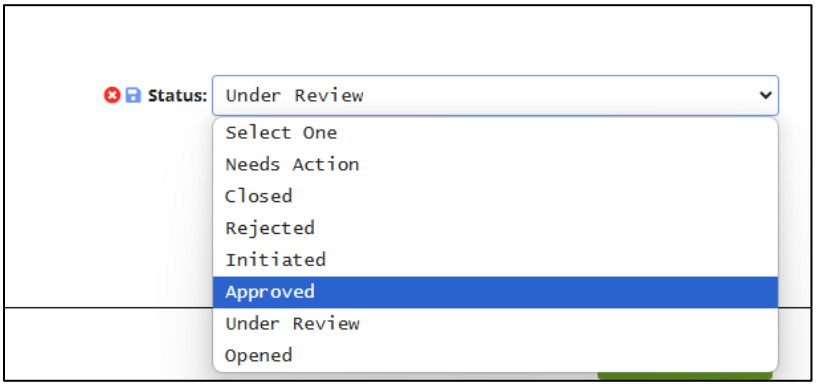
6. **Activate**
    a. Select Worker Start Date.
    b. Click Set Active Status.
        i. This will make them active in CMP Admin.



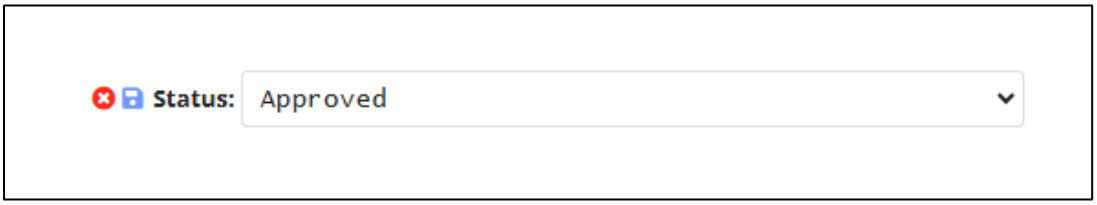
7. Send **Welcome Notification** and click **Save and Next.**



8. Change Status from Under Review to **Approved.**



9. Click the **Save** disk icon.



Accessing Enrollment Forms

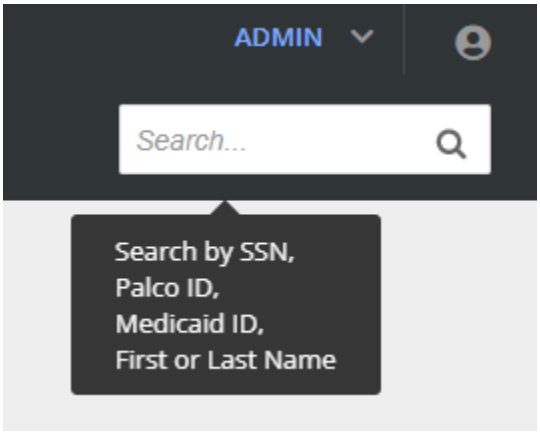
1. Open your web browser and go to https://cmp.palcofirst.com/

2. Log in to your account.

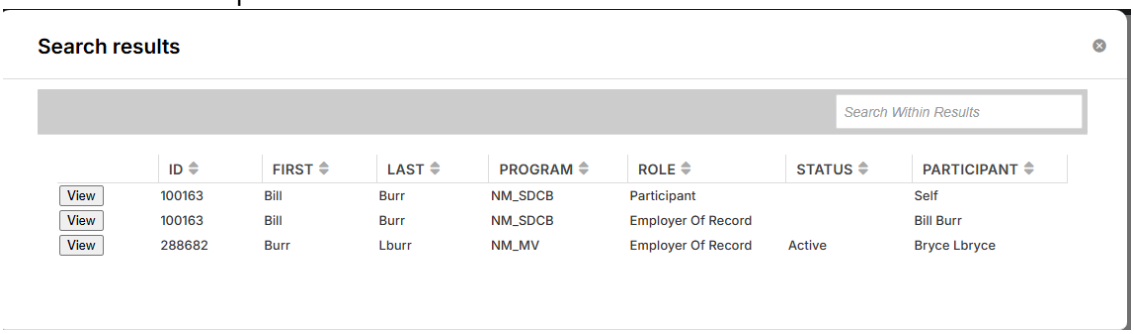
Steps to Search for a Participant, Employer, or Worker

To search for a Participant, Employer, or Worker, follow these steps:

1. Enter one of the following search criteria in the search box located in the top right corner of the screen:



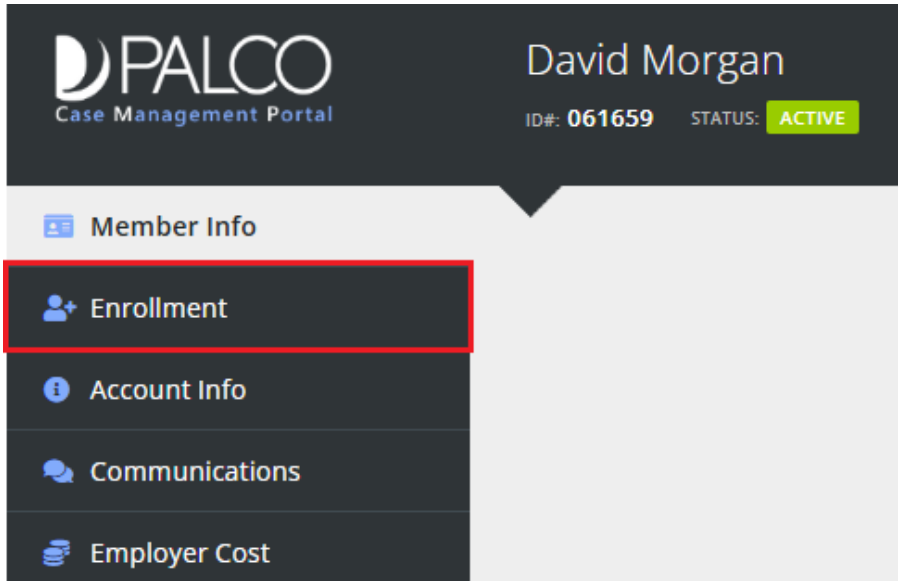
2. Select the desired search person and click **View**.



To view the status of an individual enrollment or to access enrollments forms, professional users should access CMP Admin and follow the below steps.

Helpful Hint: Enrollment forms can be only found in the Employer of Record and Worker roles.

1. Click the Enrollment tab on the left-hand side.



2. To view an enrollment form, click the form you want to download.