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FISCAL EMPLOYER AGENT

West Virginia
Personal Options
Employer Training Guide

February 2024

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Palco Overview

Members utilizing the self-direction service model through Personal Options will work with a Fiscal Employer Agent (FEA). FEAs provide support to the member through their self-directed journey. Palco is the Fiscal Employer Agent for the Personal Options program.

Who Are We?

Palco is the first Financial Management Services (FMS) provider in the country. We have been providing services for nearly 25 years. In that time, we have influenced and helped grow self-direction to what it is today!

Our mission at Palco is to empower independence. Sharpened by experience and amplified by modern technology, Palco advocates for people to live independent lives.

Our Core Values

- ✓ **Independence** - Empowering people to live independent and quality lives through original ideas and tools that solve problems.
- ✓ **Innovation** - Our all-encompassing tools revolutionize self-direction, providing solutions to business problems through modern technology.
- ✓ **Expertise** - A quarter century providing financial management services with unmatched industry experience.
- ✓ **Trust** - Palco leadership strives for long-lasting partnerships forged from integrity, accessibility, and commitment to client achievement.
- ✓ **Diversity** - Our experience spans a variety of health and human services contracts. Our business practices honor diverse individuals and perspectives.
- ✓ **Advocacy** - Advocating for industry best practices and incorporating feedback from end users to ensure stakeholders at all levels of the service continuum get the resources deserved.

Our role at Palco is to:

- ✓ Assist members and their workers with the required paperwork.
- ✓ Verify criminal background checks for workers.
- ✓ Confirm workers' qualifications including CPR and First Aid Certification.
- ✓ Perform all payroll and tax functions for members and their workers.
- ✓ Answer payroll questions via phone.
- ✓ Assign a Palco Resource Consultant to help members and their workers understand their responsibilities in the Personal Options program.

Palco provides the time capture system called Electronic Visit Verification (EVV) and Connect for the submission and management of all time. In addition, the Connect portal provides valuable resources such as access to pay stubs, W-2s, the ability to update your contact information, and more. Resources and instructions for the use of Connect and EVV can be found on the Palco website. Palco maintains a training library for members and their workers, which can be accessed from the Palco website as well. Visit www.palcofirst.com/west-virginia for more information.

Every member within Palco is assigned a dedicated Resource Consultant who can help you along your journey with self-directed services. Resource Consultants are regionally located across the state to provide the best and most person-centered support to every member.

Palco maintains a Customer Support Center for any questions or concerns. You can contact the West Virginia team at 866-710-0456, Monday-Friday between 9:00am and 6:00pm EST.

Mailing Address: P.O. Box 242930 Little Rock, AR 72223

Palco Fax Line: 501-821-0045

Email: customersupport@palcofirst.com

Website: www.palcofirst.com/west-virginia

Online Timesheet Portal (Connect): <https://connect.palcofirst.com/>

What is Self-Direction?

Self-direction is the act of choosing and controlling aspects of your life. This includes using your right to make choices and changes about your services. It also gives you the ability to decide:

- ✓ Who will provide your services
- ✓ What services will be provided
- ✓ When services will be provided
- ✓ Where services will be provided

The Personal Options program is West Virginia's self-directed program service delivery model. Personal Options is available on three different waivers:

Aged and Disabled Waiver (ADW)

The member is their own Employer of Record (EoR). They may pick a representative to help with the responsibilities of being an employer.

The member can hire their own workers, decide how much they are paid, and when they will work. Workers in this program are referred to as "Personal Attendants." They cannot be paid more than the Medicaid rate minus all mandatory deductions. They must be paid at least the current state minimum wage.

Self-Directed services available to ADW members are:

- Personal Attendant Services
- Non-Medical Transportation
- Environmental Accessibility Adaptations (EAA) for home or vehicle
- Pest Eradication

Supports available to the member through their time enrolled in the program are:

- Financial Management Services (FMS): This service is provided by Palco. It includes performing payroll and tax functions for the member. The West Virginia Bureau for Medical Services (BMS) pays for this service.
- Resource Consultant (RC) Services: RCs help the member with enrollment, development of the spending plan, and staying within their budget. The RC also provides employer training and ongoing assistance with employer-related responsibilities. The RC is provided by Palco and is a Palco worker.

ADW program members may choose to transfer to the Traditional Service Delivery Model at any time.

Intellectual and Developmental Disabilities Waiver (IDDW)

The member is their own Employer of Record (EoR). They may pick a representative to help with the responsibilities of being an employer.

The member can hire their own workers, decide how much they are paid, and when they will work. Workers in this program are referred to as “Person-Centered Supports.” They cannot be paid more than the Medicaid rate minus all mandatory deductions. They must be paid at least the current state minimum wage.

Self-Directed services available to IDDW members are:

- Person Centered Support
- Respite
- Transportation
- Personal Emergency Response System (PERS)
- Participant Directed Goods and Services (PDGS)
- Environmental Accessibility Adaptations (EAA)for home or vehicle

Supports available to the member through their time enrolled in the program are:

- Financial Management Services (FMS): This service is provided by Palco. It includes performing payroll and tax functions for the member. The West Virginia Bureau for Medical Services (BMS) pays for this service.
- Resource Consultant (RC) Services: RCs help the member with enrollment, development of the spending plan, and staying within their budget. The RC also provides employer training and ongoing assistance with employer-related responsibilities. The RC is provided by Palco and is a Palco worker.

IDDW program members may choose to transfer to the Traditional Service Delivery Model at any time.

Traumatic Brain Injury Waiver (TBIW)

The member is their own Employer of Record (EoR). They may pick a representative to help with the responsibilities of being an employer.

The member can hire their own workers, decide how much they are paid, and when they will work. Workers in this program are referred to as “Personal Attendants.” They cannot be paid more than the Medicaid rate minus all mandatory deductions. They must be paid at least the current state minimum wage.

Self-Directed services available to IDDW members are:

- Personal Attendant Services

- Non-Medical Transportation
- Transportation
- Personal Emergency Response System (PERS)
- Environmental Accessibility Adaptations (EAA)for home or vehicle
- Pest Eradication

Supports available to the member through their time enrolled in the program are:

- Financial Management Services (FMS): This service is provided by Palco. It includes performing payroll and tax functions for the member. The West Virginia Bureau for Medical Services (BMS) pays for this service.
- Resource Consultant (RC) Services: RCs help the member with enrollment, development of the spending plan, and staying within their budget. The RC also provides employer training and ongoing assistance with employer-related responsibilities. The RC is provided by Palco and is a Palco worker.

TBIW program members may choose to transfer to the Traditional Service Delivery Model at any time.

The Principles of Self-Direction

Regardless of which of the three Personal Options programs you participate in, the following principles of self-direction will apply:

- ✓ You have freedom to choose a meaningful life in the community.
- ✓ You have authority over an authorized amount of dollars in your budget.
- ✓ You will organize resources to enhance your life.
- ✓ You have responsibility for the wise use of public funds.
- ✓ You will have confirmation of the important leadership role that individuals and families play in self-direction.

Enrollment

Before you start directing your care, you will go through an enrollment process with your Palco Resource Consultant. This is after meeting the medical and financial eligibility requirements for the program and selecting to participate in the Personal Options program.

During this process you will:

- ✓ Review the information in this guide.
- ✓ Make important decisions about your care.

- ✓ Identify key supports to assist you in successfully participating in the program.
- ✓ Develop your Service Plan and Spending Plan.
- ✓

The enrollment process may look a little different depending on which waiver Personal Options program you are participating in, but here are possible steps to the process:

Referral: Palco will receive a referral from the waiver program you are participating in. The referral normally contains the following information:

- ✓ Member demographic information (name, address, Medicaid number, etc.).
- ✓ Pre-Admission Screening (PAS) indicating medical eligibility.
- ✓ DHS-2 indicating financial eligibility.
- ✓ Service Delivery Model Selection Form or Personal Options Transfer Form.

Initial Contact: Once Palco receives a complete referral, a Palco representative will be contacting you within three days to:

- ✓ Welcome you to Palco.
- ✓ Confirm your demographic information.
- ✓ Briefly explain the program.
- ✓ Provide important information about the enrollment process.
- ✓ Answer any questions you may have.
- ✓ Schedule your enrollment appointment.

Enrollment Visit: It's time for your enrollment visit! You will meet with your Palco Resource Consultant to review all the information you have received. They'll help you complete the enrollment forms and also review resources available to you.

- ✓ If you appointed a program representative and know who your potential workers are, they should be present at the meeting.

Once the enrollment process is complete, you will then work with your Resource Consultant to develop your Personal Options Spending Plan.

Your Resource Consultant will notify you of your start date. This is when you can begin receiving services as outlined in your Service Plan. You must have a worker with all training

documentation turned in and a completed background check before you will be issued a start date.

Involuntary Transfer

If you are unable to self-direct waiver services, either due to a misuse of funds, noncompliance of program rules, or an ongoing health and welfare risk, you will be required to appoint a program representative to assist you with the responsibilities of self-direction. If you refuse to appoint a program representative, or if your program representative fails to assist you with your employer responsibilities, you will be transferred to the Traditional Service Option. Your Resource Consultant and case manager will assist you in this process.

Appointment of a Program Representative (PR)

Members self-directing their care through the Personal Options service model may choose to appoint a program representative to assist them with their employer responsibilities. Your Palco Resource Consultant can assist you with this during the enrollment meeting.

Being appointed as a program representative is a big responsibility. It is important that your program representative:

- ✓ Show a strong personal commitment to you to ensure your needs are met.
- ✓ Respect your preferences.
- ✓ Is willing and able to help you with the requirements of self-direction.
- ✓ Assist you in verifying your worker(s) timesheets, personal attendant logs, and transportation invoices.
- ✓ Be at least 18 years old.

Your program representative **CANNOT**:

- ✓ Be paid to assist you with your employer responsibilities and cannot be hired to provide your care services.
- ✓ Be known to abuse drugs or alcohol.
- ✓ Have any history of physical, mental, or financial abuse.

Employer Roles and Responsibilities

As a member utilizing Personal Options you will be the Employer of Record (EOR) for your workers. This means you will have some very important responsibilities. If you choose to appoint a program representative, they will assist you with these responsibilities.

You will be assigned an EIN (Employer Identification Number) from the IRS. This is a process that Palco will take care of for you. Palco will also pay your employer taxes such as Social Security, Medicare, and unemployment taxes for your workers. The funds for these taxes comes from your approved budget. You should continue to file your personal taxes (if applicable) as you have always done.

As an employer, you are responsible for:

1. Recruiting, hiring, training, and supervising worker(s). Best practices for managing and supervising your workers include the following:
 - a. Providing orientation to your workers about your home and the job.
 - b. Training your workers how you want things done.
 - c. Making sure tasks are performed safely, and that precautions for health and safety are followed.
 - d. Setting a work schedule for the employee to follow.
 - e. Giving positive and constructive feedback when necessary.
 - f. Creating a good working relationship with open and honest communication.
 - g. Treating your worker with respect and kindness.
2. Ensuring your worker(s) meets all the required qualifications including:
 - Completing and passing a criminal background check through WV CARES. Background checks are run at hire and again every 5 years.
 - Completing CPR and First Aid trainings using the BMS approved providers list (see the BMS website at <https://dhhr.wv.gov/bms/Programs/WaiverPrograms/Pages/default.aspx>). Look under the "Member/Provider Information" tab and go to the "Approved CPR and First Aid Providers" header.
 - Completing initial and annual training as applicable to the waiver.
 - Providing Palco with copies of your workers' current documents as required by your Personal Options program. Examples of these include:
 - Current, valid state driver's license (if your worker will provide transportation services).

- Current vehicle insurance and registration.
 - Current CPR and First Aid certifications.
3. Determining your workers' rates of pay (within state guidelines).
 4. Verifying and approving complete and accurate timesheets, transportation invoices, and vendor invoices (as applicable).
 5. Making sure your workers do not work over the approved daily, weekly, or monthly hours as approved on your plan. You are responsible for payment to your workers for any time worked that exceeds what is on your plan.
 6. Ensuring your worker(s) provide services that follow the Service Plan developed by you and your case manager .
 7. Completing the personal attendant log with your worker(s) and submitting it to Palco within five business days after the end of the month. (For ADW workers only)
 8. Keeping a safe working environment free from any harassment, hostilities, or illegal drugs.
 9. Educating your family members to treat your worker(s) with respect.
 10. Developing your monthly spending plans.
 11. Keeping track of your monthly spending plan allocations.
 12. Connecting with your resource consultant through monthly phone calls and biannual 6-month home visits (waiver dependent).
 13. Working with your case manager to update your Service Plan for any long-term changes in your services/service hours. Your resource consultant will assist you to update your Spending Plan.
 14. Monitoring for Medicaid Fraud, Waste, and Abuse
 - a. Only hours worked by your workers can be paid. Your signature on these documents will verify these forms are accurate. Knowingly falsifying hours or services provided is Medicaid fraud and will be reported to the WV Medicaid Fraud Unit for investigation.

If you ever suspect Medicaid Fraud is occurring, please call 1-888-372-8398.
 15. Terminating workers when appropriate

Selecting, Hiring, Training, and Supervising Worker(s): Deciding who will be providing your care is an important task. As an employer, you will need to make sure your workers meet the following requirements before they can be hired and start providing services:

- ✓ Be 18 years or older and eligible for employment in the U.S.
- ✓ Pass a criminal background check through WV Cares initially and every five years thereafter.

- ✓ Pass the Office of Inspector General Medicaid Exclusion List monthly.
- ✓ Complete all forms in the Worker Packet.
- ✓ Complete initial and annual training.
- ✓ Maintain all training, CPR, and First Aid certifications.

Individuals who have been convicted of certain offenses or who have committed Medicaid fraud are not eligible for employment through Personal Options. The negative findings list that would disqualify an applicant for employment is available in Chapter 700 WV Clearance for Access: Registry and Employment Screening (WV CARES).

In this Employer Guide we have provided some guidance on how to complete some of the more common employer duties.

- ✓ **Recruiting:** Tips on effective worker recruitment, writing a job description, posting a job ad, interview questions, checking references, and making an offer (see Appendix A).
- ✓ **Worker Management:** Information on scheduling, training, corrective action, performance reviews, and termination (see Appendix B).
- ✓ **Budget Management:** Staying on top of your spending (see Appendix C).

Worker Timesheets and Payments: Your workers will be required to report time worked each day. As an employer, you will be responsible for reviewing that time for accuracy and approving the time for payment.

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), the ability to track and monitor spending, the ability to update your information, and the ability to access W-2s and paystubs.

Using **Connect** allows compliance with **Electronic Visit Verification (EVV)**, which is a federal mandate to verify home and community-based services occur. It captures six points of data:

- ✓ Type of services performed.
- ✓ Individual receiving services.
- ✓ Person providing services.
- ✓ Date of service.

- ✓ Location of service.
- ✓ Time service begins and ends.

All Medicaid agencies must comply with the EVV mandate. Some workers are exempt from EVV requirements, including those who live in the home with the member.

Overtime: Domestic workers of household employers are considered exempt from the overtime provisions of the Fair Labor Standards Act if they reside with the employer. However, workers who do not reside with the employer are eligible for overtime pay if they work more than 40 hours per week. The amount paid varies depending on the hourly rate you pay your workers for hours. These additional funds will come out of your budget. Please see the FLSA Live-in Exemption Form included in the worker packet for more information.

As an employer, it is suggested that you have multiple workers who work less than 40 hours per week. Or, to plan ahead for a reduction of hours worked in order to not use up your budgeted amount before the end of the month. Your Resource Consultant can assist you with the necessary planning.

Worker's Compensation: Your workers are considered domestic workers of a household employer. As such, they are unable to purchase workers' compensation insurance coverage through Palco or through the West Virginia Personal Options program. You may wish to clarify with your homeowners or renters insurance to determine possible coverage.

Developing Your Spending Plan

Development of your Spending Plan happens after the enrollment process has been completed.

*A **spending** plan will show how much you will pay your workers or how much you will pay for a service (if applicable). It is a budgeting tool that will help you stay on top of your authorized program funds which are allocated to you based on your authorized budget. This is developed between you and your Palco Resource Consultant.*

Some questions you may be asked by your resource consultant:

- ✓ Who will you hire to provide services?
- ✓ What hourly rate will you pay your worker(s)?
- ✓ Will your worker(s) provide transportation services?

Your paid supports will be reflected in your Spending Plan within your approved budget. Unused funds from one month's budget cannot be carried over to the following month.

Key Points:

- ✓ The Spending Plan will be used by Palco as an authorization to pay for services and supports on your behalf.
- ✓ Palco cannot pay for hours worked or miles traveled that are not in your Service Plan and Spending Plan.
- ✓ The amount of budget allocation in your Spending Plan can be changed from one service to another to meet your needs and as per the waiver program allows. You must discuss any changes needed in your Service Plan with your Case Manager and adjust your Spending Plan with your resource consultant before implementing a change.
- ✓ Any changes in your Spending Plan must be approved prior to the first of the following month to become effective on the first of the month.
- ✓ Any workers that work more than 40 hours per week will be eligible for overtime pay if the worker is not living with you. Any hours worked over 40 will be paid time and one-half and will thus impact your budget.

Remember that only approved services outlined in your Service Plan will be paid for by Palco. If your workers work over the approved number of hours, or provides services not in your Service Plan or allowed by the waiver, Palco cannot pay them for that time.

Revising Your Spending Plan

If you need to make changes to your spending plan, you may do so by contacting your Resource Consultant. Your Resource Consultant can assist you in increasing or decreasing worker wages. Approved changes will begin on the first day of the following month or as otherwise indicated by your Resource Consultant.

If your care needs change during your service year and you need additional funds to receive that care, contact your Resource Consultant and let them know. Your Resource Consultant will be available to assist you with this process and help you work with your Case Manager to make this request.. Once your request is submitted and if approved,

your Resource Consultant will work with you to revise your Spending Plan after your Service Plan has been updated.

Six-Month Review of Your Spending Plan

As part of the program requirements, you will review your spending plan every six months, after your six-month Service Plan Review, with your Palco Resource Consultant. Together, you will make any changes that need to be made.

Appendix A—Recruiting

SELF-DIRECTION

Recruiting



RECRUITING SELF-DIRECTING EMPLOYEES

Before recruiting, you must know what you want your workers to do. You must consider the work to be performed and the knowledge and skills a person needs to have in order to be able to perform that work. A sample job description is included at the end of this section. Finding the right worker takes time. How much time depends on your needs and how well you have planned. Use all the resources available to you. Think about whether you want to use friends or family members. Using people you know can make the process easier, but it can also be tough on your relationships. Recruiting can be divided into several areas.

WRITING A JOB DESCRIPTION

A well-written job description will help you screen and interview people. It will help you make sure that your potential attendants are comfortable with all aspects of the job. List in the job description the skills and experience you want attendants to have. State other capabilities you want in caregivers, such as physical strength, cooking skills, etc.

POSTING A JOB AD



The job description you develop becomes the foundation for your job listing. The primary purpose of a job listing is to identify people who are both qualified and interested in doing what you need done. A well-written listing can help screen out people who do not fit your needs and save you time up front.

Consider creative ways to post your job ad and attract the most qualified candidates. Location ideas include, colleges and hospitals, job service centers, social media, local publications and newspapers, bulletin boards and word of mouth with family and friends.

INTERVIEW QUESTIONS

Once you have some responses to your job ad, you will want to choose people to interview. Interviews should be face-to-face meetings, consider where and how they will happen. If you do not want strangers coming into your home, consider a public place such as a restaurant or library. You may also want to have a family member or friend present. Prepare questions in advance you want to ask and bring the job description so they can get a good understanding of the position.

CHECKING REFERENCES

If you wish to proceed with an applicant you've interviewed, you will need to check their references. To check references, call the people listed as references and ask about the applicant.

Some good questions you might ask are:

- How do you know the applicant and for how long have you known them?
- Have they worked for you previously and when?
- What are the applicant's strengths?
- What are the applicant's weaknesses?
- Would they rehire this person?



MAKING AN OFFER

When you identify someone you'd like to hire as an employee, call to let the individual know you want to hire him or her for the job and restate what the job pays. Be sure to have them complete all necessary paperwork as required by Palco and let them know the start date will be set once you have an official good-to-go from Palco.

When you are ready to move forward with the enrollment process, contact Palco and an Enrollment Coordinator will connect with you to make the process as easy and seamless as possible!

AR SDSB Program- Companion Guide

JOB DESCRIPTION

Sample



DUTIES: The person in this position will assist with activities of daily living. The employer is a 25-year-old man who has a physical disability, lives in his own apartment and uses a wheelchair. Specific activities include assistance with bathing, dressing, personal hygiene, toileting (includes bowel and bladder care), eating, transferring to and from the wheelchair, taking medications and range-of-motion exercises. The position also involves meal preparation, housekeeping, shopping, laundry and other household chores. The position requires a valid Arkansas driver's license, as the attendant will drive the employer's adapted van occasionally

EDUCATION & EXPERIENCE: Nothing specific is required, though some experience providing attendant services in the home of a person with a disability is helpful.

A. Be dependable, be ready to work at the agreed-upon time.

1. If you need to be absent for any reason,
2. Please give a minimum of 48 hours notice for the employer to make other arrangements.
3. If you are unable to be on time, call as soon as possible.
4. If you plan to arrive more than one-half hour early, please phone ahead to find out if it is acceptable to do so.
5. Be responsible.
6. Be able to work independently

The employer wants to trust you to do your work unsupervised. This means the employer does not want to have to be with you every minute

B. Be observant, motivated, self-starting and pay attention to details.

C. Do not leave work unfinished or for someone else to do. Do what is your responsibility to do.

D. Sanitation and hygiene

1. Good health begins with cleanliness. Please wash your hands with soap before handling kitchen items and preparing food and after using the toilet, including when you assist the employer

SALARY: \$11.25 per hour

BENEFITS: This position does not include paid vacation, paid sick time or health insurance, but covers workers' compensation.

HOURS: Two hours a day in the early morning, typically 6 to 8 a.m. and some weekend hours

OTHER REQUIREMENTS: The person selected must submit to a criminal history check, APS and CPS check.



AR SDSB Program- Companion Guide

Appendix B—Worker Management

SELF-DIRECTION

Being an Employer



EMPLOYEE MANAGEMENT

As the legal employer of record of your workers, you are responsible for recruiting, hiring, supervising, evaluating and firing, when necessary, the workers that provide your self-directed support services. Below are some general tips and guidelines for being a good employer. Developing these skills can help you be a good employer and retain employees for a long time. In addition, being a good employer can help keep your employer tax rate low and provide you more usable money in the budget!

SCHEDULING

As the employer, you are responsible for scheduling your workers in accordance with your cash expenditure plan and approved services. Think about the times of day you prefer tasks to be completed and how you like your day to flow. For example, if you enjoy showering in the evening and you need assistance with that task, you should schedule your workers to come that time of day. To prevent over spending, you should have a set schedule for every worker that aligns with your approved service hours for the two week period.

TRAINING

If you choose a worker who already knows you, your needs, and preferences, they may require less training on your specific needs. However, if you hire a worker who doesn't know you, training is essential in making sure you receive the necessary supports. You are in control of training workers on your needs, likes and dislikes. In addition to general training, you should tailor your training to match their job description. If your workers are going to be a backup for each other, you will need to train each on all of your needs. Other topics you should consider training on include: orientation to your home, equipment, blood borne pathogens, HIPAA, lifting and moving, and fraud.

PERFORMANCE REVIEWS

Performance reviews are an important part of ensuring your workers have meaningful employment. Performance reviews provide valuable praise and feedback with opportunities for improvement.

Come up with categories you would like to evaluate your employees based on on a schedule for which you will meet with them. It is recommended to review their performance at least 1 time per year.

CORRECTIVE ACTION

As with any employment arrangement, you should be evaluating and coaching your workers as issues arrive. This process includes tracking absences, late arrivals and no call/no shows. You should track these items in the workers employee file with dates and details of the occurrences. If a issue persists after coaching has been provided, you may need to develop a corrective action plan that lays out steps to correct the behavior and consequences if it is not remedied. The plan should be clearly written timelines for when the issues must be corrected by. It should be signed by both the employer and worker, and stored in the employee's file.

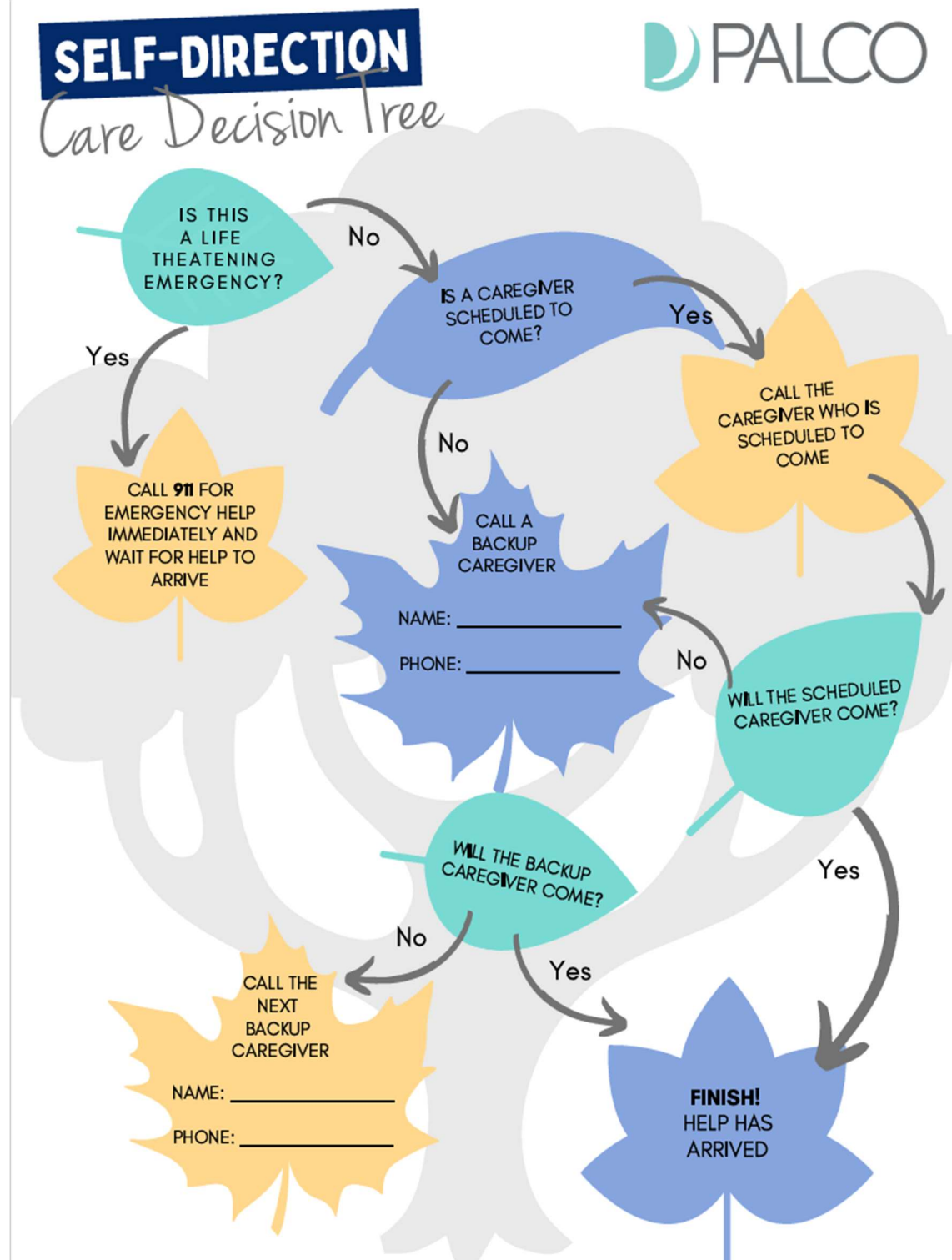


TERMINATION

Unfortunately, at some point, you may have to terminate a worker. It is a good idea to follow some guidelines during their employment, which will make it easier when you need to let them go. Make sure to document the verbal warnings about issues you have had with them and develop a file of any corrective action plans you have developed to provide them coaching and support.

As soon as you terminate a worker, you should let Palco know right away! This ensures Palco does not issue paychecks to them after they are fired.

Appendix C—Back-Up Planning



EMERGENCY INFO SHEET



IDENTIFICATION

Name _____
Address _____
Phone 1 _____ Phone 2 _____
Birth Date ____/____/____ Drivers License # _____
SSN _____ Medicaid ID _____



PALCO

Palco Customer Support **1-866-710-0456** Support Coordinator Name _____

EMERGENCY CARE

Emergency Contact Name _____ Emergency Contact Phone _____ Relationship to Person _____
Durable Power of Attorney _____ Phone _____
Insurance Company _____ Insurance ID/Policy # _____ Contact _____

Medical Conditions

1. _____
2. _____
3. _____
4. _____

Drug Prescriptions and Dosages

1. _____
2. _____
3. _____
4. _____

Drug Allergies _____

Blood Type _____

Primary Physician Name _____ Hospital _____ Phone _____ Fax _____

PERSONAL INFO

Phone Lock Code _____ Voicemail Passcode _____

Email Address _____ Email Password _____ Computer Login _____

Other Important Info _____

This document was filled out by _____ on ____/____/____, Relationship: _____ Phone: _____

Appendix D—Time Capture and Submission

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.

Download the Authenticare App.

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

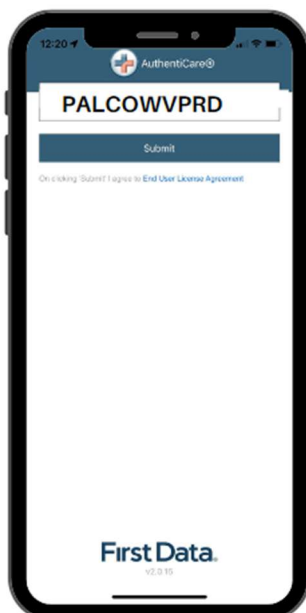
Step 2: Tap on Search

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.

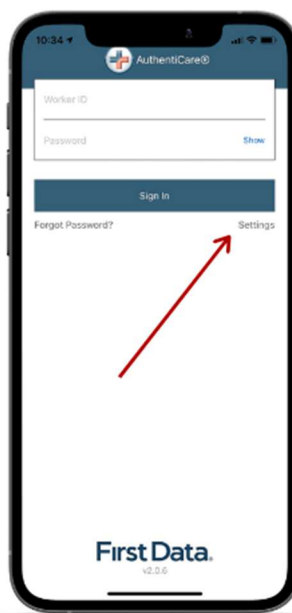
Tap Allow to access this device's location and Allow to make and manage phone calls.



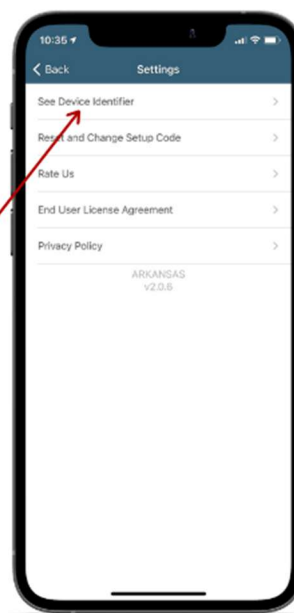
Once downloaded, enter the **Setup Code** provided to you by Palco.

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

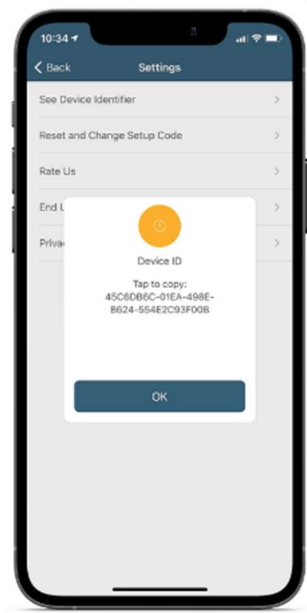
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Next, obtain your device ID. Click **Settings** at the bottom right of the login screen.

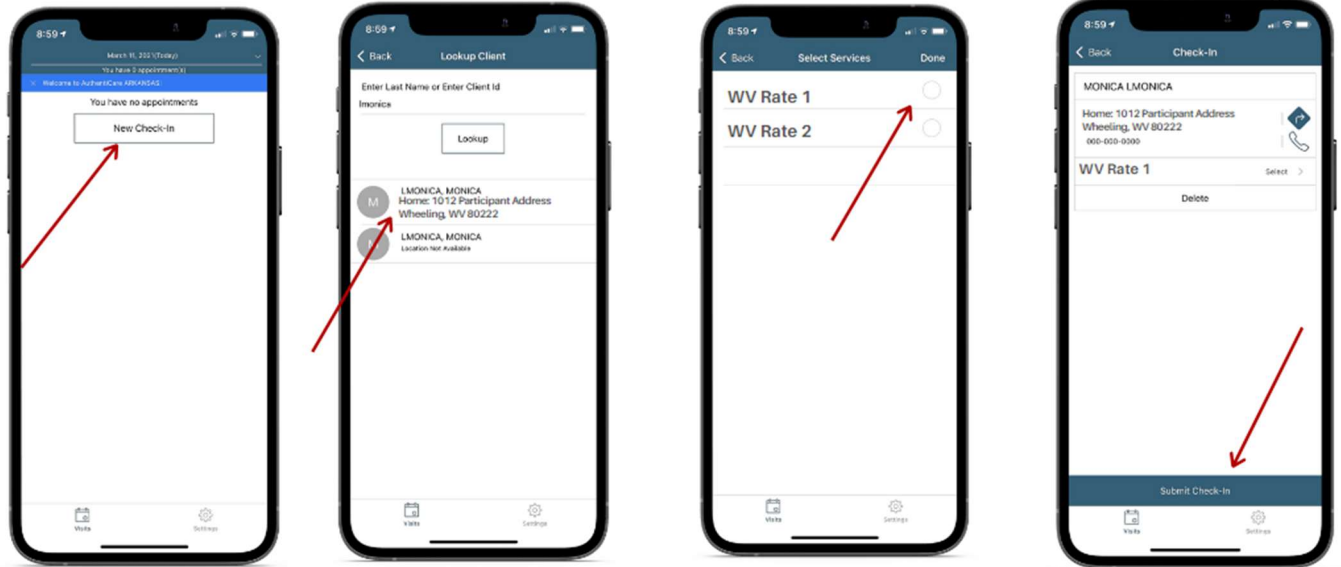


Click **See Device Identifier** from the menu options



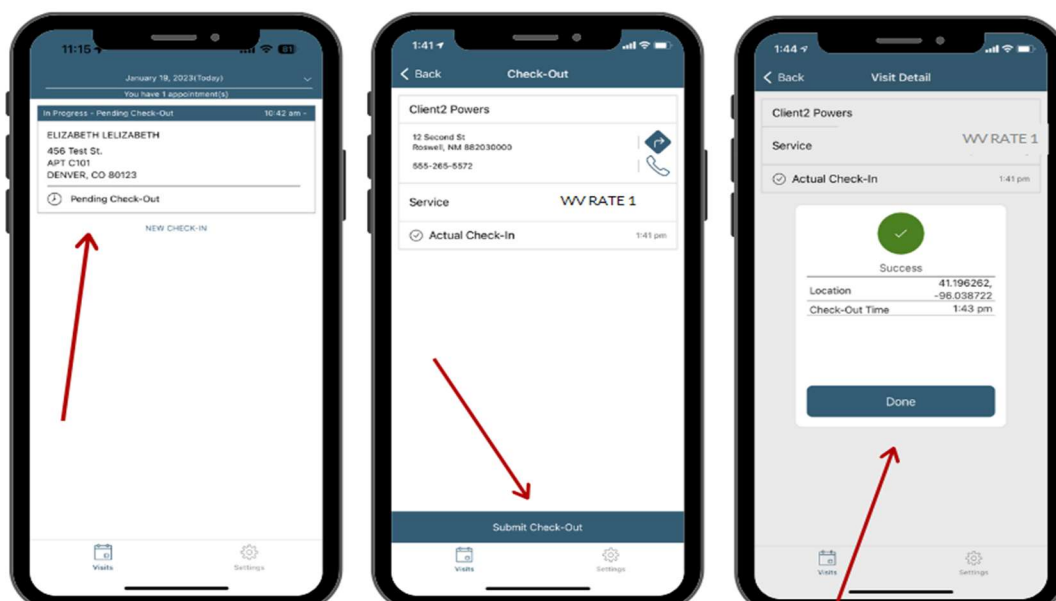
Write down your **Device ID** as shown on the screen and provide to Palco via the **EVV Registration Form** for setup.

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."

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 "ok" 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 as an approved EVV method as well.

Using a landline phone or cellphone, 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.

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.