CMP General User Guide

A guide for navigating the Palco Case Manager Portal (CMP) for professional users.

September 2025

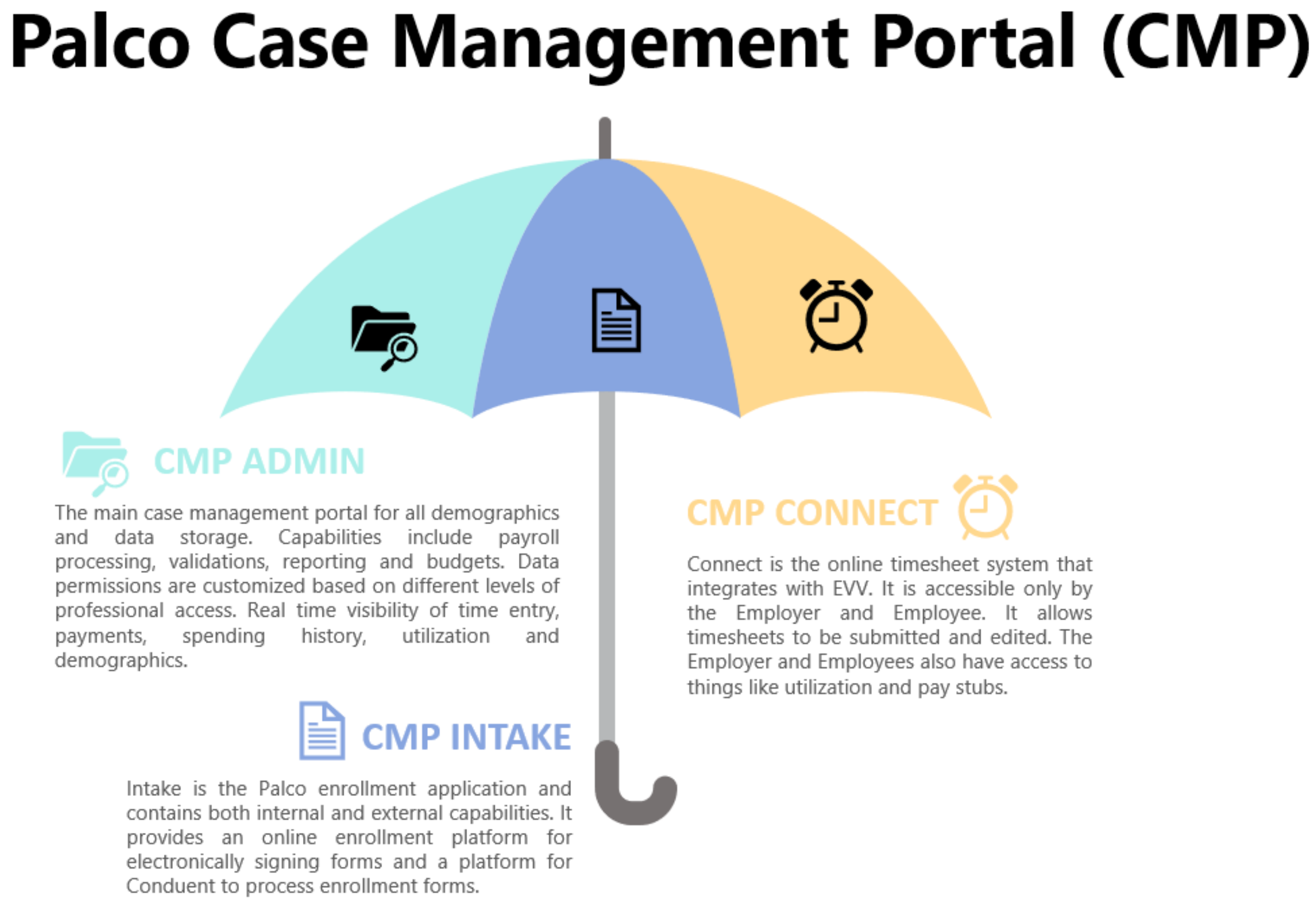
PALCO

FOR INTERNAL USE ONLY

Case Management Portal (CMP) Overview

Purpose of the system

The Palco Case Management Portal is a suite of applications that each serve a unique purpose and audience while working together seamlessly to capture and store information. This guide will cover the main components of the CMP Admin suite that is accessed by professional users External State and Program staff can utilize the Palco application to view information and help them manage the participants services. CMP is accessible 24/7 and uses proprietary cloud-based software.



Certain aspects of the CMP system may be configured with program specific details that differ slightly from the screen shots and information in this guide. Please note, this guide is meant to serve as a general guide and tool for navigation. For program specific questions, speak to you Palco Account Manager.

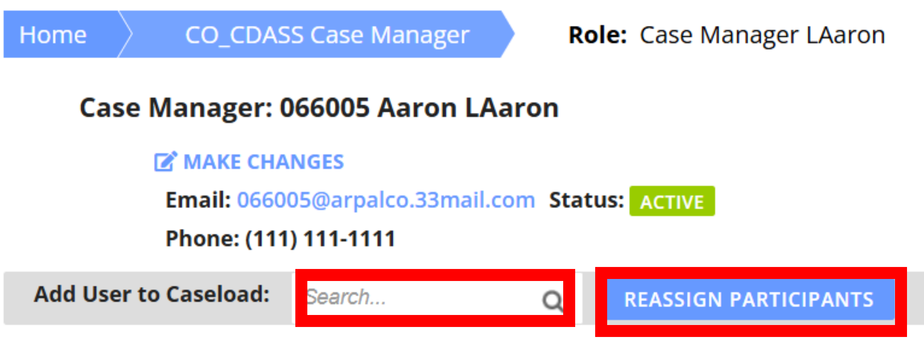
Caseload Permissions and Management

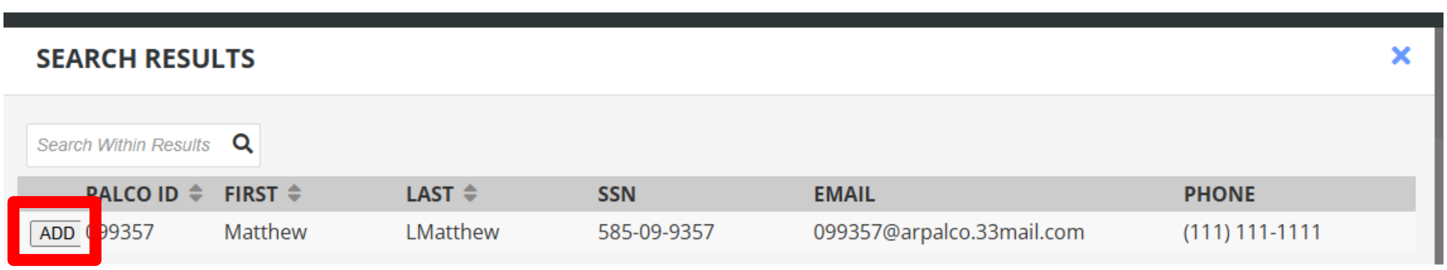
Caseload Administrator Overview

The Caseload Administrator allows certain users of CMP to add and delete caseloads for Support Coordinators, Independent Living Counselors, and Case Managers across the various programs. Depending on a user's role, the records they can see in the system may be limited to just those within the scope of their caseload. To access the Caseload Administrator, a user's individual permission set must have access to this feature. If you have questions, speak to your Palco Client Engagement Specialist/Manager.

Managing Caseload Assignments

To add a current member/participant to a user's caseload, you must select the user you wish to add members to. After selecting the user, search for the member and click add.





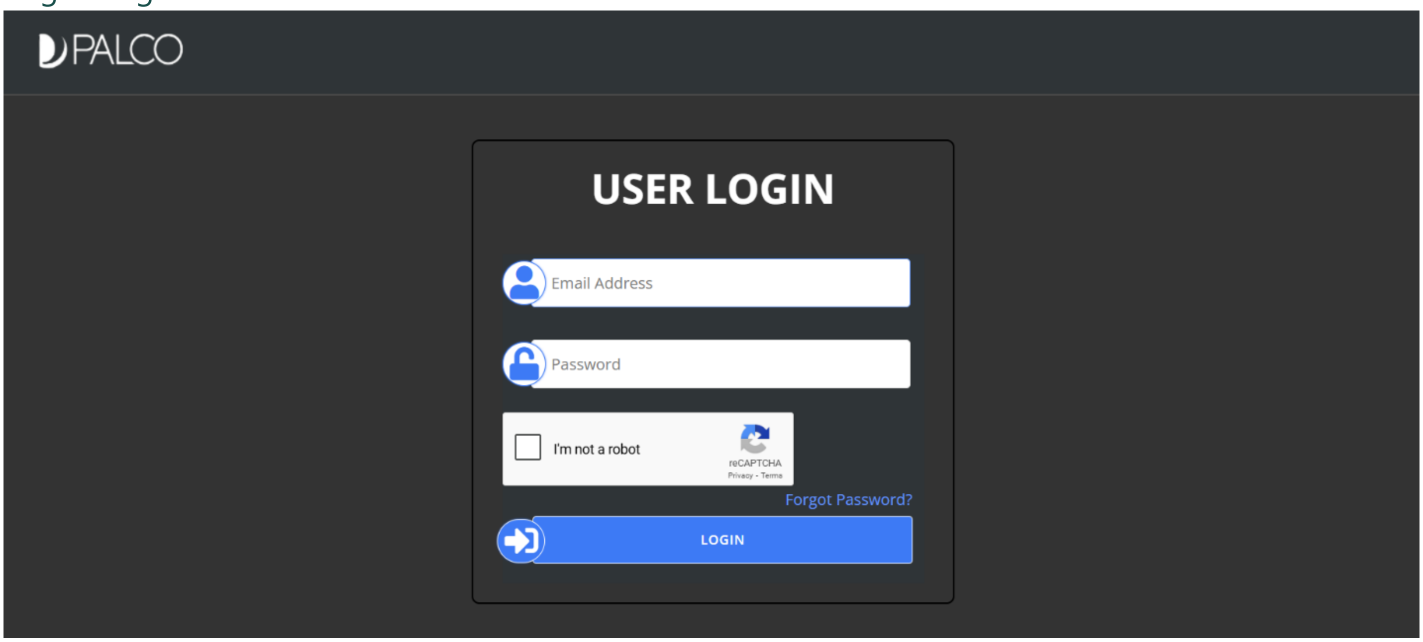
In some cases, multiple participants can be reassigned to other counselors/case managers. By clicking on "Reassign Participants," you can select multiple participants and assign those to another user.

Navigation

Accessing the Portal

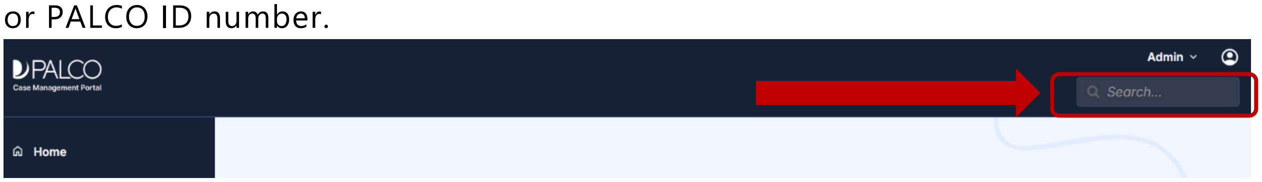
Navigate to https://cmp.palcofirst.com/ and enter your email and password credentials. New users will be given credentials during enrollment once they have a client with Palco.
For help registering or issues please email enrollment@palcofirst.com

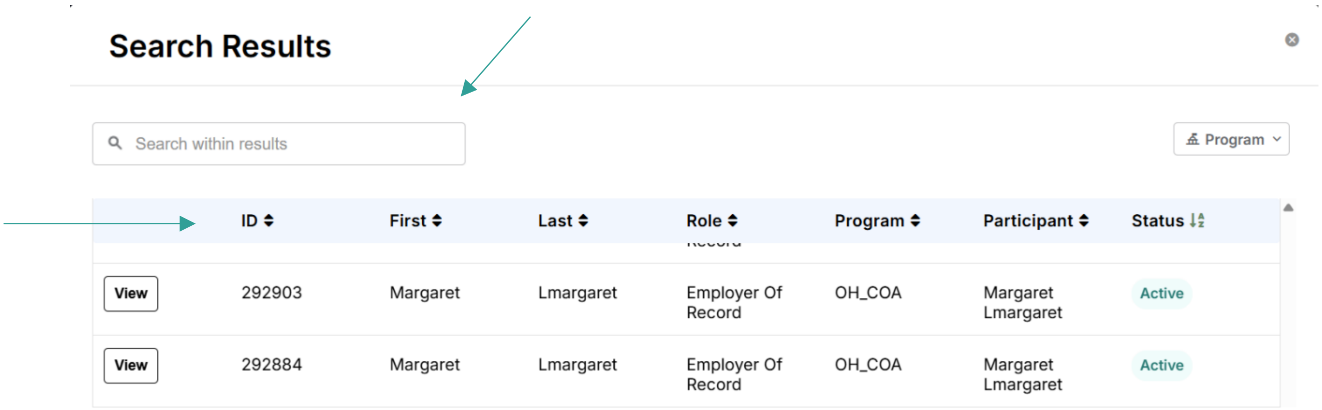
Login Page:



Searching

Once you are logged in, use the **"Search"** box that the top to locate the Member you would like to access. You can search by first name, last name, Social Security Number (no dashes), or PALCO ID number.





Once you search, a box will pop up with a list of individuals who match your search criteria.

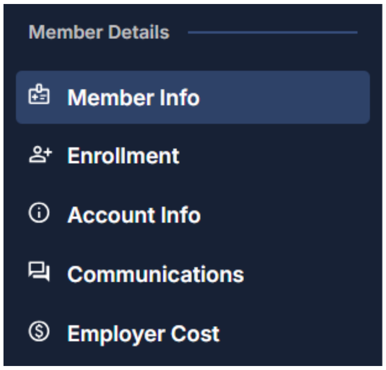
Choose the record you would like to access by clicking **"View"** on the left-hand side next to the record you would like to see. If you receive a large number of results, try narrowing your search by adding more detail to the "Search Within Results" field or by sorting the columns to help you find what you are looking for.

If the record you are looking for does not show up, you may not have permission to view it. Speak with a Supervisor at your agency or contact PALCO for assistance.

Navigation Tabs

Once you access the record, you will see several tabs to where information is stored. You can navigate to different tabs by clicking on them. Depending on the profile's role, you may see different tabs on the record. For example, only an Employer records display a "Employer Cost" tab.

Once on a tab, certain tabs may display additional sub tabs of information. Navigate through to find the specific details and information you are looking for. For example, the Member Info tab contains several sub tabs such as Personal Info, Contact Info, and Program details.



Tab	Function
Member Info	General contact information regarding the individual.
Enrollment	This will allow you to view the status of the Members enrollment with PALCO.
Budget Info	Shows current budget and historical budgets
Account Info	This tab will allow you to access time sheet history, utilization report and payments made to attendants.
Employer Cost	View the employer's cost and worker's tax exemptions. This helps in calculating and assessing budgets.
Rate of Pay	View a worker's rate of pay for each service authorization.

Profile Menu and Case Status

Every CMP record will have a profile menu at the top of the page which provides a quick snapshot to their information and case status. In this section, important details like the Palco ID, program assignment, and their role are visible.

Program

The program listed at the top of each profile corresponds with the specific program they are enrolled in.

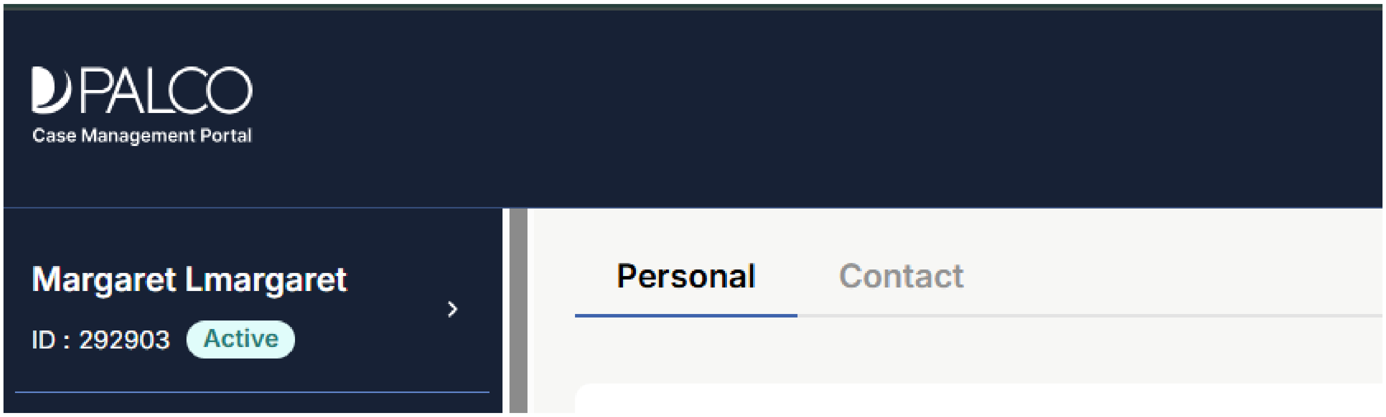
Roles

In Palco's CMP, a person may have more than one profile. A worker has a profile for each participant for which they provide services. An employer has a profile for each participant for which they serve as the EOR (including themselves, if that's the case).

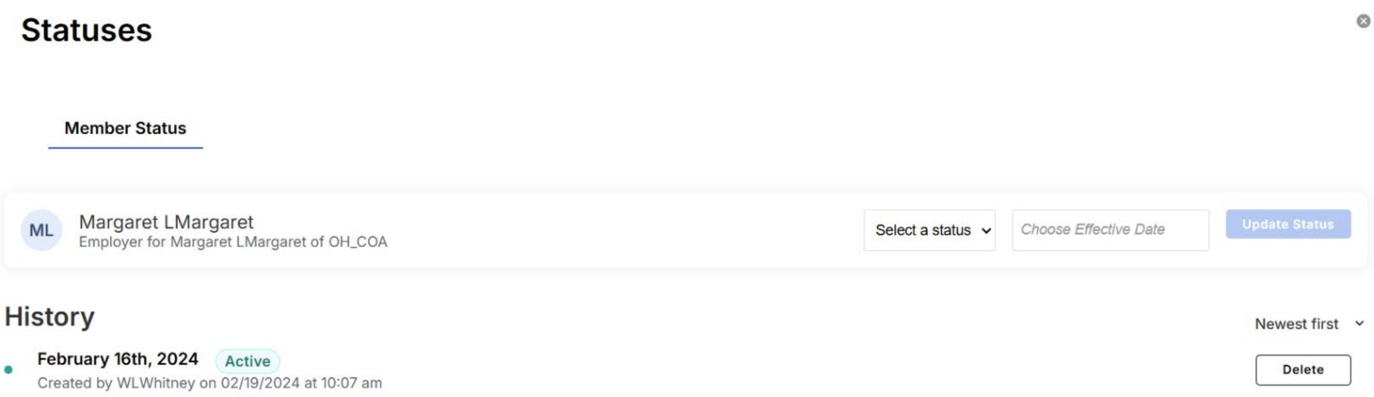
The profile menu lets you quickly move between these different roles by using the "**ROLES**" drop-down. This drop-down list displays the profiles related to the individual you are currently viewing on the screen. It also includes past roles for the individual. An example of a past role is a person who has worked for other participants and is no longer employed with them.

Case Status

An individual's current case status in CMP is always in the upper left-hand corner of the profile on screen. A person who has different roles may have different statuses for different roles. Clicking on the status in this area shows more detail about the individual's status for that role. It shows a history of statuses, who entered the status, and the date that each status took effect.



In the example below, we see that Margaret's became active on 02/16. We can also see when these statuses were entered into CMP, and who put them there.



Case Status Definitions

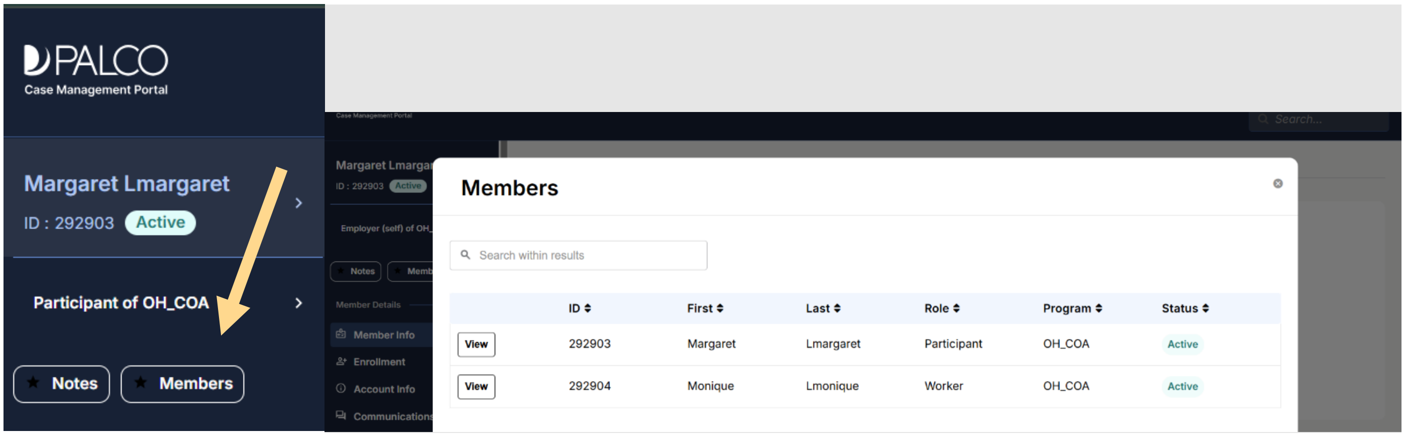
The following table lists Case Statuses that you will see for different types of profiles in CMP.

Role	Case Status	Meaning
Participant	Active	Participant is fully enrolled and able to receive services.
	Terminated	Participant has been removed from the program and can no longer receive services as of the effective date.
	Pending	Participant is in the process of enrolling.
	Deceased	Participant has passed away.

Employer	Active	Employer is fully enrolled.
	Terminated	Employer is no longer active as the employer for the Participant.
	Pending	Employer is in the process of enrolling.
	Deceased	Employer has passed away.
Worker	Active	Worker is fully enrolled and able to be paid.
	Terminated	Employer has terminated the worker, or the worker has quit.
	Deceased	Worker has passed away.
	Pending	Worker is in the process of enrolling.

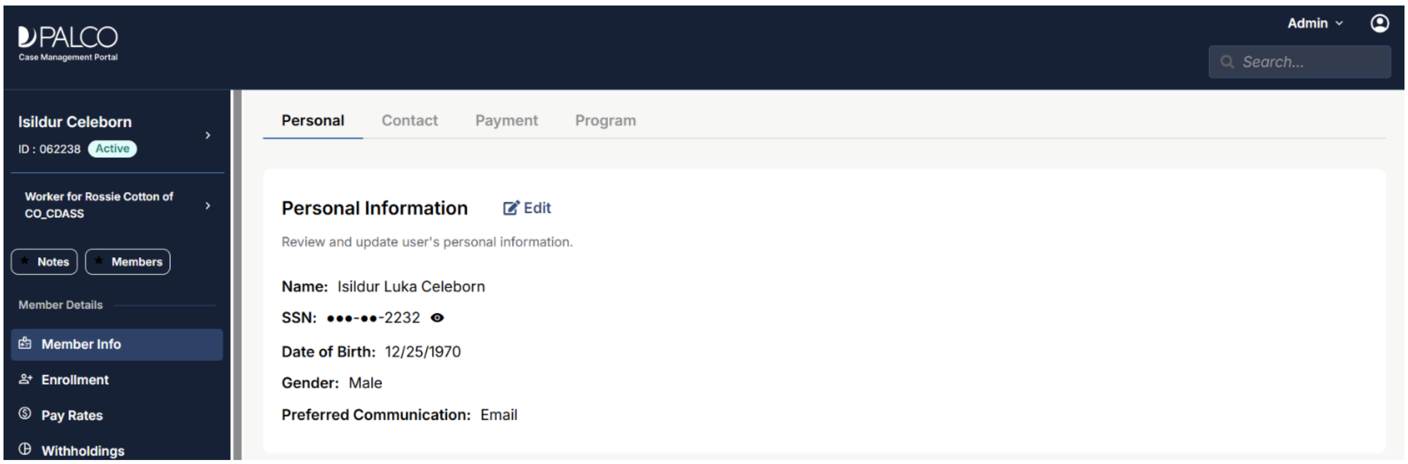
Members

On the left side of each CMP profile is a link called "Members." Click or tap this for a full list of profiles related to the individual you are viewing on the screen. For example, if you are looking at a participant, clicking/tapping "Members" brings up a list of all their workers and the employer.



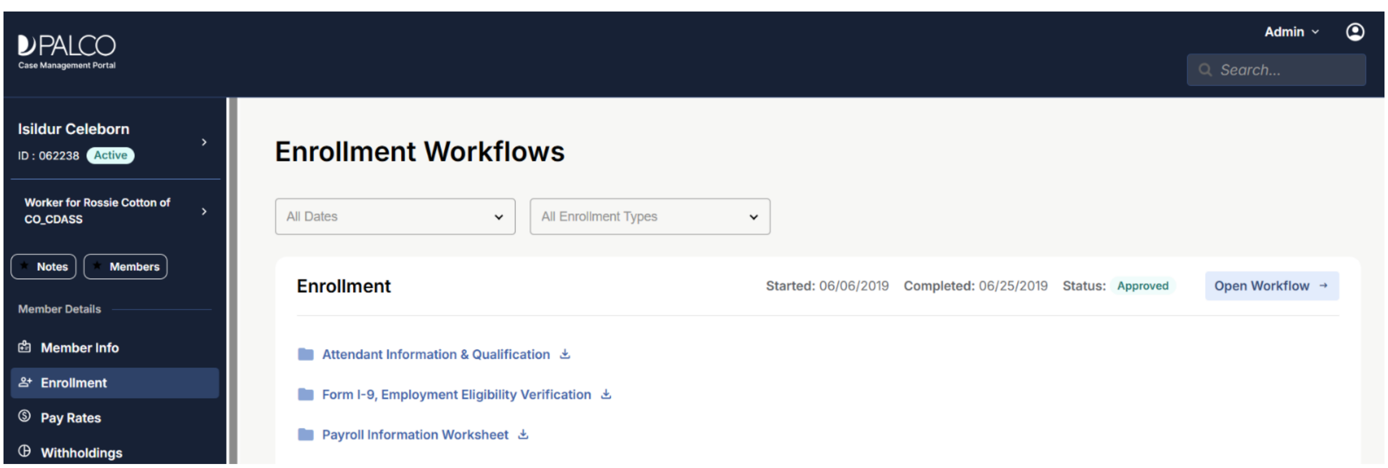
Member Info

The Member Info section will display valuable information such as the individuals name, demographics, contact information, external IDs, or Payment Information which is only viewable on the worker's profile.



Enrollment

To view the individual's enrollment status and details, visit the Enrollment tab. The status field on the far right will give you visibility on where they are at in the process.

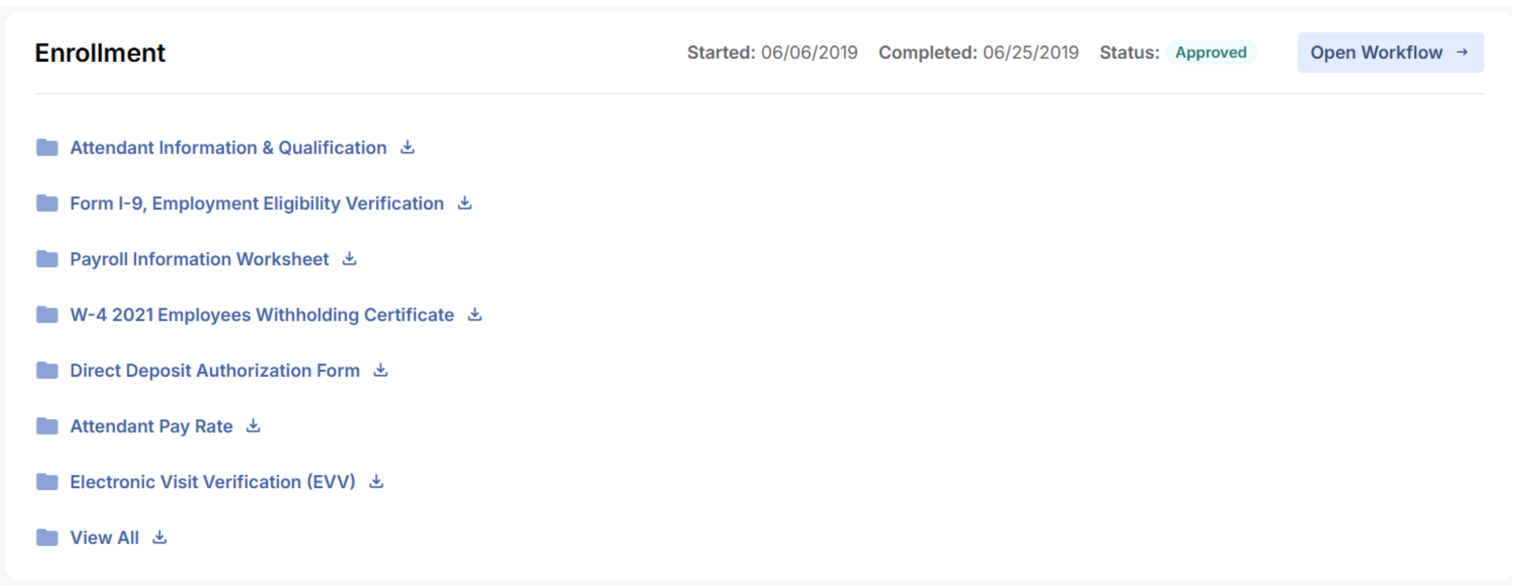


Status	Description
Initiated	The enrollment shell has been created, and demographic information is being updated for packet generation.
Opened	The packet has been sent to the enrollee either online or via a packet download and is awaiting their response.
Under Review	The enrollee has completed their forms online and they are being reviewed by a Palco enrollment specialist.
Approved	The enrollment is complete, and the good-to-go notification has been sent.
Needs Action	Forms and/or necessary information are missing from the submitted packet and outreach has been completed to inform the enrollee of what is needed.
Rejected	The enrollment was stopped due to a failed background check that deemed the worker as not eligible for hire.
Closed	The enrollment has been stopped and will not continue.

When the enrollment details are displayed, you will see the following:

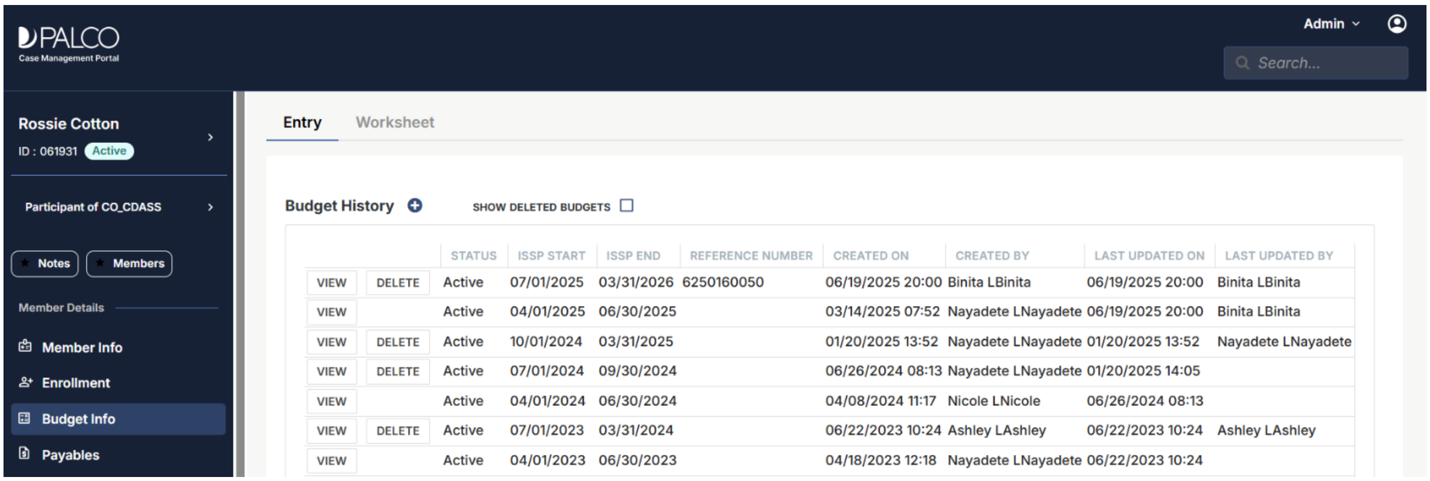
- Summary of completion for each section of the enrollment
- Form Summary (bottom)

To view an individual document, click on the arrow icon on the right and it will download.



Budget Info

An active approved Budget is required for every participant before services can be performed. In CMP, Budgets are entered on the participant profile, where they can be updated, reviewed, and revised as the Budget takes form. To view the current budget in the system for the Participant, navigate to the Budget Info tab and click “view” next to the budget you want to see more details on. Additional details like services authorized and budget amounts can be seen within the additional screens.



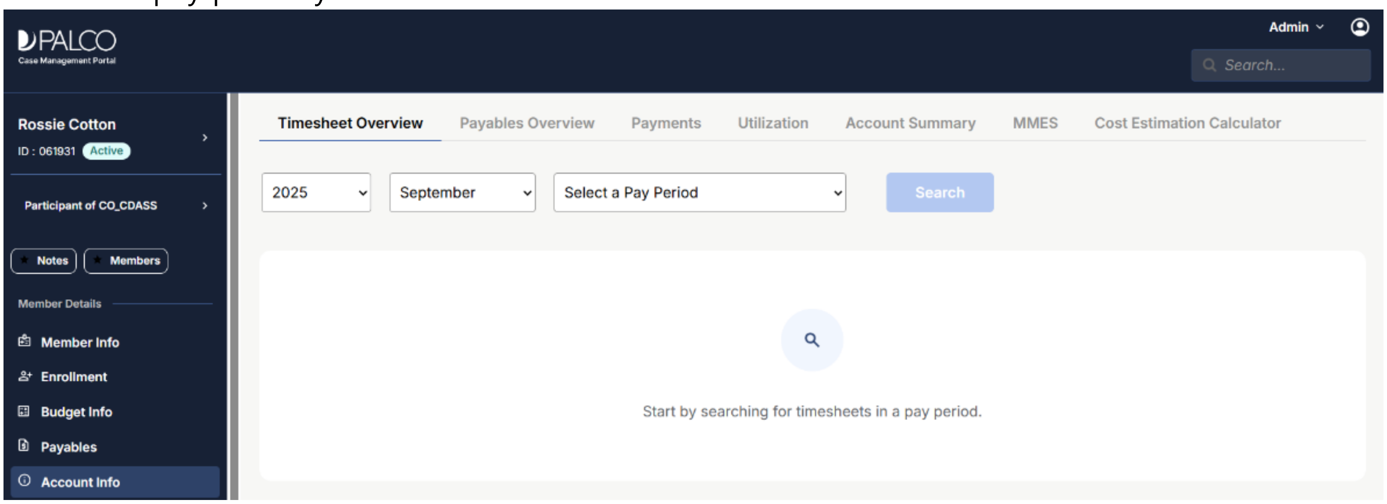
*Information specific to the Colorado CDASS program that details how to **enter** a budget in the Palco CMP system can be found in [Appendix A](#).*

Account Info

To view the timesheet and payable info and utilization information, this can be found in the Account Info tab.

Timesheet Overview:

1. Select the pay period you wish to see the timesheet



2. Once you have the pay period selected, you will be able to view more information about the timesheet. This includes the status, worker, employer, total hours, entry method, when the timesheet was created, who created the timesheet, and the reference number.

Timesheets For 2025-08-01

CURRENT STATUS	WORKER	EMPLOYER	TOTAL HOURS	CREATED	CREATOR	REFERENCE
Open	Isildur Celeborn	Rossie Cotton	0	08/18/2025 12:48	Isildur Celeborn	062238-2619CF

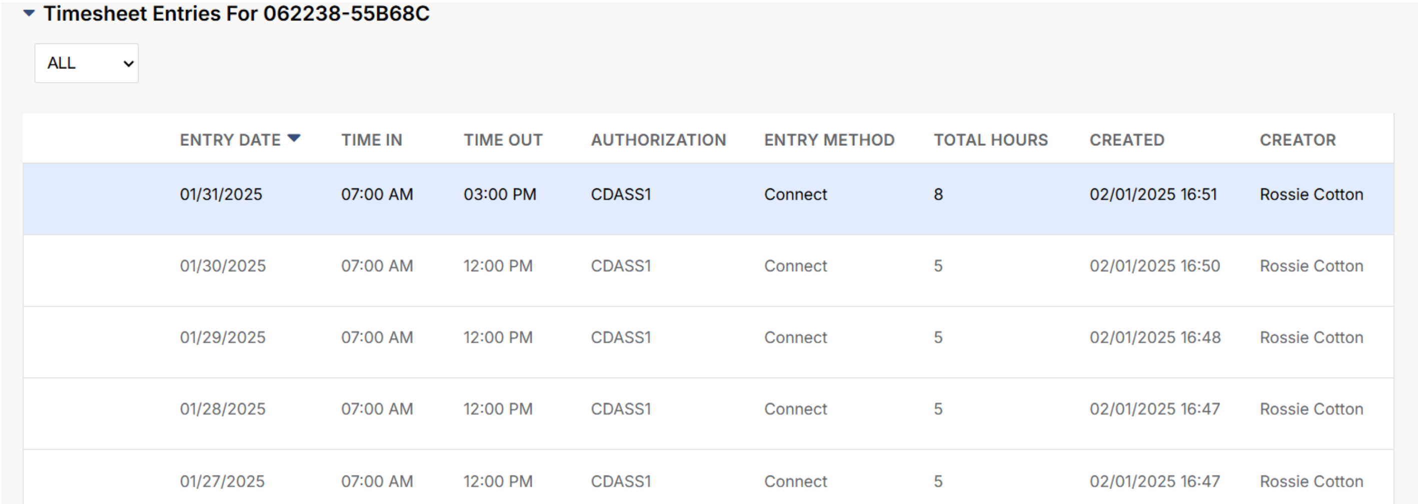
▸ **Timesheet Events For 062238-2619CF**

▸ **Timesheet Entries For 062238-2619CF**

3. To see more details about the timesheets, you can select Timesheet Events, which will show any events where the timesheet status changes.

	EVENT	CREATED	CREATOR
✓	Status Changed: Open	08/18/2025 12:48	Isildur Celeborn

4. To see individual entries for any time sheet, you can select Timesheet Entries, which will show specific shifts including the time in and time out and Authorizations, and Shift Notes for each shift.



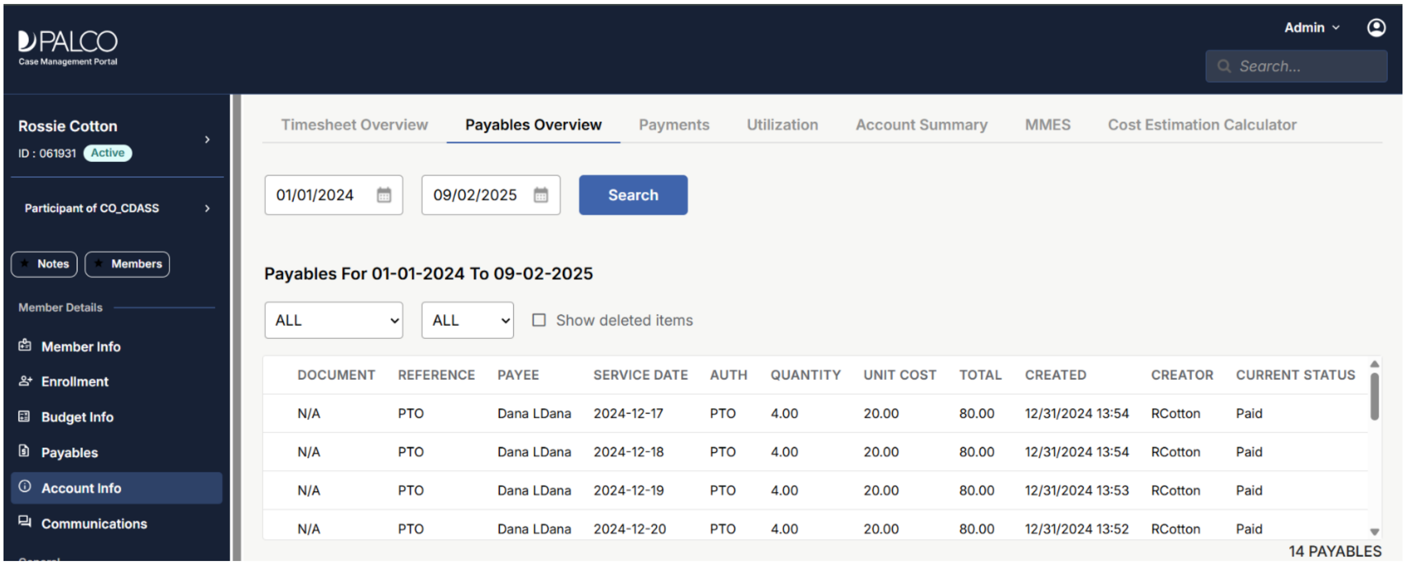
Timesheet Entries For 062238-55B68C

ALL

ENTRY DATE	TIME IN	TIME OUT	AUTHORIZATION	ENTRY METHOD	TOTAL HOURS	CREATED	CREATOR
01/31/2025	07:00 AM	03:00 PM	CDASS1	Connect	8	02/01/2025 16:51	Rossie Cotton
01/30/2025	07:00 AM	12:00 PM	CDASS1	Connect	5	02/01/2025 16:50	Rossie Cotton
01/29/2025	07:00 AM	12:00 PM	CDASS1	Connect	5	02/01/2025 16:48	Rossie Cotton
01/28/2025	07:00 AM	12:00 PM	CDASS1	Connect	5	02/01/2025 16:47	Rossie Cotton
01/27/2025	07:00 AM	12:00 PM	CDASS1	Connect	5	02/01/2025 16:47	Rossie Cotton

Payables Overview

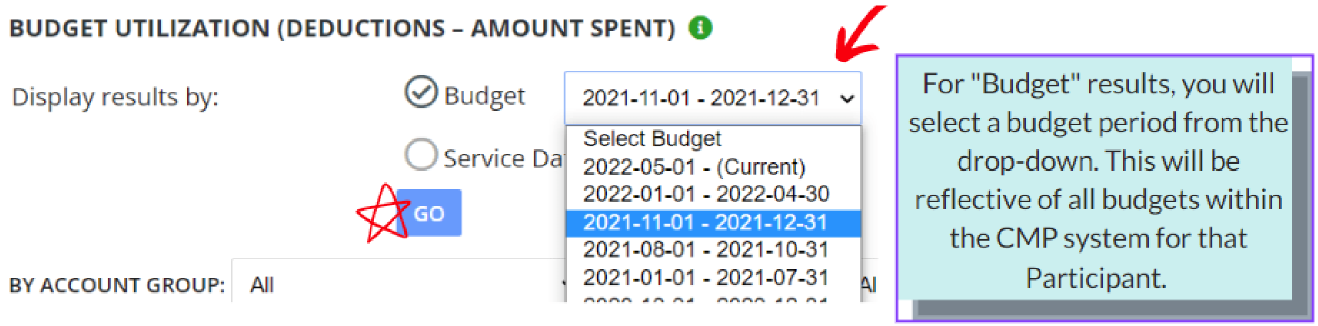
1. Select the date range you wish to see any vendor payments for and click search. You will see detailed information including the services or goods provided, current status, service dates, and total amount spent. In the results, under the Document column, the document can be viewed by selecting the “eye” icon, or by downloading. If a document was not attached, the column will list “N/A.”



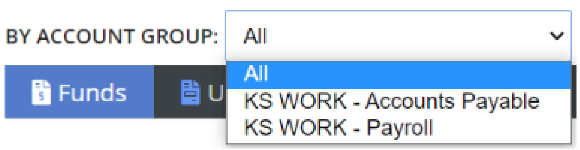
DOCUMENT	REFERENCE	PAYEE	SERVICE DATE	AUTH	QUANTITY	UNIT COST	TOTAL	CREATED	CREATOR	CURRENT STATUS
N/A	PTO	Dana LDana	2024-12-17	PTO	4.00	20.00	80.00	12/31/2024 13:54	RCotton	Paid
N/A	PTO	Dana LDana	2024-12-18	PTO	4.00	20.00	80.00	12/31/2024 13:54	RCotton	Paid
N/A	PTO	Dana LDana	2024-12-19	PTO	4.00	20.00	80.00	12/31/2024 13:53	RCotton	Paid
N/A	PTO	Dana LDana	2024-12-20	PTO	4.00	20.00	80.00	12/31/2024 13:52	RCotton	Paid

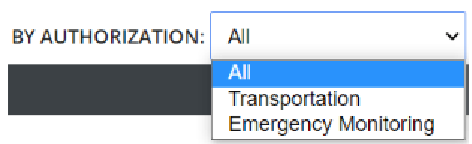
Utilization

1. To begin, select if you want to view the results for a specific budget period or a date span using service dates. Then choose the time frame you are wanting to see the utilization data for, and press "Go" to display the results.

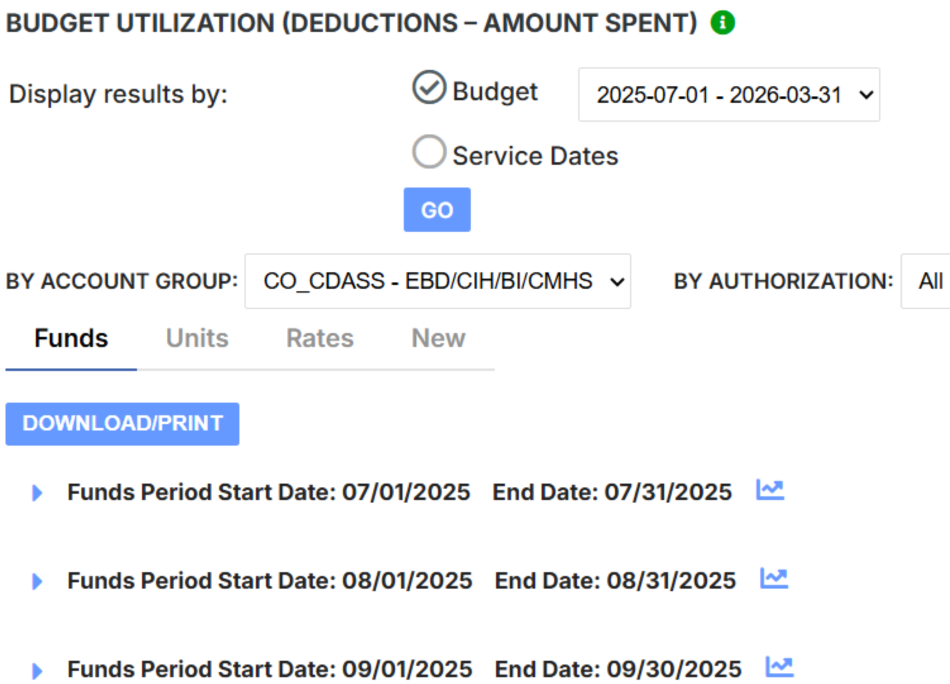


2. The displayed results can be filtered by the Account Group and then can be filtered down even more by selecting the Authorization.



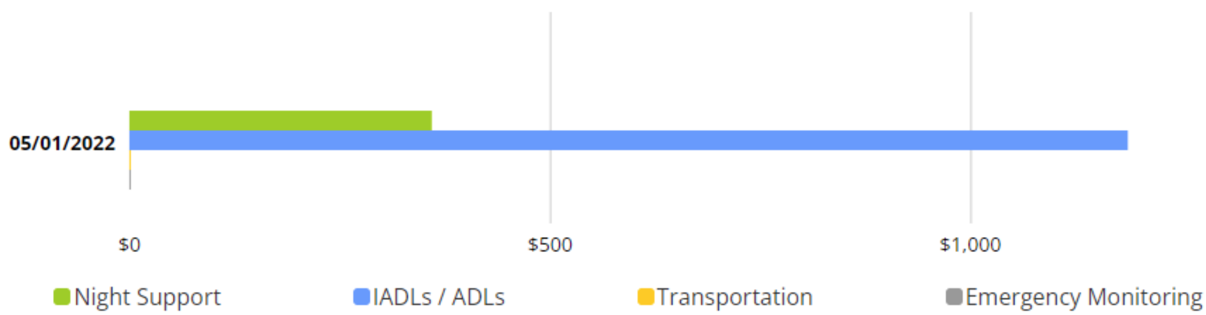


3. Once you have your parameters set up, you will be able to view Utilization. You have the option to view Funds, Units, and Rates for the budget period.



NOTE: You can click on DOWNLOAD/PRINT and this will download a PDF version of the Utilization Report, including a summary and a detailed report.

4. For each month, you can either expand the sections by clicking on the blue arrow on the left or to get a quick glance at the monthly utilization, you can click on the graph icon to the right



5. To see more details about spending related to individual services within a participant's budget, click on the blue arrow next to the Start Date.

Funds

Funds | Units | Rates | New

DOWNLOAD/PRINT

Funds Period Start Date: 07/01/2025 End Date: 07/31/2025

CO_CDASS - EBD/CIH/BI/CMHS	STARTING BALANCE:	6980.63
CDASS RATE 3		
CDASS RATE 1		
CDASS RATE 2		
	SUBTOTAL:	$-2938.38
	CURRENT BALANCE:	$4042.25
	UTILIZED:	42.09%

Units

Funds | Units | Rates | New

Units Period Start Date: 07/01/2025

CO_CDASS - EBD/CIH/BI/CMHS

CDASS RATE 3

CDASS RATE 1

SERVICE DATE	AMOUNT UTILIZED	REFERENCE
07/01/2025	-9.13	Payment
07/02/2025	-8.10	Payment
07/03/2025	-9.00	Payment
07/04/2025	-9.18	Payment
07/05/2025	-13.03	Payment

6. Each Account Group can also be expanded by clicking on the blue arrows next to them. When the monthly period details are displayed, it will show the following:
    a. Starting Balance
    b. Service Date
    c. Subtotal of the account group expenditures
    d. Current Balance - This is what the participant has remaining for the funds period selected
    e. Utilized percentage - This will show the percentage utilized for the funds period selected

NOTE: Current Balance and Utilized Percentage will change color depending on their remaining balance. It will be "green" if they have a positive balance and will turn "red" if they have a negative balance.

Rates (Budgets)

If you would like to see the different rates during specific budget periods, select the rates option. This will display all pay rates for each worker and the services that they provide.

Funds | Units | Rates | New

WORKER	AUTHORIZATION	PAY PERIOD	RATE
Dana	CDASS Rate 1	2025-07-01	20.5000
Isildur	CDASS Rate 3	2025-07-01	25.0000
Isildur	CDASS Rate 1	2025-07-01	25.0000
Rowan	CDASS Rate 1	2019-10-01	18.0000

Information specific to the Colorado CDASS program that details how to view Monthly Member Expenditure Statements (MMES) in the Palco CMP system can be found in Appendix B.

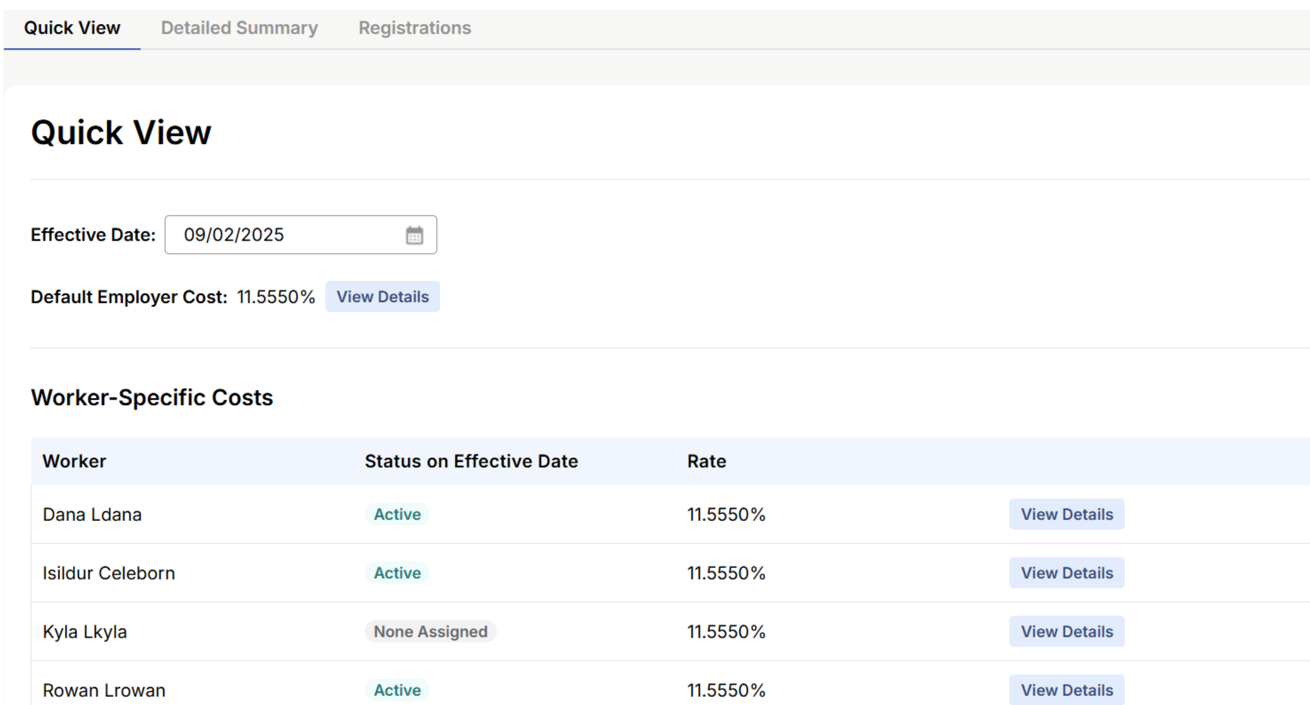
Employer Cost (Employer)

The Employer cost tab show the taxes and fees which are 'added on' whenever pay is issued for a worker. It can only be viewed from the employers' record within CMP. Information related to the employer-worker relationship which includes tax exemptions including FICA, FUTA, and SUTA rates is also viewed on this tab (example: spouse employed by a spouse is exempt from FICA, FUTA, and SUTA).

There are four standard kinds of employer taxes,

- FICA, which is Federal Income Tax
- FUTA, which is Federal Unemployment Tax
- SUTA, which is State Unemployment Tax
- WC, which is Workers Compensation (does not apply to all programs)

The Quick View tab displays a glance at the employer cost and any specific worker costs on a specific date.



The Detailed Summary tab shows a breakdown of the different taxes as well as a change history. For each you will see an effective rate %, an effective date, and the person who last made a change to it.

Quick View | **Detailed Summary** | Registrations

Current Rate Summary

Cost Type

Default

Tax/Cost Type	Effective Rate %	Effective Date	Editor
WC	0.9300	07/01/2025	
FICA	7.6500	01/01/2017	
FUTA	0.6000	01/01/2015	
PTO	1.1000	02/01/2025	
FML ★ Edit	0.0000	03/01/2025	
SUTA ★ Edit	1.2750	01/01/2025	BLBinita 12/27/2024
TOTAL	**11.5550%**		

Pay Rates (Worker)

The Pay Rates section in CMP is where Rates are entered for workers. Professional users may or may not have access to this tab dependent on their individual program configurations. Pay rates only applies to services which are entered on a timesheet or submitted via a time capture application (like electronic visit verification EVV). Pay Rates are created in CMP on a worker-by-employer basis. A current rate for each worker and the services they perform must be in the system for payment to process. For convenience, CMP splits employee pay rates into two different tabs, current rates and rate history.

The Current Rates tab shows the effective rate at the present time. Rate History shows all rates of pay, including current rates.

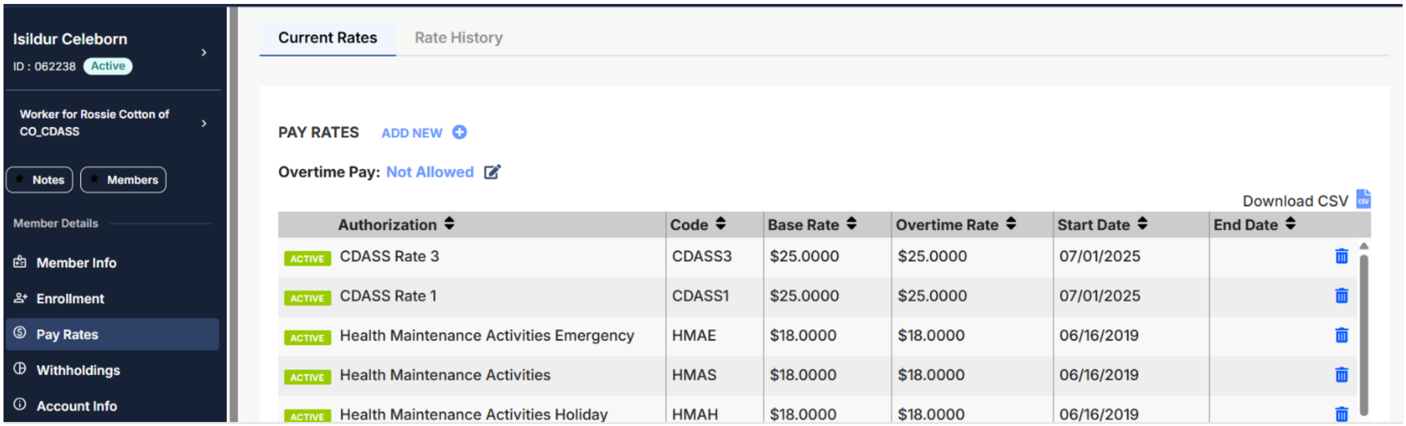
Each worker pay rate in CMP has the following information:

- The type of service and code
- The Rate and Overtime Rate
- The effective (start) date

- The end date for the rate

Within the Rate History tab, users also see:

- The user who entered the pay rate into CMP
- The date the rate was entered

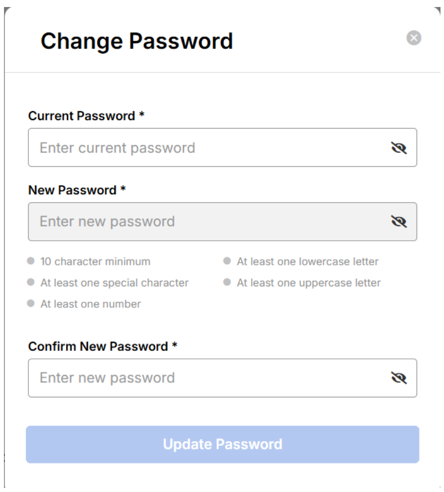


Support

Resetting your Password:

It is recommended that you reset your password immediately after your first login and then every 6 months after that. Follow the instructions below to reset.

1. Click on the person icon located in the top right corner of your screen once you have logged in.
2. Click on **"Profile"**
3. Under **"Account Information"** click edit and set your new password.



Contact Us:

Have any questions? We'd love to hear from you. Here's how to get in touch with us:

Our Customer Support team is ready to help and give you answers fast. Give us a call Monday through Friday between 8am & 5pm.

Phone: 1-866-710-0456

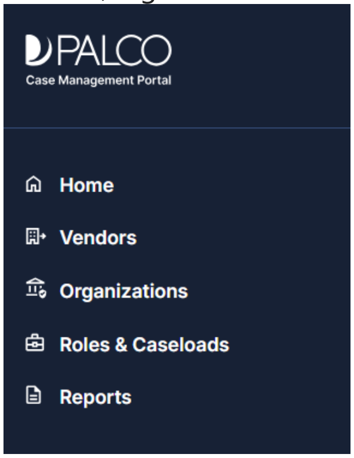
For more information about Palco, email us at, customersupport@palcofirst.com or visit our website: https://palcofirst.com/

Appendix A-CMP Reports

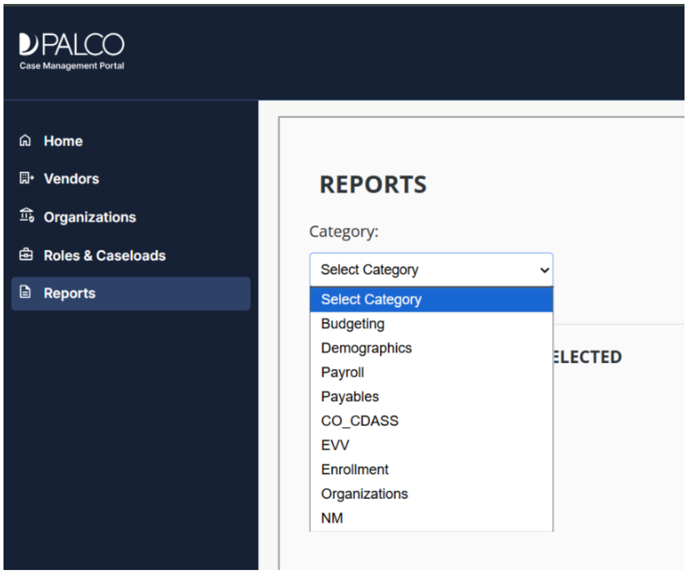
The Palco Case Management Portal (CMP) was designed to serve as the repository for all program participant-related data and program and Palco business rules. It also allows for several reports to be accessed from any screen in CMP. These reports are only available to those with certain permissions.

Running Reports

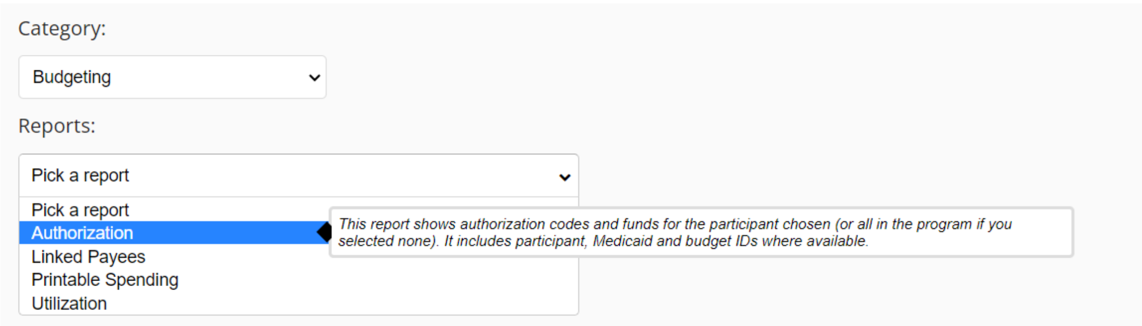
To start, log in to CMP and select "**Reports**" on the left-hand side.



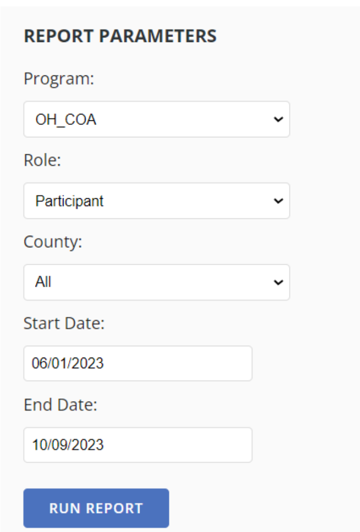
When selected, a drop-down box will appear with a list of categories. When a category is selected, a list of reports related to that category will be displayed. Each report will have different sets of data to input to acquire the desired results.



When you hover over the reports, a popover or tooltip will display giving a brief description of the report and the information it will deliver.

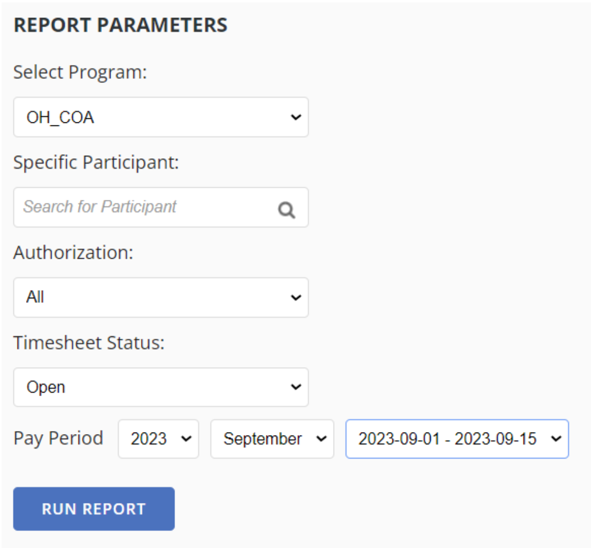


After you have selected the report you would like to run, enter the requested Report Parameters to help narrow your results and provide you with the most up to date and accurate information.



Example of an Active Enrollment Report

For example, when running the Active Enrollment report, you will need to choose the select Role for the set of data you would like- Participant, Employer or Employee. Other reports like the Timesheet Report will require you to choose the pay period and timesheet status you would like to see.



Example of the Timesheet Report

After the parameters have been entered, click "Run Report" on the right. The system will gather your report details and display them on the screen. Depending on the volume of data you're pulling, the results may display quickly or take a few minutes. If you are having issues getting results, check the parameters you have entered for accuracy.

After you have your results, you can view them on the screen, or you can export them to Excel. To export, click "Download CSV" and the report will be downloaded. Some reports will also be available to download as a PDF. This depends on the number of columns and results of the report. To export to PDF, click "Download PDF" when available.

List of Reports

Report Title	Description
Active Enrollments	The Active Enrollment report identifies CMP Members (Participant, Worker, or Employer of Record) active during the date range specified along with their current Case Status. Users enter a role and a date range to see Members active during that time.
Authorization Report	Authorizations in CMP are specific services and goods budget categories. The Authorization Report allows end users to pull both broad and refined lists of Authorizations from CMP. Congruent with the User's Role and scoped permissions, users may search for data across entire programs and with widely defined budget date time frames.
Budget ISSP Creation from PAR Report	This report is specific to the CO CDASS program and provides details from the external Case Manager budget worksheet which allows them to generate authorizations via the Palco system.
Employer Rate and Registration Report	The Employer Rate & Registration report lists Federal and State tax rates, unemployment insurance costs, and worker's compensation costs for Employers. These rates are applied to worker wages based on program, state, and federal requirements.
EVV Registration	The EVV Registration report provides a list of workers and details about the worker's EVV compliance. It shows if the worker is required to use EVV, and if so, how they submit their time. It is particularly useful in gauging overall compliance and narrowing down workers who are out of EVV compliance.
EVV Exemptions	The EVV Exemptions Report provides NM State Staff and MCOs with information on Participants who are EVV Exempt and when the exemptions expire.
Member Contact	The Member Contact report shows current contact information for Participants, Workers, or Employers of Record. Palco maintains physical and mailing addresses, email addresses, and phone numbers.

Member Statuses	Member Statuses produces a list of participants, employers of record, and workers with their Case Status as of the date selected by CMP End User. Member statuses help CMP users understand which Members are currently active, inactive, or pending. It shows how long a Case status has been in effect and helps CMP users review historical statuses.
Missing Timesheets	The Employee Missing Timecard report provides a list of active workers who did not submit a timecard for a specific pay period.
Nursing Facility Cost of Care Detail	Compares Budgetary information to Nursing Facility Cost of Care by member.
Nursing Facility Cost of Care Summary	Provides summary date of budgetary information for all members in relation to the Nursing Facility Cost of Care.
Participant Support	The Participant Support report lists all participants within a Program and their immediate support within that Program, be that a Case Manager, Support Broker, or other support role.
Payables Register	The Payables Register lists payments and reimbursements to Vendors for services and goods different than timesheet and timecard entries. It includes all payments within the service date range selected, including those in progress and rejected. The report includes Participant, Employer, and Payee IDs and Names, the service and cost, the Payable's present status, and additional reference information.
Payment Method	The Payment Method report identifies how Workers, Participants, and Employers are paid, if they receive paper checks or electronic deposits for funds sent to them. Account details are not displayed
Payroll Register	The Payroll Register report shows information about what was paid to workers on a given pay period, including deductions and exemptions and the payment method. CMP Users can specify a date range for inclusion, as well as limit results to a specific Participant or Worker. This report produces summarized pay information and calculates gross wages overall.
Payroll & Tax Info	The Payroll and Tax Info report displays rates, exemptions and other statuses that affect a worker's Payroll and Tax withholdings. The report includes factors affecting pay, such if the worker is exempt from Overtime pay and Difficulty of Care.

Start Date Report	The Start Date Report shows two types of Start Dates. It shows the original date that a Member (Participant, Employer, Worker) started in a Program, and it also shows a 'Restart' date, which is the most recent date the Member became active again. The Restart date is shown whenever a Participant, Employer, or Worker's profile has changed from Active to Inactive and back to Active.
Timesheet Report	The Timesheet Status report gives CMP users the ability to see the bigger picture and overall progress of timesheets within a Program. It also gives CMP users shift level specifics across a range of workers, employers, and participants. This report lets the user narrow down results listed by Timesheet status. In doing so, the user can isolate timesheets with concerns or that need action such as Worker or Employer review. If the timesheet failed, the reason for that failure is identified.
User Demographics	The User Demographics report shows essential and basic information about Participants, Employers of Records, and Workers. This report identifies the name, relevant IDs, current Case Status in CMP, gender, zip code, and date of birth of the Member listed. Workers on the list also show their relationship and shared dwelling status with participant.
Vendor Info Report	The Vendor Info report is a demographic report containing active, complete Vendors in CMP. Vendors are individuals and companies that produce an invoice or bill for payment, or where reimbursement is needed. Importantly, this report also lists the Vendor's tax ID.

Appendix B- Colorado Consumer Directed Attendant Support Services - Special Features for Case Managers (Budgets)

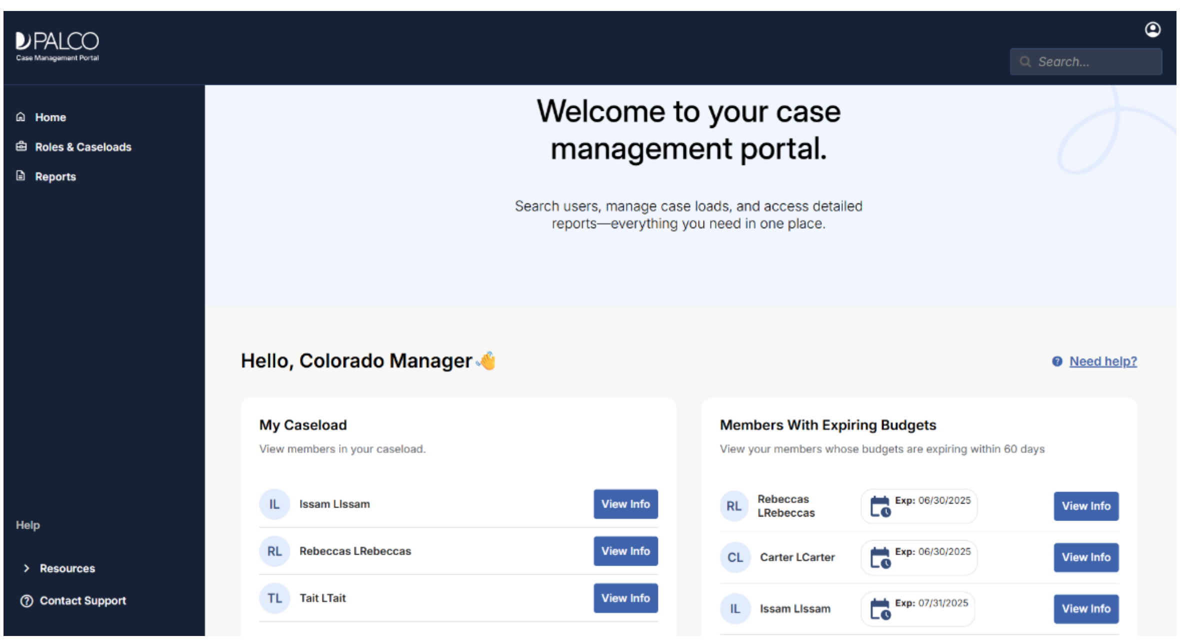
For the Colorado Consumer Directed Attendant Support Services (CDASS) program, Palco has several custom features in CMP that Case Managers and professional users should be aware of. This section provides detailed information on the transition to CFC, viewing current and historical information, viewing budgets, utilization, and details on the CO specific dashboard.

CMP Dashboard for Colorado

For case managers of the Colorado Consumer-Directed Attendant Support Services (CDASS) program, Palco has added a new dashboard to the home page in CMP.

Active Members dashboard will show the active members in the case manager's caseload. The "Info" button will direct the user to that specific member's profile in CMP.

Members with Expiring Budgets dashboard will list out the participants in the case manager's caseload whose budget is within 60 days of expiring. "Info" will jump-to that specific member's profile in CMP.



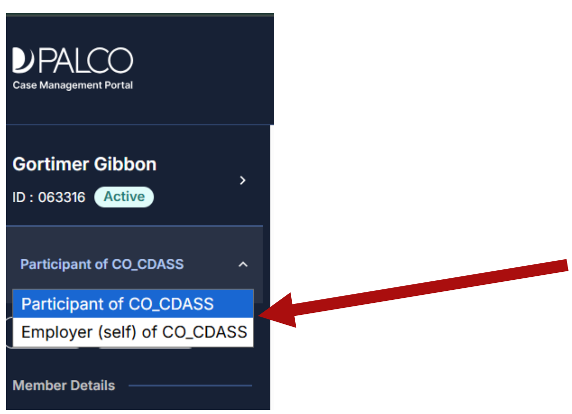
Community First Choice (CFC) July 2025

Community First Choice (CFC) is a Medicaid program that expands service and service delivery options for home and community-based services (HCBS) to Health First Colorado (Medicaid) members who need long-term care, including members who are currently on an HCBS waiver. CFC will be available in Colorado beginning July 1, 2025. All Palco members will be transitioned to CFC at the time of their Continued Stay Review. When this happens, Palco will show two different profiles for the member, differentiating the historical Consumer Directed Attendant Support Services (CDASS) and the new CFC services. This appendix is designed to help Case Managers navigate recent updates to the Case Management Portal (CMP) related to CDASS member budgets once CFC is implemented. With the removal of the PAR worksheet feature and the integration of budget data from the Bridge system, all budget-related information is now accessible through a new Budget Entry tab within CMP. This step-by-step resource will walk you through how to locate, review, and understand budget details.

Viewing Profiles/Toggling

Once the transition occurs and a new annual budget is established by the Case Manager, the profile in CMP will reflect two records for each participant. To see historical data including timesheets, spending and documents prior to the new budget start date, Case Managers should view the "CDASS" profile. Current service information will be visible under the CFC program distinction. From the Roles drop-down menu at the top of the screen, the case manager should select the member CFC item. CMP will default to the Member Info Tab. Click through each sub tab (Personal, Contact, Program) to get more details.

Below is an example of how this looks:

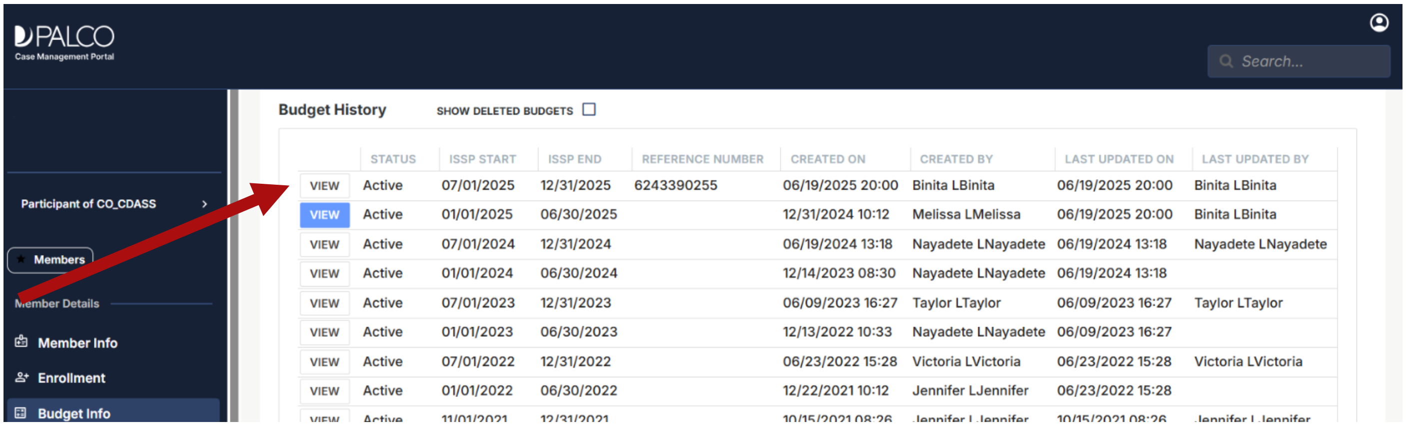


Viewing Budget Information

Within the CFC profile, the allocation worksheet that historically existed will no longer be visible or necessary. Instead, Case Managers will view the current authorization a member has on file with Palco by accessing the Budget Info Tab. Once on the Member's appropriate profile (CDASS vs CFC) follow these steps:

1. From the left sidebar menu, click on Budget Info.

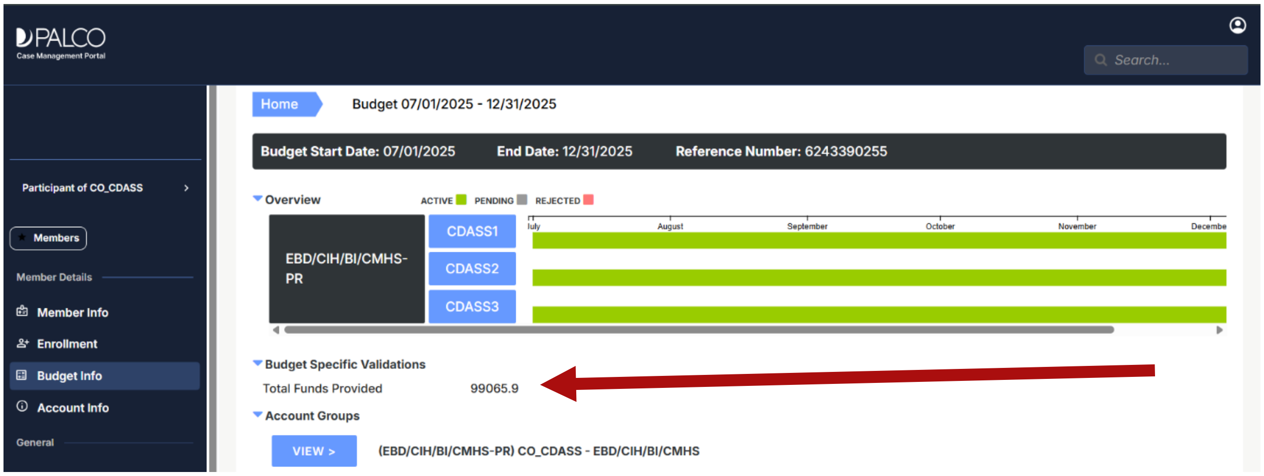
2. Locate the desired member's budget and click the View icon.



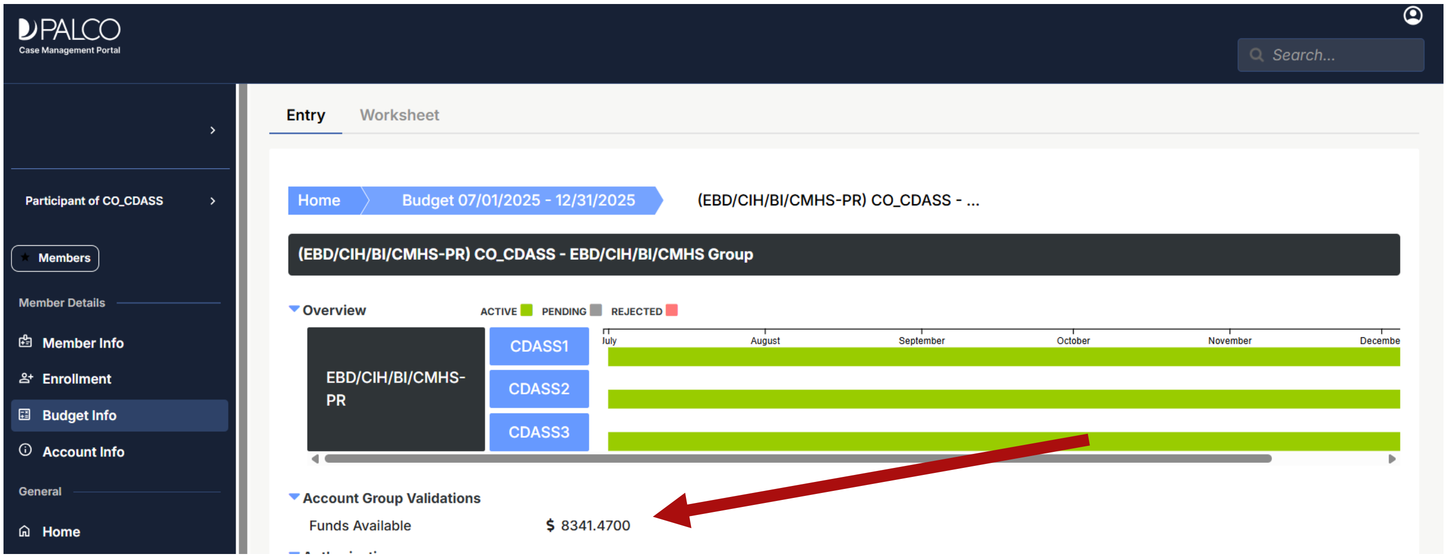
Tip: Remember, historical information before the members transition to CFC will be visible on the individual's' CDASS profile. Information on how to toggle to that record can be found earlier in this section.

Viewing the Annual and Monthly Allocation

1. Once the Budget opens, the approved Annual Allocation will be displayed next to "Total Funds Provided"



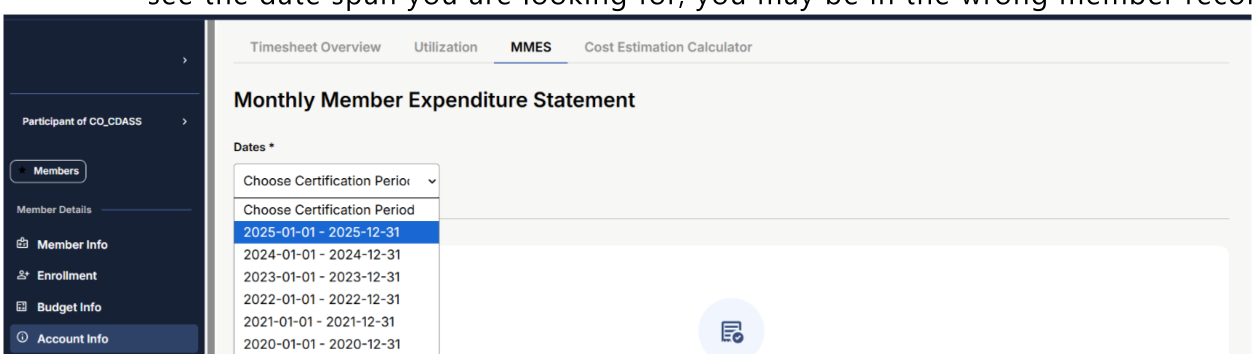
2. Click "View" under the Account Groups section to navigate to the Monthly Allocation Screen.
3. The next screen shows the member's Monthly Allocation amount.



Viewing the Monthly Member Expenditure Statement (MMES)

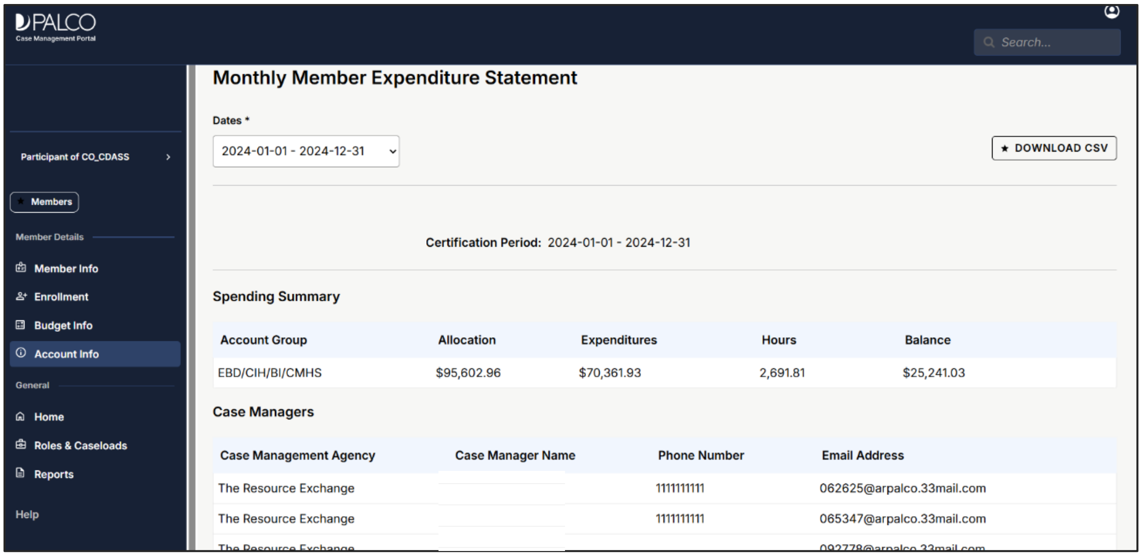
All budget and utilization information are also available in the MMES. For historical budgets, view the member's CDASS profile. Current information will be visible under the CFC profile.

1. To Access MMES:
    a. From the participant record, click the "Account Info" tab on the left sidebar.
    b. Select the appropriate allocation period from the drop-down menu. If you do not see the date span you are looking for, you may be in the wrong member record.



Reading Allocation Details in MMES

1. Under the Spending Summary, the Annual Allocation is labeled as "Allocation."
2. The Monthly Allocation is listed at the bottom of the MMES and becomes available on the 1st of each month. If you need to access future monthly allocation information, navigate to the Budget Info tab. The instructions are listed in the earlier sections.

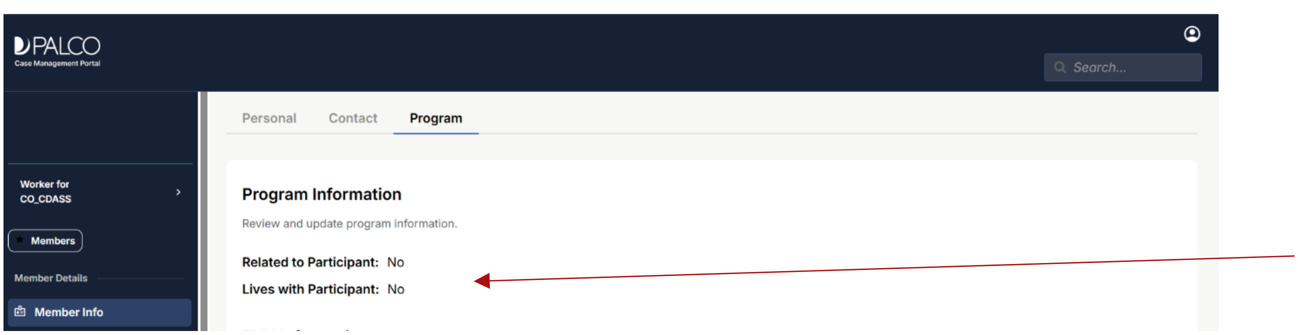


The MMES contains a variety of key information for monitoring utilization and compliance with the spending protocol. CDASS employers can also view the MMES details in Connect. For detailed information on each field of the MMES and its meaning, view the "**Colorado Consumer-Directed Attendant Support Services: Reviewing Spending in the Connect Portal"** resource located on the https://palcofirst.com/colorado/ webpage.

Legally Responsible Person (LRP) Relationship Status

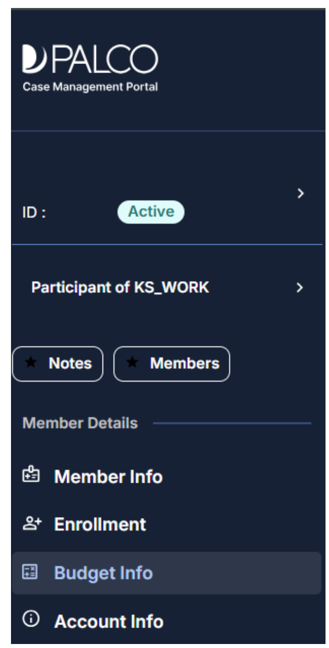
A legally responsible person is defined as any person who has the legal responsibility to care for another person such as the parent or guardian of a minor child or the member's spouse. CMP captures the worker's relationship to the participant during enrollment, and it can be seen by professional users under the worker profile.

1. To determine whether a worker is a Legally Responsible Person:
   a. Navigate to the **worker's** profile
   b. Click on the "Member Info" tab
   c. Click on the "Program" sub-tab and view the applicable LRP field.

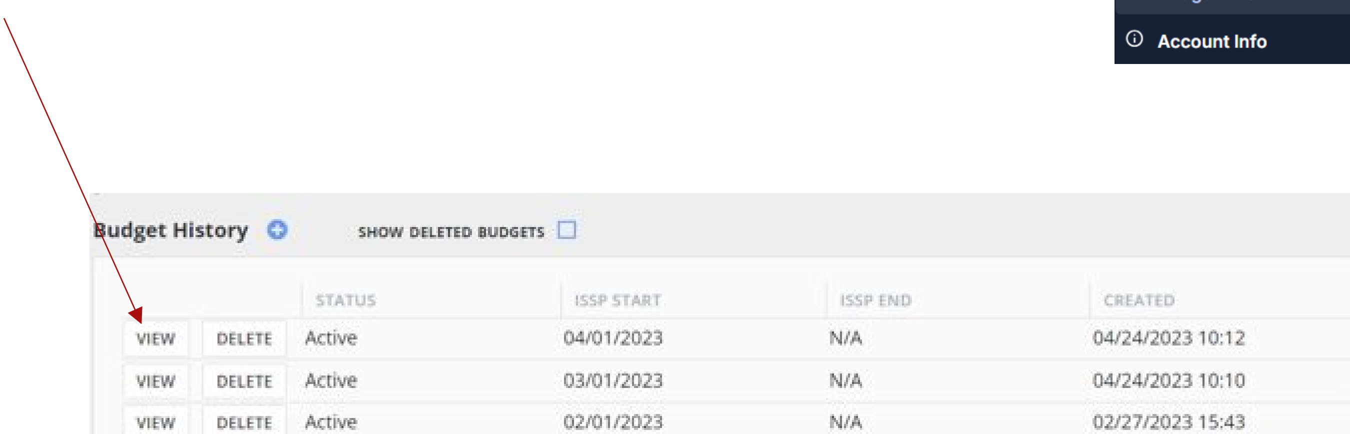


Appendix C- Kansas Viewing Carryover Fund Totals

For the Kansas WORK program members, monthly allocation funds not spent 45 days after the end of a pay period will be moved into a carryover account. At the end of each quarter, any amount above 15% of the discounted monthly allocation (1 month) will be refunded, (referred to as "swept") and returned to the MCO. Members may use carryover funds for specific purposes documented on the Individualized Budget ("Use of Carryover Funds") approved by the MCO. These funds can be viewed in both CMP for professional users and in Connect for Employers.

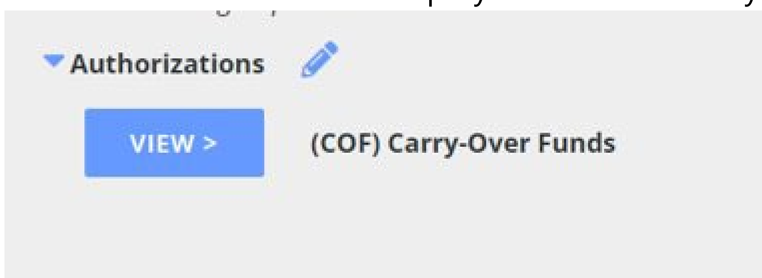


1. Locate your client using the Search feature.
2. Click on the **"Budget Info"** tab on the left side.
3. This will display the budget history. Select the most current budget by clicking **View** which will be located at the top of the page.



4. This will display a list of account groups. Choose KS WORK – Savings and click **View**.

5. In the KS WORK Savings account group, an authorization labeled **(COF) Carry-Over Funds** will appear**.** Click **View.** This will display the current Carry-Over Fund balance.



Appendix D– Idaho Budget Acronyms

When looking at budget info within CMP for Idaho, the account groups include Payroll Services or Vendor Services and then are split into service authorization categories.

Below is a list of the acronyms indicating the service authorizations used in creating Idaho budgets.

- PSS = Personal Support Services*+
- RSS = Relationship Support Services*+
- ESS = Emotional Support Services*+
- JSS = Job Support Services*+h
- TSS = Transportation Support Services*+
- LSS = Learning Support Services*+
- SNS = Skilled Nursing Support Services*+
- SBS = Support Broker Services+
- AEQ = Adaptive Equipment
- TSM = Transportation Support Mileage
- VENDOR – Vendor Authorizations

*Can also have a vendor authorization under the VENDOR code account group. For example, VENDOR – PSS: Vendor Personal Support Services

+Can have up to 3 rates. For example, PSS1: Personal Support Services Rate 1