

- → Welcome to Palco
- → Transition Enrollment Overview
- → EVV & Time Entry
- Electronic timesheet review and submission process
- → Palco Website / Resources
- Customer Support

TODAY'S TOPICS

2023



MISSION & CORE VALUES



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



PALCO



COMPANY HIGHLIGHTS

OVER 25 years of FMS experience

1ST
VF/EA in the country



Nationally-recognized thought leaders in self-direction

100%

Certified Public Accountant (CPA) and privately owned



Women owned and operated



Programs Served

1388

of Support Broker Experience \$580M

In total payroll and vendor payments administered

Arkansas



Est. 1999 Lives Served: 5,305

Colorado



Est. 2019 Lives Served: 3,787

Idaho



Est. 2023
Lives Served:
Currently
Enrolling

Kansas



Est. 2019 Lives Served: 386

Maine



Est. 2023
Lives Served:
Currently
Enrolling

Michigan



Est. 2024 Lives Served: 200

New Mexico



Est. 2020

Lives Served: 15,263

Nevada



Est. 2013 Lives Served: 1,044

Ohio



Est. 2022

Lives Served: 1,821

Pennsylvania



Est. 2018

Lives Served: 5,417

West Virginia



Est. 2024

Lives Served: 15,000







KEY DATES

Date	Activity	Important Notes
TBD	1st pay period with Palco begins	
ТВО	Timesheets due to PPL for dates of service TBD	Last PPL pay day is TBD
ТВО	Last day to submit late timesheets to PPL.	PPL will not process any timesheets after TBD so be sure you have submitted everything!
ТВО	First timesheets due to Palco for dates of service TBD.	Palco will process all timesheets going forward
ТВО	First pay day with Palco	For dates of service TBD



KEY TASKS TO COMPLETE!

Task #1:

✓ Attend one of our training sessions to get help with the switch to Palco. We want to make this change easy for you, and this training will teach you everything you need to know!

Task #2:

✓ Participants, Authorized Representatives, and Workers need to complete an online transition enrollment with Palco. Enrolling online is the fastest and easiest way to complete your enrollment with Palco! Check your email for a communication from Palco with instructions.

Task #3:

✓ Prepare to use EVV with Palco and know the key dates for when you will stop using PPL's system and start using Palco!

Task #4:

✓ Make sure all your time is submitted to PPL timely for payment before the switch to Palco.



Participant Enrollment Packet



Personal Preference Program Participant Enrollment Packet

Thank you for choosing Palco to direct your care. This packet contains all the forms you need to enroll as a Participant/Authorized Representative in self-direction and begin paying your worker. Please make sure to follow all directions in this packet.

You must complete and return:

	Participant Referral & Intake	☐ M-5008-R Appointment of Taxpayer Rep
	Participant Statement of Responsibilities & Attestation	☐ IRS Form SS4
	Personal Preference Program	☐ IRS Form 2678
	Consent Form	☐ IRS Form 8821
	Duplication of Services	□ IK3 FOITH 6021
	Participant Authorized	☐ Criminal Background
	Representative Designation Form	Check Selection
П	Participant Authorized	
_	Representative Removal Form	

Failure to return these forms will delay enrollment. We encourage you to use the checklist above as a final review before you return the forms to Palco. The other documents, including information on how to complete forms, the payment schedule, Palco's Notice of Privacy Practices, F.A.Q. and similar instructional forms, are for informational purposes only and do not need to be returned to Palco. Send completed paper forms by fax, email, or mail to Palco at the address below.

Toll Free: 877-710-0457 Fax: 1-877-859-8757 Email: enrollNJ@palcofirst.com

> Palco, Inc. Attn: Enrollment P.O. Box 13260 Maumelle, AR 72113

Visit our website to download an intake form or contact customer support to get connected to an enrollment specialist. You must complete a consent form before receiving an email with your login instructions. Follow the instructions in that email to complete your enrollment.

Worker Employment Packet



Personal Preference Program Worker Employment Packet

Welcome to self-direction and to Palco! This packet contains all the forms you need to enroll as a Worker and begin providing services to your participant. Please follow all directions in this packet. You will not be paid for services until all forms are completed, Palco verifies all information, criminal checks, and clears you for hire, and you are notified that you are ready to provide service. You must complete and return:

Worker Intake Form	 NJ W-4 State Withholding Form
Worker Information & Qualification Form	☐ IRS Form W-4
US CIS Form I-9	
New Jersey Worker Pay Rate Information	□ EVV Consent Form OR EVV Live-in
	Exemption

We encourage you to use the checklist above as a final review before you return the forms to Palco. Failure to return these forms will delay enrollment. The other documents, including information on how to complete forms, the payment schedule, Palco's Notice of Privacy Practices, F.A.Q. and similar instructional forms, are for informational purposes only and do not need to be returned to Palco. Send completed paper forms by fax, email, or mail to Palco at the address below.

Toll Free: 1-877-710-0457
Fax: 877-859-8757
Email: enrollNJ@palcofirst.com
Palco, Inc.
Attn: Enrollment
P.O. Box 13260
Maumelle, AR 72113



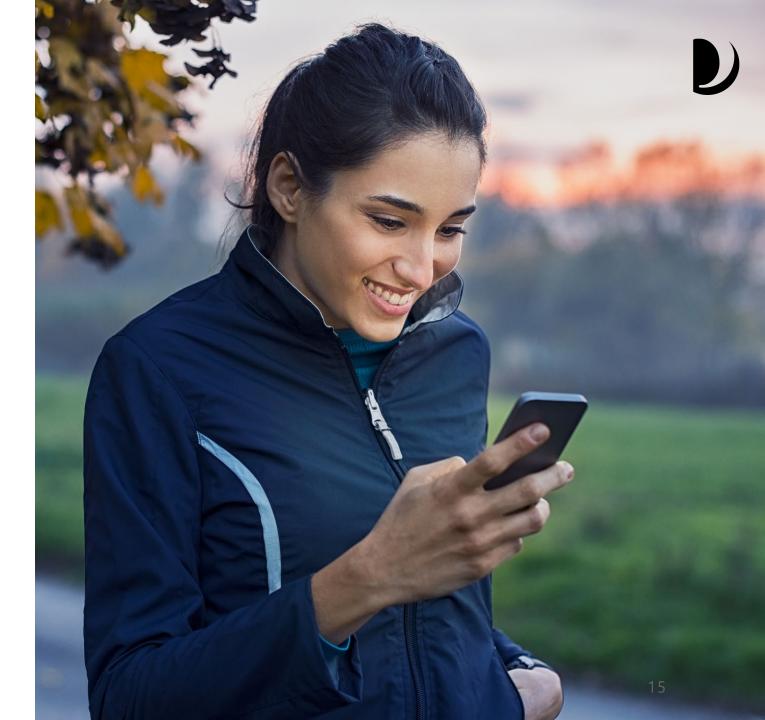
WHAT IS EVV?

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

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

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

Electronic Visit Verification (EVV) is a Federal Mandate! Compliance is required.





GETTING STARTED

TO SUBMIT TIME TO PALCO, YOU WILL NEED A MOBILE DEVICE THAT CAN CONNECT TO THE INTERNET, SUCH AS A PHONE OR TABLET. YOU CAN ALSO INSTALL THE APPLICATION ON YOUR LAPTOP OR DESKTOP COMPUTER USING A WEB BROWSER. FOLLOW THESE STEPS TO ACCESS PALCO'S EVV APPLICATION.

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

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

Step 2. Go to connect.palcofirst.com

Step 3. Sign in to Connect

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

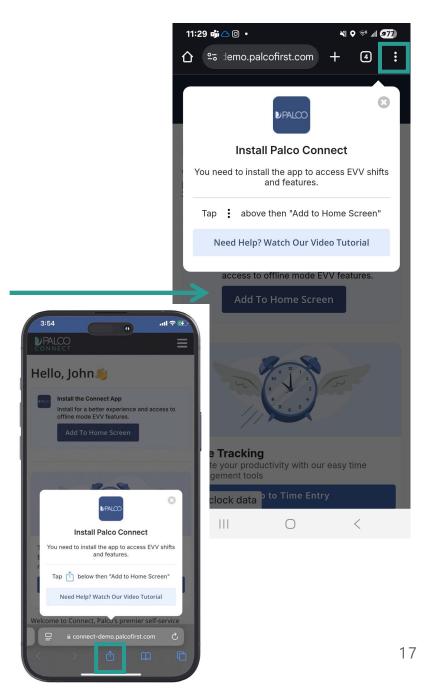


Step 4. Click the blue "Add to Home Screen" button

On the Connect home screen, click the blue button that says "Add to Home Screen".

Step 5. Tap the icon for iPhone or the icon for Android.

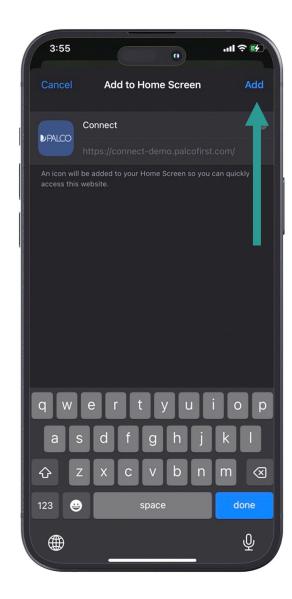
Following the on-screen instructions, tap the icon. Then, tap "Add to Home Screen" within the on-screen menu.





Step 6. Review and Confirm

By default, the Palco application shortcut will be added to your device with the name Connect. You can choose to change this name, or leave it as is. Then, click Add.





Step 7. Begin using the Application

Go to the home screen of your device. Then, tap the new Palco EVV app icon to start using it.

Note: When you open the app for the first time, you may be asked to log in to Connect again.

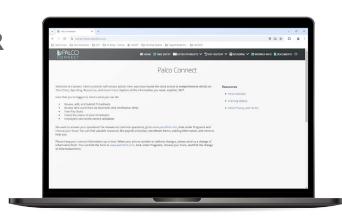




GETTING STARTED

FOLLOW THESE STEPS TO INSTALL PALCO'S EVV APPLICATION ON A LAPTOP OR DESKTOP COMPUTER USING A WEB BROWSER

Step 1. Open the browser on your internet-connected device You can use a laptop or desktop.



Step 2. Go to connect.palcofirst.com

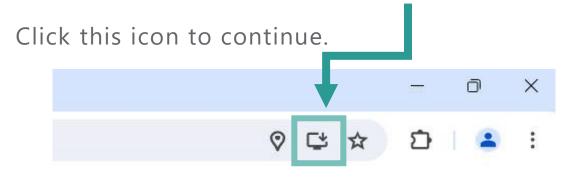
Step 3. Sign in to Connect

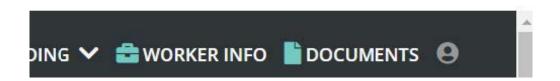
If you do not already have a Connect account, you will need to create one. Use the **Register Now** button to create an account. Come back to this step once that is done.

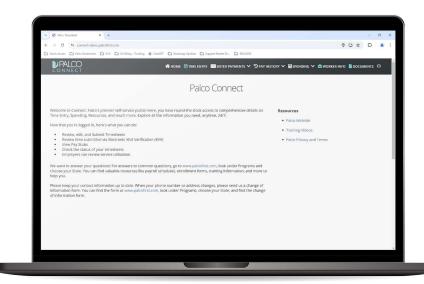


Step 4. Click the Install Icon

On the right side of the address bar will be an icon. Hovering over it says "Install Palco Connect."



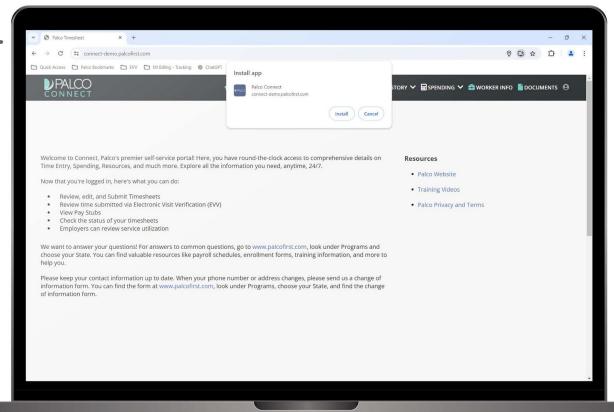






Step 5. Select "Install" in the pop-up window.

Note: Depending on the web browser you are using, your screen may look slightly different than what is shown.





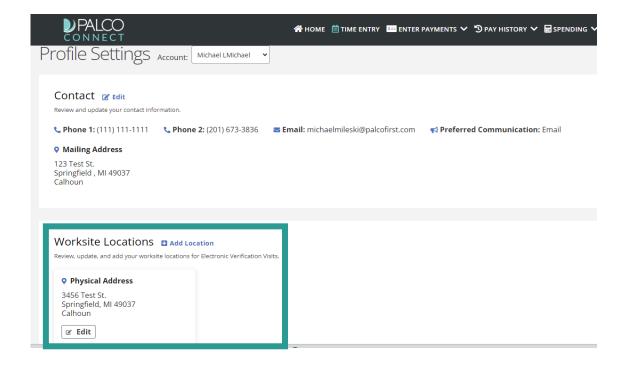


One of the most important parts of EVV is location reporting. The participant needs to add worksite locations to their profile.

Step 1

Go to the Profile Settings Page and Click Add Location

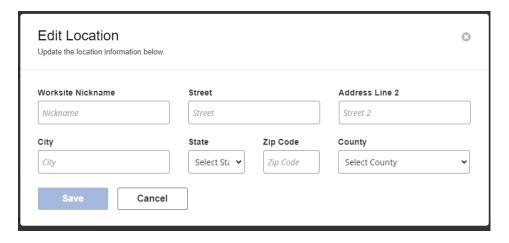
It is in the Worksite Locations section, which is below the Contact section.





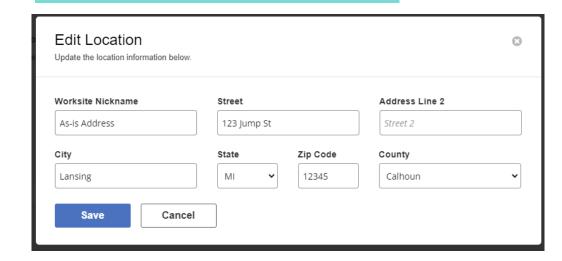
Step 2. Input the Location Information

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



Step 3. Verify Information is Correct Then Click Save

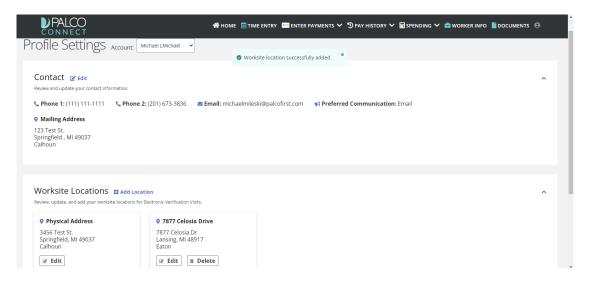
The system will make sure the address is valid. If it is not recognized, you will be alerted.





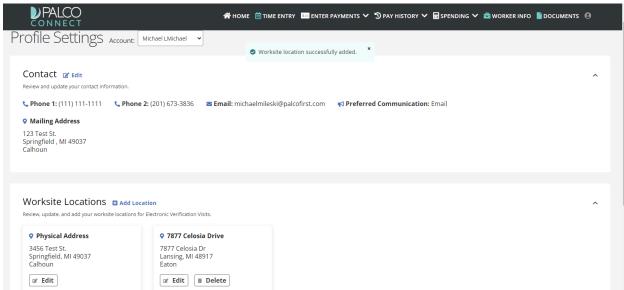
Step 4. Make Sure the New Location Appears

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



Step 5. To Make Changes to Existing Locations, Use Edit and Delete

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



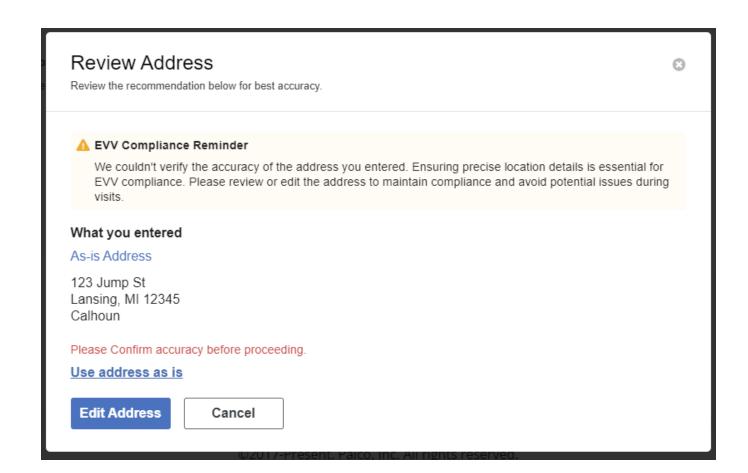


Step 6. Review the Address for Accuracy

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

Step 7. Decide to Use As-Is or Edit Address

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



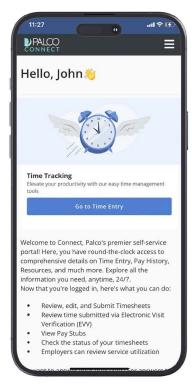


WORKER CLOCK IN



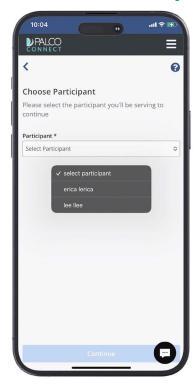
In this section, we will go over how to start an EVV-compliant time entry. Once logged into Connect, follow these steps.

Step 1. Click on Go to Time Entry



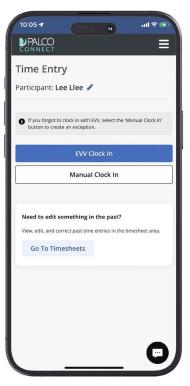
This blue button is on the home screen.

Step 2. Select a Participant



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

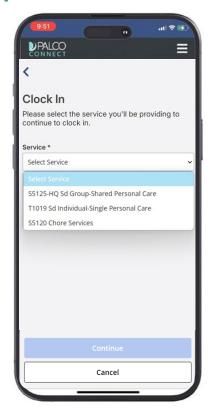
Step 3. Choose EVV Clock In



WORKER CLOCK IN

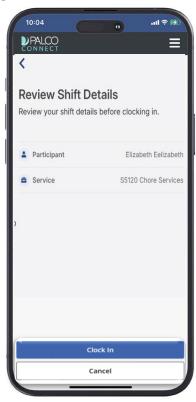


Step 4. Select a Service to Provide



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

Step 5. Review Shift Details



Double-check that everything is right before submitting.

Step 6. Clock In for the Shift



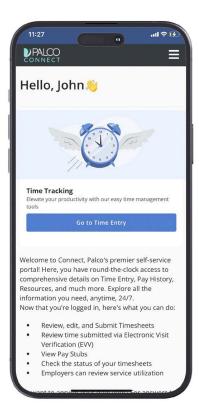
You are now on the clock for this shift.

WORKER CLOCK OUT



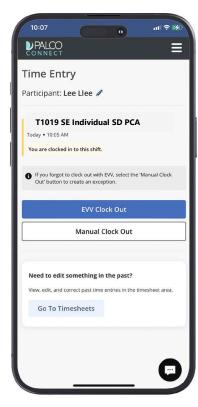
The clock out process is very similar to clocking in. Please, do not clock out until you are finished working the shift.

Step 1. Click on Go to Time Entry



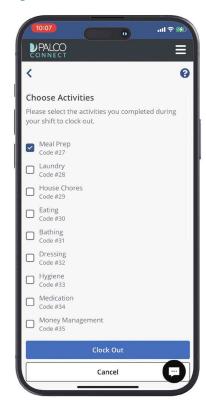
This blue button is on the home screen.

Step 2. Choose EVV Clock Out



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

Step 3. Select Activities

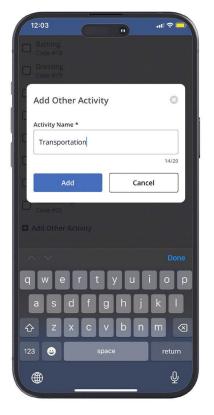


Use the check boxes to select all activities that were performed during the shift.

WORKER CLOCK OUT

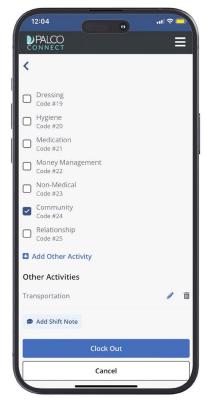


Step 4. Add Manual Activities



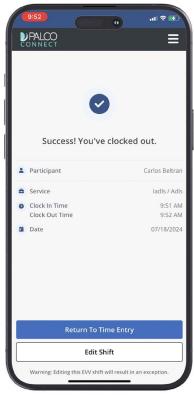
If needed, you can manually add an activity.

Step 5. Review Shift Details and Clock Out



Double-check all details before tapping clock out.

Step 6. Review Confirmation



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

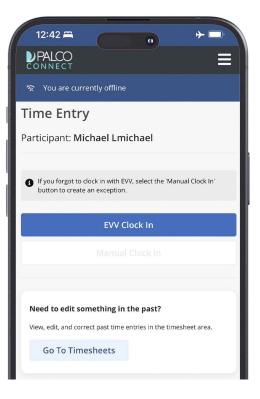




If you are without internet access, you can still clock in and out for shifts. You will follow all the same steps as before. The difference is that you will be in offline mode. Once your internet service is restored, your offline shift data will be synced automatically.

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





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

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

SHIFT EXCEPTIONS



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

WORKERS:

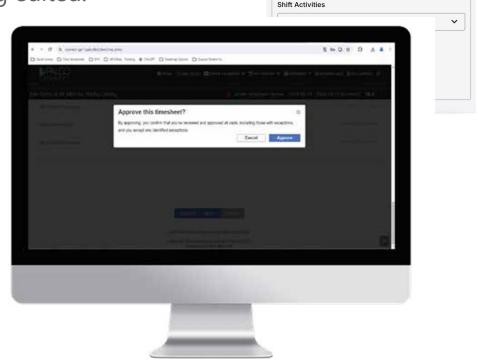
If you need to edit a shift, you will be asked for the exception reason. Please choose the reason that best explains why the entry is being edited.

PARTICIPANT/AUTHORIZED REPRESENTATIVE:

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

Please Note:

Edits should be limited and will be monitored. EVV compliance is a requirement for the PPP Program.



4:18

DPALCO CONNECT

Start Time

Time Entry for: Monday 2025-Jul-28

≎ : 00

T1019 SE Individual SD PCA

Exception Reason *

SHIFT EXCEPTIONS







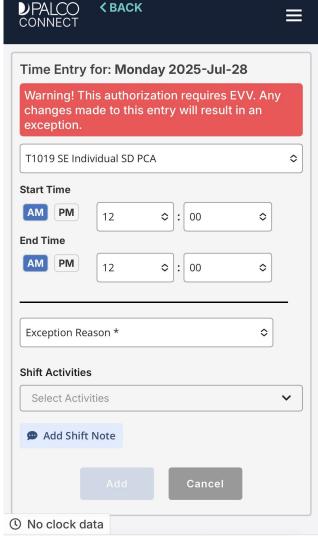
I'm a worker. How do I avoid shift exceptions?

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





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





INTERACTIVE VOICE RESPONSE (IVR)

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



Step 1: To use Interactive Voice Response, call **888-788-8270** using a touchtone phone.



Step 2: Use the keypad to enter the worker's Palco ID, then hit # (the pound key).



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



Step 4: Select the time zone.



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

INTERACTIVE VOICE RESPONSE (IVR) CLOCKING IN/OUT





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

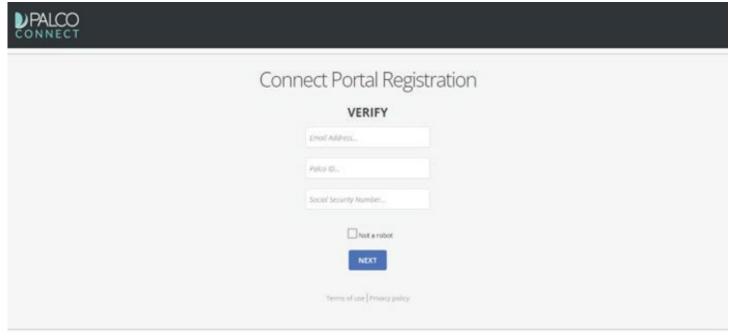
Clocking out: Key in the appropriate activity code, then press # (the pound key) or skip. You will be asked to confirm your selection.

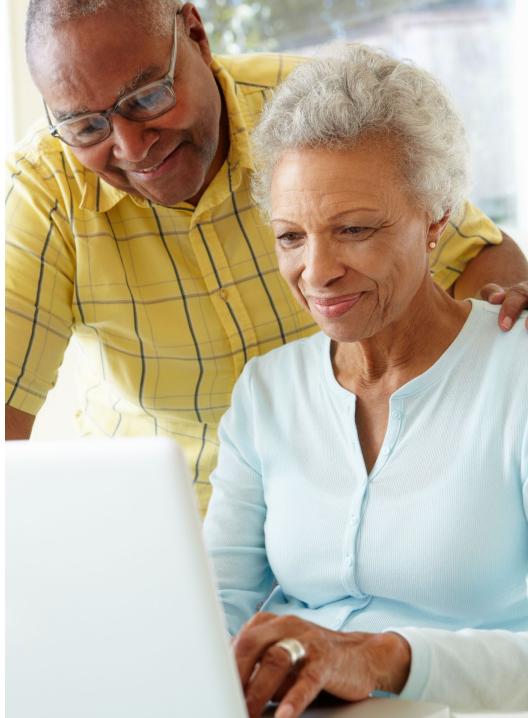


CONNECT

Connect is Palco's online timesheet portal for Participants and Workers. Connect provides everything a self-directing Participant or Worker may need, right at their fingertips!

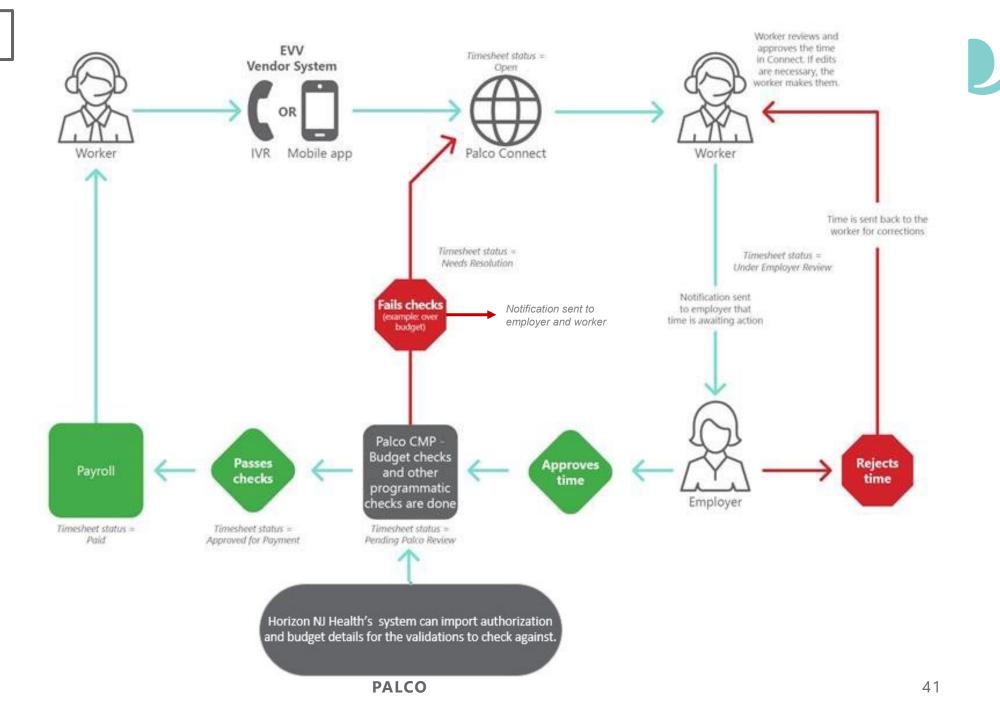
Accessible 24/7, some features of Connect include the ability to enter time, integration with Electronic Visit Verification (EVV), the ability to track and monitor spending, to update personal contact information, and access W-2s and paystubs.





CONNECT

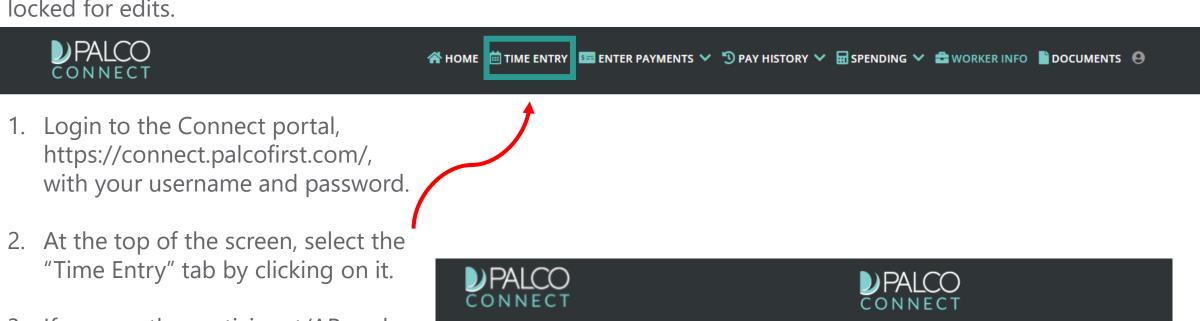
Here is how the process works:



APPROVING TIME



Every timesheet requires two approvals - one by the worker and one by the participant/AR. The timesheet will be automatically created once EVV shifts are recorded for the pay period and in a status open for the worker to review and submit to their participant. When the timesheet is pending for participant/AR review, it will be locked for edits.



3. If you are the participant/AR and have more than one worker, or if you are the worker for more than one participant, select the worker or participant for whom services were provided.

DPALCO	PALCO
SELECT A WORKER Current Status Active	SELECT A PARTICIPANT
April LApril	Rachel Green
Liliana LLiliana	Jill Green

APPROVING TIME



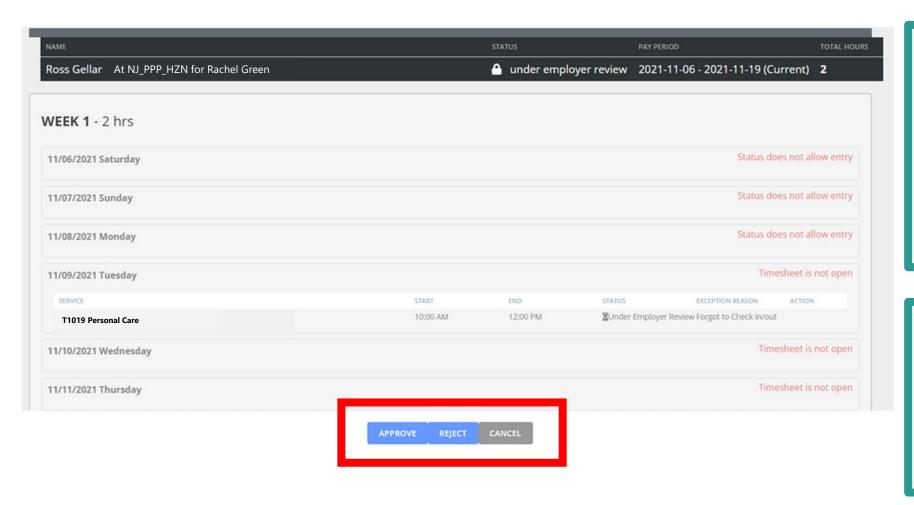
4. Select the pay period from either the center of the page or the dropdown at the top right of the screen.



APPROVING TIME



5. Review the information and determine if the timesheet should be "approved" or "rejected" for corrections.



Approve:

Selecting "Approve" confirms that all shifts are accurate and complete. As the Participant / AR, you are responsible for reviewing the schedule. Once approved, the timesheet will be submitted to Palco for payment processing and validation.

Reject:

Selecting "Reject" sends the timesheet back to the worker for corrections. Only reject if it's incorrect and ensure timely updates to avoid missing payroll deadlines.

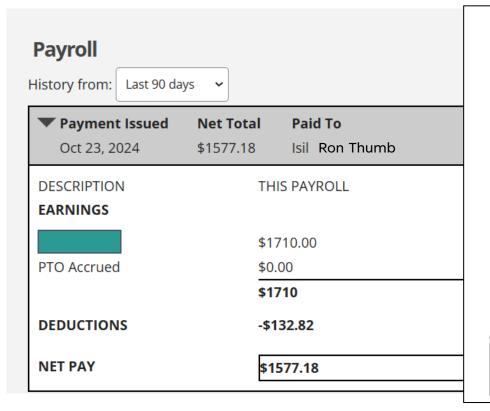
Timesheet Status

Status	Description
Open	A timesheet has been started by the participant or worker and is being edited. Only the person who started the timesheet can edit.
Under Employer Review	Time has been submitted to the participant for approval.
Needs Resolution	The participant has rejected the time and sent it back to the worker for correction. Changes can be made to the time at this stage.
Under Palco Review	Time has been approved and submitted by the participant to Palco. Palco is performing validations on the time to ensure it is payable.
Approved for Payment	Time has passed all Palco checks and validations. It is going through the final step of billing before it can be paid.
Paid	The timesheet is closed and paid.
Rejected	Palco rejected the timesheet for the reason listed in the portal. No changes can be made. To correct, a new timesheet must be started via Connect and will be recorded as an edited timesheet facing the same warnings as listed above.



CONNECT- PAY STUBS

Payment Detail provides both the participant/AR and worker access to pay stub information and history.





Direct Deposit Advice

Ron Thumb 123 Lilliput Lane Tallahassee, FL 32301

Employer	Thumb, Tom				
Employee ID	Employee Name	SSN	Payroll Date	Direct Deposit #	Amount
060480-290956	Thumb, Ron	6086	10/23/2024	151823	\$ 379.70



New Jersey Sick Time

- Sick Time must be submitted within 30 days
- → Sick Time can be requested on "Sick Time Request Form"
 OR
 submitted via Connect.
- Sick Time can be rolled over from previous calendar year, up to 40 hours.
- Sick Time is submitted by the Participant.



PO Box 13260 Maumelle, AR 72113

NJ Paid Sick Time Request Form

Instructions: Workers should use this form to ask their Employer for sick time. Once the request is approved, Employers need to enter it into the Palco portal for payment. If the employer is exempt from Electronic Visit Verification (EVV) and does not use Connect, a paper form can be submitted. You can find instructions for how to enter requests on the New Jersey webpage. Workers can check your sick time balance on their paystubs in Connect. For every 30 hours you work, worker can earn 1 hour of sick time. Requests must be within 30 days of the leave.

Worker Name:	Worker Palco ID:				
Participant Name:	Participant Palco ID:				
The rate at which workers get paid for sick time is calculated by using the worker's regular pay					
rate in Palco Connect. This follows the rules set by the Ne	w Jersey Department of Labor.				

Instructions: In the section below, write down the dates and total hours the worker was scheduled to work during the time they're asking for sick leave.

	Service Period:				/							_				
Day of Month																
# of Work Hours																
Total Sick Time Hours Requested							sted									

By signing this form, I, the worker, confirm that:

- . The information on this form is correct about my job and sick time request.
- The sick time I'm asking for is for reasons allowed by the Healthy Families and Workplaces Act.
- . I will let my employer know right away if there are any changes to my sick time request.
- I understand that once my sick time is verified, it will be paid on the next regular payday.

By signing this form, I, the employer, attest that:

- The information on this form is correct about my workers job and their sick time request.
- I understand it's my job to keep track of the workers leave requests and let Palco know if there are any changes.
- I know that giving false information on this form could lead to penalties, criminal charges, or termination from the Personal Preference Program.

Sick Time Request Form-092024



PO Box 13260 Maumelle, AR 72113

Worker Signature:	Date:
Participant Signature:	Date:

Employers should keep a copy of this form in the worker's employment file. If you are exempt from EVV/Connect, please send this form to Palco by email at timesheets@palcofirst.com or by fax to 1.877.859.8757 for processing and payment.

Sick Time Request Form-092024



Types of Authorized Representative:

Voluntary- Participant may choose to appoint an AR for various reasons

Predetermined- Participant has a predetermined representative such as legal guardian or court appointed

Mandatory – Participant has misused the budget or is unable to manage the program. Minor children as well.



PO Box 13260 Maumelle, AR 72113

Participant Authorized Representative Designation Form

Complete this form entirely to designate an authorized representative. A representative may be a participant's legal guardian, a family member, or any other individual identified who willingly accepts responsibility for performing tasks the participant cannot perform. A representative must evidence a personal commitment to the participant and must be willing to follow their wishes and respect their preferences while using sound judgment on their behalf. Representatives receive no monetary compensation for this service and may not serve as a worker to the participant.

PARTICIPANT INFORMATION							
First Name	Middle Name	Last Name	Medicaid ID #				

DESIGNATED AUTHORIZED REPRESENTATIVE INFORMATION							
First Name	Middle Nam	ne	Last Name				
Social Security Number	Relationship to Participant						
Mailing Address (Street Address, including Apt #)							
City	State	Zip	County				
Phone	Email						







VF/EA PPP Handbook

- → Employer Handbook
 - Key Terms and Information
 - → Roles and Responsibilities
 - Role of the VF/EA, FMS
 - → Role of the Employer
 - Hiring a Worker





PalCare

PalCare is Palco's self-direction job board for connecting prospective Employers and Caregivers for longterm meaningful career relationships.



To get started with PalCare, visit: palcare.palcofirst.com

PALCARE

- Caregiver can create a profile to showcase skills and availability in hopes of gaining employment.
- Employer can post job description for positions they are seeking to fill.
- Totally free and is operational for all Palco's self-direction programs!



RESOURCES

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

https://palcofirst.com/new-jersey-ppp/







TIME ENTRY USER GUIDE

Connect is Palco's online portal for Employers and Workers. It has everything you need if you're managing your own care or work schedule. You can use it anytime, day or night. Some things you can do on Connect include entering your work hours, connecting with Electronic Visit Verification (EVV), keeping track of your spending, updating your personal info, and accessing important documents like your W-2s and paystubs. This guide will explain every feature of Connect and how to use them. It's important to know that not all features apply to everyone. For instance, if your program doesn't allow vendor payments, you won't see that option. If you have any questions, you can talk to a Palco Customer Support Representative at 1-866-710-0456.

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DIFFERENT LANGUAGES

you change the language of a webpage. This means you can use tools like Palco Connect in your own language. Palco suggests using Google Chrome for all their web pages. If you need help translating a

quently Asked Questions

timesheet is at in the process approval?

the status of your timesheet, which shows where it is in nd a list of statuses and their meanings on Page 9 of this

nnect if I don't have my Palco ID?

will be sent to you in an email from Palco. If you need or verifying your details, we are here. Please contact t for help.

sheet if it's locked?

nits the timesheet to the participant, the timesheet is es, the participant would need to reject the timesheet. mesheet back to the worker and allows them to make

esheet will be paid?

record in Connect allows you to track its status. You Many web browsers let ere it is in the approval process. To find out when a be paid, check the payment schedule. It is available on

at I want them to call me instead of sending emails

preferred communication by editing your profile in nstructions on how to do this on Page 10.

iects my worker's timesheet?

o open a new timesheet, marked as edited. It will go page, check out this w, approval, and quality checks again before it can be

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ther Questions? Contact Palco!

Phone: 1-866-710-0456

Email: customersupport@palcofirst.com

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TIME ENTRY USER GUIDE

PALCO'S TIME ENTRY TRAINING RESOURCE

- → FAO







PALCO'S EVV TRAINING RESOURCE

- → Connect
- → Telephony / IVR (Interactive Voice Recognition)



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

Phone: 1-877-710-0457

Local: **732-351-4804**

Email: Support_NJ@palcofirst.com



