



## Quarterly ILC Forum

Kansas WORK

Heather Nash - Account Manager

Victoria Evans - Senior Director

# Hello, it's my pleasure to be here!

## Heather Nash, Account Manager



- Account Manager for two self-directed programs
- Three years combined experience as part of the enrollment and Account Management teams with Palco
- 10 years prior experience in enrollment and billing



# Agenda

- ▶ Introductions
- ▶ How to onboard employees
- ▶ The online enrollment process
- ▶ Additional tips
- ▶ Open Forum

# RESOURCES

Everything we discuss today is available on our website with even more details and descriptions! Always refer to the website as it will have the most up-to-date forms.

<https://palcofirst.com/programs/kansas/>

# How to onboard employees

# Completing enrollment packets

# Completing enrollment packets

- ▶ Review of blank enrollment packet
  - ▶ All fields on each form need to be completed in order for an employee to be sent the good to go
  - ▶ Results of all background checks also need to be received by Palco in addition to the completed enrollment packet before a good to go can be sent.
  - ▶ Palco will not pay workers prior to the good to go date for any dates of service that they work.
  - ▶ Workers can email [enrollment@palcofirst.com](mailto:enrollment@palcofirst.com) or call Customer Support at 866-710-0456 for assistance with completing the packets.
  - ▶ Workers can request for an enrollment specialist to call them to walk them through the process as well.

# Online enrollment process



# Online enrollment process

- ▶ At the bottom of page 2 of the Intake form, the worker has the option to complete the enrollment paperwork online.

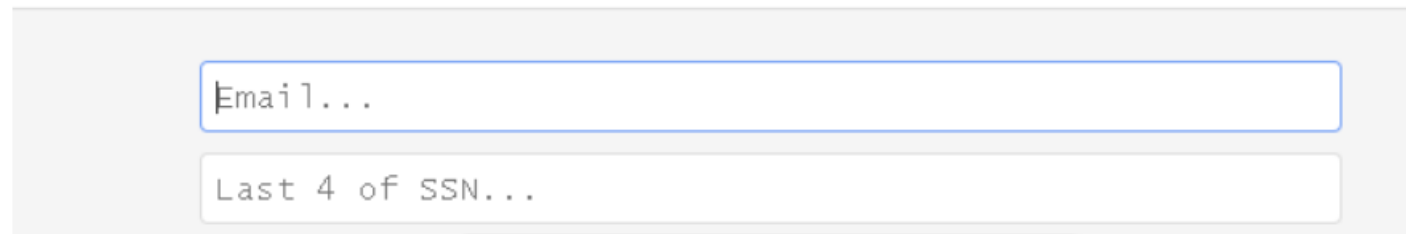
How would you like to continue the enrollment process?

- Complete Enrollment Paperwork Online. The worker will receive login instructions from Palco.
- Email a prepopulated PDF packet to the worker.
- Mail a prepopulated paper packet to the worker's address

# Online enrollment process, cont.

- ▶ When online enrollment is requested, a link will be emailed from [support@palcofirst.com](mailto:support@palcofirst.com) to the worker's email address indicated on the Intake form.
- ▶ This encrypted link is good for 30 days.
- ▶ The worker will be asked to verify their email address and the last four digits of their SSN in order to access the documents.

## YOU'VE BEEN INVITED TO ENROLL



The screenshot shows a form with two input fields. The first field is labeled 'Email...' and the second field is labeled 'Last 4 of SSN...'. The form is set against a light gray background.

# Online enrollment process, cont.

- ▶ The worker will then be asked to verify that they are not a robot by clicking in the verification box. When this is completed, they will then click Verify.
- ▶ A Consent page will appear next. The worker will need to click Save and Next to move forward.

# Online enrollment process, cont.

- ▶ The worker will then need to complete the following tabs until the completion percentage at the bottom of each tab is 100%:
  - ▶ Worker Info Tab
  - ▶ Additional Info Tab
  - ▶ Banking Info Tab
    - ▶ If EFT is selected, additional fields will appear for the financial institution information and to upload supporting documentation (bank letter or voided check)
  - ▶ Withholding Info Tab
  - ▶ I-9 Data tab
    - ▶ The worker will be prompted to upload supporting documentation when this tab is completed.

# Online enrollment process, cont.

- ▶ When the above tabs have been completed, the worker will need to complete the Signature tab.
  - ▶ The worker will use the computer mouse to create their signature.
  - ▶ Instructions for this are in the Worker Online Enrollment Instructions on the Palco website.
  - ▶ After the signature has been created, the worker will need to go back through each form and click on Apply Signature.

# Online enrollment process, cont.

- ▶ The final steps to completing the online enrollment process are:
  - ▶ Navigate to the Summary tab and confirm completion is 100%
    - ▶ If any required items are not completed, there will be a red \* (asterisk) next to the incomplete item. It will need to be completed before the enrollment is submitted
    - ▶ When completed, click Submit Enrollment.

# Online enrollment process, cont.

- ▶ The worker will see the following box when the online enrollment is completed.

**THANK YOU - ENROLLMENT SUBMITTED FOR REVIEW**

Please allow 1-2 business days for Palco to review electronically submitted documents.

» **Reminder:** Please print, sign and mail the following form(s):

**Mail To:** *Palco, Inc.  
Attn: Enrollment  
P.O. Box 242930  
Little Rock, AR 72223*

Download submitted documents for your records:

- ✓ [IRS 2678.pdf](#) - 
- ✓ [IRS 8821.pdf](#) - 
- ✓ [Employer Authorization Agreement.pdf](#) - 

# Online enrollment process, cont.

- ▶ An enrollment specialist will be notified by the system that the worker has completed the online enrollment process when all of the steps above have been completed.
- ▶ If the enrollment specialist finds any errors or missing items in their review, the enrollment specialist will contact the Employer and/or worker to discuss what is needed.
- ▶ When all forms have been received completed and the background check results have been returned to Palco, the enrollment specialist will send the good to go email to let the worker know the enrollment has been completed.



# Online enrollment process, cont.

- ▶ Customer Support can be reached at 866-710-0456 for assistance while a worker is completing a packet.
- ▶ The Worker Online Enrollment Instructions PDF is located as follows on the Palco site:
  - ▶ [https://palcofirst.com/wp-content/uploads/2020/11/WORKER\\_ONLINE\\_ENROLLMENT\\_INSTRUCTIONS\\_KS-1.pdf](https://palcofirst.com/wp-content/uploads/2020/11/WORKER_ONLINE_ENROLLMENT_INSTRUCTIONS_KS-1.pdf)

# Online enrollment process, cont.

- ▶ In the coming months, Palco will be moving away from paper packets being mailed and PDFs of enrollment packets being emailed to workers.
- ▶ At that time, Palco will move toward electronic enrollment only.
- ▶ When this happens, all enrollments will need to be completed electronically. There will no longer be other options for completing the enrollment.
- ▶ It is important for Employers to become familiar with how to complete online enrollments in preparation for this upcoming change.

# Additional Tips

# Additional tips

- ▶ Employers should be reviewing each employee's timesheet to ensure that the time being entered by the worker was actually worked.
  - ▶ Please note -- It is a federal crime for an Employer to approve for payment time that a worker actually did not work.

# OPEN FORUM



# NEXT STEPS

Forms referenced in this presentation can  
all be found here:

<https://palcofirst.com/programs/kansas/>

Next Open Forum Date: Thursday, January  
19<sup>th</sup>, 2023, 11:00 AM

# THANK YOU!

If you have questions or need support,  
Palco is here to help!!

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

**Fax: 501-821-0045**

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