



CMP General User Guide

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

March 2023

PALCO

FOR INTERNAL USE ONLY



Case Management Portal (CMP) Overview 2

 Purpose of the system 2

Navigation 3

 Accessing the Portal 3

 Searching 3

 Navigation Tabs 4

 Profile Menu and Case Status 5

 Member Info 8

 Enrollment 8

 Budget Info 10

 Account Info 10

 Employer Cost (Employer) 14

 Pay Rates (Worker) 15

Support 17

 Resetting your Password: 17

 Contact Us: 17

Appendix A- CDASS Budget Entry (Colorado) 18

Appendix B- CO CDASS MMES Instructions for Case Managers 222

Appendix C – KS WORK Viewing Carryover Fund
Totals 225

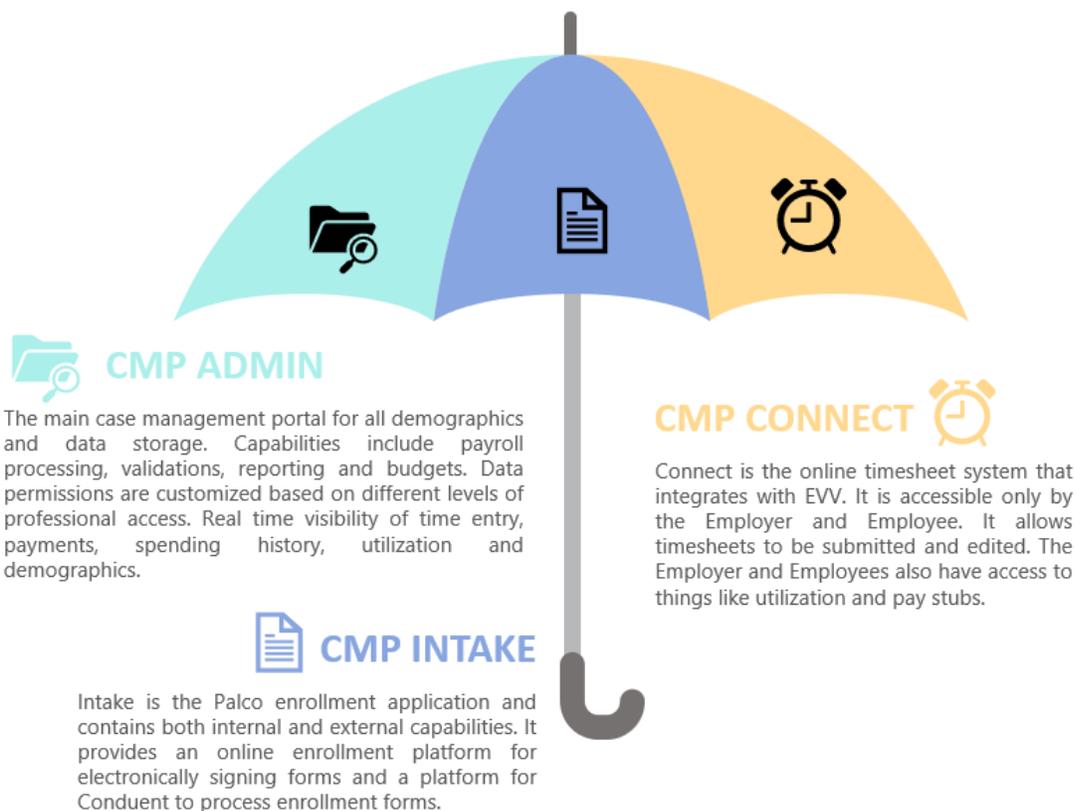


Case Management Portal (CMP) Overview

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 a proprietary cloud-based software.

Palco Case Management Portal (CMP)



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 your Palco Account Manager.



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:

PALCO SIGN IN

Email...

Password...

SIGN IN

Privacy & Terms

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.

PALCO Case Management Portal

v2022.4.0

Search...

General

Reports



SEARCH RESULTS ✕

	ID	FIRST	LAST	PROGRAM	ROLE	STATUS	PARTICIPANT
View	085870	MARGARET	LMARGARET	OH_COA	participant		Self
View	085842	MARGARET	LMARGARET	OH_COA	participant		Self
View	085307	MARGARET	LMARGARET	OH_COA	participant		Self
View	085870	MARGARET	LMARGARET	OH_COA	employer_of_record		Self
View	085307	MARGARET	LMARGARET	OH_COA	employer_of_record		Self
View	064017	MARGARET	LMARGARET	OH_COA	worker		BETTY LBETTY

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

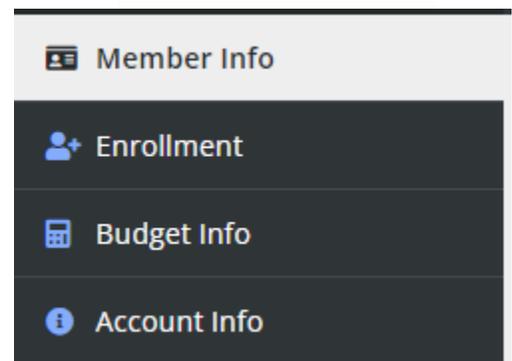
Choose the record you would like to access by clicking **“View”** on the left-hand side next to the record you would like to see. If you receive a large number of results, try narrowing your search by adding more detail to the “Search Within Results” field or by sorting the columns to help you find what 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 Bobbie’s status was pending on 10/15 and then Bobbie became active on 11/15. 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

At the top of each CMP profile is a bold 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.

ROBERT LROBERT PROGRAM: NM_SDCB
 ID#: 076687 ACTIVE ROLES Worker for BOBBY LBOBBY NOTES | MEMBERS Search

MEMBERS [X]

Search Within Results

	ID	FIRST	LAST	PROGRAM	ROLE	STATUS	PARTICIPANT
View	085498	BOBBY	LBOBBY	NM_SDCB	participant	Active	Self
View	068548	DEBRA	LDEBRA	NM_SDCB	employer_of_record	Active	BOBBY LBOBBY

Contact Information



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.

The screenshot displays two examples of the Member Info section in the PALCO Case Management Portal. Each example includes a header with the member's name, ID, status, and role, along with navigation tabs for Personal, Contact, and Program. The left sidebar contains menu items for Enrollment, Budget Info, Account Info, and Reports.

Example 1: Betty Lbetty
 ID#: 083502 | STATUS: NONE ASSIGNED | ROLES: Participant of OH_COA
 Name: BETTY LBETTY
 SSN:-3502
 Date of Birth: 12/25/1970
 Gender:

Example 2: Robin Lrobin
 ID#: 063745 | STATUS: NONE ASSIGNED | ROLES: Worker for BETTY LBETTY of OH_COA
 Name: ROBIN LROBIN
 SSN:-3745
 Date of Birth: 12/25/1970
 Gender:

Enrollment

To view the individual's enrollment status and details, visit the Enrollment tab. The 3 blue dots on the left of the record can be used to expand the enrollment and show more details. The status field on the far right will give you visibility on where they are at in the process.

The screenshot shows the Enrollment tab with a 'HISTORY:' table. The table has columns for TYPE, NAME, AGE, STARTED, and STATUS. The 'Approved' status in the final row is highlighted with a red box.

TYPE	NAME	AGE	STARTED	STATUS
New Participant (Designate EOR)	(Client Name)	258 day(s)	08/07/2019 10:22	Approved



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 left and it will download. You can also view the status of each document to determine if corrections are needed and the date/time the document was submitted to Palco.

Form Summary

	NAME	STATUS	REASON(S)	SUBMITTED AT
	Attendant Information & Qu...	Approved		02/07/2020 14:27
	USCIS Form I-9	Approved		02/07/2020 14:27
	Payroll Information Worksheet	Approved		02/07/2020 14:27
	W-4_2020 Employee's Withhol...	Approved		02/07/2020 14:27
	Direct Deposit Authorization ...	Approved		02/07/2020 14:27
	Attendant Pay Rate	Approved		02/13/2020 14:42



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.

	STATUS	ISSP START	ISSP END	CREATED	CREATOR
VIEW	Active	03/01/2022	04/30/2022	06/09/2022 15:33	TLTaylor
VIEW	Active	05/01/2022	02/28/2023	05/20/2022 08:57	KLKaitlyn

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 2022-05-22

DELETED ■

	CURRENT STATUS ▲	WORKER	EMPLOYER	TOTAL HOURS	ENTRY METHOD	CREATED	CREATOR	REFERENCE
☰	Open	CLCARMEN	ALANDREA	57.16	Connect	05/31/2022 11:27	CLCARMEN	060662-AF55A4

▶ TIMESHEET EVENTS FOR 060662-AF55A4

▶ TIMESHEET ENTRIES FOR 060662-AF55A4

- 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: Pending Palco Review	05/24/2022 07:14	ALANDREA
✓	Status Changed: Pending Employer Review	05/20/2022 15:53	CLCARMEN
✓	Status Changed: Open	05/20/2022 11:49	CLCARMEN

- 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 for each shift.

▼ TIMESHEET ENTRIES FOR 060662-2B1386

DELETED ■

AUTHORIZATION

	ENTRY DATE ▼	TIME IN	TIME OUT	AUTHORIZATION	TOTAL HOURS	CREATED	CREATOR
✓	05/21/2022	11:45 PM	11:59 PM	NIGHT	0.23333333	05/20/2022 15:52	CLCARMEN
✓	05/21/2022	07:00 AM	09:48 AM	DAILY	2.8	05/20/2022 15:47	CLCARMEN
✓	05/20/2022	07:00 AM	10:00 AM	DAILY	3	05/20/2022 15:33	CLCARMEN
✓	05/19/2022	07:00 AM	10:10 AM	DAILY	3.16666666	05/20/2022 15:30	CLCARMEN
✓	05/19/2022	12:00 AM	05:00 AM	NIGHT	5	05/20/2022 15:18	CLCARMEN
✓	05/18/2022	11:45 PM	11:59 PM	NIGHT	0.23333333	05/20/2022 15:14	CLCARMEN

Payables Overview

- 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.

SELECT A DATE RANGE

PAYABLES FOR 03-01-2022 TO 06-14-2022

PAYEE

AUTHORIZATION

DELETED ■

REFERENCE	PAYEE	SERVICE DATE	AUTH	QUANTITY	UNIT COST	TOTAL	UNIT PERIOD	FUND PERIOD	CREATED	CREATOR	CURRENT STATUS
04/01/2022	HOME BUDDY	2022-04-01	EMERG	1.00	39.95	39.95	2022-04-01	2022-04-01	05/09/2022 14:20	JLJayah	Paid
3/1/2022	HOME BUDDY	2022-03-01	EMERG	1.00	39.95	39.95	2022-03-01	2022-03-01	04/08/2022 08:54	BLBrandi	Paid

2 PAYABLES



Utilization

- To begin, select if you are wanting 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.

BUDGET UTILIZATION (DEDUCTIONS - AMOUNT SPENT) ⓘ

Display results by:

Budget

2021-11-01 - 2021-12-31

Service Dates

- Select Budget
- 2022-05-01 - (Current)
- 2022-01-01 - 2022-04-30
- 2021-11-01 - 2021-12-31
- 2021-08-01 - 2021-10-31
- 2021-01-01 - 2021-07-31
- 2020-10-01 - 2020-12-31



For "Budget" results, you will select a budget period from the drop-down. This will be reflective of all budgets within the CMP system for that Participant.

BY ACCOUNT GROUP: All

"Service Dates" will require you to enter a start and end date.

Display results by:

Budget

Service Dates

09/01/2021

02/28/2022



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

BY ACCOUNT GROUP: All

- All
- KS WORK - Accounts Payable
- KS WORK - Payroll

BY AUTHORIZATION: All

- All
- Transportation
- Emergency Monitoring

- 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.

BUDGET UTILIZATION (DEDUCTIONS - AMOUNT SPENT) ⓘ

Display results by:

Budget

2021-08-01 - 2021-10-31

Service Dates



BY ACCOUNT GROUP: All

BY AUTHORIZATION: /

Funds Units Rates + New



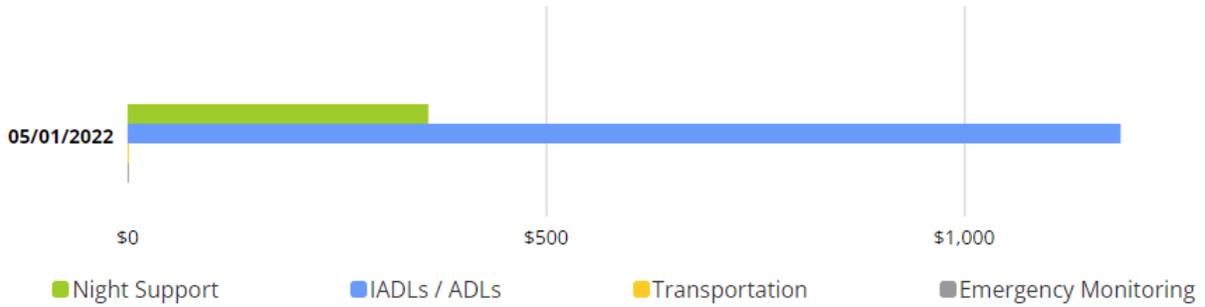
Funds Period Start Date: 08/01/2021

Funds Period Start Date: 09/01/2021

Funds Period Start Date: 10/01/2021



- 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



- 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 Period Start Date: 05/01/2022

Fund Name	Starting Balance
KS WORK - PAYROLL	6714.85
NIGHT SUPPORT	
IADLS / ADLS	
SUBTOTAL: \$-1547.91	
CURRENT BALANCE: \$5166.94	
UTILIZED: 23.05%	
TRANSPORTATION	28.00
SUBTOTAL: \$0.00	
CURRENT BALANCE: \$28.00	
UTILIZED: 0.00%	
EMERGENCY MONITORING	39.95
SUBTOTAL: \$0.00	
CURRENT BALANCE: \$39.95	
UTILIZED: 0.00%	

Units

Funds Units Rates New

Units Period Start Date: 07/01/2021

Unit Name	Starting Balance
PA ODP - PAYROLL	552.00
RESPITE DAY	
SUBTOTAL: -552.00	
CURRENT BALANCE: 0.00	
UTILIZED: 100.00%	



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:
- Starting Balance
 - Service Date
 - Subtotal of the account group expenditures
 - Current Balance - This is what the participant has remaining for the funds period selected
 - 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.

WORKER	AUTHORIZATION	PAY PERIOD	RATE
Carolyn	CDASS Rate 1	2020-11-16	26.5000
Carolyn	CDASS Rate 1	2022-02-01	29.5000
Wendy	CDASS Rate 1	2020-02-01	23.2500

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.

👁 Quick View
📄 Details
📄 Registrations

SELECT EFFECTIVE DATE:

DEFAULT EMPLOYER COST: 10.8005% [🔗](#)

WORKER-SPECIFIC COSTS:

WORKER	STATUS ON EFF. DATE	RATE
Ernest Lerner	Voluntary	10.8005% 🔗
Jennifer Ljennifer	Active	10.8005% 🔗
Patricia Lpatricia	None Assigned	10.8005% 🔗

The **Details** 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
📄 Details
📄 Registrations

CURRENT RATE SUMMARY

SELECT COST TYPE:

TAX/COST TYPE	EFFECTIVE RATE %	EFFECTIVE DATE	EDITOR
FICA	7.6500	01/01/2017	
FUTA	0.6000	01/01/2015	
WC	1.7200	01/01/2022	
SUTA 🔗	2.7000	01/01/2022	
TOTAL 12.6700%			

CHANGE HISTORY

Last Year All

TAX/COST TYPE	EFFECTIVE RATE %	EFFECTIVE DATE
SUTA	2.7000	01/01/2022
WC	1.7200	01/01/2022

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

BASE RATES

Filter by: Authorization

Service dates: PERSONAL CARE SERVICES 99509

Download CSV (filters will remain applied)

Authorization	Code	Base Rate	Effective Date	End Date	Creator	Created Date
PERSONAL CARE SERVICES 99509	99509	14.6000	01/29/2022	04/22/2022	PAdmin II	02/11/2022
PERSONAL CARE SERVICES 99509	99509	11.5000	04/23/2022		PAdmin II	02/08/2022

OVERTIME EXEMPTIONS

Download CSV

Exempt Status	Created Date
Not Exempt	02/05/2021



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 **"Password Reset"** click edit and set your new password.

PASSWORD RESET	 
Current Password	<input type="text" value="Current Password"/>
New Password	<input type="text" value="New Password"/>
ReEnter New Password	<input type="text" value="Confirm 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](tel:1-866-710-0456)

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



Appendix A- CDASS Budget Entry (Colorado)

For the Colorado Consumer Directed Attendant Support Services (CDASS) program, Palco provides a user interface that allows Case Managers a mechanism to enter and submit budgets (allocations) to Palco. This section will cover the process for entering a new budget (initial or renewal) and the process for entering a revision to an active budget. This process should always be followed in conjunction with the entry to the State authorization system.

Entering a New Budget

1. Locate your client using the Search feature.
2. Click on the **"Budget"** tab on the left side.
3. Click **"Add New +"** at the top to start a new budget / authorization.
4. Enter the dates for the CDASS period identical to your authorization from the bridge.

PAR NUMBER	ELIGIBILITY START	ELIGIBILITY END	AUTHORIZATIONS	STATUS	CREATED BY	CREATED AT
1	2019-07-15	2019-09-30	HMS,HMAS,PCPS	Not Submitted	KLKadlyn	07/09/2019 10:17

SERVICE	ADJUSTED RATE	HOURS/WEEK	PERIOD ALLOCATION	DAILY RATE	MONTHLY ALLOCATION
Totals: \$0.00					
\$0.00					
\$0.00					

5. Use the **"Service"** drop down to select a service category. Click the **"+"** symbol to add that service and enter the number of hours per week for each service category the client has been authorized for. When finished, click save.

SERVICE	ADJUSTED RATE	HOURS/WEEK	PERIOD ALLOCATION	DAILY RATE	MONTHLY ALLOCATION
Homemaker	14.99	Enter Hours	\$	\$	\$
Personal Care	14.99	20	\$15675.78	\$42.83	\$1306.32
Totals: \$					
\$					
\$					

PRIOR AUTHORIZATION REQUEST SERVICE	MODIFIER	# OF UNITS	COST PER UNIT	TOTAL \$ AUTHORIZED	DAILY RATE
T2025 CDASS	U1		\$0.01	\$	\$
T2040 PMPM		12	\$85.00	\$1020.00	\$2.79
Totals: \$				\$	\$



- Review the monthly allocation, total dollars authorized and units to ensure everything matches your DXC PAR. Your PAR will remain in "Pending" status until you enter a PAR number and submit. While in a "Pending" status, the Case Manager can make edits or delete the request entirely.
- Once you have received your PAR number, enter the number into the designated box and click **"Save and Submit."**

PAR Number 1234567890 **Status:** **PENDING**

Client Name: Carter LCarter
Medicaid ID: ██████████
Waiver: EBD

CDASS (Program Participation) Period: 07/01/2023 through 06/30/2024 DAYS: 366 MONTHS: 12.00000000

SERVICE:	ADJUSTED RATE	HOURS/WEEK	PERIOD ALLOCATION	DAILY RATE	MONTHLY ALLOCATION
Homemaker	19.46	10	\$10174.80	\$27.80	\$847.90
Personal Care	19.46	20	\$20349.60	\$55.60	\$1695.80
Health Maintenance Activities	30.59	10	\$15994.20	\$43.70	\$1332.85
Totals: \$46518.60			\$127.10	\$3876.55	

PRIOR AUTHORIZATION REQUEST SERVICE	MODIFIER	# OF UNITS	COST PER UNIT	TOTAL \$ AUTHORIZED	DAILY RATE
T2025 CDASS	U1	4651860	\$0.01	\$46518.60	\$127.10
T2040 PMPM		12	\$85.00	\$1020.00	\$2.79
Totals: \$47538.60				\$129.89	

- Once submitted, the status changes to "Under Review" which has replaced the "Submitted" status. Under this status, Palco is reviewing the PAR Worksheet. Case Managers should check back the next day after budgets have been submitted to see if they have been approved by Palco.

Rejected Budgets

- Sometimes a budget is submitted that is rejected by Palco. When the request has been rejected, a **"Rejected"** status will appear as well as the reason for the rejection.

PAR Number: 0123456789 **Status:** **REJECTED** (PAR mismatch with Bridge - Annual Units/Dates)

Client Name: Carter LCarter
Medicaid ID: ██████████
Waiver: EBD

CDASS (Program Participation) Period: 07/01/2023 through 06/30/2024 DAYS: 366 MONTHS: 12.00000000

SERVICE:	ADJUSTED RATE	HOURS/WEEK	PERIOD ALLOCATION	DAILY RATE	MONTHLY ALLOCATION
Homemaker	19.46	10	\$10174.80	\$27.80	\$847.90
Personal Care	19.46	20	\$20349.60	\$55.60	\$1695.80
Health Maintenance Activities	30.59	10	\$15994.20	\$43.70	\$1332.85
Totals: \$46518.60			\$127.10	\$3876.55	

PRIOR AUTHORIZATION REQUEST SERVICE	MODIFIER	# OF UNITS	COST PER UNIT	TOTAL \$ AUTHORIZED	DAILY RATE
T2025 CDASS	U1	4651860	\$0.01	\$46518.60	\$127.10
T2040 PMPM		12	\$85.00	\$1020.00	\$2.79
Totals: \$47538.60				\$129.89	



- Case Managers will be able to edit and resubmit requests in this status.
- They can also delete this request if they do not want to resubmit.

Revising an Existing Budget

- Locate your client using the Search feature.
- Click on the **"Budget"** tab on the left side.
- Choose the PAR you would like to revise by selecting it in the "History" section at the top of the page.
- Click **"Create Revision."**

History

Par Number	Eligibility Start	Eligibility End	Authorizations	Status	Created By	Created At
0123456789	07/01/2023	06/30/2024	HMS,PCPS	Approved	CManager	03/13/2023 20:23
6221730125	01/01/2023	06/30/2023	HMS,HMAS,PCPS	Submitted	JNoe	11/26/2022 14:46
6221730125	07/01/2022	12/31/2022	HMS,HMAS,PCPS	Submitted	MAnderson	07/14/2022 19:54
6211760041	01/01/2022	06/30/2022	HMS,HMAS,PCPS	Submitted	NArens	12/14/2021 21:53
6211760041	11/01/2021	12/31/2021	HMS,HMAS,PCPS	Submitted	NArens	10/25/2021 19:44
6211760041	07/01/2021	10/31/2021	HMS,HMAS,PCPS	Submitted	MAnderson	06/29/2021 17:04
6211760041	01/01/2022	06/30/2022	HMS,HMAS,PCPS	Submitted	MAnderson	12/10/2021 15:53
6201540095	10/01/2020	06/30/2021	HMS,HMAS,PCPS	Submitted	VLucero	09/16/2020 14:35
6201540095	07/01/2020	09/30/2020	HMS,HMAS,PCPS	Submitted	FGillespie	07/24/2020 22:39
6191200237	01/01/2020	06/30/2020	HMS,HMAS,PCPS	Submitted	Palco Admin	12/06/2019 19:01

PAR Number: 0123456789 Status: **APPROVED**

Client Name: Carter LCarter
 Medicaid ID: [REDACTED]
 Waiver: EBD
 CDASS (Program Participation) Period: 07/01/2023 through 06/30/2024 DAYS: 366 MONTHS: 12.00000000

SERVICE	ADJUSTED RATE	HOURS/WEEK	PERIOD ALLOCATION	DAILY RATE	MONTHLY ALLOCATION
Homemaker	19.46	10	\$10174.80	\$27.80	\$847.90
Personal Care	19.46	30	\$30524.40	\$83.40	\$2543.70
Totals:			\$40699.20	\$111.20	\$3391.60

PRIOR AUTHORIZATION REQUEST SERVICE	MODIFIER	# OF UNITS	COST PER UNIT	TOTAL \$ AUTHORIZED	DAILY RATE
T2025 CDASS	U1	4069920	\$0.01	\$40699.20	\$111.20
T2040 PMPM		12	\$85.00	\$1020.00	\$2.79
Totals:			\$41719.20	\$113.99	

CREATE REVISION

- Using the "Add Revision" pop up screen, enter the effective date and verify it is correct selecting the check box. Once sure, click **"Create Revision."**

ADD REVISION

Current Worksheet Range: 07/01/2019 through 06/30/2020

Revision Start Date:

I'm sure the revision start date that I've chosen is correct.

- Complete the revision by changing the number of weekly hours per service category as applicable. Once you have finished, Click **"Save and Submit."** You can also delete the request entirely and start a new request.



You can use the History section to view prior authorizations, allocations, and service allotments by selecting the date span you would like to see. You can also view what different statuses mean, by clicking on the information icon next to "Status."

History

Par Number	Eligibility Start	Eligibility End	Authorizations	Status 	Created By	Created At
0123456789	08/01/2023	06/30/2024	HMS,PCPS	Approved	CManager	03/13/2023 20:36
0123456789	07/01/2023	07/31/2023	HMS,PCPS	Revised	CManager	03/13/2023 20:23

You will notice that there are several statuses that help provide more information about the PAR Worksheets and allows the user to know where the process is currently at any time.

- Pending:** Case Manager initiated a PAR Worksheet, but it has not been submitted for Palco review.
- Under Review:** Palco is reviewing the PAR Worksheet.
- Rejected:** Palco identified a problem with the PAR Worksheet. Case Manager should edit and resubmit.
- Approved:** PAR Worksheet matches the Bridge and has been processed.
- Revised:** PAR Worksheet has been updated since it was originally approved.
- Submitted:** PAR Worksheets entered prior to the above statuses being implemented. These grandfathered statuses will not change.



[Click here to view the MMES User Guide for Case Managers Online](#)



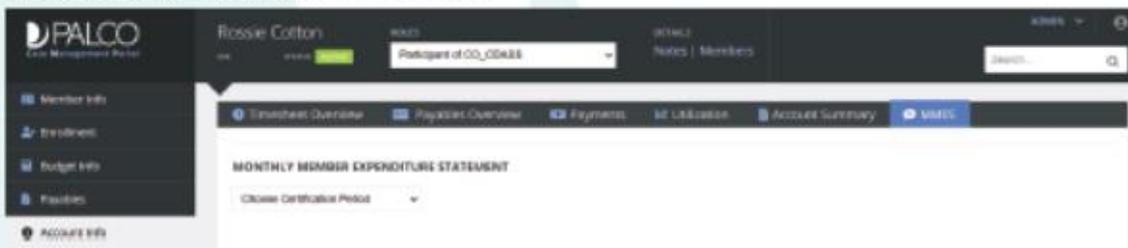
Monthly Member Expenditure Statement (MMES)

All CDASS members receive an MMES report each month that provides a breakdown of spending and details their CDASS budget reserves. Furnishing the MMES is a contractual obligation and is critical to providing the Member/Employer with visibility of the spending and budget reserves. The Member/Employer must review for accuracy and is responsible for their allocation management. Palco's MMES is available to Employers via Connect and to Case Managers via CMP. Training materials for Employers are available on our website. The MMES will be available 24/7 and will display the previous month's data by the 15th of each month. Data shown will always be reflective of only the services processed and paid. Case Managers will be able to view the MMES via CMP and will not be emailed a copy effective January 2023.

Budgets for Colorado are an annual budget (typically 12 months) that is distributed equally across the number of months in the certification period, creating a monthly budget. Any money not used within the month can be utilized in a future month as long as it falls within the certification period and follows the parameters of the CDASS Overspending Protocol – this is commonly referred to as **reserves**. Any money not used by the end of the certification period is returned to Medicaid.

Using CMP to view the MMES - Professional Users

1. After searching for a participant in CMP, the user can navigate to the MMES by selecting the "Account Info" tab and then selecting the "MMES" subtab.



2. The user will then select the Certification Period from the drop-down box.

3. Once the user has selected the certification period, they will be able to view the MMES Statement. Detailed Spending can be filtered by Month and Account Group (CDASS, SLS, or SLS HMA).

MONTHLY MEMBER EXPENDITURE STATEMENT





2022-04-01 - 2023-03-31

Name:	Rossie Cotton
Medicaid ID:	
Certification Period:	2022-04-01 - 2023-03-31
Authorized Representative:	Rossie Cotton



Spending Summary

Account Group	Allocation	Expenditures	Hours	Balance
CDASS	\$72,098.97	\$42,432.29	2,095.75	\$29,666.68



Attendant Pay

Attendant Name	Relationship To Participant	Hours/Month	Employee Hourly Wage
Rossie Cotton		0.00	\$0.00
Name L Lastname	Other Non-relative	0.00	\$0.00
Isidur Celeborn	Spouse	111.68	\$12.00
Name L Lastname	Other Non-relative	62.95	\$12.00



This section provides key details about the member and their budget date span.



This section provides totals such as the total allocation (annual budget amount), expenditures to date (dollars and hours) and the total remaining for the year.



This section provides an overview of each attendant, their relationship to the participant, how many hours they worked during the month and their hourly wage. (average across all services)



Quick Tip:

Should you need to print the MMES or save it as a PDF to your computer, follow these instructions.

Once you have chosen the certification period, the option to Download/Print will appear. Click the button to save a copy for your records!

[DOWNLOAD/PRINT](#)



Detailed Spending

Filter By Account Group



Month	Account Group	Allocation	Expenditures	Employer Costs Withheld	Balance	Percent Utilized
Apr 2022	CD405	\$5,955.55	\$5,452.81	\$292.48	\$480.71	92.10%
May 2022	CD405	\$5,983.53	\$5,389.95	\$265.33	\$503.57	91.40%
Jun 2022	CD405	\$5,986.53	\$5,373.98	\$299.66	\$597.54	91.20%
Jul 2022	CD405	\$6,013.48	\$5,562.94	\$268.68	\$480.55	92.51%
Aug 2022	CD405	\$6,013.48	\$5,227.75	\$257.81	\$675.72	86.76%
Sep 2022	CD405	\$6,013.48	\$4,794.57	\$231.58	\$1,218.92	79.75%
Oct 2022	CD405	\$6,013.48	\$5,334.46	\$237.65	\$679.92	88.71%
Nov 2022	CD405	\$6,013.48	\$5,283.81	\$251.34	\$609.67	86.54%
Dec 2022	CD405	\$6,013.48	\$5,295.02	\$235.79	\$718.46	86.95%
Jan 2023	CD405	\$6,112.48	\$5,095.69	\$280.17	\$1,112.79	83.43%
Feb 2023	CD405	\$6,112.48	\$4,844.31	\$275.64	\$1,208.10	79.25%
Mar 2023	CD405	\$6,112.48	\$3.00	\$3.00	\$6,112.48	0.08%
TOTAL		\$72,098.96	\$57,671.31		\$14,427.65	



"Month" indicates the specific month the spending correlates to.



"Account Group" will identify the specific budget the spending is from. SLS waiver participants will see a specific HMA budget if applicable.



"Allocation" provides the total monthly funds that were available that month.



"Expenditures" shows the total amount spent that month. Only fully processed/paid timesheets will display.



"Employer Costs Withheld" displays the employer taxes that were collected for the month. This amount is already reflected in the total displayed in the "Expenditures" column.



"Balance" displays the total funds left at the end of the month. This money becomes the members' "reserve funds," which can be used in a future month during the same certification period, with Case Manager approval. If overspending occurred, a negative number will display.



"Percent Utilized" provides the percentage of the total monthly budget that was used for tracking in accordance with the overspending protocol.

The MMES is available to the employer in Connect and provides key details for the Member/AR to monitor and track the spending that occurs during their certification period. To access it, the employer should navigate to "Spending" from the top tool bar and click on "MMES."

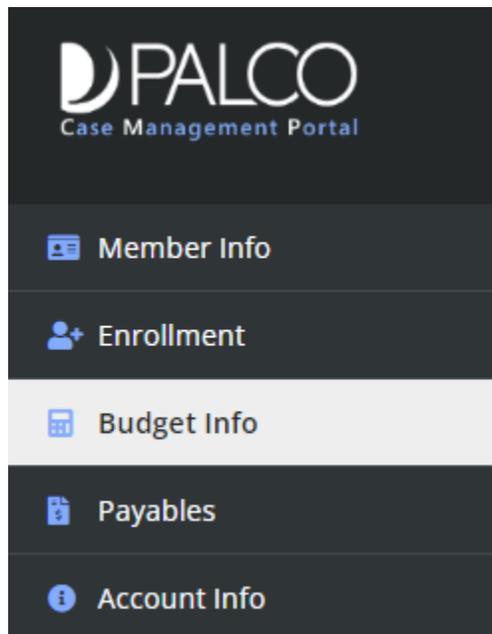


Appendix C – Viewing Carryover Fund Totals

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.

Viewing Carryover Funds in CMP

1. Locate your client using the Search feature.
2. Click on the **“Budget Info”** tab on the left side.





- This will display the budget history. Select the most current budget by clicking **View** which will be located at the top of the page.

Budget History + SHOW DELETED BUDGETS

		STATUS	ISSP START	ISSP END	CREATED
VIEW	DELETE	Active	04/01/2023	N/A	04/24/2023 10:12
VIEW	DELETE	Active	03/01/2023	N/A	04/24/2023 10:10
VIEW	DELETE	Active	02/01/2023	N/A	02/27/2023 15:43

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

Account Groups ✎

- [VIEW >](#) (KSPR) KS WORK - Payroll
- [VIEW >](#) (KSSV) KS WORK - Savings
- [VIEW >](#) (KSAP) KS WORK - Accounts Payable

- 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.

Authorizations ✎

- [VIEW >](#) (COF) Carry-Over Funds

	START	END
	04/01/2023	
Authorization Validations ✎		
Funds Available		\$ 2981.83