WELCOME!

West Virginia Electronic Visit Verification (EVV) Training

November 2024

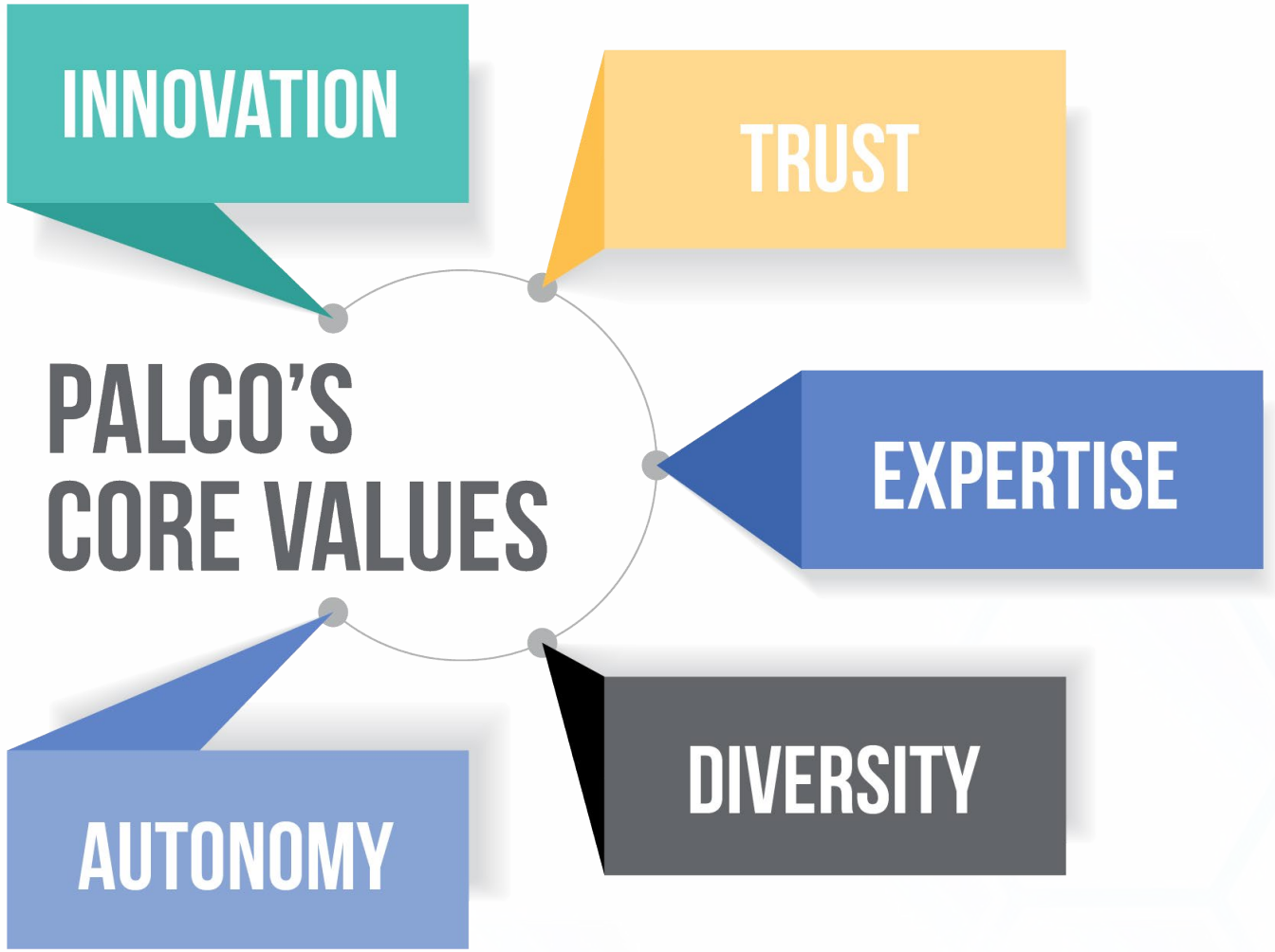
TODAY'S TOPICS

- Overview
- Connect & EVV
- Employer Worksite Locations
- Getting Started with EVV
- Time Entry
- Shift Exceptions
- Interactive Voice Response (IVR)
- Activity Codes
- Resources / Additional Support

PALCO
OVERVIEW

MISSION & CORE VALUES

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



COMPANY HIGHLIGHTS

OVER 25 years of FMS experience

1ST F/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

13 YEARS of Support Broker Experience

$580M In total payroll and vendor payments administered

In late 2024, Palco will transition all West Virginia Participant Directed Options (PDO) participants to the Palco EVV solution with a phased approach.

TRANSITION SCHEDULE

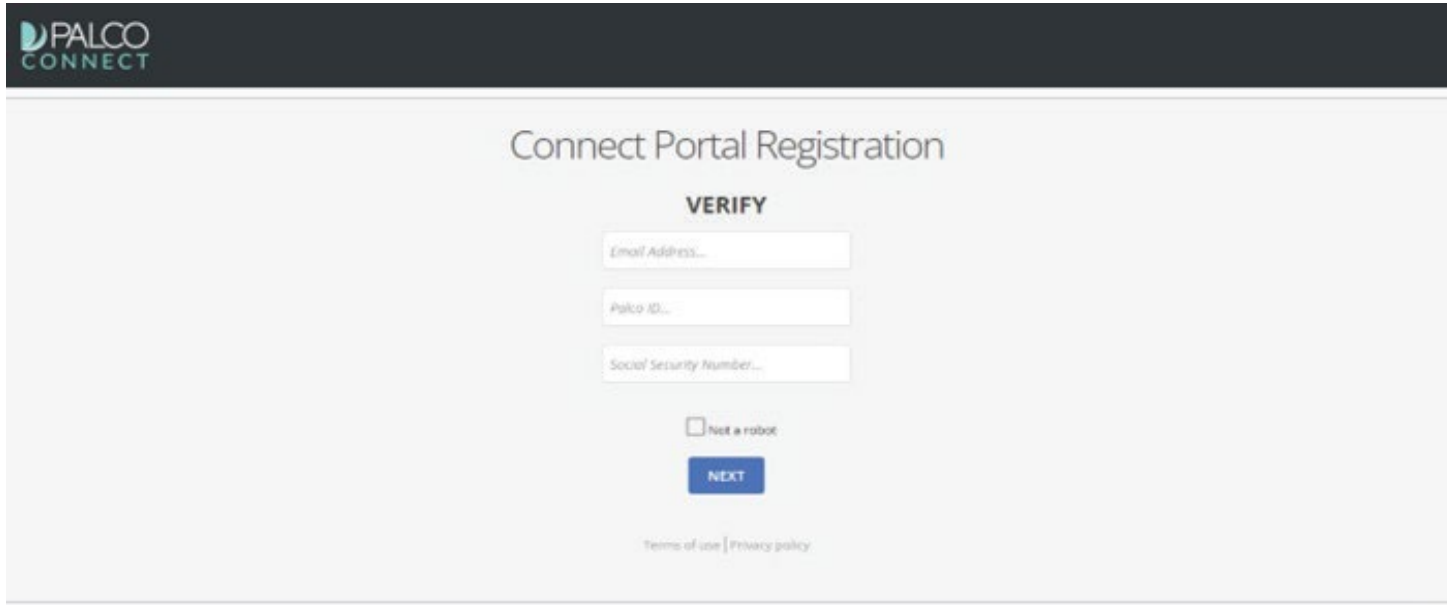
On the date indicated below for your applicable waiver, you will switch to using the Palco Connect EVV solution and stop using the AuthentiCare application.

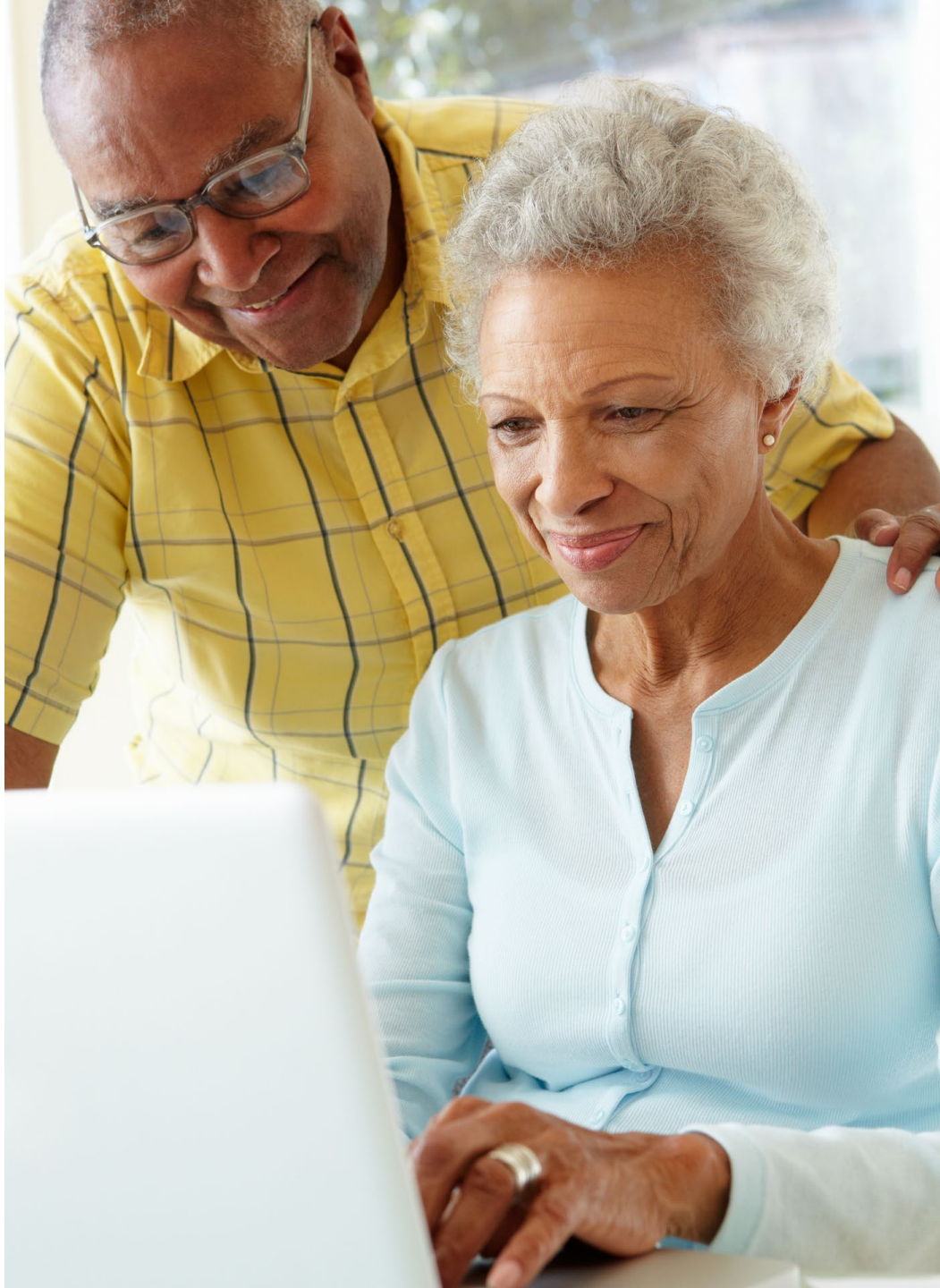
Date	Waiver
November 4th, 2024	WV Traumatic Brain Injury Waiver (TBIW)
December 2nd, 2024	WV Aging and Disabled Waiver (ADW)
January 6th, 2025	WV Intellectual and Developmental Disabilities Waiver (IDDW)

ELECTRONIC VISIT VERIFICATION (EVV)

CONNECT

Connect is Palco's online timesheet portal for Employers and Workers. Connect provides everything a self-directing Employer or Worker may need, right at their fingertips! Accessible 24/7, some features of Connect include the ability to enter time, integration with Electronic Visit Verification (EVV), the ability to track and monitor spending, to update personal contact information, and access W-2s and paystubs.





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.

PALCO
EMPLOYER
WORKSITE
LOCATIONS

EMPLOYER WORKSITE LOCATIONS

One of the most important parts of EVV is location reporting. The system records the worker's geocoordinates when they clock in and out. This is done to verify that the worker is where they should be when providing services.

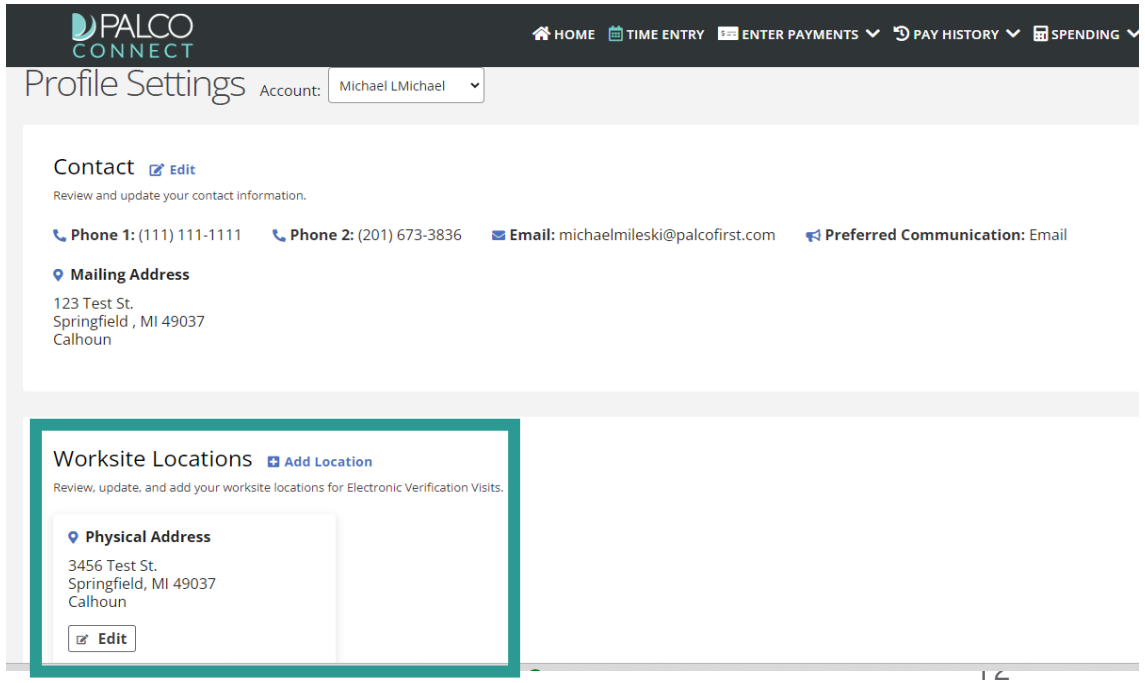
The employer needs to add these worksite locations to their profile. The area surrounding a worksite location is a geofence. If a worker is reporting time shifts outside of the geofence area, it can be a cause for concern.

Please add all locations to the Profile Settings Page where either: The employer may receive services or the worker may provide services.

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.



EMPLOYER WORKSITE LOCATIONS

Step 2.

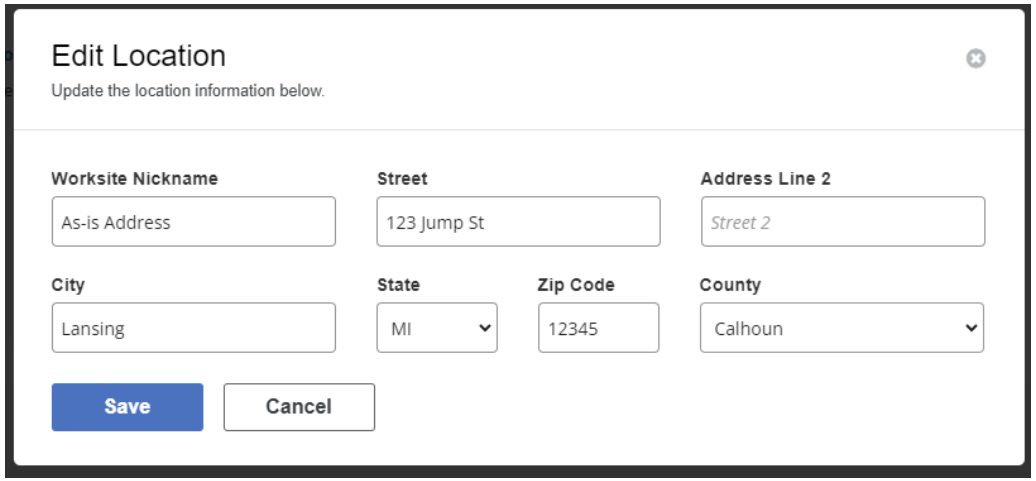
Input the Location Information

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.

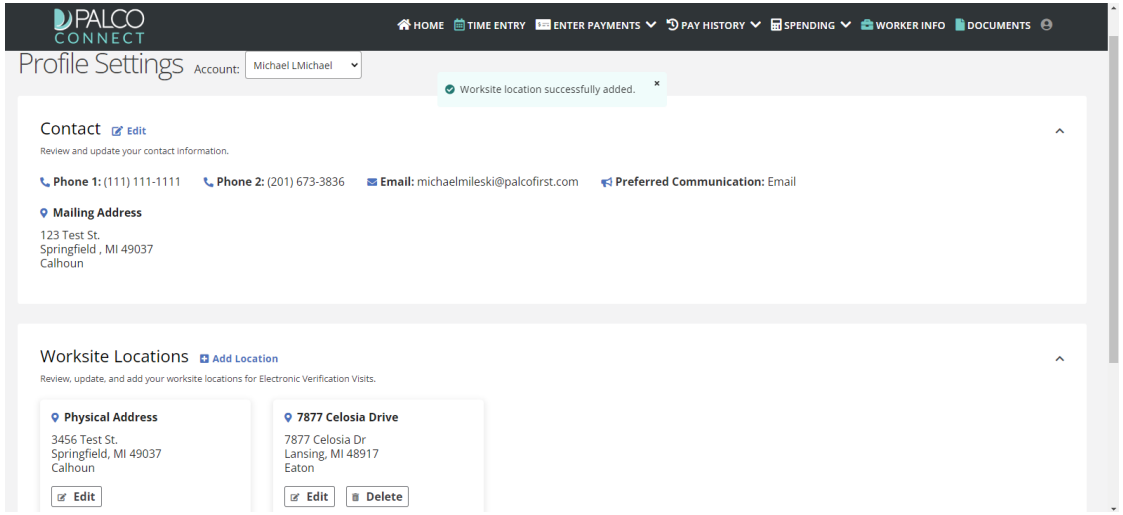
Step 3.

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.



EMPLOYER WORKSITE LOCATIONS



Step 4.

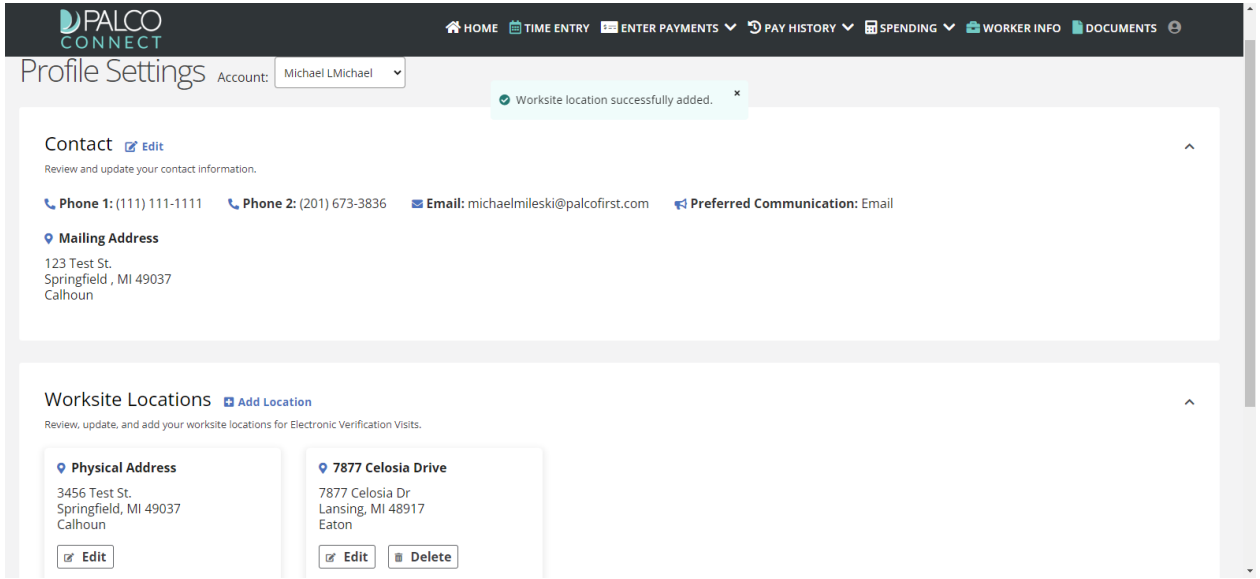
Make Sure The New Location Appears

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.



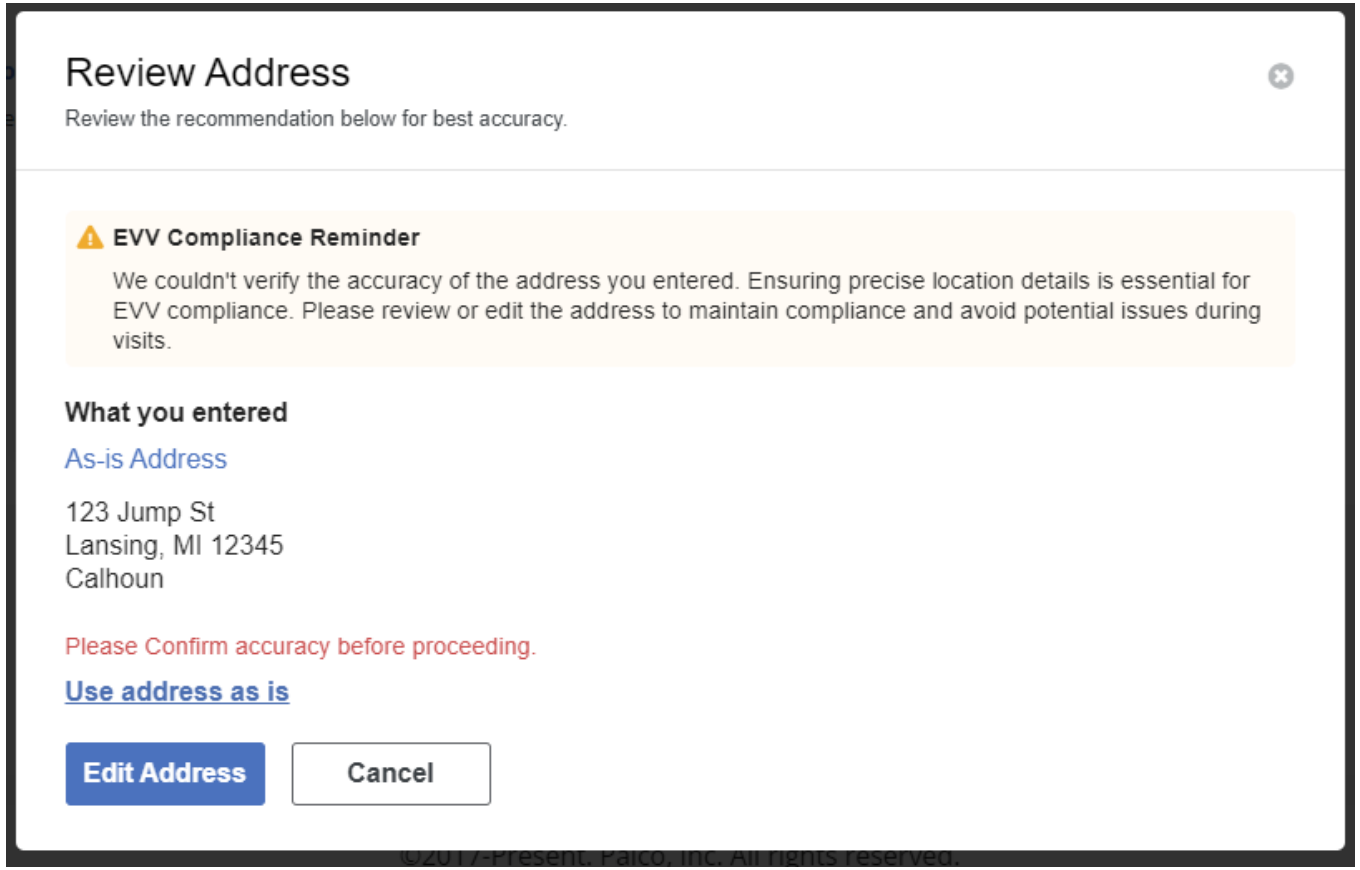
EMPLOYER WORKSITE LOCATIONS

Step 1.
Review the Address for Accuracy

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

Step 2.
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.



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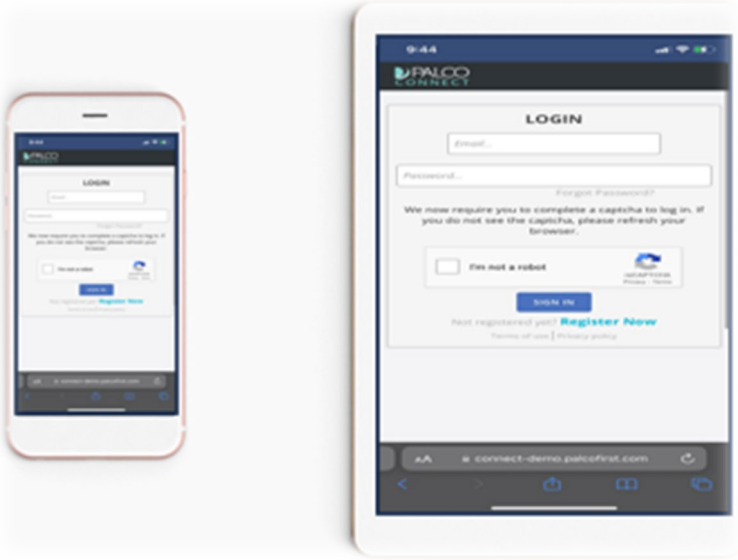
GETTING WORKERS STARTED WITH EVV

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 OR YOU CAN 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.

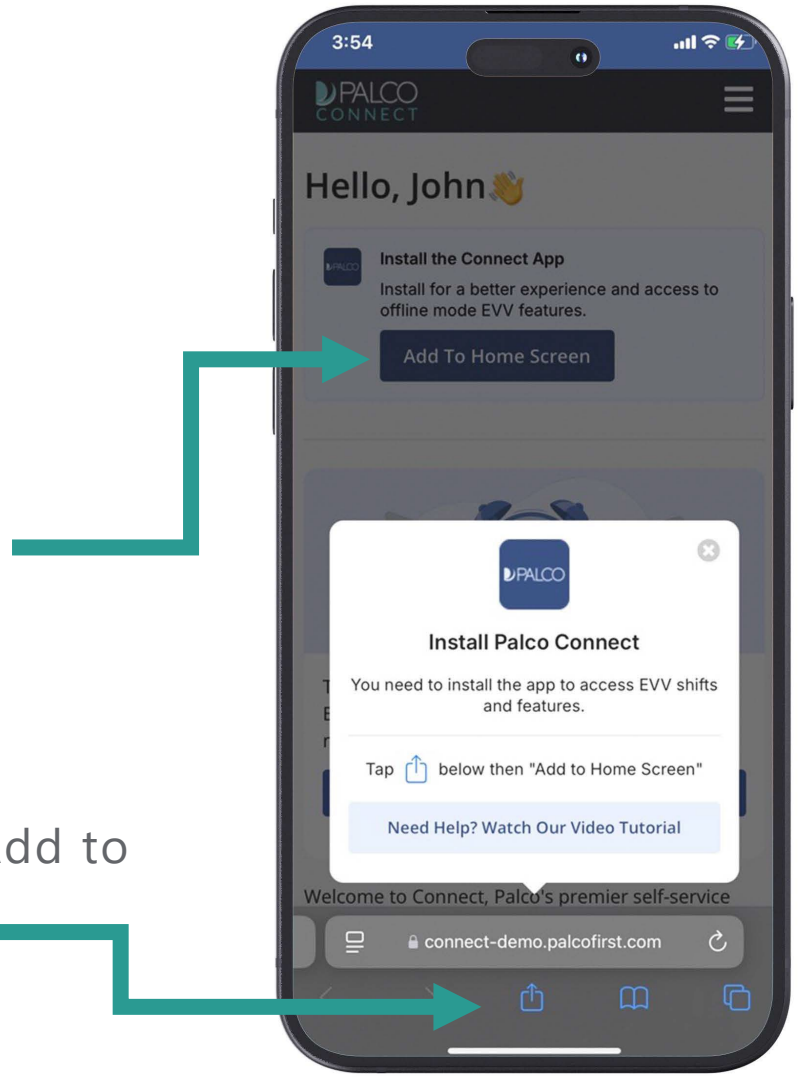
GETTING STARTED CONTINUED

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.**

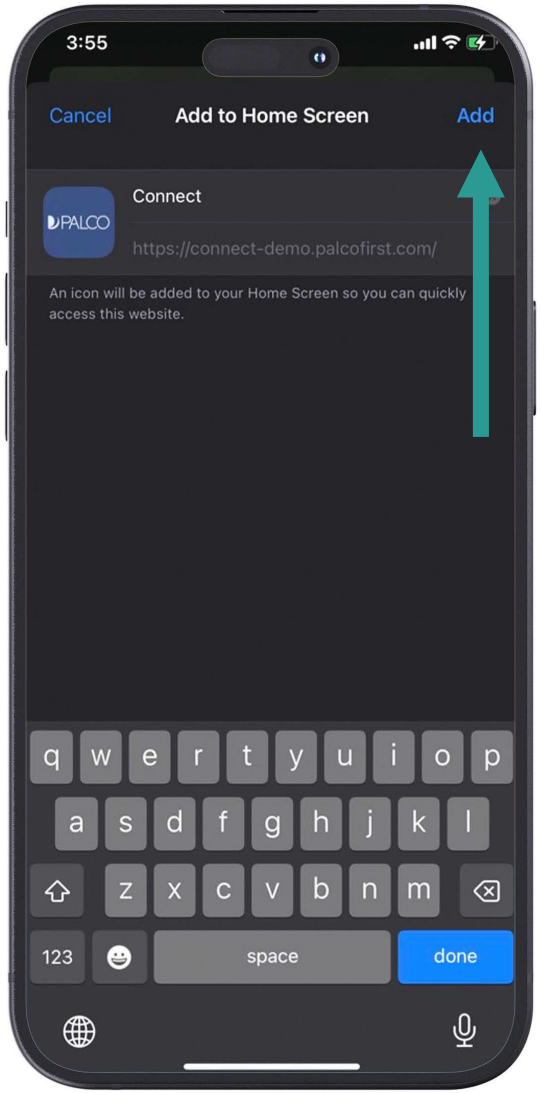
Following the on-screen instructions, tap the icon. Then, tap “Add to Home Screen” within the on-screen menu.



GETTING STARTED CONTINUED

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.

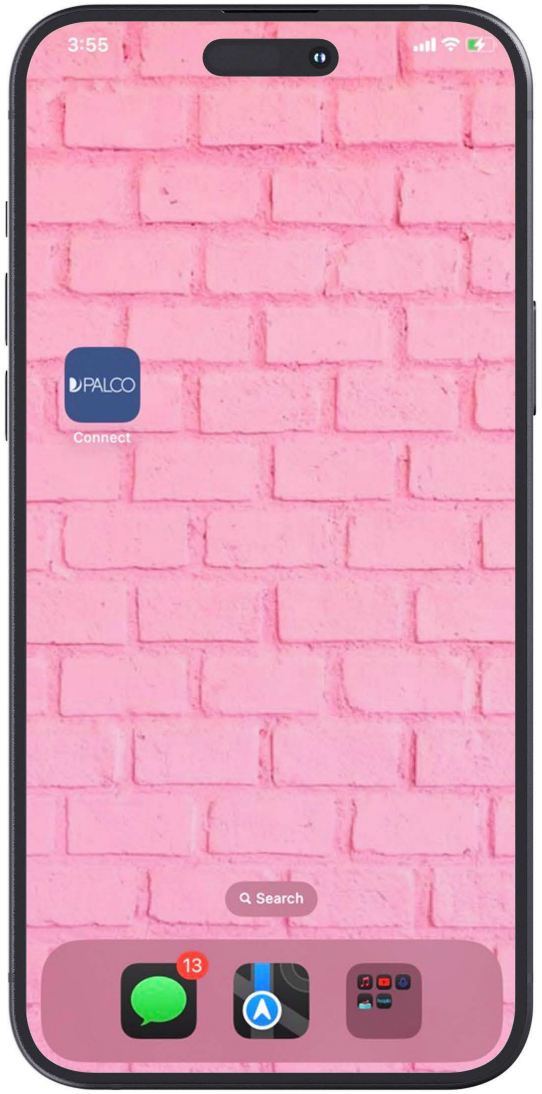


GETTING STARTED CONTINUED

Step 7. Begin using the Application

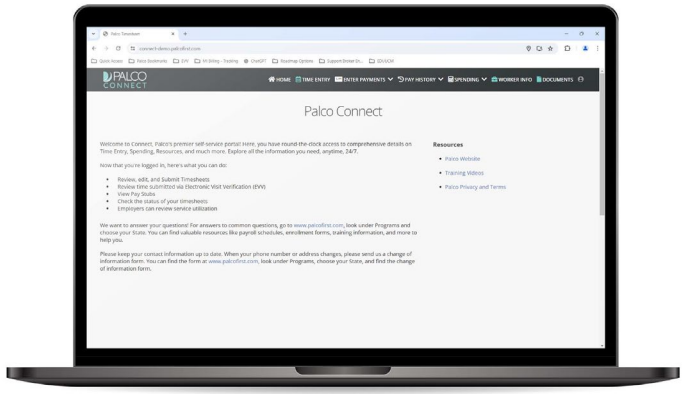
Go to the home screen of your device. Then, tap the new Palco EVV app icon to start using it.

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

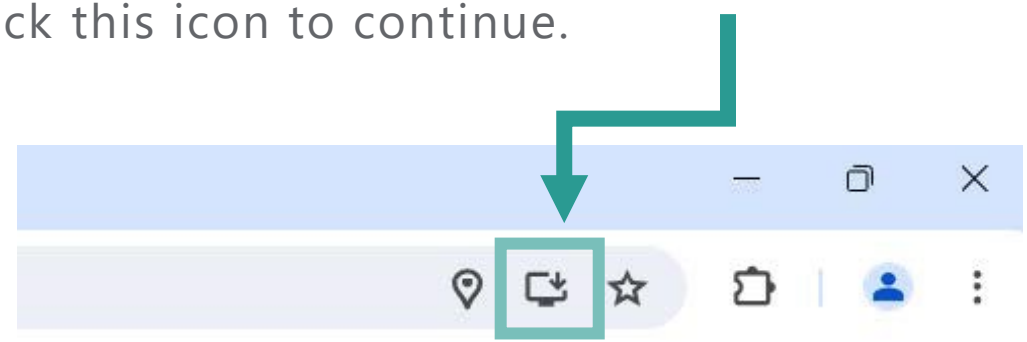
Step 3. Sign in to Connect

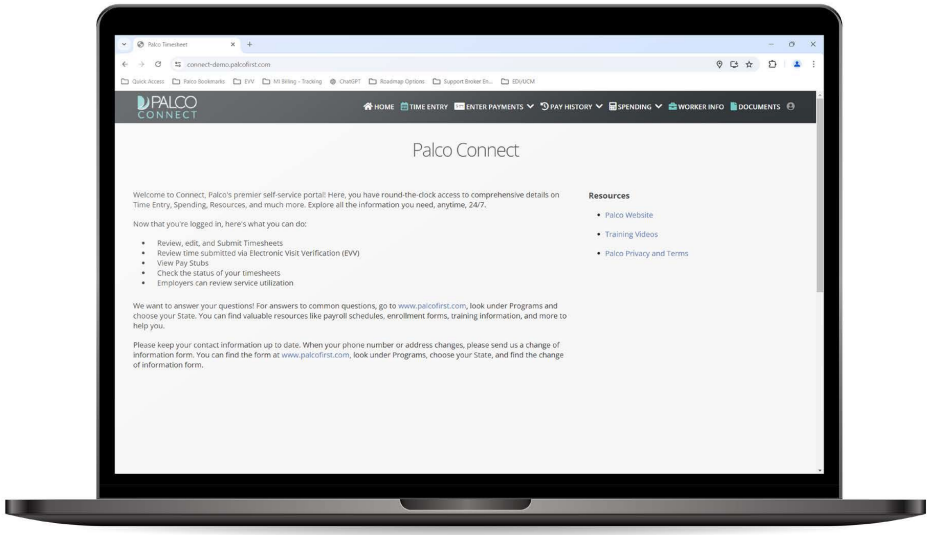
If you do not already have a Connect account, you will need to create one. Use the **Register Now** button to create an account. Come back to this step once that is done.

GETTING STARTED CONTINUED

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.” Click this icon to continue.

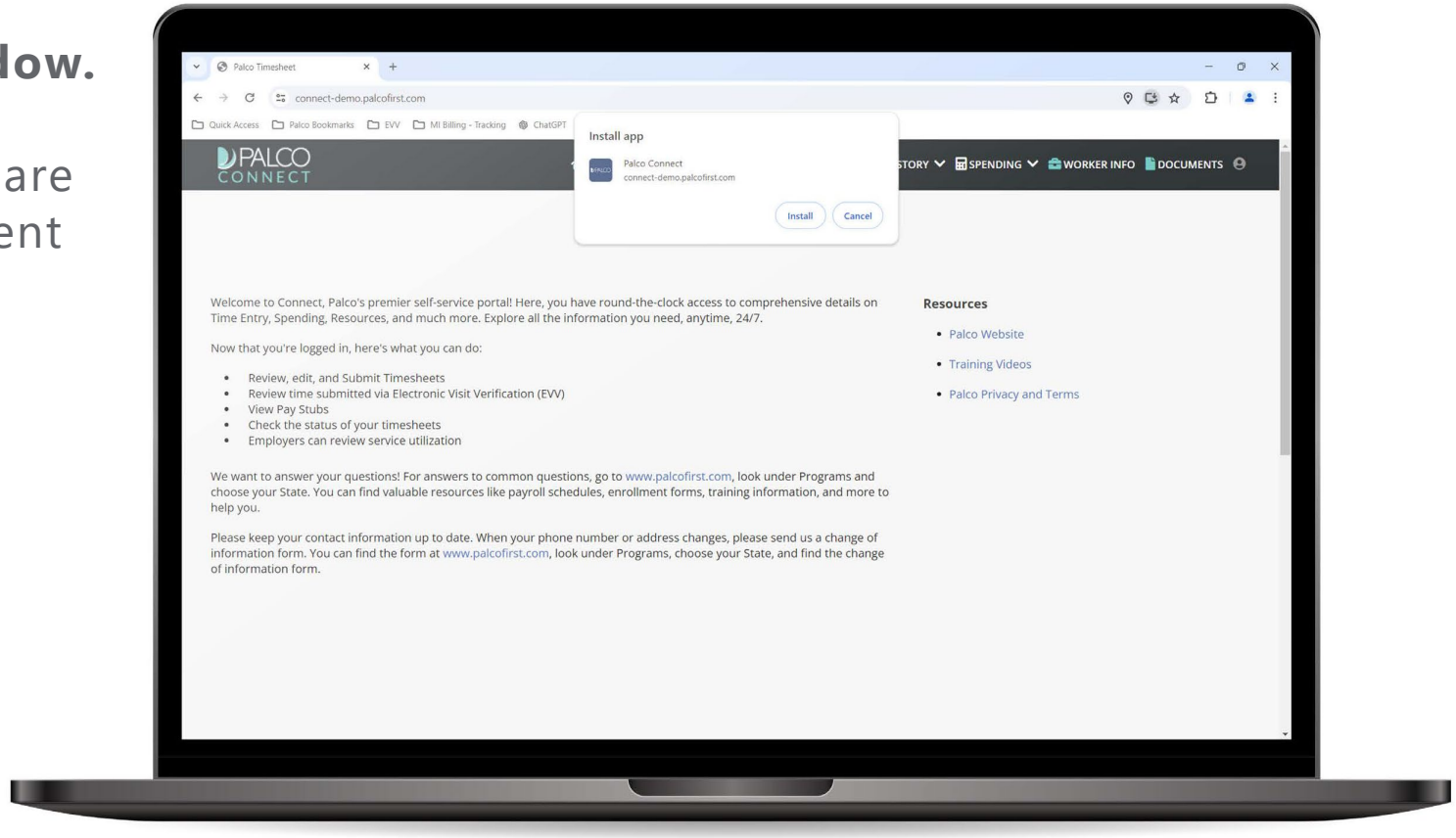




GETTING STARTED CONTINUED

Step 5. Select “Install in the popup window.

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

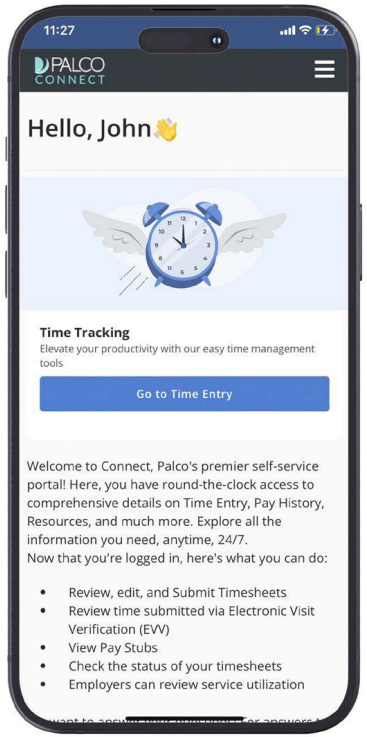


PALCO
TIME ENTRY

WORKER CLOCK IN

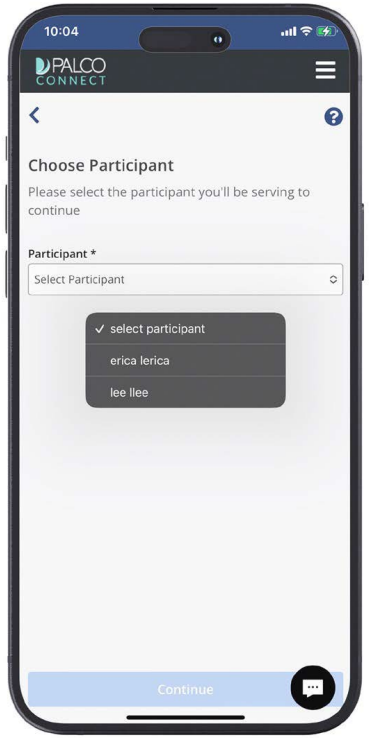
In this section, we will go over how to start an EVV-compliant time entry. Once logged into Connect, follow these steps.

Step 1. Click on Go to Time Entry



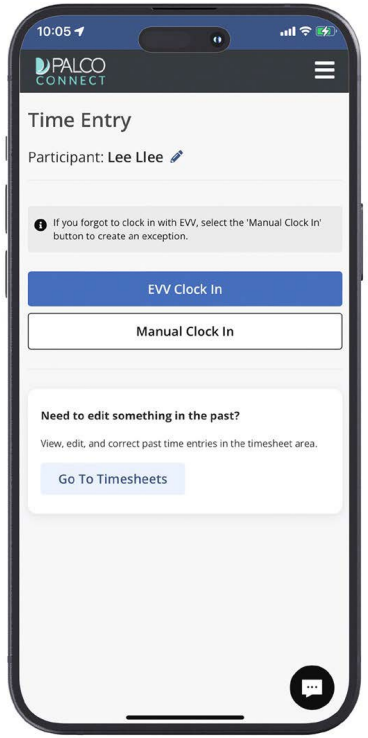
This blue button is on the home screen.

Step 2. Select a Participant



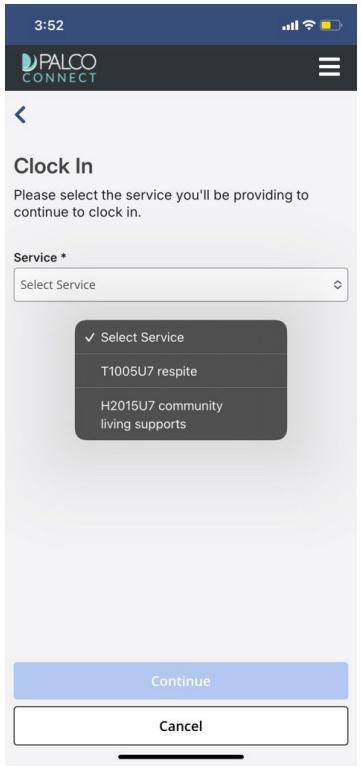
You will only need to select a Participant if you work for more than one.

Step 3. Choose EVV Clock In



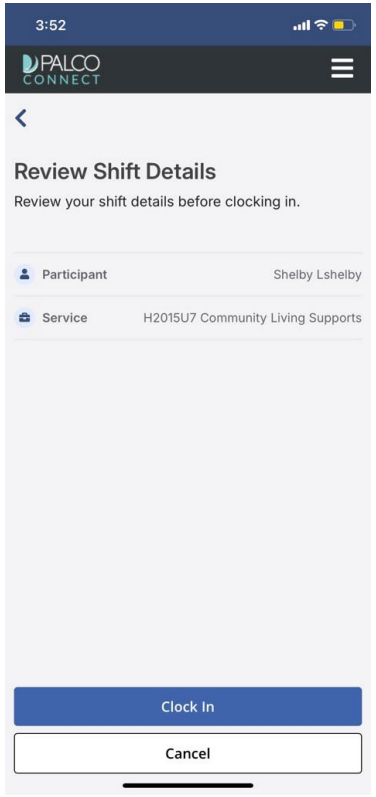
WORKER CLOCK IN

Step 4. Select a Service to Provide



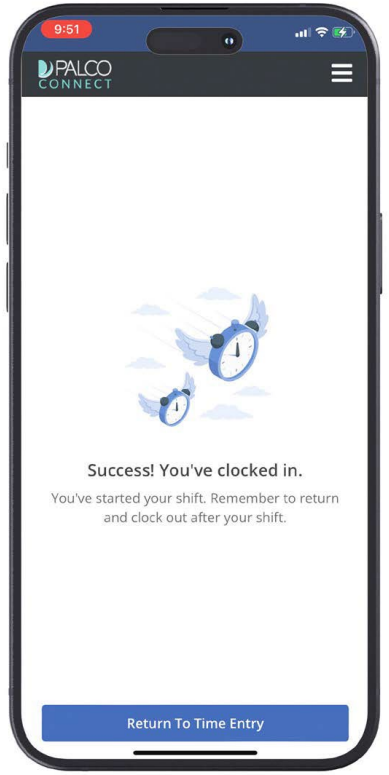
Service code options will be in the drop-down menu.

Step 5. Review Shift Details



Double-check that everything is right before submitting.

Step 6. Clock In for the Shift

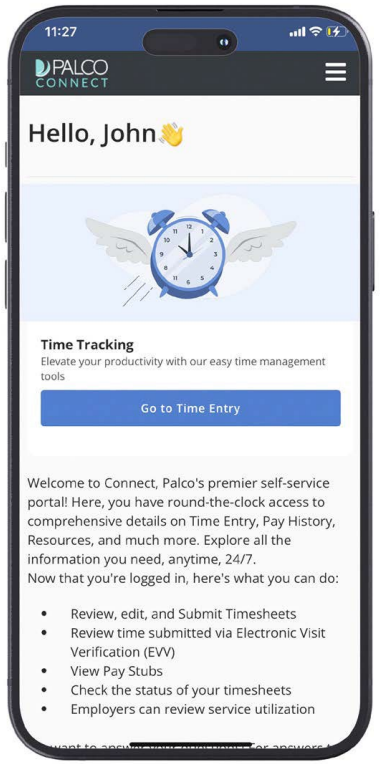


You are now on the clock for this shift.

WORKER CLOCK OUT

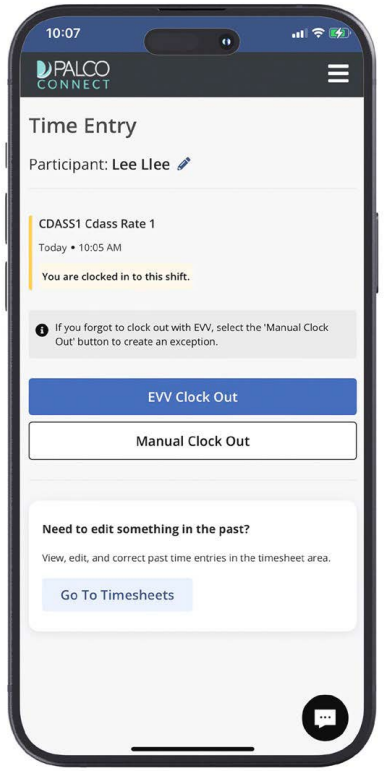
The Clock Out process is very similar to clocking in. Please, do not clock out until you are finished working the shift.

Step 1. Click on Go to Time Entry



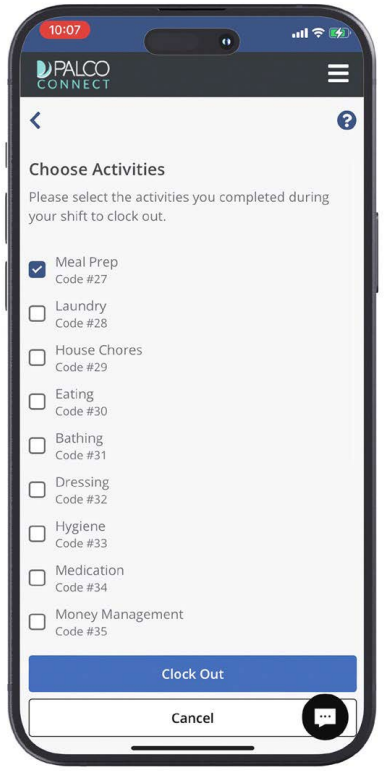
This blue button is on the home screen.

Step 2. Choose EVV Clock Out



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

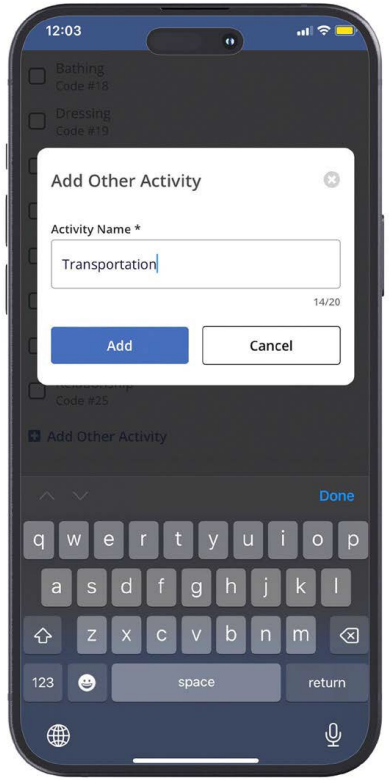
Step 3. Select Activities



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

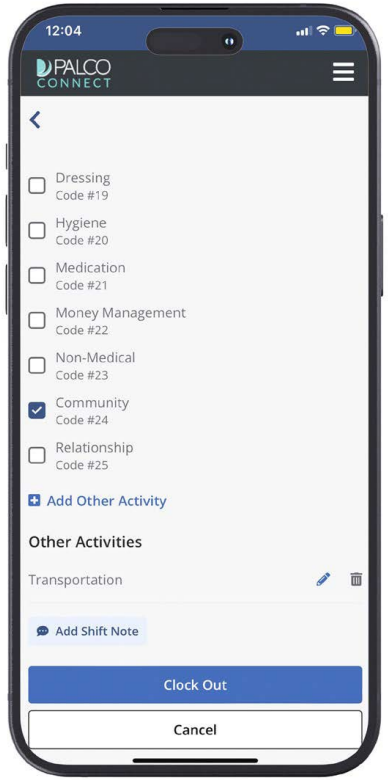
WORKER CLOCK OUT

Step 4. Add Manual Activities



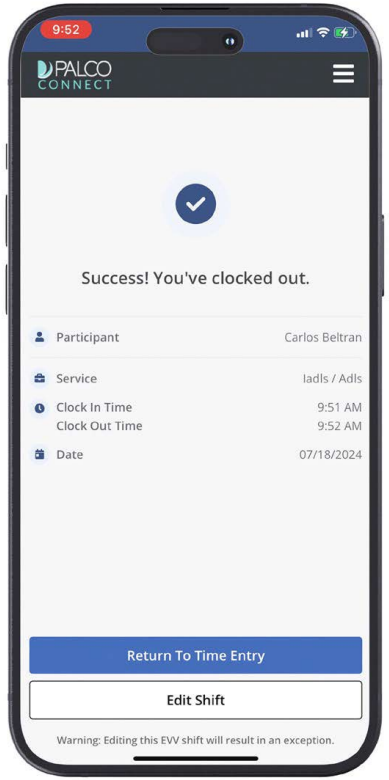
If needed, you can manually add an activity.

Step 5. Review Shift Details and Clock Out



Double-check all details before tapping Clock Out.

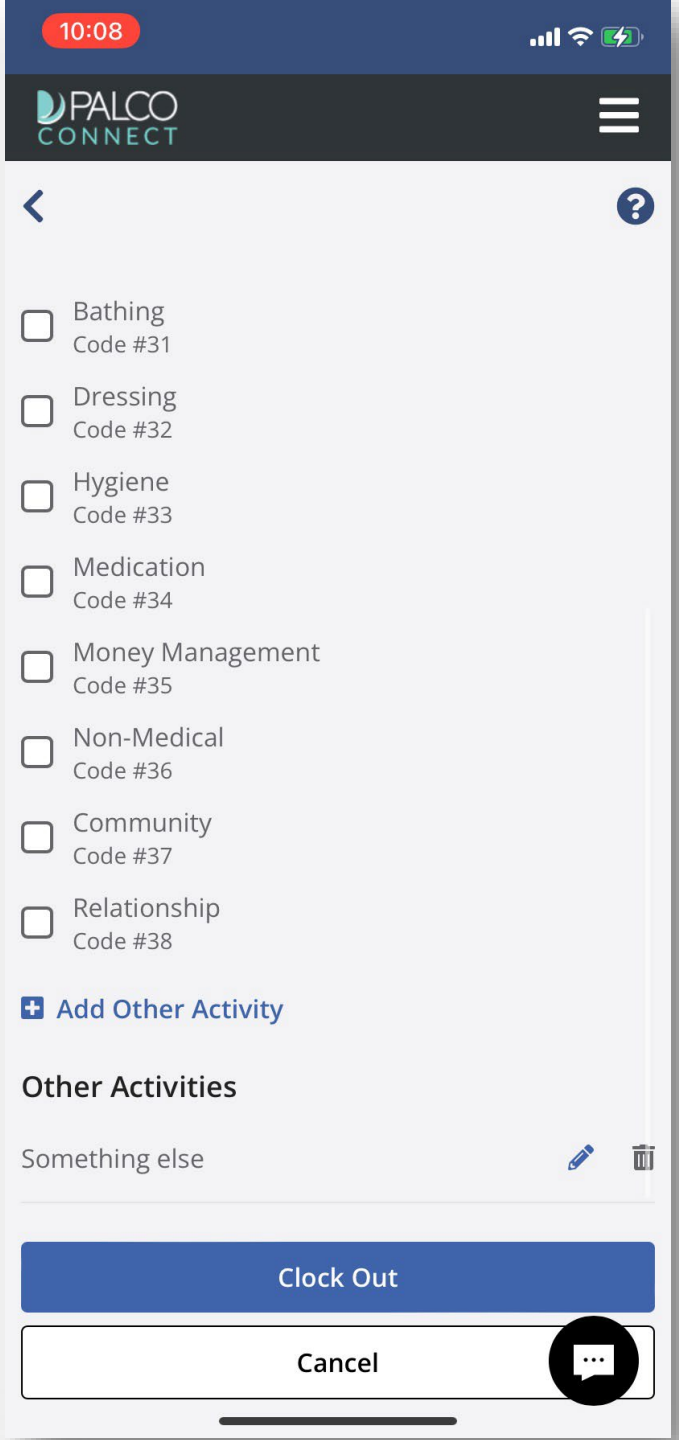
Step 6. Review Confirmation



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

HELPFUL TIP

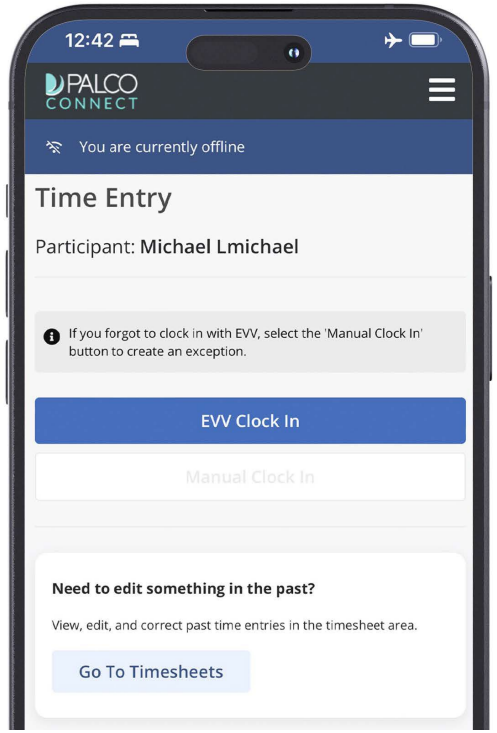
If your program requires an activity, you won't be able to clock out without selecting one.



OFFLINE MODE

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.



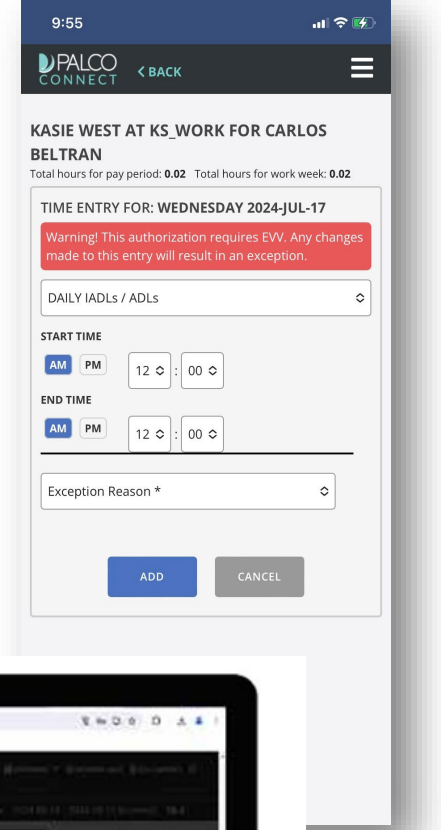
When offline, your menu options will be limited. For full use of the Palco EVV app, connect to the internet.

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

PALCO
SHIFT EXCEPTIONS

SHIFT EXCEPTIONS

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

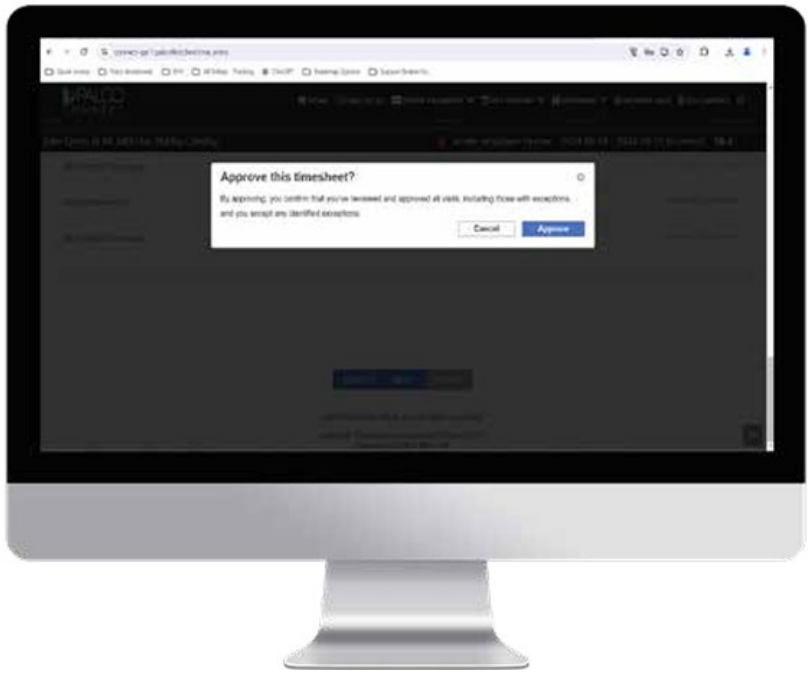


WORKERS:

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.

EMPLOYER:

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.



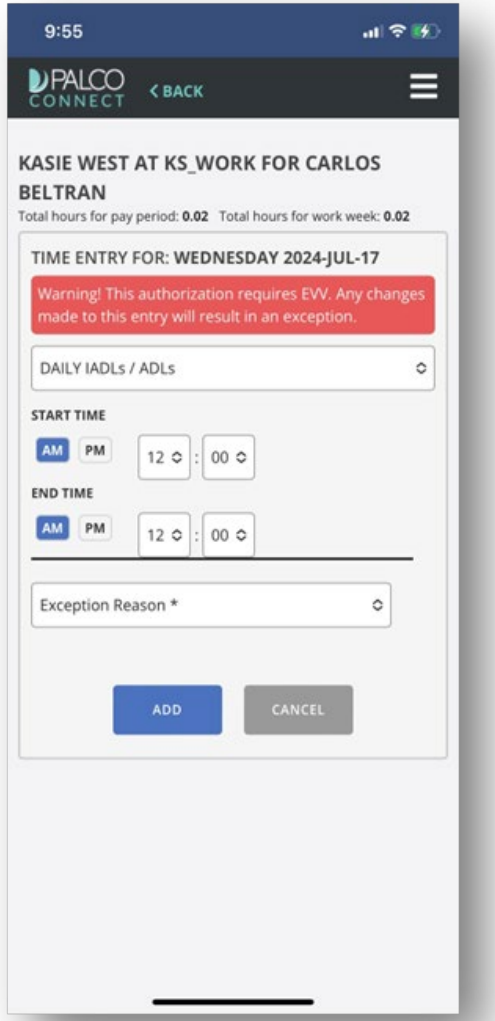
SHIFT EXCEPTIONS

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.

I'm the employer. Why do I need to verify the reason for a shift exception?

- Part of the role of an employer is to manage the 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 (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.

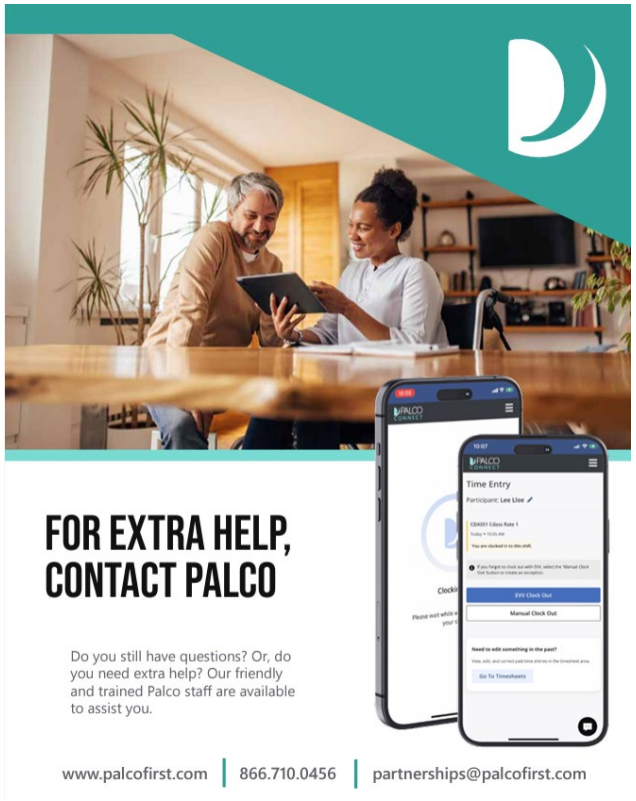
ACTIVITY CODES

Some programs require you to input an activity code. Here is a list of activities with their corresponding codes used with IVR for the West Virginia TBIW and ADW waivers.

CODE	ACTIVITY
105	Meal Preparation
106	Housework/Chore
107	Vacuum/Sweep
108	Mop
109	Dust
110	Straighten (house)
111	Managing Finances
112	Managing Medications
113	Shopping
114	Transportation
115	Hygiene
116	Dressing Upper
117	Dressing Lower
118	Locomotion
119	Transfer
120	Positioning
121	Toilet Use
122	Bed Mobility
123	Bed Making
124	Eating
125	Bladder incontinence

CODE	ACTIVITY
126	Bowel Incontinence
127	Personal Care
128	Bathing
129	Skin Care
130	Hair
131	Nails
132	Mouth Care
133	Lotion/Ointment
134	Laundry
135	Reading/Writing
136	Supervision/Coaching/ Cueing
137	Incontinence Care
138	Catheter Care
139	Wound Care
140	G-Tube Feeding
141	Stairs
142	In Person
143	Via Telephone
144	Other
145	Phone Use

ADDITIONAL SUPPORT



PALCO'S EVV TRAINING RESOURCES

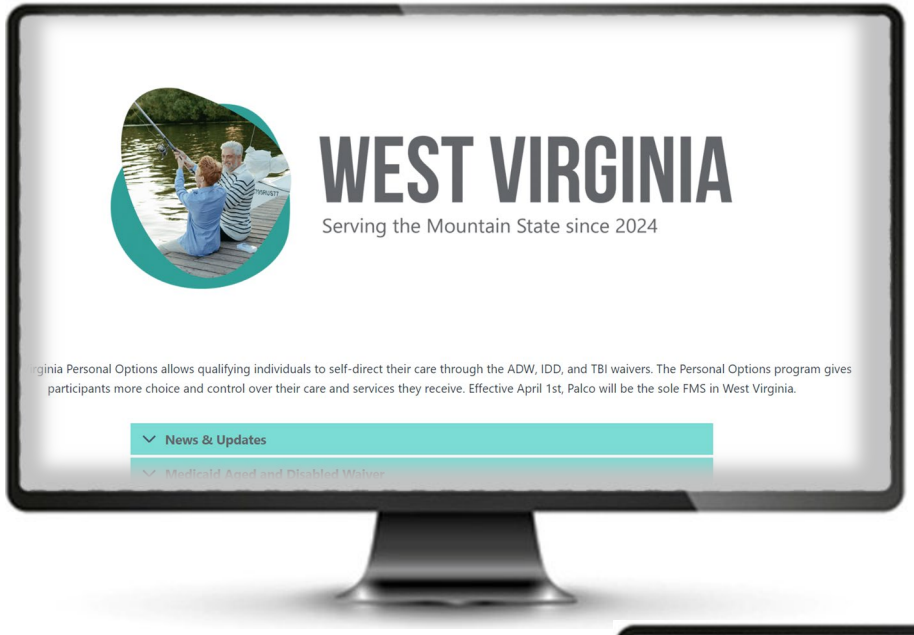
- User Guide
- Videos

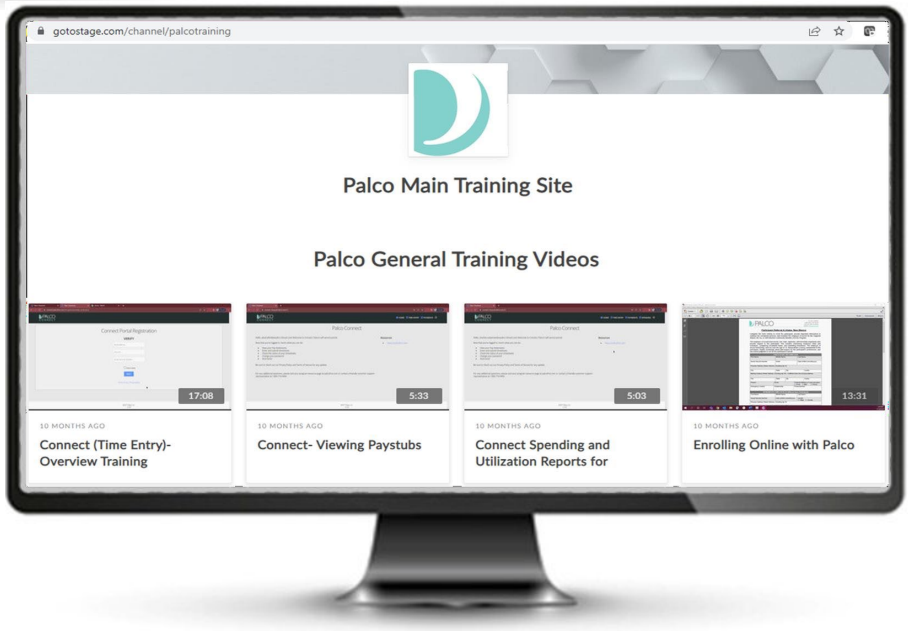
EVV Resources

RESOURCES

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

https://palcofirst.com/west-virginia/





CUSTOMER SUPPORT

You can contact the Palco Customer Support team Monday-Friday between 8:00am and 5:00pm EST.
Phone: **1-866-710-0456**

Email: **customersupport@palcofirst.com**

Visit our website to chat with a live customer service agent!

PALCO
QUESTIONS

THANK YOU FOR YOUR TIME!

For more information about Palco, visit:

https://www.palcofirst.com

Email: **https://palcofirst.com/**

Contact: 1-866-710-0456