



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

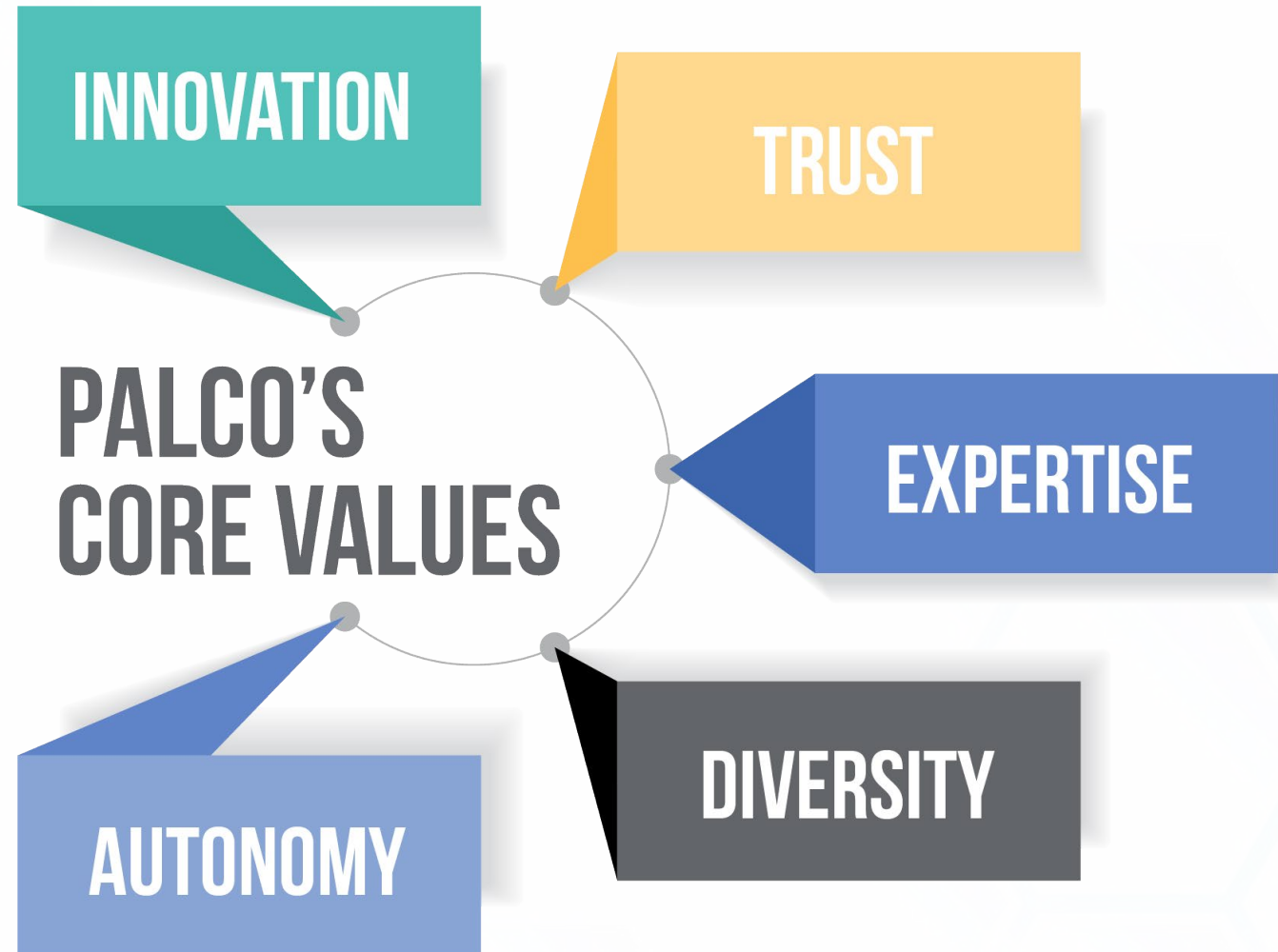
A photograph of a diverse group of people in a workshop or classroom setting. A woman in a blue shirt and patterned skirt is standing and pointing towards a laptop on a table. Other participants are seated around the table, some looking at their own devices. The scene is brightly lit with a wooden ceiling and fluorescent lights.

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.

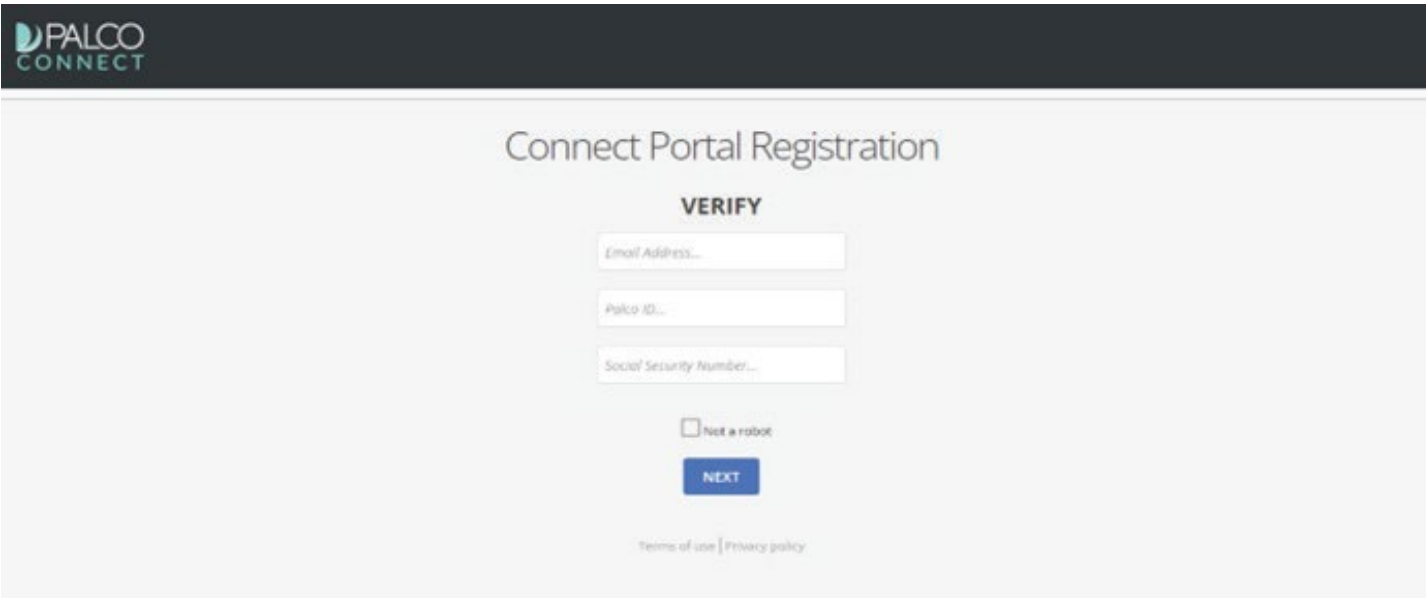
Date	Waiver
November 4th, 2024	WV Traumatic Brain Injury Waiver (TBIW)
December 2nd, 2024	WV Aging and Disabled Waiver (ADW)
January 6th, 2025	WV Intellectual and Developmental Disabilities Waiver (IDDW)

A photograph of an elderly man with glasses and a grey beard, wearing a green sweater, sitting on a light-colored sofa. He is looking at a tablet held by a younger woman with braided hair, also wearing a green sweater. They are in a bright, modern living room with a wooden side table and a potted plant. The text 'ELECTRONIC VISIT VERIFICATION (EUV)' is overlaid in a white box in the center of the image.

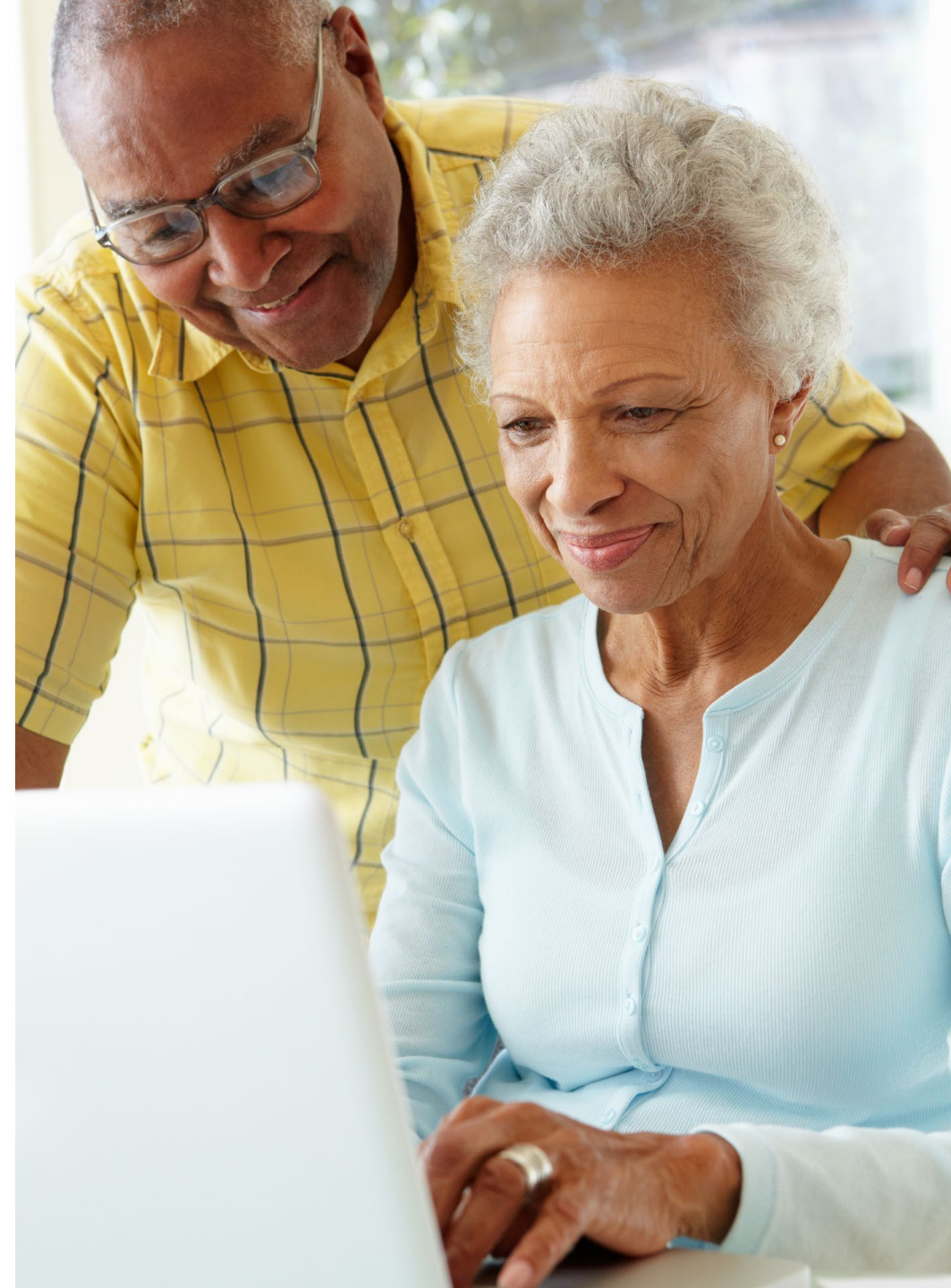
ELECTRONIC VISIT VERIFICATION (EUV)

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.



The screenshot shows the Palco Connect Portal Registration page. At the top left is the Palco Connect logo. The main heading is "Connect Portal Registration". Below this is a "VERIFY" section with three input fields: "Email Address...", "Palco ID...", and "Social Security Number...". There is a checkbox labeled "Not a robot" and a blue "NEXT" button. At the bottom, there are links for "Terms of use" and "Privacy policy".



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.



A man with a beard and glasses, wearing a patterned shirt and large headphones, is seated in a wheelchair at a desk. He is focused on his work, with his hands on a laptop keyboard. The background shows a bright, modern office environment with large windows and another person sitting on a sofa in the distance.

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.

The screenshot shows the PALCO CONNECT user interface. At the top, there is a navigation bar with the logo and menu items: HOME, TIME ENTRY, ENTER PAYMENTS, PAY HISTORY, and SPENDING. Below this is the 'Profile Settings' page for user 'Michael LMichael'. The 'Contact' section is visible, including phone numbers, email, and a mailing address. The 'Worksite Locations' section is highlighted with a teal border and contains a 'Physical Address' field with the address: 3456 Test St., Springfield, MI 49037, Calhoun, and an 'Edit' button.

EMPLOYER WORKSITE LOCATIONS



Edit Location ✕
Update the location information below.

Worksite Nickname <input type="text" value="Nickname"/>	Street <input type="text" value="Street"/>	Address Line 2 <input type="text" value="Street 2"/>	
City <input type="text" value="City"/>	State <input type="text" value="Select State"/>	Zip Code <input type="text" value="Zip Code"/>	County <input type="text" value="Select County"/>

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.

Edit Location ✕
Update the location information below.

Worksite Nickname <input type="text" value="As-is Address"/>	Street <input type="text" value="123 Jump St"/>	Address Line 2 <input type="text" value="Street 2"/>	
City <input type="text" value="Lansing"/>	State <input type="text" value="MI"/>	Zip Code <input type="text" value="12345"/>	County <input type="text" value="Calhoun"/>

EMPLOYER WORKSITE LOCATIONS



PALCO CONNECT Profile Settings Account: Michael LMichael

Worksite location successfully added.

Contact [Edit](#)

Review and update your contact information.

Phone 1: (111) 111-1111 Phone 2: (201) 673-3836 Email: michaelmileski@palcofirst.com Preferred Communication: Email

Mailing Address

123 Test St.
Springfield, MI 49037
Calhoun

Worksite Locations [Add Location](#)

Review, update, and add your worksite locations for Electronic Verification Visits.

Physical Address

3456 Test St.
Springfield, MI 49037
Calhoun [Edit](#)

7877 Celosia Drive

7877 Celosia Dr
Lansing, MI 48917
Eaton [Edit](#) [Delete](#)

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 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.

PALCO CONNECT Profile Settings Account: Michael LMichael

Worksite location successfully added.

Contact [Edit](#)

Review and update your contact information.

Phone 1: (111) 111-1111 Phone 2: (201) 673-3836 Email: michaelmileski@palcofirst.com Preferred Communication: Email

Mailing Address

123 Test St.
Springfield, MI 49037
Calhoun

Worksite Locations [Add Location](#)

Review, update, and add your worksite locations for Electronic Verification Visits.

Physical Address

3456 Test St.
Springfield, MI 49037
Calhoun [Edit](#)

7877 Celosia Drive

7877 Celosia Dr
Lansing, MI 48917
Eaton [Edit](#) [Delete](#)



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.

Review Address

Review the recommendation below for best accuracy.

⚠ EVV Compliance Reminder

We couldn't verify the accuracy of the address you entered. Ensuring precise location details is essential for EVV compliance. Please review or edit the address to maintain compliance and avoid potential issues during visits.

What you entered

[As-is Address](#)

123 Jump St
Lansing, MI 12345
Calhoun

Please Confirm accuracy before proceeding.

[Use address as is](#)

[Edit Address](#) [Cancel](#)

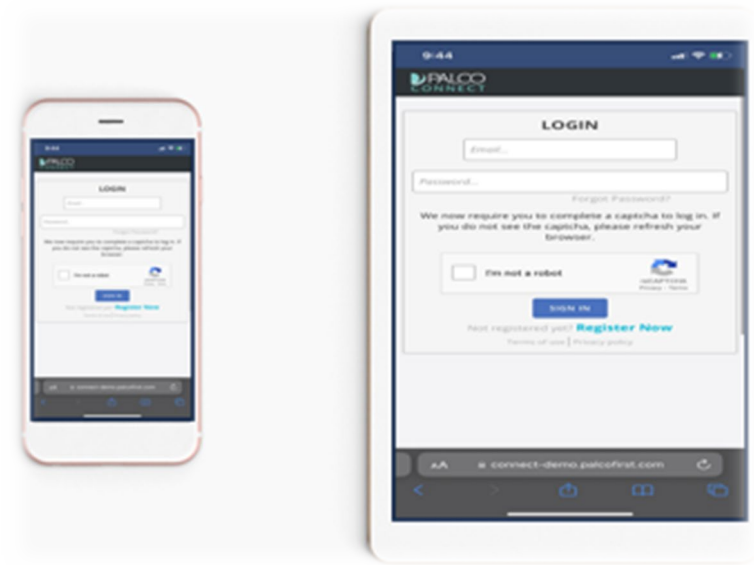
©2017-Present, Paico, Inc. All rights reserved.

A photograph of a man and a woman sitting together, looking at a smartphone. The woman is on the left, wearing a striped shirt, and the man is on the right, wearing a light-colored shirt. They are both smiling and appear to be engaged in a conversation about the phone. The background is a bright, indoor setting with a window and some greenery.

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.

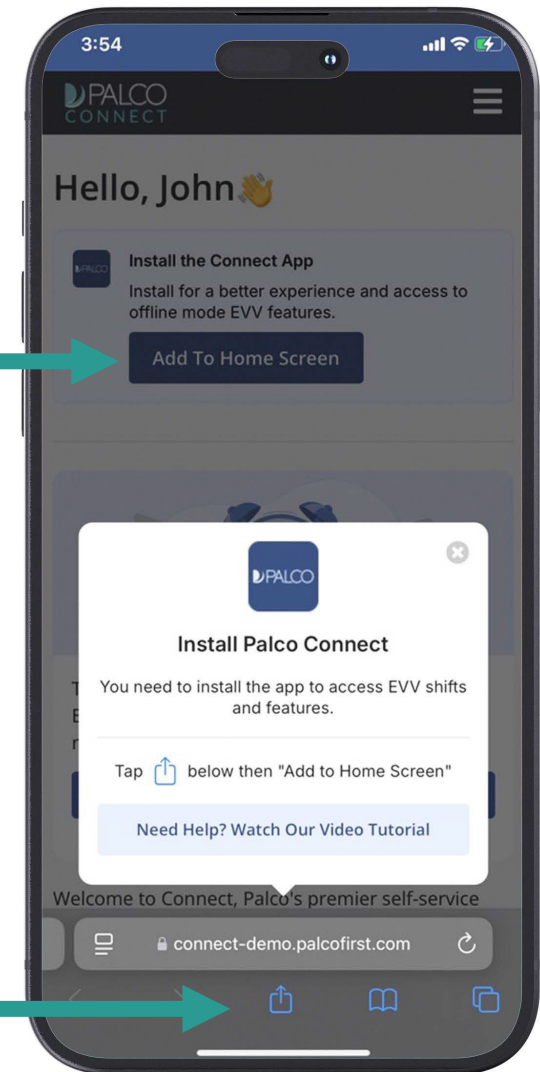
GETTING STARTED CONTINUED

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.

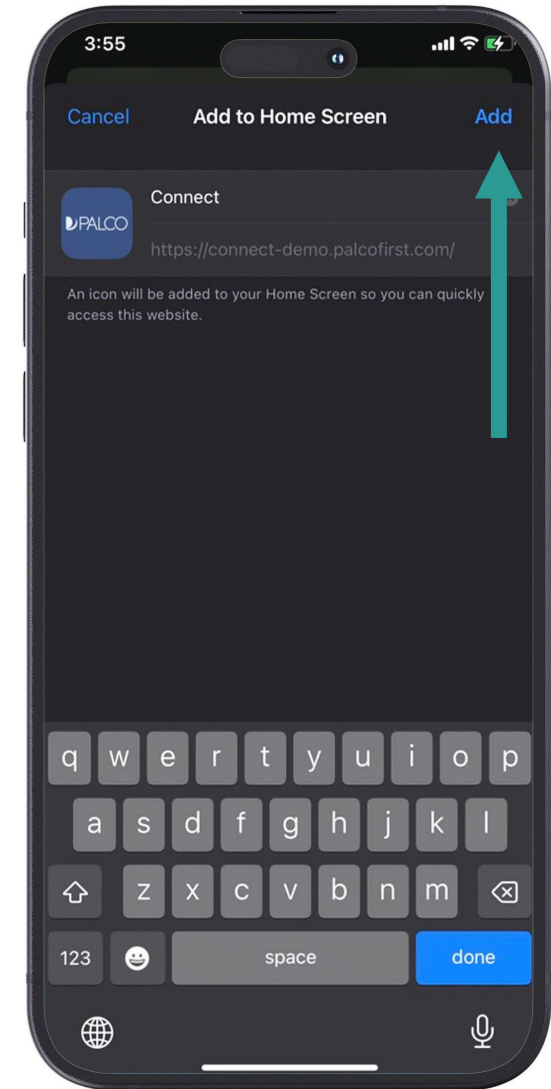
Following the on-screen instructions, tap the icon. Then, tap "Add to Home Screen" within the on-screen menu.



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.

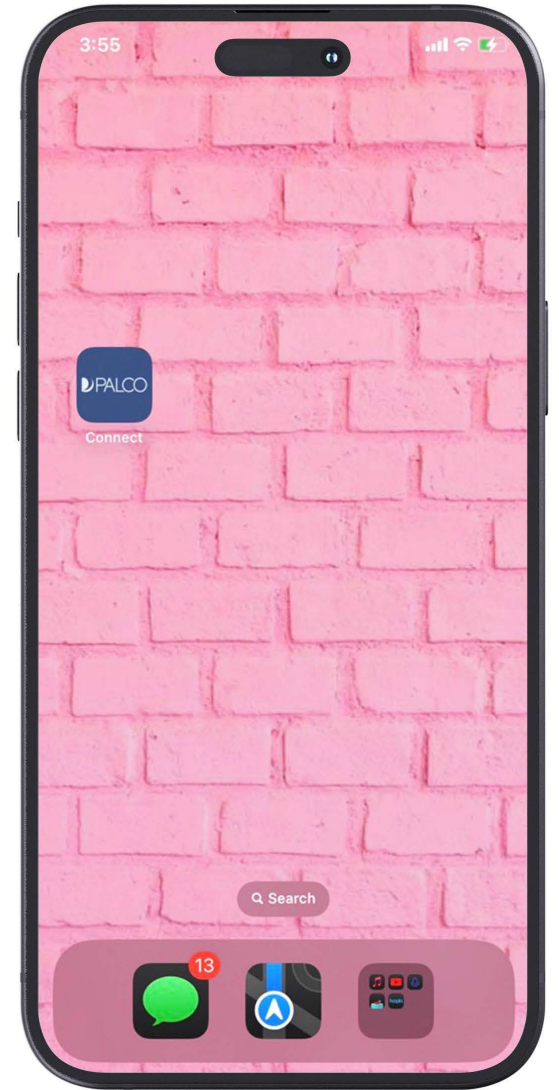


GETTING STARTED CONTINUED

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

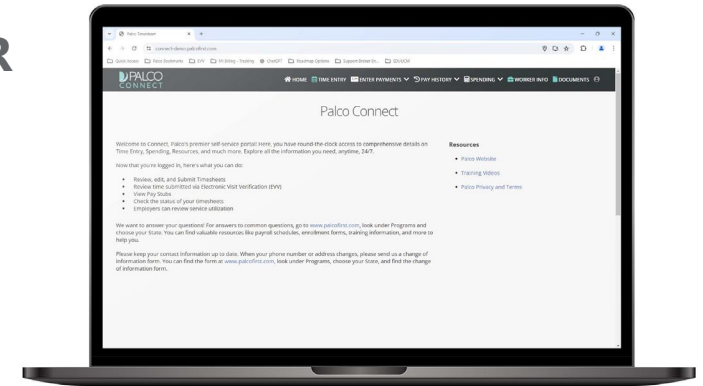
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You can use a laptop or desktop.

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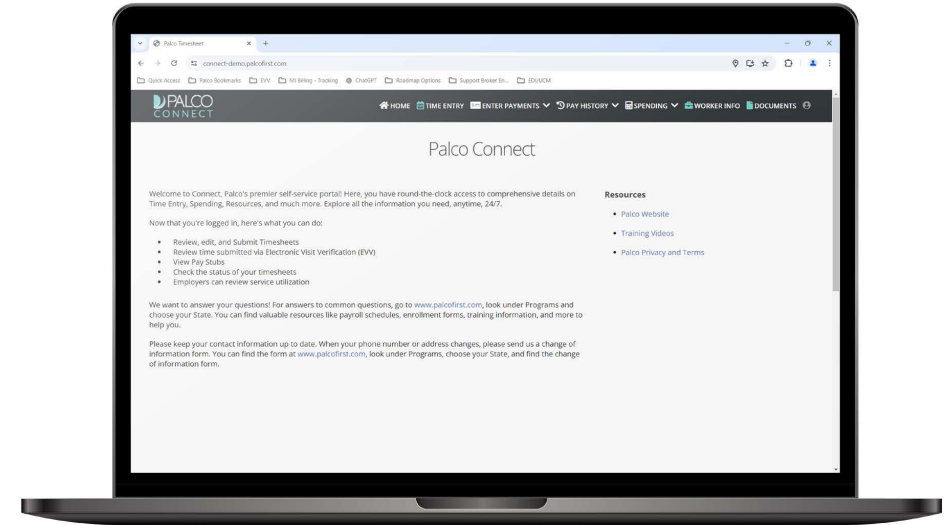
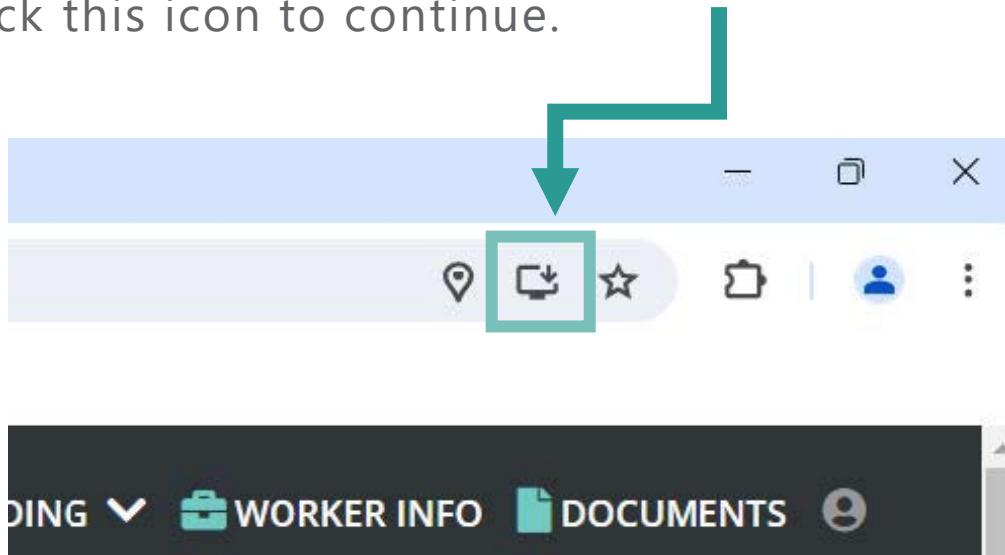




GETTING STARTED CONTINUED

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.

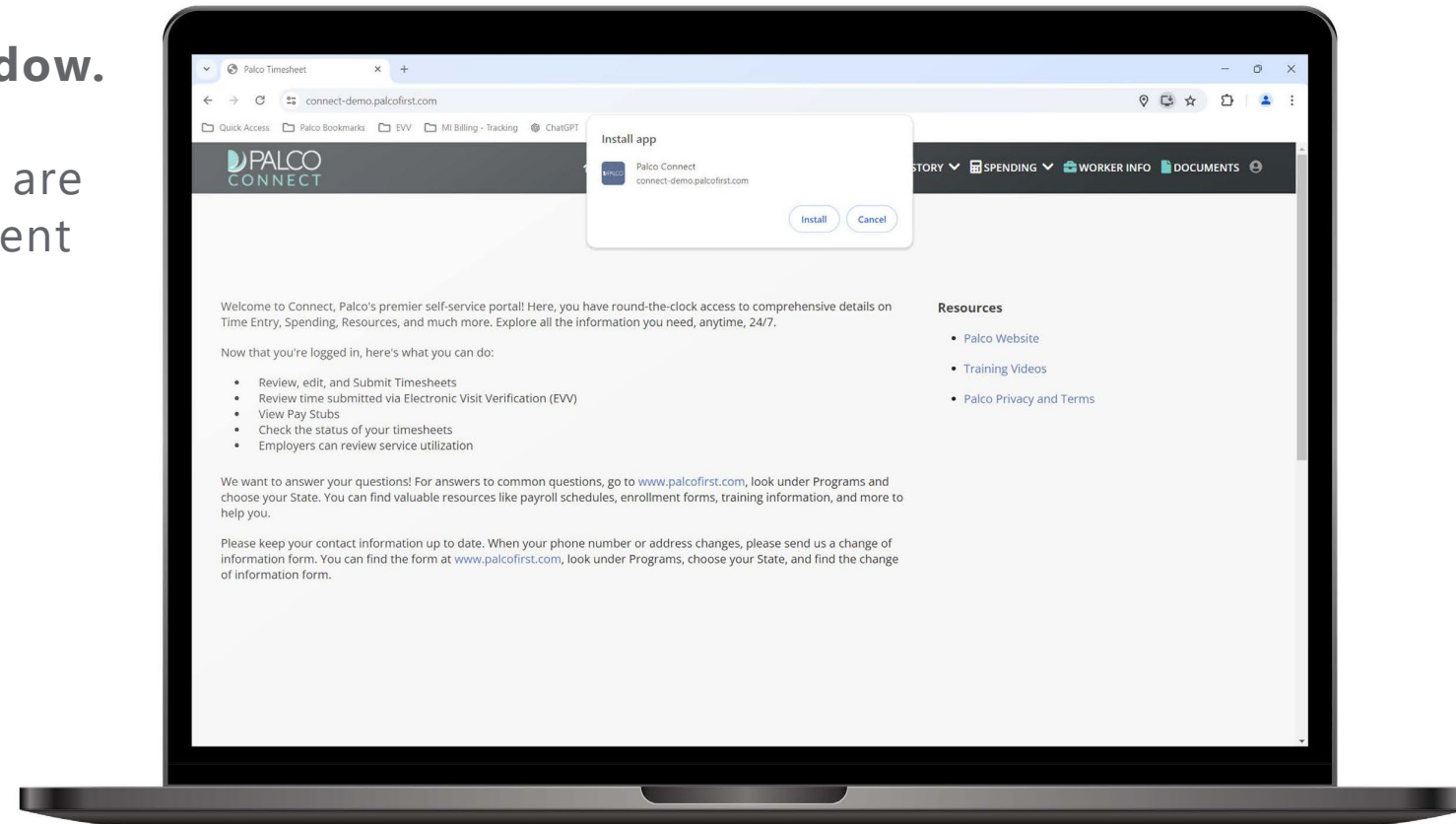




GETTING STARTED CONTINUED

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.



A woman with short dark hair, wearing a white sleeveless top, is smiling and looking down at a black smartphone she is holding in her hands. The background is a blurred outdoor setting with green trees and a light-colored building.

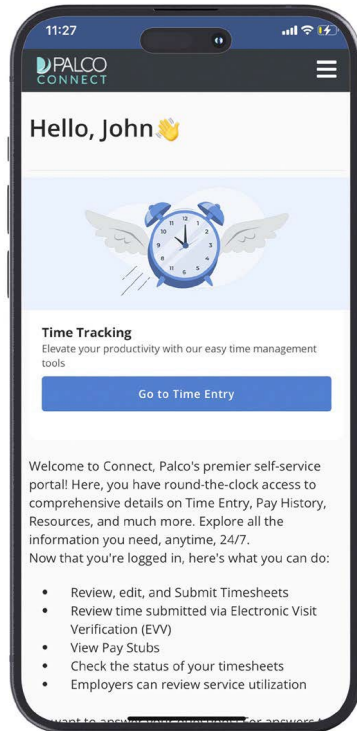
TIME ENTRY

WORKER CLOCK IN



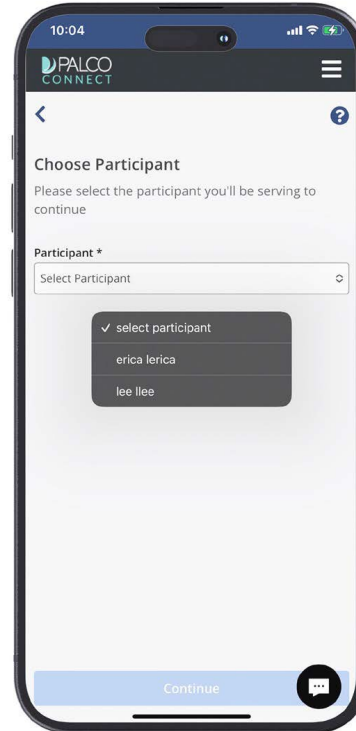
In this section, we will go over how to start an EVV-compliant time entry. Once logged into Connect, follow these steps.

Step 1. Click on Go to Time Entry



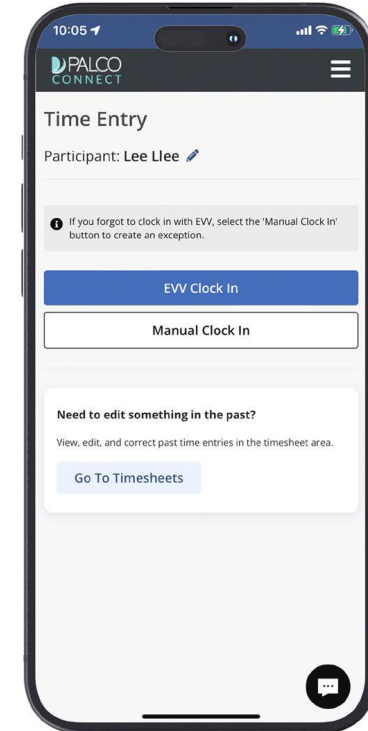
This blue button is on the home screen.

Step 2. Select a Participant



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

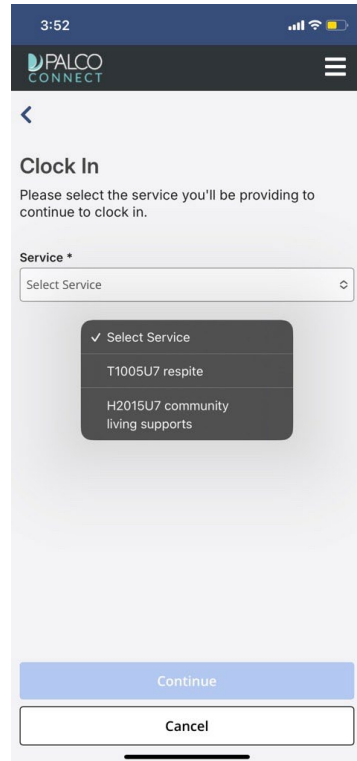
Step 3. Choose EVV Clock In



WORKER CLOCK IN

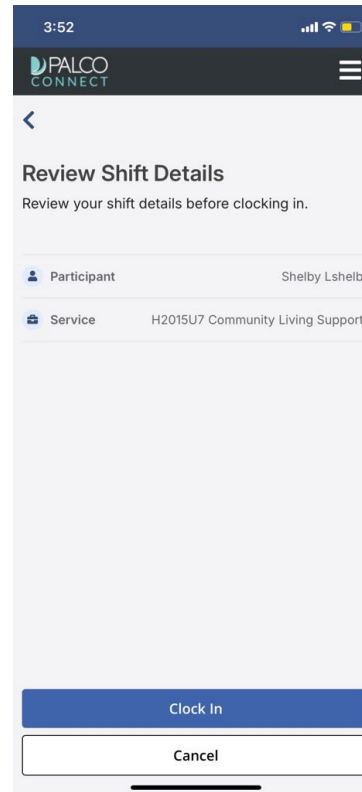


Step 4. Select a Service to Provide



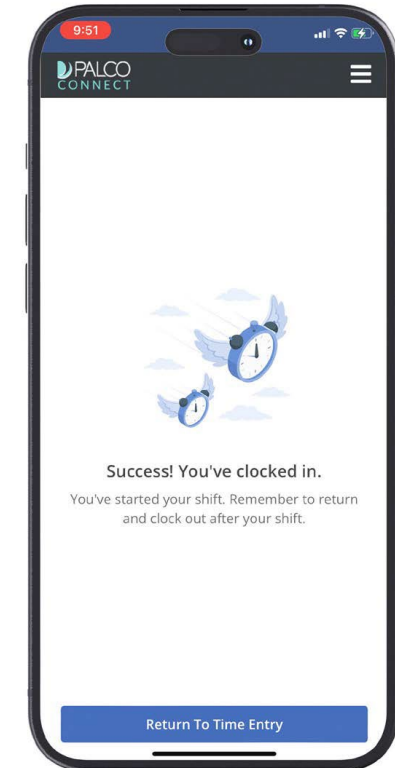
Service code options will be in the drop-down menu.

Step 5. Review Shift Details



Double-check that everything is right before submitting.

Step 6. Clock In for the Shift



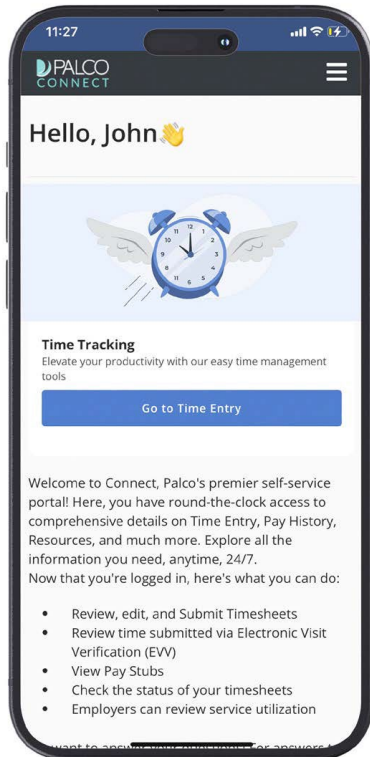
You are now on the clock for this shift.

WORKER CLOCK OUT



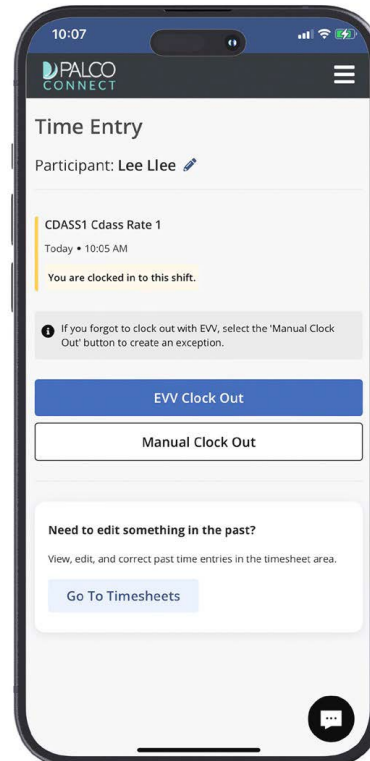
The Clock Out process is very similar to clocking in. Please, do not clock out until you are finished working the shift.

Step 1. Click on Go to Time Entry



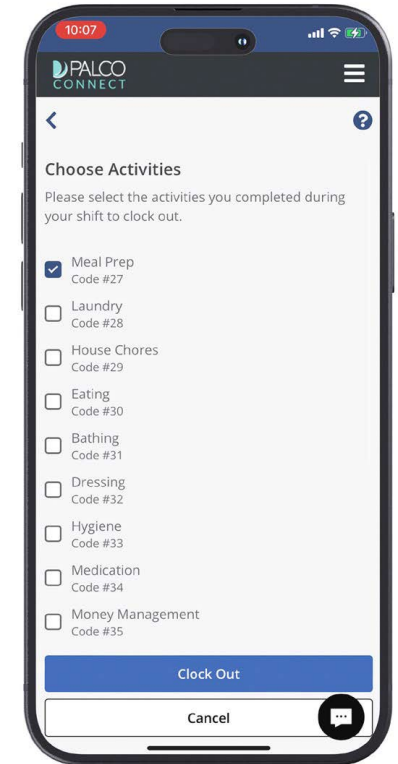
This blue button is on the home screen.

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

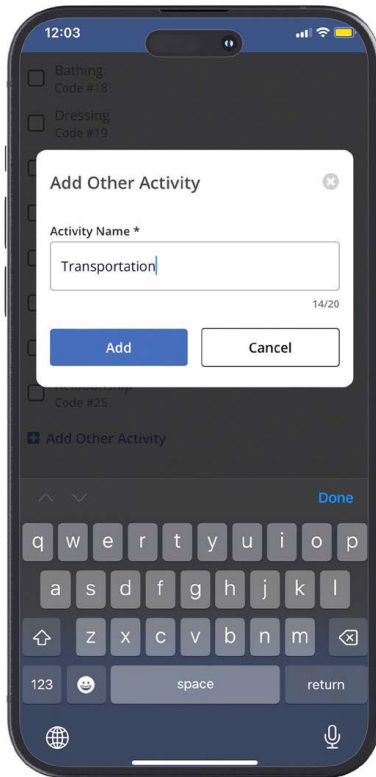


Use the check boxes to select all activities that were performed during the shift.

WORKER CLOCK OUT

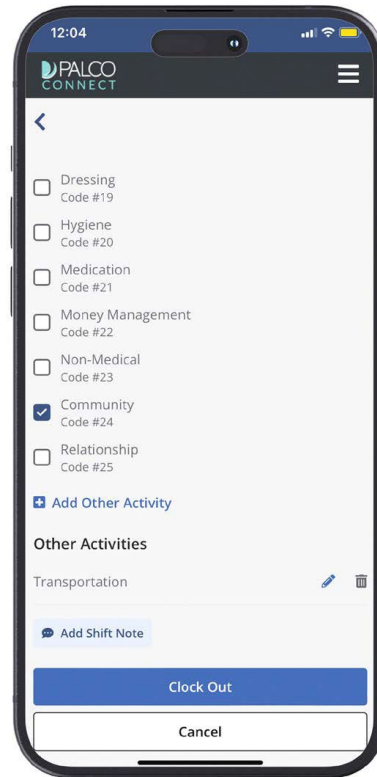


Step 4. Add Manual Activities



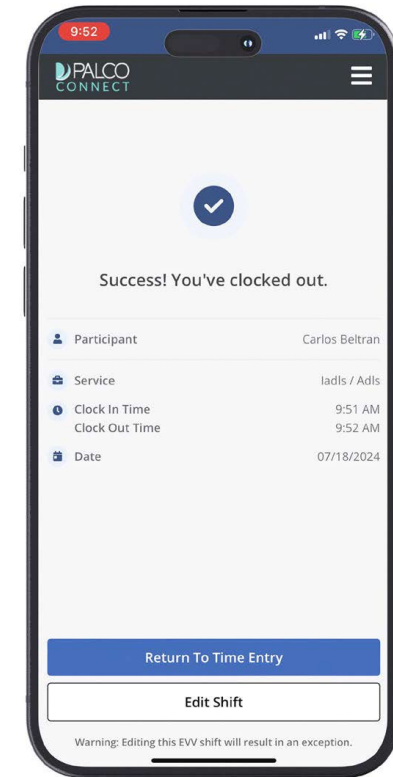
If needed, you can manually add an activity.

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.



10:08



PALCO CONNECT

< ?


- Bathing
Code #31
- Dressing
Code #32
- Hygiene
Code #33
- Medication
Code #34
- Money Management
Code #35
- Non-Medical
Code #36
- Community
Code #37
- Relationship
Code #38

+ Add Other Activity

Other Activities

Something else  

Clock Out

Cancel 

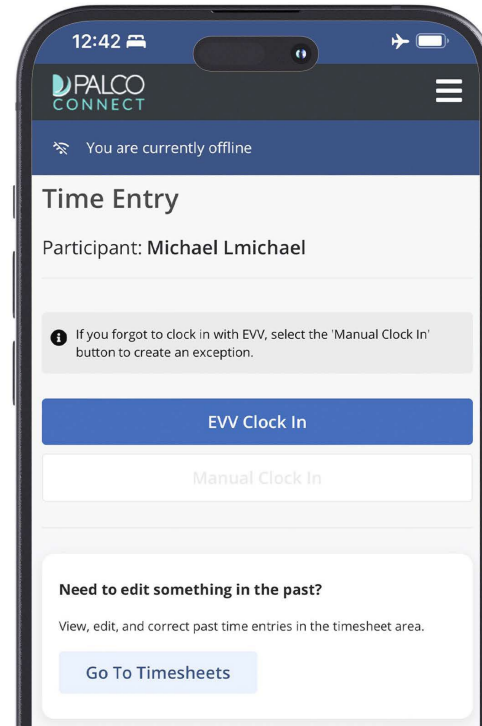




OFFLINE MODE

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.

A man with a shaved head, wearing a light blue button-down shirt and light blue jeans, is seated in a wheelchair. He is looking down at a smartphone held in his left hand, with his right hand resting on his lap. The background is a bright, slightly blurred indoor setting with vertical lines, possibly a window or a wall panel. A white rectangular box is superimposed over the center of the image, containing the text 'SHIFT EXCEPTIONS' in a bold, white, sans-serif font.

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.

9:55
PALCO CONNECT < BACK

KASIE WEST AT KS_WORK FOR CARLOS BELTRAN
Total hours for pay period: 0.02 Total hours for work week: 0.02

TIME ENTRY FOR: WEDNESDAY 2024-JUL-17

Warning! This authorization requires EVV. Any changes made to this entry will result in an exception.

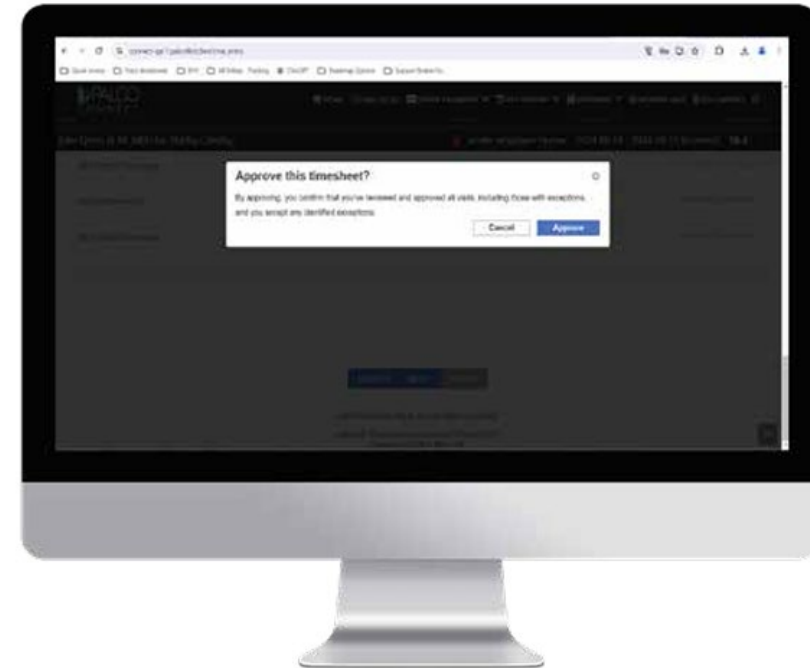
DAILY IADLS / ADLs

START TIME
AM PM 12 : 00

END TIME
AM PM 12 : 00

Exception Reason *

ADD CANCEL





SHIFT EXCEPTIONS



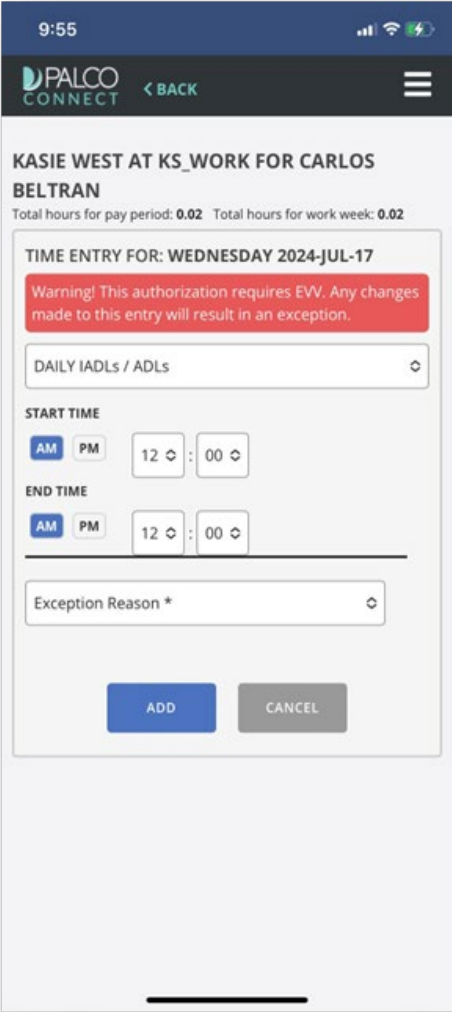
I'm a worker. How do I avoid shift exceptions?

- 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.



A close-up photograph of an elderly woman with short, curly grey hair, smiling warmly while talking on a black mobile phone. She is wearing a white t-shirt. The background is a softly blurred kitchen setting with a tiled backsplash and a dark bowl on a shelf.

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

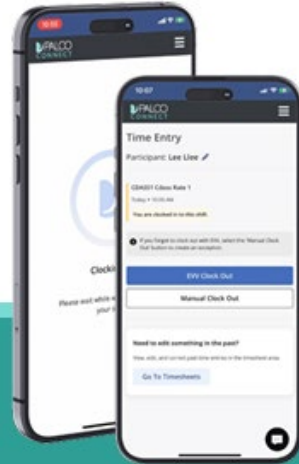


ADDITIONAL
SUPPORT



EVV AND IVR USER GUIDE

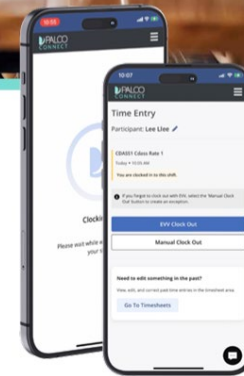
A guide for sending time entries to Palco



FOR EXTRA HELP, CONTACT PALCO

Do you still have questions? Or, do you need extra help? Our friendly and trained Palco staff are available to assist you.

www.palcofirst.com | 866.710.0456 | partnerships@palcofirst.com



PALCO'S EVV TRAINING RESOURCES

- User Guide
- Videos

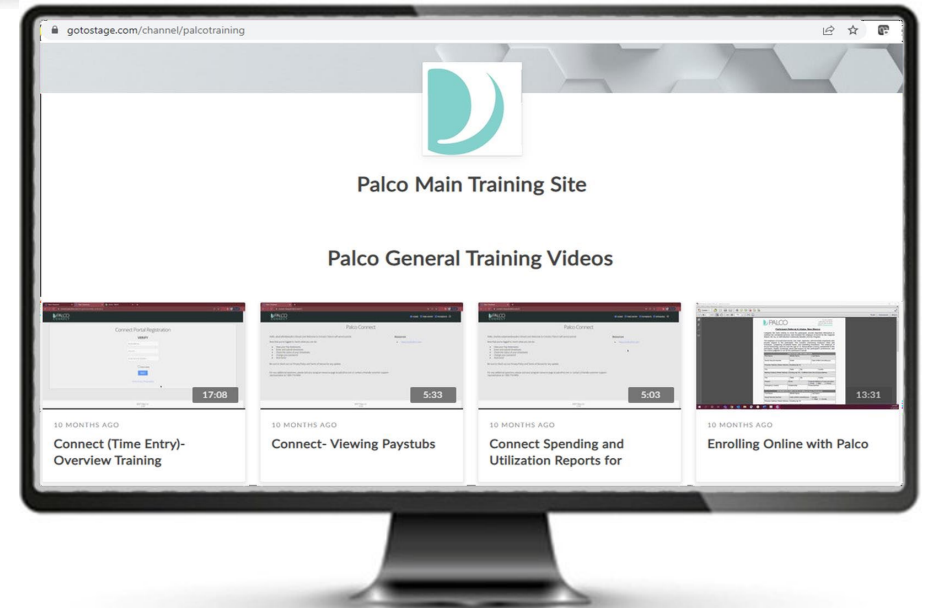
EVV Resources



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!

A blurred background image of a diverse group of people in a meeting or conference, with several individuals raising their hands, suggesting an interactive session or a Q&A period.

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