

Providers of Developmental Disabilities, Mi Via and Supports Waiver Services

March 24, 2021

Critical Updates

Mi Via & Supports Waiver (SW) Self-Directed:

The following forms are used to determine the taxes withheld from an employee's paycheck.

W-4 (State and Federal):

State and federal taxes are withheld according to how the employee fills out their W-4. Employees can do separate forms for federal and state. The employee has flexibility to have greater or fewer taxes taken out of their check. Palco takes out the appropriate amount of taxes based on the W-4 that the employee submits to Palco. State and federal W-4 forms are available on the Medicaid Portal website at:

<https://nmmedicaid.portal.conduent.com/static/ProviderInformation.htm#Self-DirectionForms>

Palco will send a W2 at the end of the year for taxes that were taken out of employees' checks. Employees can file their taxes at the beginning of the year using the W-2. Taxes will be reconciled at this time. If the employee does not have enough taxes taken out of their paychecks, it will likely mean that the employee will need to pay more money to the IRS at the beginning of the following year when they file their taxes with their W-2.

Please note that Palco only sends out W2 for employees of EORs/participants. Palco does not issue W2 or 1099 to service providers employed through an agency.

Family Caregivers/Payroll Information Worksheet (PIW):

Services may or may not be provided by a family member. If the service provider/caregiver (employee) is a family member, the employee may be exempt from employment taxes such as Social Security and Medicare. More information is available at the IRS website, Family Caregivers and Self-Employment

Tax: <https://www.irs.gov/businesses/small-businesses-self-employed/family-caregivers-and-self-employment-tax>

The Payroll Information Worksheet is used to show the relationship between the employee and the employer (EOR). Depending on the relationship, certain taxes are taken out (FICA, FUTA, SUTA). An example of this is Medicare, Unemployment and Social Security. An employee may be "exempt" from these taxes if the employee is:

- the spouse; or
- child under 21 (FUTA); or
- child under 18 (FICA); or
- the parent of the employer (EOR).



If the employee falls under one of these categories but is having FUTA, FICA or SUTA erroneously withheld, please update the Payroll Information Worksheet (PIW) and submit to Conduent.

- **Note:** If the employee or employer does not make contributions to Unemployment and Social Security, the employee will not be eligible to receive these benefits.

Only employees who fall under the above listed categories are "exempt". All other employees are "non-exempt". This means the employee will have these taxes taken out of their paycheck (FICA, FUTA, SUTA).

Determining whether an employee is "exempt" or "non-exempt" is completely dependent on the familial relationship between the employee and employer (EOR). These statuses are dictated by IRS regulations. If an employee is exempt but had these taxes taken out previously, they can request these taxes back from the IRS by submitting IRS form 843 which can be found at: <https://www.irs.gov/pub/irs-pdf/f843.pdf>. More information on this can be found on the IRS website under Publication 15 and IRS form 843.

Please note that the State nor Palco provide tax guidance, please seek advice from a tax professional if you have questions about your taxes and what exemptions you may be eligible for.

All Providers

Phase 2 Information:

The State acknowledges the concerns expressed by consultants, vendors, EORs, participants and families regarding Phase 1 of the Electronic Visit Verification (EVV) implementation. To address requests for testing, training and better communication for Phase 2 EVV implementation, the State and vendors involved have decided to extend Phase 2 EVV implementation through a phased in approach beginning summer through fall of 2021. Changes coming in Phase 2:

- Launch of mobile app
- Replacement of FOCOOnline with the Palco Connect system (Mi Via and Supports Waiver Self-Directed)



Major Issues and Resolutions

Using the Payment Request Form (PRF) Mi Via & SW Self-Directed: Please ensure that your PRF is complete before submission. Failure to submit a complete or correct PRF will result in Return to Participant (RTP) and delay in payments.

Below are the most frequent reasons for returns.

1. Correct participant name - The participants name must match what is in FOCoS.
2. Correct vendor name - The Vendor Name on the PRF must match the name of the Vendor on the Vendor Cost Quote or Valid Invoice.
3. Correct participant budget dates – Please include the dates of the current approved Participant/Self-Direction Budget.
4. Invoice not attached - Must be submitted with the payment request form. Future dated invoices WILL NOT be accepted
5. Invoice and amount requested must match

Vendor Payment Schedule can be found at:

<https://nmmedicaid.portal.conduent.com/static/PDFs/Self%20Direction%20Forms/2021%20Vendor%20Payroll%20Schedule.pdf>

How-to Tips:

For agency-based and self-directed users

The Consolidated Customer Service Center (CCSC) and Palco have received a variety of questions about the AuthentiCare Interactive Voice Response (IVR) system. Below are the most common questions we have received:

Question 1: What determines which services a worker hears on the IVR?

Answer: The IVR plays every service that is listed on the Provider Entity Settings page to which a worker is associated.

Question 2: If my agency does not offer every service can I limit the number of services that my workers hear?

Answer: Yes, if your agency does not offer a service then you should remove that service from the provider services list on your Provider Entity Settings page. Removing invalid services will save your workers time listening to the IVR and it will ensure they do not accidentally select an invalid service. Example, if the Delivery Test Provider agency only offers Mi Via Homemaker their provider entity settings page should look like this:



Provider Entity Settings

* Indicates a required field.

ID: 9999999

PIN: *****

First Name:

Middle Name:

Last Name:

* Company Name:

SSN:

* FID:

Gender:

Birth Date:

Email:

* Begin Date:

End Date:

Language:

Status: Active

* Entity Qualifier:

NPI:

* Provider Services:

- Mi Via Homemaker
- Mi Via IHLS
- Mi Via Respite-SD
- DDW Respite
- DDW Respite-GP

Question 3: Who can update the Provider Entity Settings page?

Answer: Provider Administrators can update the Provider Entity Settings page. Provider Admins can select a single service by left clicking on a service and or they can select multiple services by holding the control button on their keyboard while left clicking multiple services.

Question 4: What do callers hear when calling into the IVR?

Answer: The IVR will play this standard script –
Check in:

- Welcome to AuthentiCare Palco New Mexico.
 - Enter your worker ID followed by the pound sign.
- To check in press 1.
 - To check out press 2.
- Please enter your client ID followed by the pound sign.
- If the service is XXXXXXXX press 1.
 - If the service is XXXXXXXXX press 2.....
- If you are WORKER and you work for PROVIDER and you are providing SERVICE for CLIENT press 1.
 - If this is not correct press 2.



- Your check in was successful.
 - To return to the main menu press 1.
 - To end this call press 2.

Check Out:

- Welcome to AuthentiCare Palco New Mexico. Enter your worker ID followed by the pound sign.
- To check in press 1.
 - To check out press 2.
- Please enter your client ID followed by the pound sign.
- Please enter your activity code followed by the pound sign.
 - To continue without entering an activity code press 8.
 - **Note:** Workers should always press 8 because activity codes are not currently being used.
- If you are WORKER and you work for PROVIDER and you are providing SERVICE for CLIENT press 1. If this is not correct press 2.
- Your checkout was successful at TIME.
 - To return to the main menu press 1.
 - To end this call press 2.

Question 5: Do workers need to check in from a specific number?

Answer: In Phase 1, workers can check in/out from any number. In Phase 2, workers will be required to call the IVR from a phone number listed on the client's entity settings page. Phase 1 rules are intentionally flexible to give everyone time to adjust to the AuthentiCare solution.

The link to the IVR guide created for the agencies:

- <https://palcofirst.com/wp-content/uploads/2021/01/New-Mexico-Telephony-EVV-Guide-Provider-and-Vendor-Agencies.pdf>

Hopefully, this article helped expand your IVR knowledge but if you have any further questions please feel free to contact the Consolidated Call Center. We are happy to answer your additional questions and we are committed to ensuring everyone is comfortable using the AuthentiCare solution.

