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March 30, 2022

## Training News

### Phase 2: Training Announcement

We are excited to share a Phase 2 Go-Live update with all stakeholders!

As part of Phase 2 of this project, we will:

- Transition from FOCOOnline to the Palco web portal
- Offer an online enrollment option using Palco Intake to enroll new members, employees, and Employers of Record
- Offer an online resource, Palco Connect, for electronic timesheet review and approval for Employers and Workers
- Offer an online administrative resource, Palco Case Management Portal, for professional users like State staff, MCO staff, Utilization Reviewers, Care Coordinators, Support Brokers, and CCSC
- Offer an Electronic Visit Verification (EVV) solution for SDCB Vendor Agency Providers called AuthentiCare

Throughout the months of February – May, Palco will offer numerous training opportunities for State staff, CCSC staff, MCO staff, Support Brokers, Utilization Reviewers, Care Coordinators, and Vendors as well as Members/Employers and Workers. The same training topics will be repeated on multiple dates and times so you can select the best option for your schedule. To access training session recordings, go to [www.palcofirst.com/new-mexico-training-announcement](http://www.palcofirst.com/new-mexico-training-announcement). Scroll down to “Training Video Recordings” and click on the training session recording of your choice.

In addition to training opportunities, Palco staff will offer live Question and Answer (Q&A) sessions specific to each of the groups listed above. This will give you an opportunity to call in and ask questions about a recent training session you attended and get clarification on specific areas of interest. Be on the lookout for emails and announcements for our upcoming training and Q&A sessions!

**\*\*If no one has joined a training session, after 10 minutes, Palco will end the session.**

### To register for an upcoming training session:

1. Visit this link:  
<https://www.gotostage.com/channel/9046a0fa9a4e45838bcc1fec441e64ae>
2. Find the group that best describes your role.
  - a. Under this group, you will see each training session being offered.
  - b. The training sessions look like colorful blue/green squares with a calendar date.
3. When you click on a training session square, you will find basic information about that

training session including date, time, agenda/training topics, and a short registration form at the bottom.

4. Fill in the registration form with your first name, last name, and your email address. Then click Register. **ONLY** register for the sessions listed under the group that best describes your role.
5. Once you click Register, you will receive an email reminder for that session.

NOTE: If you register for multiple training sessions, you will receive an email reminder for each session for which you registered.

Below are the remaining trainings scheduled for the month of March and the upcoming trainings scheduled for the month of April.

Month	Training Topics
March & April	<p><b>Training sessions for HSD staff.</b> Trainings will cover Palco's administrative Case Management Portal (CMP), including features of the budget application, viewing budget utilization, generating and viewing reports, etc.</p> <p><b>Training sessions for MCO staff, Support Brokers, Utilization Reviews, and Care Coordinators.</b> Trainings will cover Palco's administrative Case Management Portal (CMP). Specific topics include:</p> <ul style="list-style-type: none"> <li>• Features of the CMP budget application <ul style="list-style-type: none"> <li>○ viewing employer costs</li> <li>○ viewing worker rate of pay</li> <li>○ viewing timesheets and PRFs</li> <li>○ viewing budget revisions</li> <li>○ viewing budget justifications (needs/goals)</li> <li>○ viewing budget statuses and budget approvals</li> </ul> </li> <li>• Viewing payments and budget utilization</li> <li>• Generating and viewing reports</li> </ul> <p><b>Training sessions for Members/Employers.</b> Trainings will cover Palco's online timesheet system (Connect) and the AuthentiCare mobile app. Specific topics include:</p> <ul style="list-style-type: none"> <li>• How Workers will use AuthentiCare to clock in and clock out for EVV services</li> <li>• How Workers will use Palco Connect to capture shifts for non-EVV services</li> <li>• How Members/Employers and Workers will review and approve timesheets in Palco Connect</li> <li>• How Members/Employers will view paystubs and review budget utilization in Palco Connect</li> <li>• Reports available to Members/Employers in Palco Connect</li> <li>• General payroll process, payroll deadlines, and timeframes</li> </ul>

Month	Training Topics
	<p><b>Training sessions for Workers.</b> Trainings will cover Palco's online timesheet system (Connect) and the AuthentiCare mobile app. Specific topics include:</p> <ul style="list-style-type: none"> <li>• How Workers will use AuthentiCare to clock in and clock out for EVV services</li> <li>• How Workers will use Palco Connect to capture shifts for non-EVV services</li> <li>• How Members/Employers and Workers will review and approve timesheets in Palco Connect</li> <li>• How Workers will view paystubs in Palco Connect</li> <li>• General payroll process, payroll deadlines, and timeframes</li> </ul>

## Spanish Instructions

Spanish language instructions on the enrollment process for Mi Via and Supports Waiver participants/employers and workers, including instructions on how to enroll using the online Palco Intake portal can be found here: [https://palcofirst.com/wp-content/uploads/2022/02/NM-Enrollment-Instructions-V11\\_Spanish\\_FINAL.pdf](https://palcofirst.com/wp-content/uploads/2022/02/NM-Enrollment-Instructions-V11_Spanish_FINAL.pdf).

Spanish language instructions on the timesheet review and approval process for Mi Via and Supports Waiver participants/employers and workers can be found here: <https://palcofirst.com/wp-content/uploads/2022/02/NM-Time-Entry-User-Guide-SPANISH-.pdf>.

## Critical Updates

### Financial Management Agency (FMA) System Implementation

Phase I of the FMA Transition from TNT to Palco began on January 1<sup>st</sup>, 2021 when Palco assumed responsibility for payments to Self-Directed Community Benefit (SDCB) employees and vendors. In addition, Electronic Visit Verification (EVV) was implemented for Self-Directed Personal Care and Respite Services.

**Phase II of the FMA Transition will occur on May 21<sup>st</sup>, 2022** and will include the following:

- Full system transition from FOCOOnline to Palco's Case Management Portal (CMP)
- Data migration including Demographics, Budgets, SDCB Care Plans, and Reporting
- EVV confirmation of time entries within Palco's Connect system within CMP for Employers of Record and Employees
- FMA functions to be performed utilizing Palco's CMP system

As part of the full system transition from FOCOOnline to Palco's CMP system, there will be a timeframe when data will be unavailable within the FOCOOnline system. **Data migration will begin on May 7<sup>th</sup>- May 20<sup>th</sup>, 2022 prior to Palco's CMP system go-live on May 21<sup>st</sup>, 2022.** In addition, MCOs will not be transitioning any Members from the Agency Based Community Benefit Model to the Self-Directed Community Benefit model in the months of May and June.

In order to ensure that all data is converted, this will require that all transitions, annuals and revised SDCB Care Plans must be submitted within the *FOCoSOnline* system by **April 22<sup>nd</sup>, 2022**. This date ensures that all Supports Brokers, Care Coordinators and Utilization Management have time to process pending SDCB Care Plan requests.

This will afford the Members/Employers of Record and Support Brokers time to address pending Requests for Information (RFI) and Requests for Action (RFA).

To ensure smooth data migration, the state has directed the MCOs to issue an administrative denial for any services that were issued a RFI/RFA and were not responded to by **May 6<sup>th</sup>, 2022**. **Any services in a pending status as of 5:00 pm MST on May 6<sup>th</sup>, 2022 will not transfer into the new Palco CMP System during migration.** Requests that were not submitted timely or were administratively denied can be requested on or after **May 21<sup>st</sup>, 2022** within the Palco CMP System.

DATE	ACTIVITY
April 22 <sup>nd</sup> , 2022	• Final date to submit Annuals, Revisions for SDCB Care Plans
May 1 <sup>st</sup> - June 31 <sup>st</sup> , 2022	• No SDCB Transitioning Members to occur in May and June 2022
May 6 <sup>th</sup> , 2022	• Last day to issue administrative denials for pending RFI's and RFA's
May 6 <sup>th</sup> , 2022	• Last day to utilize <i>FOCoSOnline</i>
May 7 <sup>th</sup> - May 20 <sup>th</sup> , 2022	• Data migration occurring, <i>FOCoSOnline</i> not accessible. Palco CMP System not accessible for routine functions.
May 21 <sup>st</sup> , 2022	• Palco CMP System Go-Live

#### Key Considerations:

- For urgent SDCB Care Plan requests, please contact the Member's Care Coordinator if immediate needs are identified
- Please refer to Palco's website for additional resources and training materials  
<https://palcofirst.com/new-mexico/>

Please be advised that timelines identified within the Managed Care Policy Manual under Section 9: Self-Directed Community Benefits may not be followed during this System Implementation in alignment with the justifications referenced above.

### Major Issues & Resolutions

#### Reminder: Fingerprinting Process

Effective immediately new hires will be required to complete the fingerprinting process through a new digital process. Conduent will no longer be doing fingerprinting. ***See attached Background Check Guidance.***

#### New hires Process:

The employee will be required to submit pre-hire packet before employment begins. Once Conduent receives the pre-hire packet a Caregivers online registry (COR) will be processed. If the employee passes the COR they will be allowed to begin work. The employee or Employee of record (EOR) will need to submit an

employee packet. Once Conduent receives the employee packet, a notification will be sent to the employee within 2 to 3 business days by email with an authorization letter directing the employee on locations of where to go to complete the fingerprinting at no cost. Conduent will copy the Support Broker or EOR on all emails related to background checks. The authorization letter will have personal information **unique to each employee**. If no email is on file, then the request will be sent via standard mail.

### **Fingerprint backlog:**

Individuals impacted by the pandemic who completed COR, but still need fingerprints will receive authorization letters by the end of February.

### **Notification requirements:**

Once the employee receives the authorization letter, they will have 20 days to complete the fingerprinting process. Any individuals that exceed the 20-day timeframe, will need submit the pre-hire and employee packets again.

### **Fingerprint location map:**

Below is the Gemalto Cogent New Mexico Fingerprint Location Map, which can be found here: <https://www.aps.gemalto.com/nm/Maps/MapFrame.htm>. When you visit the site, you can click on the link to the address you want to visit for the location's hours, phone number, additional information, and a link to directions. **Please call the fingerprint location prior to your visit to ensure availability and special instructions.**





## Reminder: Tax Withholdings

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 the 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 of record (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 of record (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 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 neither 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.