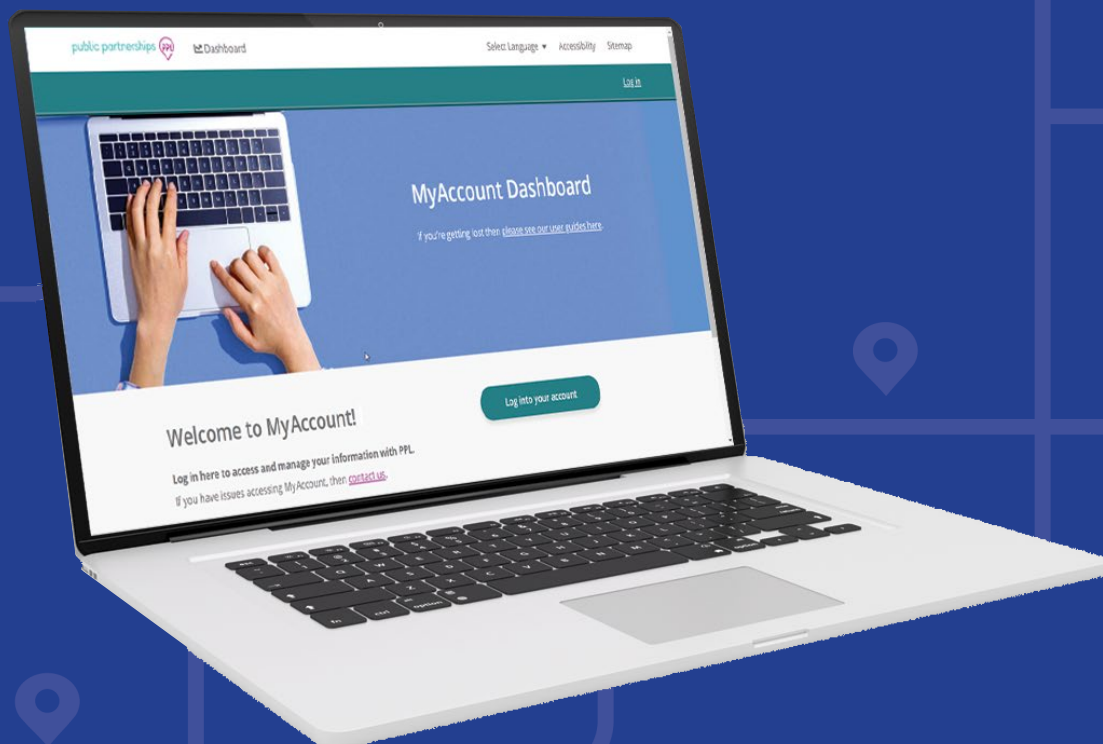


MYACCOUNT

Guide for Participants





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USER GUIDE *at a glance*

WELCOME

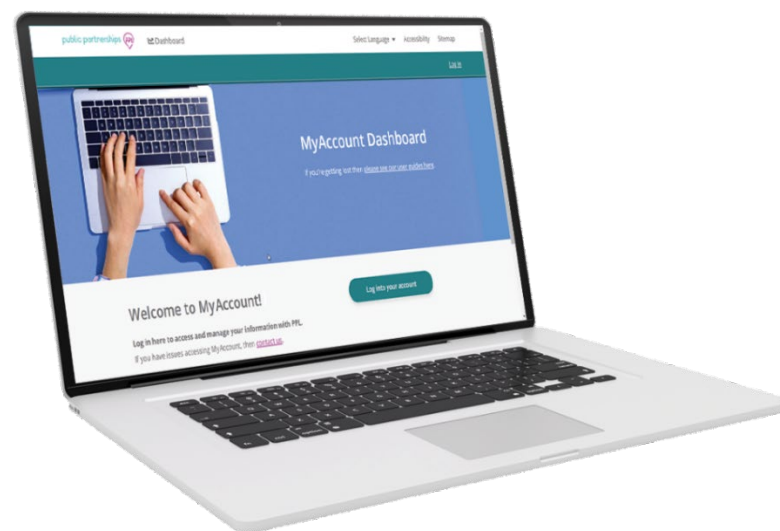
The MyAccount platform from Public Partnerships (PPL) is where you'll manage your self-direction information. You will also use it to view information about your employees.

This guide provides:

- How to set up your MyAccount access
- How to enroll as an employer
- How to view and manage your budget

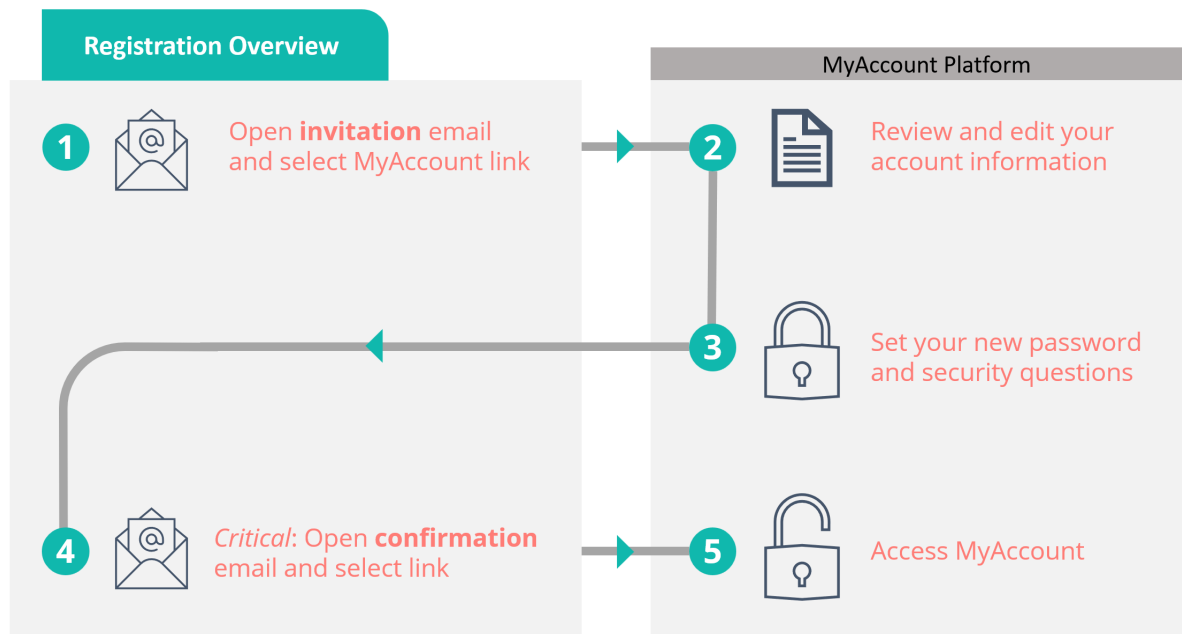
Getting Program Documents in an Alternative Format

If needed, you can request program documents in an alternative format at no expense to you. For example, you could request large print, audio, or a translation. Please contact the Public Partnerships Customer Service.



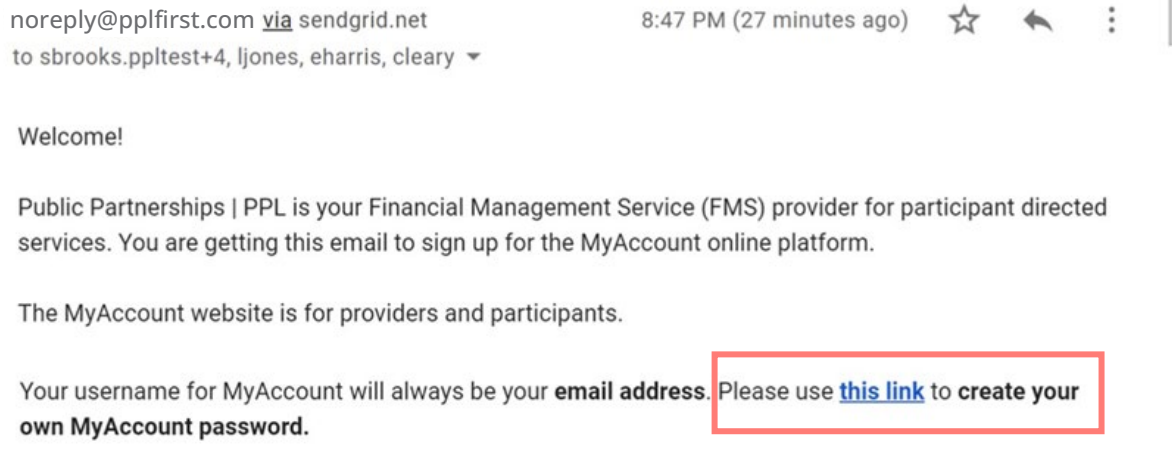
Set Up Your MyAccount Access

Here are the major actions to register in MyAccount:



1. Look for an email asking you to register for MyAccount.
2. In your email, open the MyAccount link.
3. In MyAccount, verify that the account name matches the *person receiving care*.
4. Under **MyAccount Login Details**, type a new password and set your security questions.

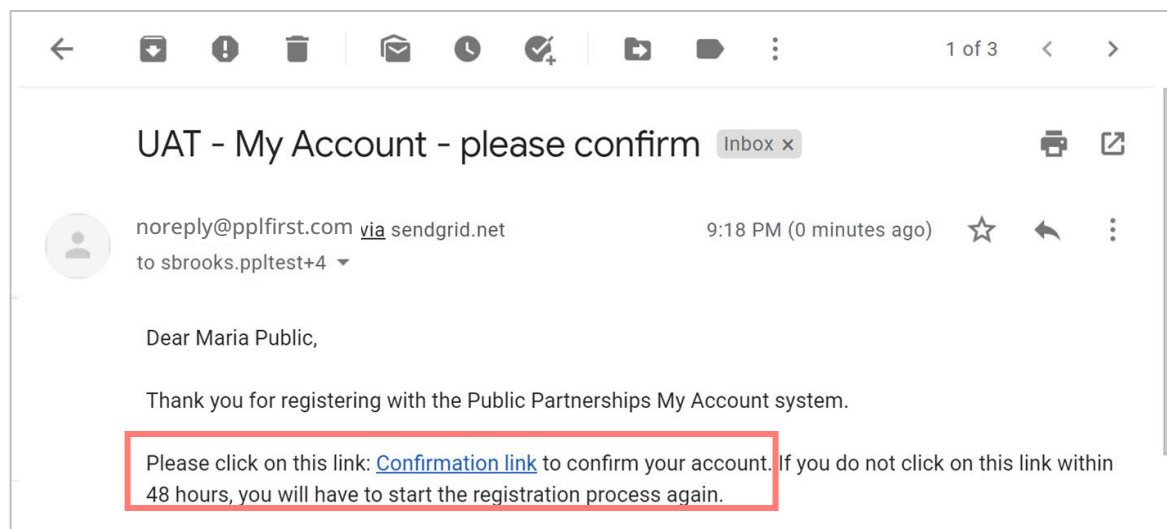
NOTE: Your new password will also apply to the Time4Care™ app.



5. Look for a “confirm” email and open the *Confirmation link*.

NOTE: Must confirm within 48 hours.

6. Now you have MyAccount access. Continue with enrollment or other tasks.



Set Up Your Signature

To complete enrollment, you will use an electronic signature. You can receive help, but no other person can create it for you.

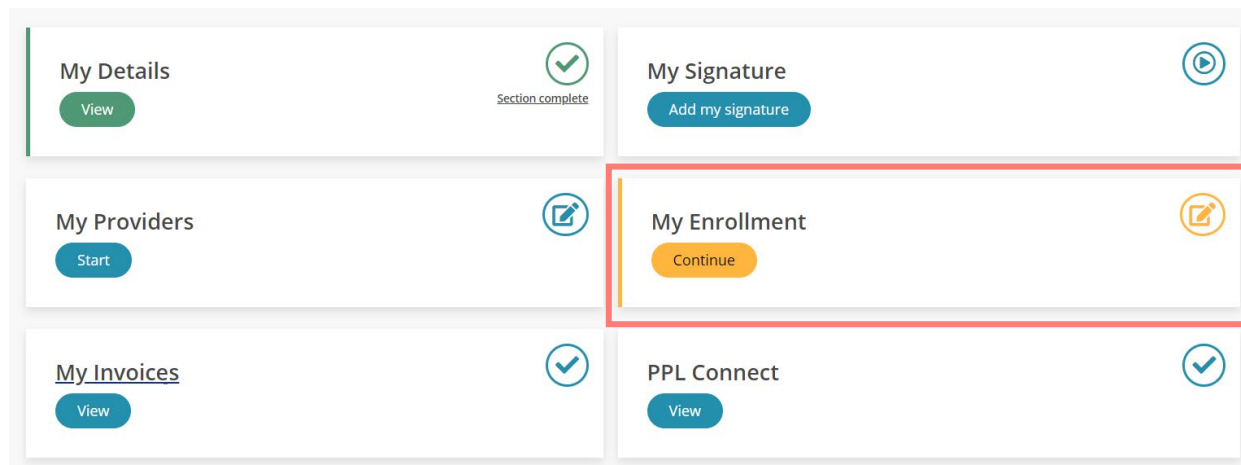
1. On your MyAccount dashboard, select **My signature**.
2. Under **Who will be signing**, select which role you are serving.
3. Choose between these options:
 - **Select a Style** – Useful if you can only type your name. You can select different styles and sizes to your liking.
 - **Draw It** – Useful if you have a touch screen device.
4. Select **Save signature**.

The image displays the MyAccount dashboard with the 'My Signature' section highlighted in red. Below this, two side-by-side screenshots illustrate the signature setup process. The left screenshot shows the 'Select a style' option highlighted in red, with a preview of a cursive signature for 'John Smith' and radio buttons for 'Small', 'Medium' (selected), and 'Large'. The right screenshot shows the 'Draw It' option highlighted in red, with a 'Clear' button and a drawing area containing the handwritten signature 'John Smith'. A double-headed arrow connects the two screenshots.

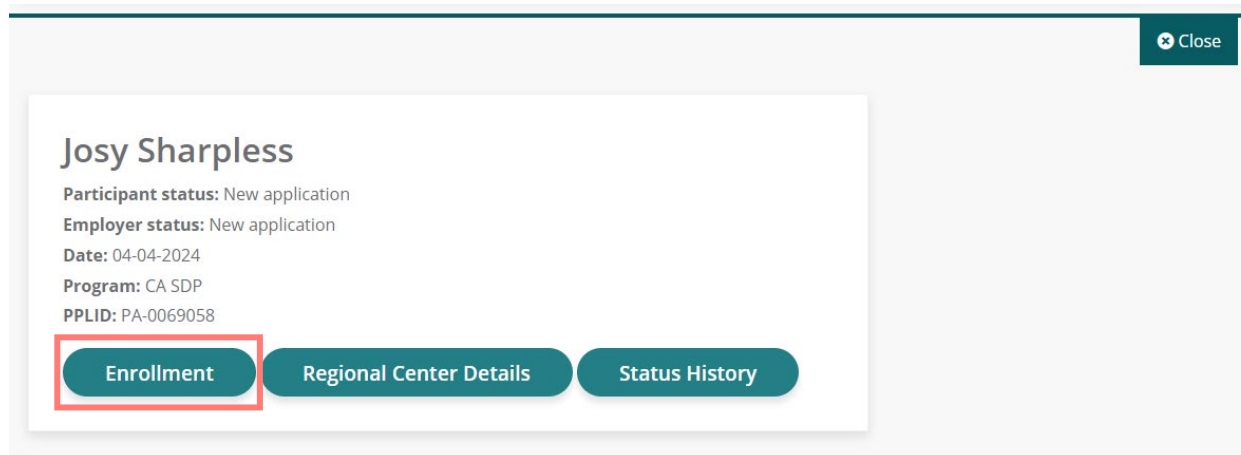
Complete Your Enrollment

When you are just starting with Public Partnerships (PPL), you need to complete your enrollment.

1. On the MyAccount dashboard, select **My Enrollment**.



2. Under your summary details, select **Enrollment**.
The other options, like Regional Center, are for reference only.



- Under Employer Information, read the description of your duties.

The first choice (**Who is responsible**) is based on the information you provided PPL.

- If you already have your **Employer Identification Number (EIN)**, choose **Yes** and enter the number.

If you don't yet have the EIN, choose **No** and continue. Public Partnerships will help you obtain your EIN.

- If available, upload an electronic copy of a document showing your EIN.

✓ *Who is responsible for Employment tasks?*

✎ [Terms and Conditions](#)

Employer Information

The Employer of Record(EOR) is the actual owner of the Self-Directed Supports business and will have a Federal Employer Identification Number (EIN) established in their name. The EOR also manages the providers and approves their time.

Who is responsible for employment tasks?*

Self (Participant) ▼

Does the Employer have an existing Employer Identification Number?*

- Yes
 No

Enter Employer Identification Number (EIN)*

51-1233163

If you have supporting documentation such as a Letter 147C, please upload it here

[browse for a file](#)

6. Move to the next section, **Terms and Conditions** and review all statements.
7. Scroll to the bottom and select the agreement checkbox.
8. Select **Finish** at the bottom of the page.
9. Wait for Public Partnerships to review and verify your enrollment forms.

Agree and Sign

By signing below, I confirm that:

- I have read this entire Employer Agreement.
- I understand my responsibilities as an Employer in the SDP.
- I agree to follow all SDP rules.
- I understand that if I have provided false information to the State, the Regional Center or to PPL, I may no longer be allowed to serve as an Employer in the SDP and may be subject to further legal action.
- I understand that the State or Regional Center may choose to change or ignore any of the above requirements at any time. PPL will follow the directions of the State or Regional Center if any requirement is changed or should be ignored.
- I agree that I will not bring any claims or legal actions against PPL that are related to my failure to follow the rules in this Employer Agreement or in the SDP.

Date: 4/2/2024

- Select the checkbox to confirm you have read and agree with all of the Terms and Conditions of this Enrollment***

Previous

Finish

Hire an Employee (My Provider)

As an employer, you can hire family members, friends, or anyone who meets the program requirements.

Note: In MyAccount, “Provider” and “Worker” are the terms used for a Support Service Professional (SSP) who provides care.

You are required to complete all information marked with an asterisk (*).

1. On the MyAccount Dashboard, select **My Providers**.

The screenshot shows a dashboard with four sections arranged in a 2x2 grid. The top-left section is 'My Details' with a 'View' button and a 'Section complete' status. The top-right section is 'My Signature' with an 'Add my signature' button and a play icon. The bottom-left section is 'My Providers' with a 'Start' button and a pencil icon; this section is highlighted with a red border. The bottom-right section is 'My Enrollment' with a 'Change' button and a 'Section complete' status.

2. Select **Hire a New Provider**.
3. Select **Add provider to this program**.

The screenshot shows a form with the text 'Please choose a program for this provider:' followed by a dropdown menu containing 'CA SDP'. Below the dropdown is a large teal button with the text 'Add provider to this program'.

4. Under Provider Type, select the provider type:
 - a. **Independent Provider** = Serves as a direct employee who is entitled to minimum wage.
 - b. **Independent Contractor** = Serves indirectly and is legally not an employee.

The screenshot shows a form with a teal header for 'Provider Details'. Below the header is a section titled 'Provider Type' with the text 'Choose a Provider Type*'. There are two radio button options: 'Independent Provider' (which is selected) and 'Independent Contractor'.

5. Complete the basic Provider details.
6. At the bottom, select **Next**.
7. Choose whether the Provider can complete enrollment online.

Choosing **Yes** and providing an **Email** is the fastest enrollment method.

If you choose **No**, or do not provide an Email, then tell your Provider to contact Public Partnerships for enrollment instructions.

8. Complete the contact information.

9. At the bottom, select **Next**.

Provider Contact Details

Do they have an email address or mobile phone to register for MyAccount and complete their enrollment online?*

- Yes
- No, they will not register for MyAccount and need to complete their enrollment on paper

How will they register?*

- Email
- Mobile


Email*

Home or Business Phone*

Mobile Phone

Physical Address*

Your selected address:

 600 State St , San Diego, San Diego CA, 92101-6717, US

Is the mailing address different than the physical address?*

- Yes
- No

Based on your participant's county and city, the minimum service rate for this participant is:

10. Select all the services you intend the Provider to offer, as well as the pay rate for each service.

NOTE: If your pay rate needs to be changed after enrollment, contact PPL Customer Service.

11. At the bottom, select **Finish**.

12. Review the summary and select **Confirm**.

13. Wait for the Provider to complete enrollment.

[Provider Details](#)

Provider Services

The service code identifies the type of Self-Directed Support so we can accurately assist the Participant.

! IMPORTANT: We need to know the hourly rate of pay, not the hourly rate plus Employer taxes or other costs. For example: If a person works in a job, they can tell you how much money they make per hour. That's the information you write in the "Hourly Rate".

Select from the list of service codes and services below*

- 310: Respite
- 312: Live-In Caregiver
- 313: Homemaker
- 320: Community Living Supports
- 331: Community Integration Supports
- 334: Individual Training and Education
- 335: Employment Supports
- 338: Non-Medical Transportation
- 359: Home Health Aide
- 361: Skilled Nursing

[Previous](#) [Finish](#)

Disassociate a Provider

If you need to end employment for a care Provider, use the disassociate feature in MyAccount.

After disassociation, the Provider remains in MyAccount in case you need to restore or rehire that person.

1. On the MyAccount dashboard, select **My Providers**.
2. Under the Provider's name, select **Disassociate provider**.
3. Enter a **Disassociation Date** when the Provider will no longer provide care.

After this date, the Provider can no longer submit time entries.

4. Choose a **Disassociation Reason** and select **Finish**.
5. Select **Confirm**.

NOTE: The dismissed Provider will continue to appear under your information, as required by the program.

Restore a Provider

If the Provider was disassociated recently (less than 6 months), you can Restore their employment.

The Provider will not need to do anything.

1. On the MyAccount dashboard, select **My Providers**.
2. Under the Provider's name, select **Restore provider**.
3. Select **Review** to check that the Provider information is still valid.
4. Select **Sign and Submit**.

PROVIDER DISSOCIATION

This provider will not be able to submit dates of service worked after the disassociation date you have selected below.

- If this provider is in a pending disassociation status, the provider has up to 30 days after the disassociation date to submit any remaining timesheets for payment.
- If this provider is in a disassociation status, the provider is now disassociated and your employment relationship is no longer active

Disassociation Date
*

Disassociation Reason*

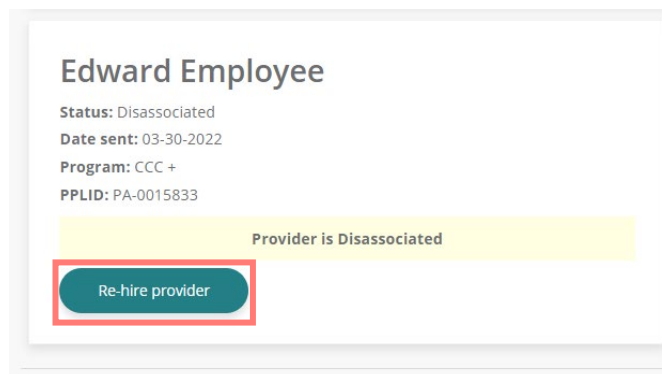
- 1 - Provider quit due to dissatisfaction with VA CCC+ Program
- 2 - Provider quit due to dissatisfaction with pay
- 3 - Provider quit due to scheduling reasons
- 4 - Provider quit for unknown reasons
- 5 - Provider was let go due to performance issues
- 6 - Provider was let go due to participant dissatisfaction
- 7 - Provider was let go due to scheduling issues
- 20 - Other

Re-hire a Provider

For a Provider disassociated longer than 6 months ago, you can use the re-hire feature.

The Provider will need to complete the enrolment information again.

1. On the MyAccount dashboard, select **My Providers**.
2. Under the Provider's name, select **Re-hire provider**.
3. The Provider can now open MyAccount and complete the enrollment questions.



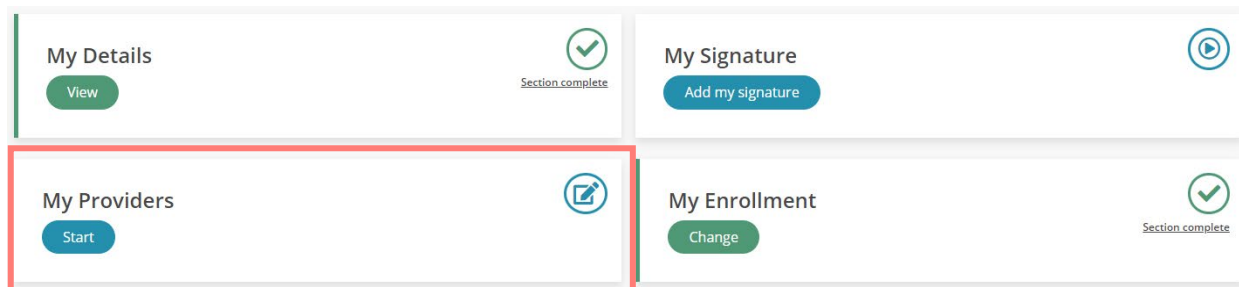
Hire a Vendor

If you receive services from a vendor, you will need to hire them through MyAccount.

Note: In MyAccount, a vendor is also known as a “Provider.”

You are required to complete all information marked with an asterisk (*).

1. On the MyAccount Dashboard, select **My Providers**.



2. Select **Hire a New Provider**.
3. Select **Add provider to this program**.
4. Under Provider Type, select **Vendor**.
5. In the search box, enter the vendor’s name because they may already exist in the system.

If found, select **Next** and **Confirm**. Wait for the vendor to complete enrollment.

If not found, select the option to register a new vendor.

The screenshot shows the 'Provider Details' form.

- Provider Details:** A teal header bar with a pencil icon and the text 'Provider Details'.
- Provider Type:** A teal header bar with the text 'Provider Type'. Below it, the text 'Choose a Provider Type*' is followed by three radio button options: 'Independent Provider', 'Independent Contractor', and 'Vendor'. The 'Vendor' option is selected and highlighted with a red box.
- Vendor Details:** A teal header bar with the text 'Vendor Details'. Below it, the text 'Use the Search below to find the Vendor you want to hire' is followed by a search box. The search box has the label 'Enter Vendor Name *' and contains the placeholder text 'Search for...'. A teal 'Search' button is to the right of the search box.
- At the bottom, there is a checkbox labeled 'Select if you can't find the Vendor and need to register a new Vendor'. The checkbox is currently unchecked and highlighted with a red box.

6. If adding this vendor, complete the basic information.

Note: The **Vendor TIN** (Tax Identification Number) is required. Your vendor will need to provide it to you.

Vendor Name*

Max 250 characters. remaining 239

Doing Business As (DBA)

Max 30 characters. remaining 30

Vendor TIN

Vendor Contact Name

First Name

Max 30 characters. remaining 24

7. At the bottom, select **Next**.
8. Choose whether the vendor can complete enrollment online.

Choosing **Yes** and providing an **Email** is the fastest enrollment method.

If you choose **No**, or do not provide an Email, then tell your vendor to contact Public Partnerships for enrollment instructions.

9. Complete the contact information.
10. At the bottom, select **Next**.
11. At the bottom, select **Finish**.
12. Review the summary and select **Confirm**.
13. Wait for the vendor to complete enrollment.

Vendor Contact Details

Do they have an email address or mobile phone to register for MyAccount and complete their enrollment online?*

Yes

No, they will not register for MyAccount and need to complete their enrollment on paper

Manage Budget and Authorizations

Use MyAccount to view interactive charts that help you manage your authorizations, or “budget.”

1. Under the MyAccount dashboard, select **My budget and Time Entries**.

The screenshot shows a dashboard with several navigation cards:

- My Providers**: Start button, edit icon.
- My Enrollment**: Change button, checkmark icon, Section complete.
- My Invoices**: View button, checkmark icon.
- My Budget and Time Entries**: View button, checkmark icon. This card is highlighted with a red border.
- My Purchases**: View button, checkmark icon.

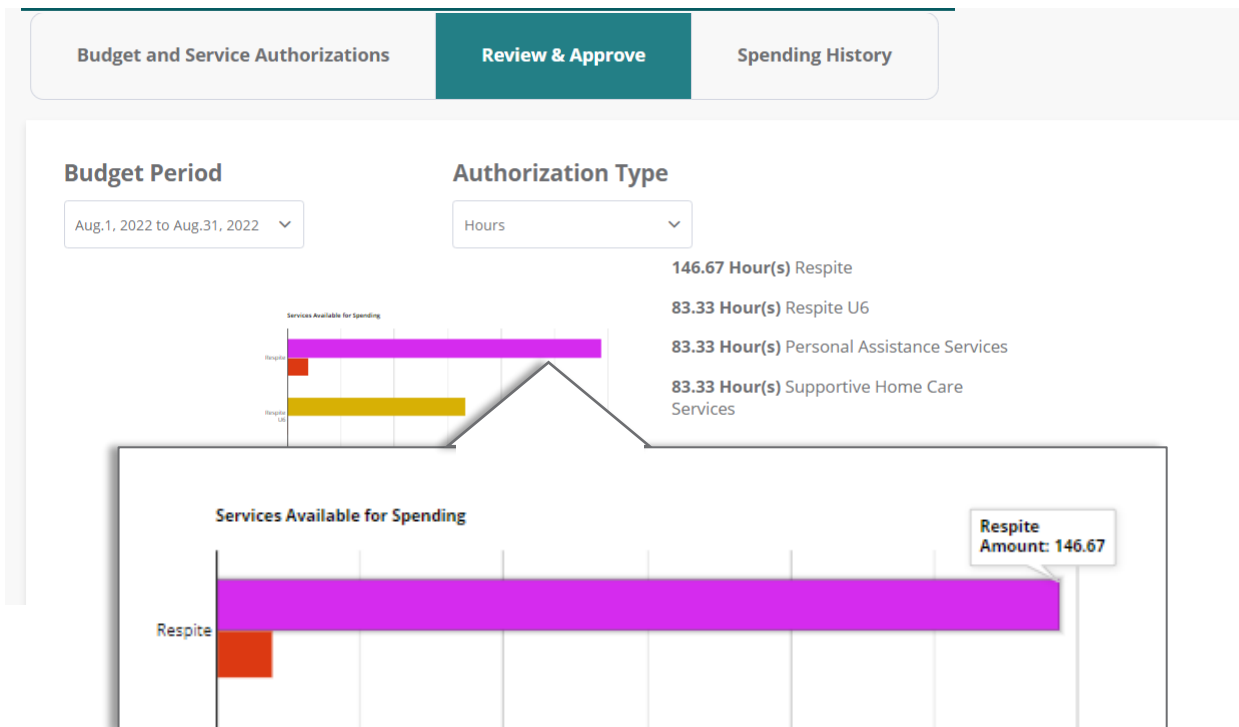
2. Under the **Budget and Service Authorizations** tab, view a summary of spending compared to your budget.
 - a. To see spending for a specific service or budget period, use the **Filter Options**.
 - b. To see amounts and percentages, hover your mouse over the graphic.

The screenshot shows the **Budget and Service Authorizations** page with the following details:

- Showing:** Total - 488.23 Hour(s)
- Filter Options:**
 - Program Budget:** Monthly
 - Total:** [Dropdown menu]
 - Budget Period:** Aug.1, 2022 to Aug.31, 2022 [Dropdown menu]
- Spending Breakdown (from donut chart):**
 - Spent:** 20.00 (4%)
 - 30.78 Hour(s)** awaiting your approval
 - 40.78 Hour(s)** in process
 - 20.00 Hour(s)** paid to providers and goods/services
 - 396.67 Hour(s)** available to spend

3. Under the **Review & Approve** tab, you can see how many hours or dollars you have remaining for each service type.

NOTE: If you see an orange bar below the service bar, it shows you how much time has been submitted for approval.



4. Under the **Spending History** tab, you can view all the time entries from your employee.
 - a. Use the filters to limit what appears.
 - b. Use the **Print** button to export the information to a spreadsheet.

Budget and Service Authorizations | Review & Approve | **Spending History**

Date Range: Aug.23, 2022 to Sep.20, 2022
Provider: Any
Status: Any
Service: Any

Total Hours Worked: 15 hrs 59 mins
 Total Payable Hours: 16 hrs 0 min
 Total Billable Pay: \$206.40

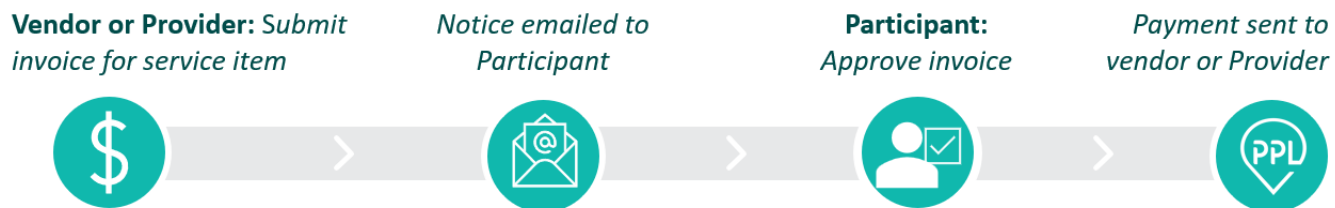
Time Entries

Date	Provider	Service	Hours Worked	Clock In	Clock Out	Billable Pay	Status	Review Date
09/13	Amy Attendant	PAS	3 hrs 59 mins	4:01 PM	8:00 PM	\$59.40	Good to Pay	09/14
09/11	William Worker	RSP	12 hrs 0 min	8:00 AM	8:00 PM	\$147.00	Good to Pay	09/14

Manage Invoices for Goods

Follow these steps to approve payments for expenses like medical supplies or mileage reimbursement for your employees.

Here are the overall steps:



Note: If you cannot arrange for a vendor to invoice you, you could use the purchase request feature (see the next section).

1. On the MyAccount dashboard, select **My Invoices**.

<p>My Details</p> <p>View</p> <p>Section complete</p>	<p>My Signature</p> <p>Add my signature</p>
<p>My Providers</p> <p>Start</p>	<p>My Enrollment</p> <p>Change</p> <p>Section complete</p>
<p>My Invoices</p> <p>View</p>	<p>My Budget and Time Entries</p> <p>View</p>
<p>My Purchases</p> <p>View</p>	

- Under the list of invoices, find the one needing approval and select **View Details**.

My Invoices

Approve

From: To: Filter by status: Filter by Provider:

Status	Invoice Number	Date	Provider Name	Amount	
<input type="checkbox"/> Approved	UAT 304701	1/16/2024	Kevin Suns	\$37.990	View Details
<input type="checkbox"/> Waiting approval	1554	2/28/2024	DanVendor95	\$37.185	View Details

- Check the details for correct dates, amounts, and service code.

You may need to refer to authorization documents from your regional center.

Edit Invoice

Invoice information

Individual DDD:* Invoice date:* Phone: 16534537685 Email: bohdanppltest+3295@gmail.com

Rejection note: Invoice number: Address: 761 Pelham Ave, Warminster, Bucks, 18974-2507, PA, United States of America FEIN: PR-0046338

Provider: DanVendor95

Start time	End time	Service date	Service code	Receipt	Service Unit	Rate \$	Total cost \$	Rejection reason	Action
		2/1/2024	W7271		55.5	0.67	37.185	<input type="text" value="Please select..."/>	Reject

Invoice total: \$37.185

Approve **Reject** **Close**

- If needed, select **Reject** next to a line item (you must also select a Rejection reason).

This individual item will be returned to the vendor or provider, along with the reason for rejection.

- For the entire invoice, select either **Approve** or **Reject** at the bottom.

Caution: Choosing **Reject** at the bottom of this page sends the entire invoice back.

Create a Purchase Request

For approved online purchases, you can request PPL to buy a product on your behalf. This process is meant as an alternative to the process of requesting invoices (see prior section).

Note: Purchase requests only apply to items that PPL can purchase online from a website. PPL cannot reimburse you for purchases you have already made.

Gather Purchase Information

Here is the main information you need to obtain:

INFORMATION NEEDED	EXPLANATION
Vendor Web addresses	Obtain both the main Web address of the vendor as well as the address of each product.
Vendor's phone number	Although not required, it's useful to obtain a customer service number in case PPL has a question about the product purchase.
Service code & authorization	Your regional center can provide the specific name of the support you have been authorized to purchase. If possible, also obtain the code.
Product price	Obtain the standard price , not a discounted price. Because PPL is making the purchase on your behalf, we can only use the standard, publicly available price. Note: Also check the total price with tax and shipping in case the total exceeds your budget authorization. If it does, you will need to find a cheaper product.
Product details	For product options, like color, you should document what you need in a standard file format. You can also take a screen capture. You will be able to upload documents and pictures into MyAccount.

Add Request in MyAccount

1. On the MyAccount dashboard, select **My Purchases**.

A screenshot of the MyAccount dashboard showing a grid of six sections. The 'My Purchases' section is highlighted with a red border. Each section includes a title, a button, and a status icon.

My Details View Section complete	My Signature Add my signature Section complete
My Providers Start	My Enrollment Change Section complete
My Invoices View	My Budget and Time Entries View
My Purchases View	

2. Select **Create Purchase Request**.

A screenshot of the 'Purchase request' page. The 'Create Purchase Request' button is highlighted with a red border. Below the button is a search bar with the placeholder text 'Search for...' and a 'Search' button. At the bottom, it says 'No purchase request yet'.

Purchase request **Create Purchase Request**

Search for...

No purchase request yet

- On the purchase request page, check the address under **Participant Details**.

If needed, you can check the box to add a different address.

- Under **Vendor Details**, provide the information you gathered.

- Under **Purchase Details**, select the **Service Code** and authorization you received from the regional center.

- For each item you want purchased, select **Add** and enter both the standard price (no tax or shipping) and the Web address (URL) where PPL can go to make the purchase.

- To ensure we make the right selections for you, select **Browse for a file** and upload a document or screen capture that describes the product options you want.

- Scroll down and select **Submit**.

Participant Details

Participant*
Joshua Arguelles

Participant Address*

Your selected address:
810 Hillborn Ct , Suisun City, Solano CA, 94585-4116, US

Check this box if you need this shipped to a different address

Vendor Details

Name* Max 100 characters. remaining 94

Website Address: Max 500 characters. remaining 477

Phone Number

Purchase Details

Service Code* Max 500 characters. remaining 477

Purchase requests can only be submitted for services with an active authorization. If the "Select Service Authorization" has no options, then you can't submit a purchase request for that service.

Select Service Authorization* Max 500 characters. remaining 477

Purchase Details*

Item Description	Price	URL
<input type="text" value="Orthopedic shoes"/> <small>Max 80 characters. remaining 64</small>	<input type="text" value="145"/>	<input type="text" value="https://www.amazon.com"/> <small>Max 500 characters. remaining 477</small>

Upload any supporting documentation to help us fulfill your order, such as images or screenshots.

9. Look for an email within a few business days that will indicate if the purchase was completed or rejected.

Note: If your request is rejected, you can return to the Purchase Request page to view the reason. You cannot edit a rejected request, but you can start over with a new purchase request if needed.