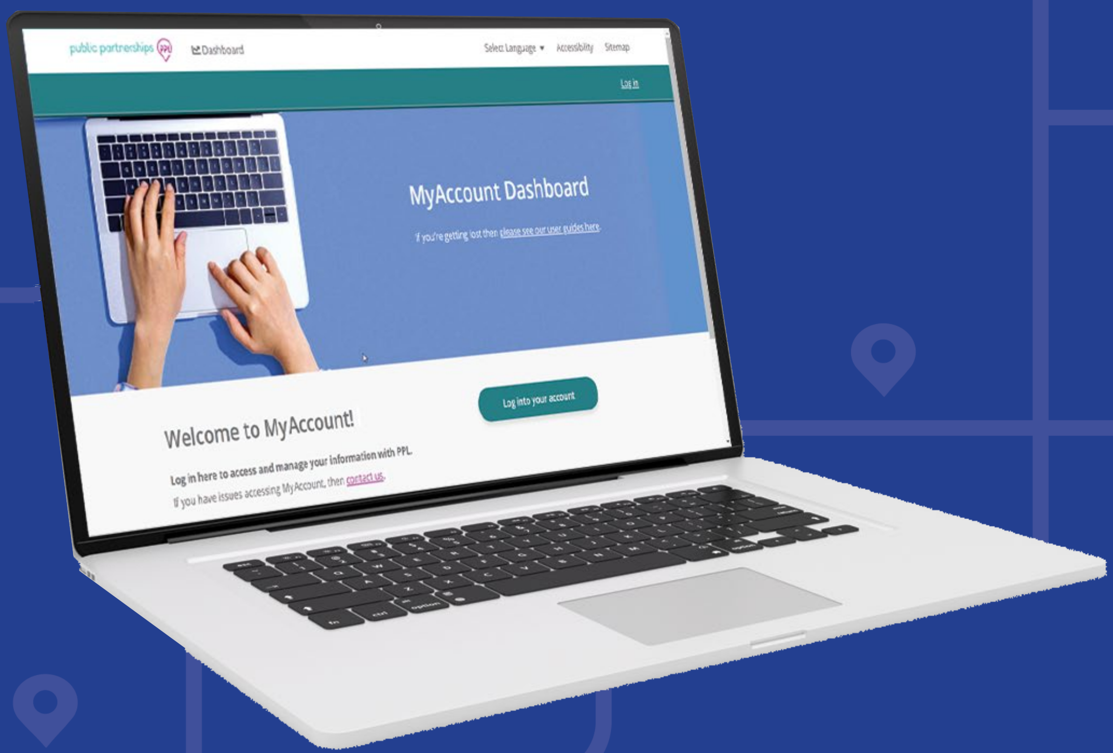
MYACCOUNT

Guide for Participants



CONTENTS

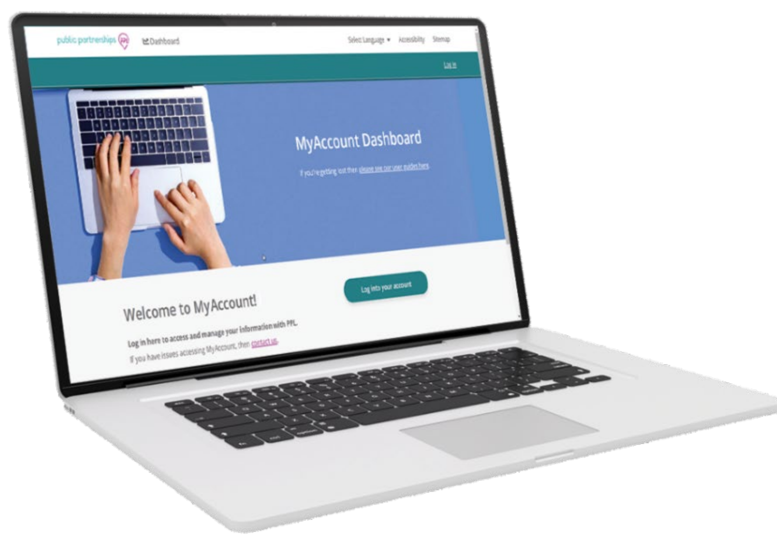
WELCOME

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:

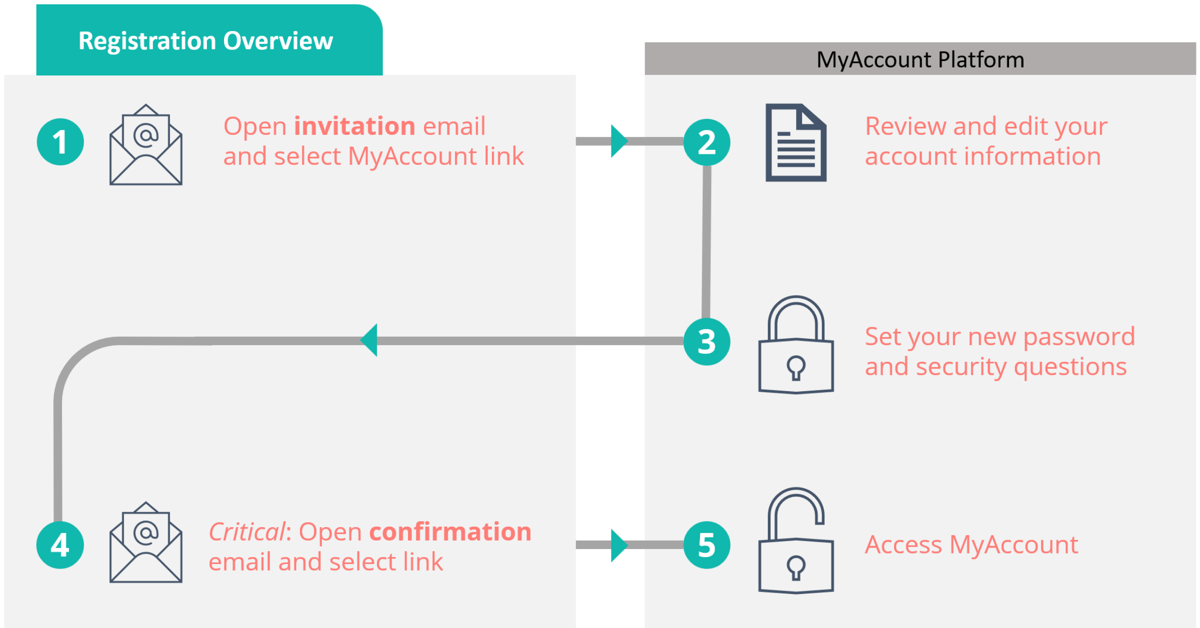
- How to set up your MyAccount access
- How to enroll as an employer
- How to view and manage your budget

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.



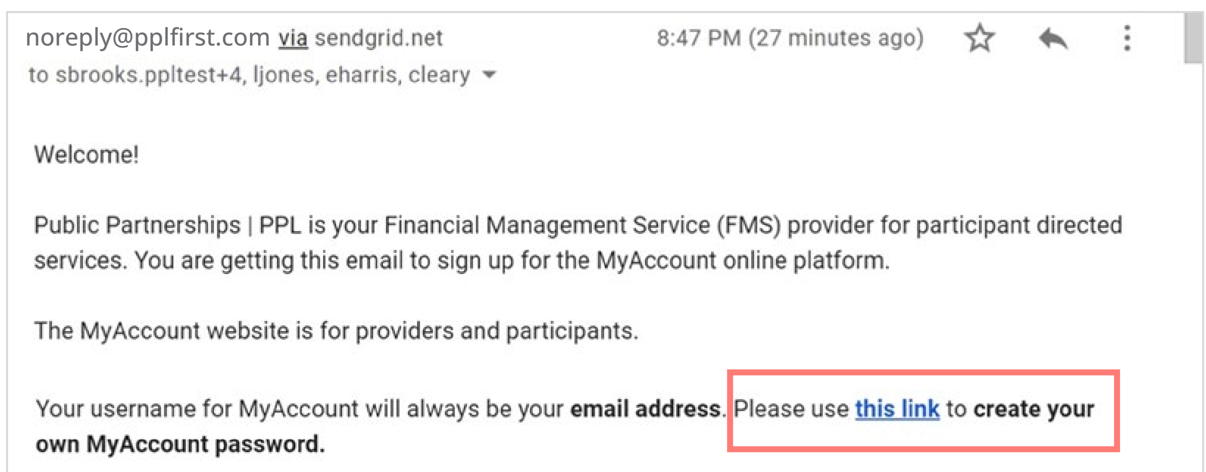
Set Up Your MyAccount Access

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.

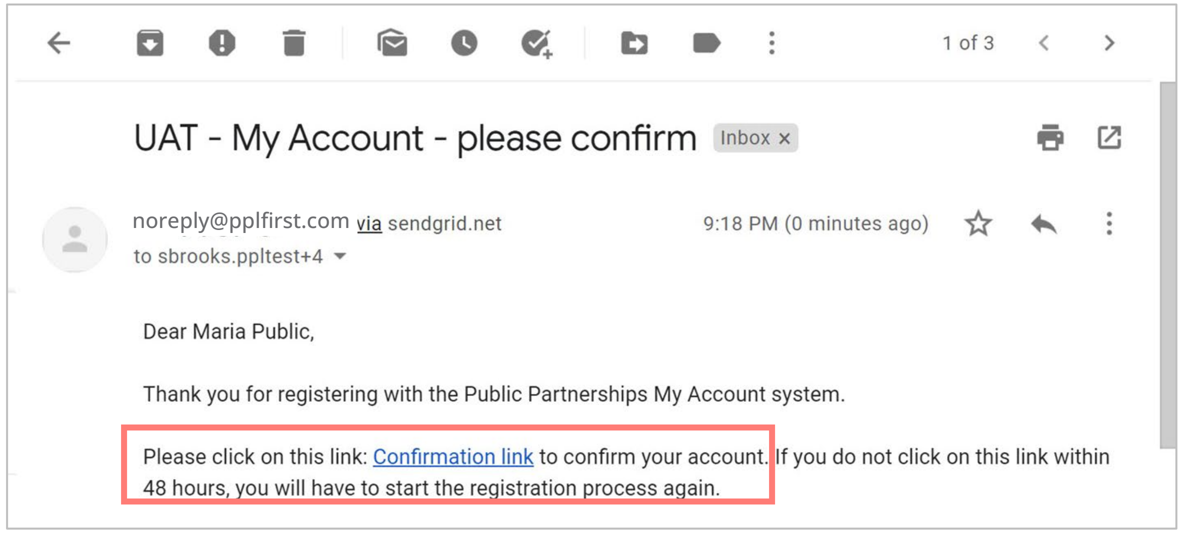
   NOTE: Your new password will also apply to the Time4Care™ app.



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

   NOTE: Must confirm within 48 hours.

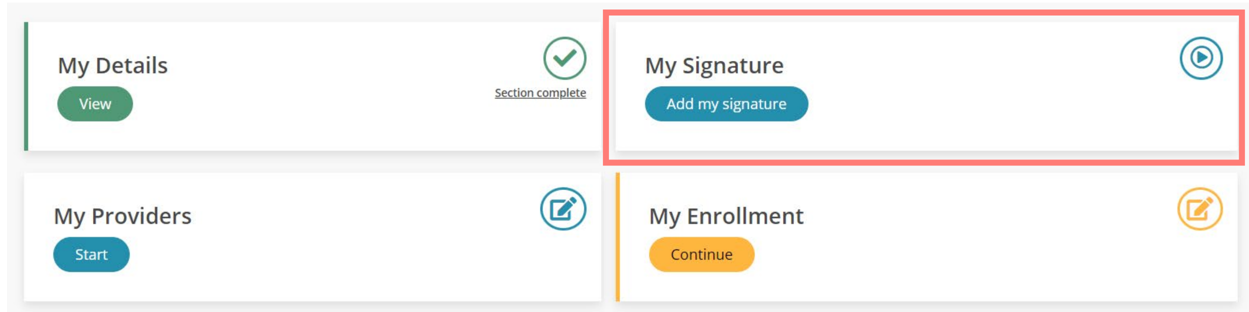
6. Now you have MyAccount access. Continue with enrollment or other tasks.



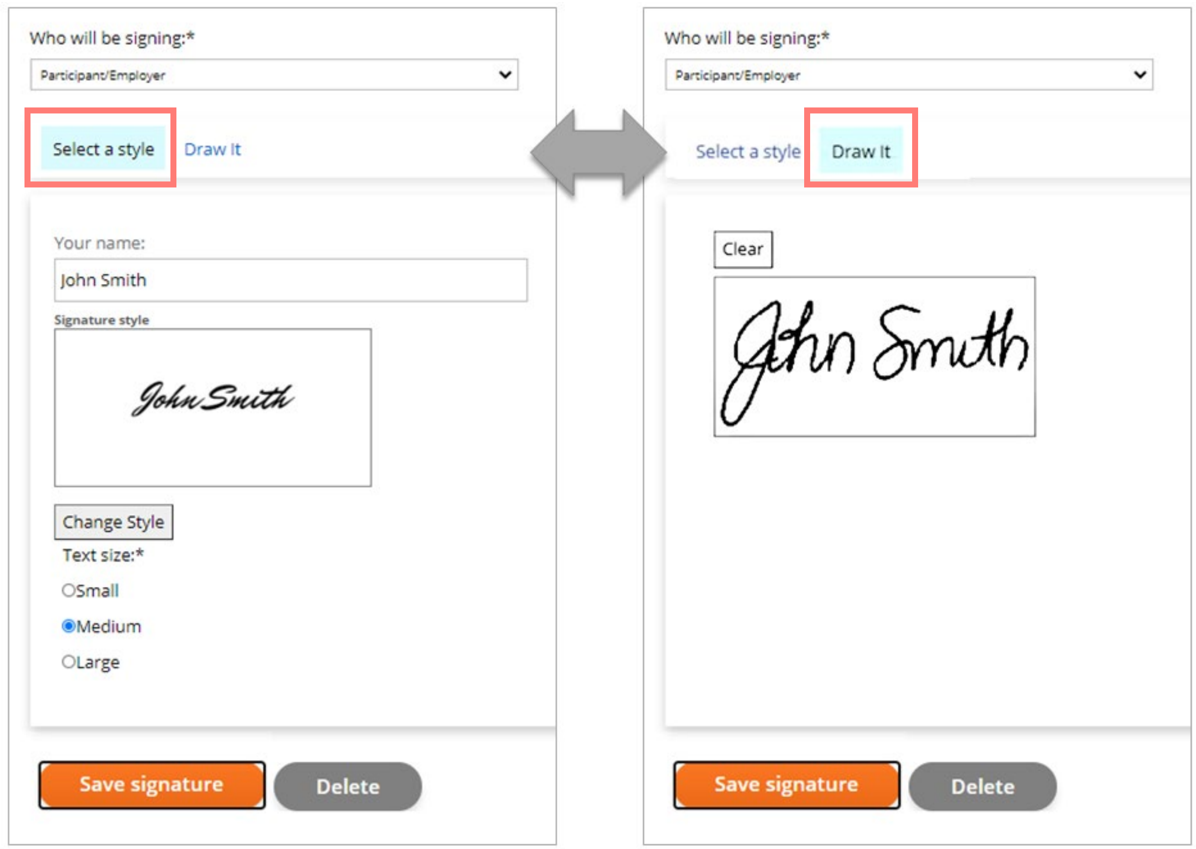
Set Up Your Signature

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**.



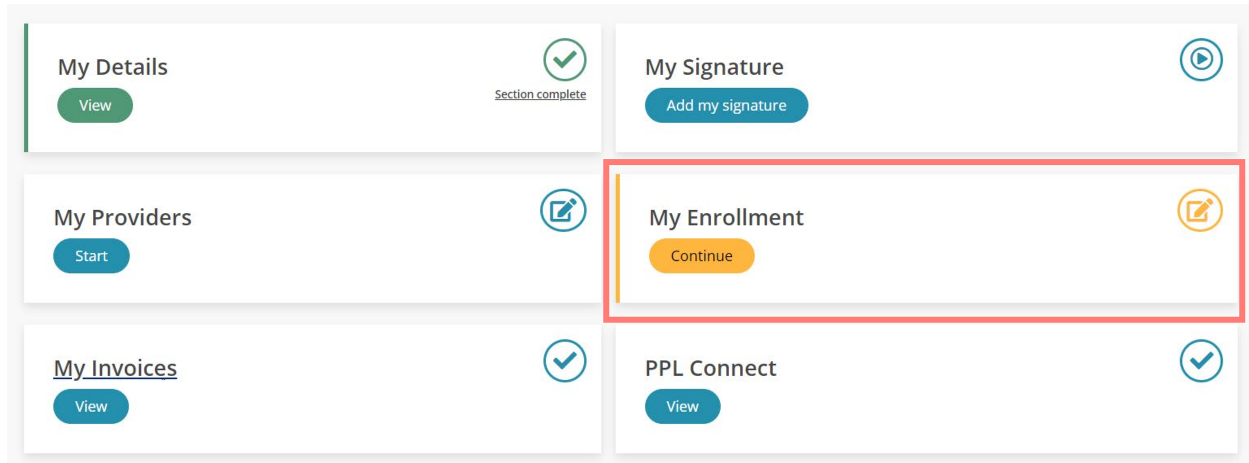
2. Under **Who will be signing**, select which role you are serving.
3. Choose between these options:
   - **Select a Style** – Useful if you can only type your name. You can select different styles and sizes to your liking.
   - **Draw It** – Useful if you have a touch screen device.
4. Select **Save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



Complete Your Enrollment

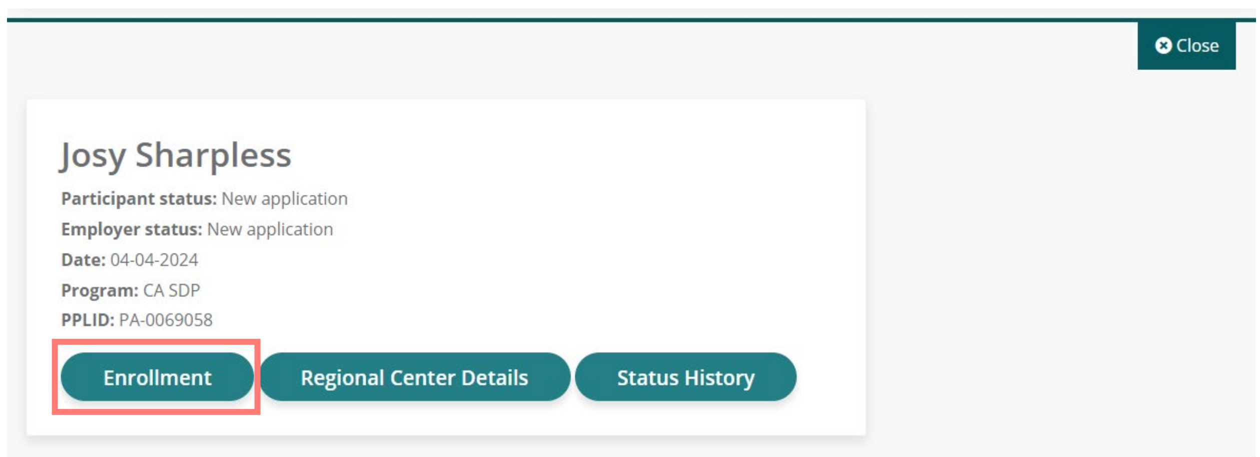
When you are just starting with Public Partnerships (PPL), you need to complete your enrollment.

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.



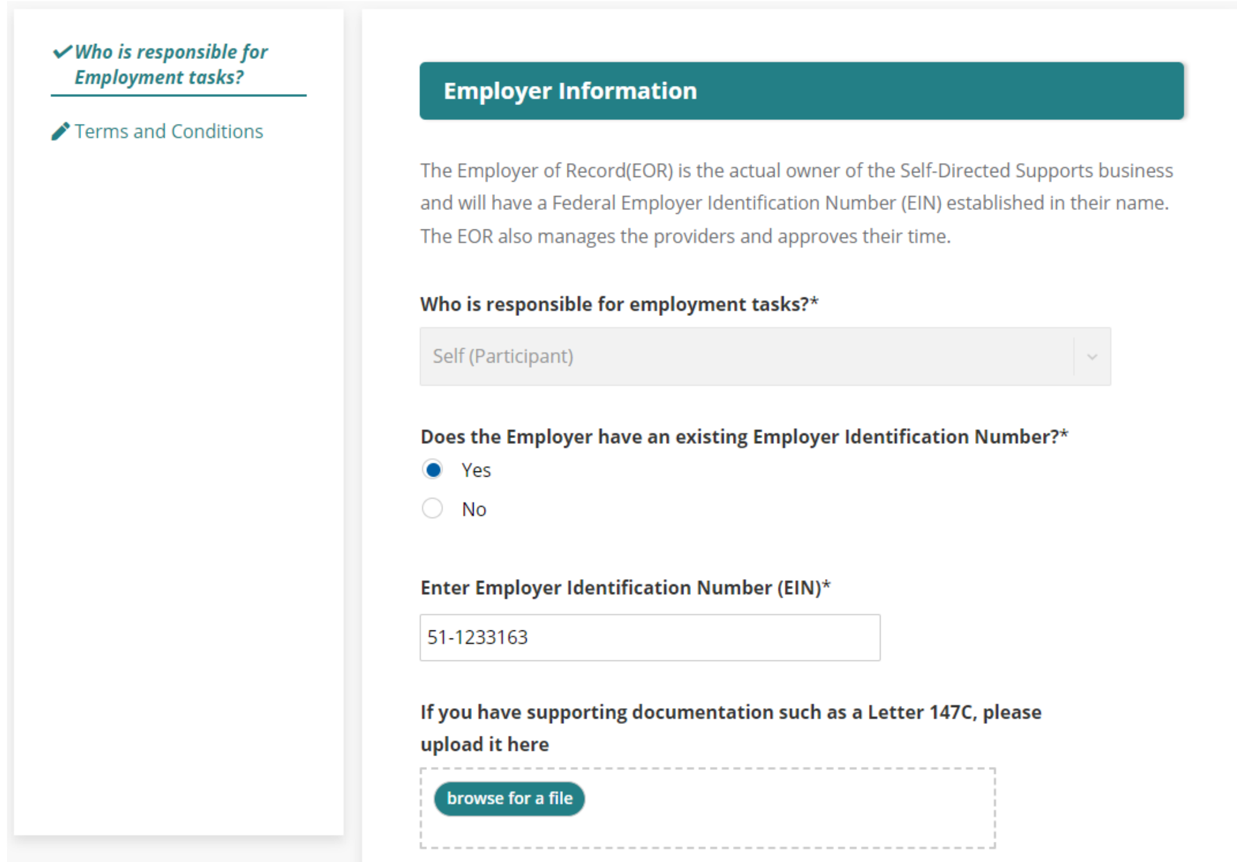
3. Under Employer Information, read the description of your duties.

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

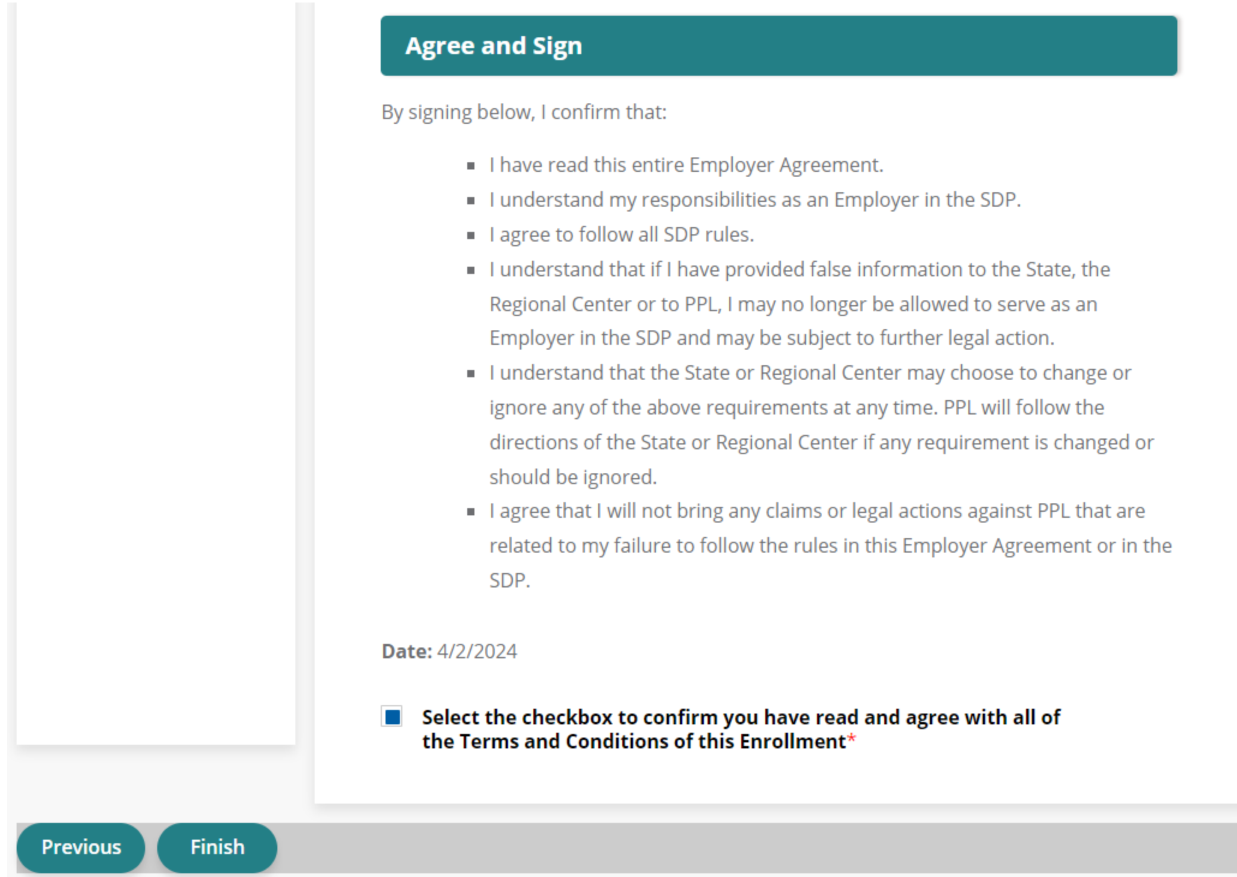
4. If you already have your **Employer Identification Number (EIN)**, choose **Yes** and enter the number.

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

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



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.



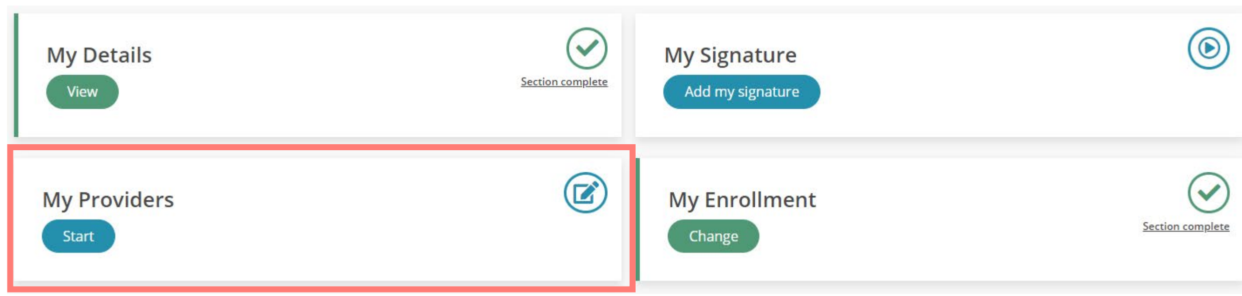
Hire an Employee (My Provider)

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

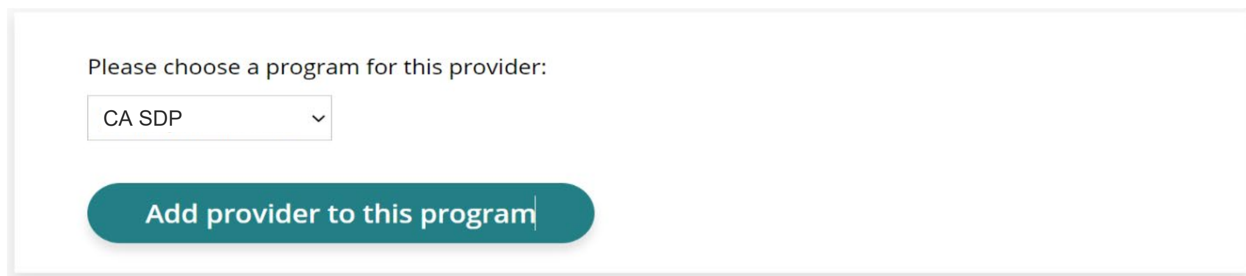
Note: In MyAccount, “Provider” and “Worker” are the terms used for a Support Service Professional (SSP) who provides care.

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

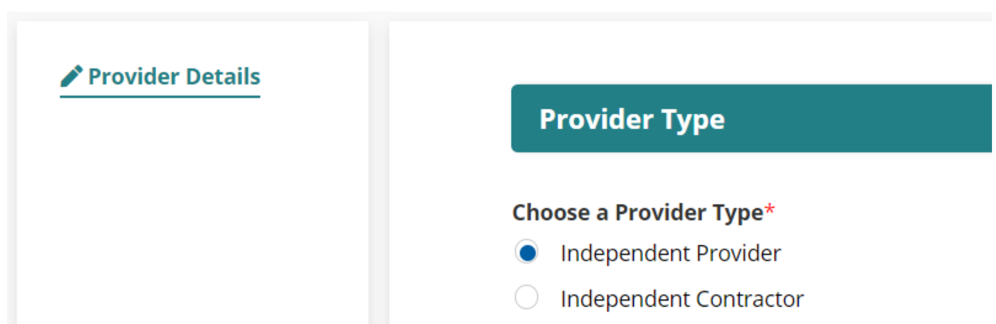
1. On the MyAccount Dashboard, select **My Providers**.



2. Select **Hire a New Provider**.
3. Select **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.



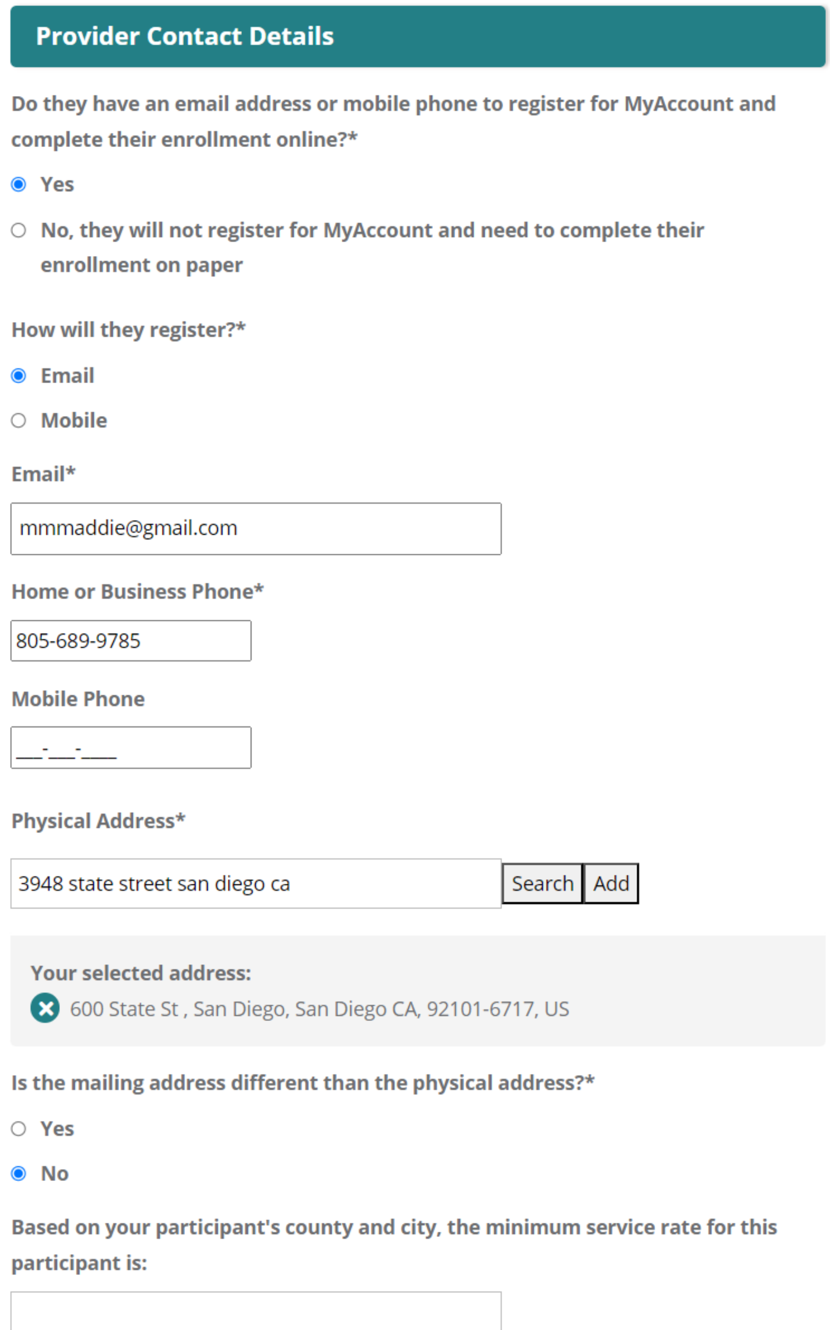
5. Complete the basic Provider details.
6. At the bottom, select **Next**.
7. Choose whether the Provider can complete enrollment online.

   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.

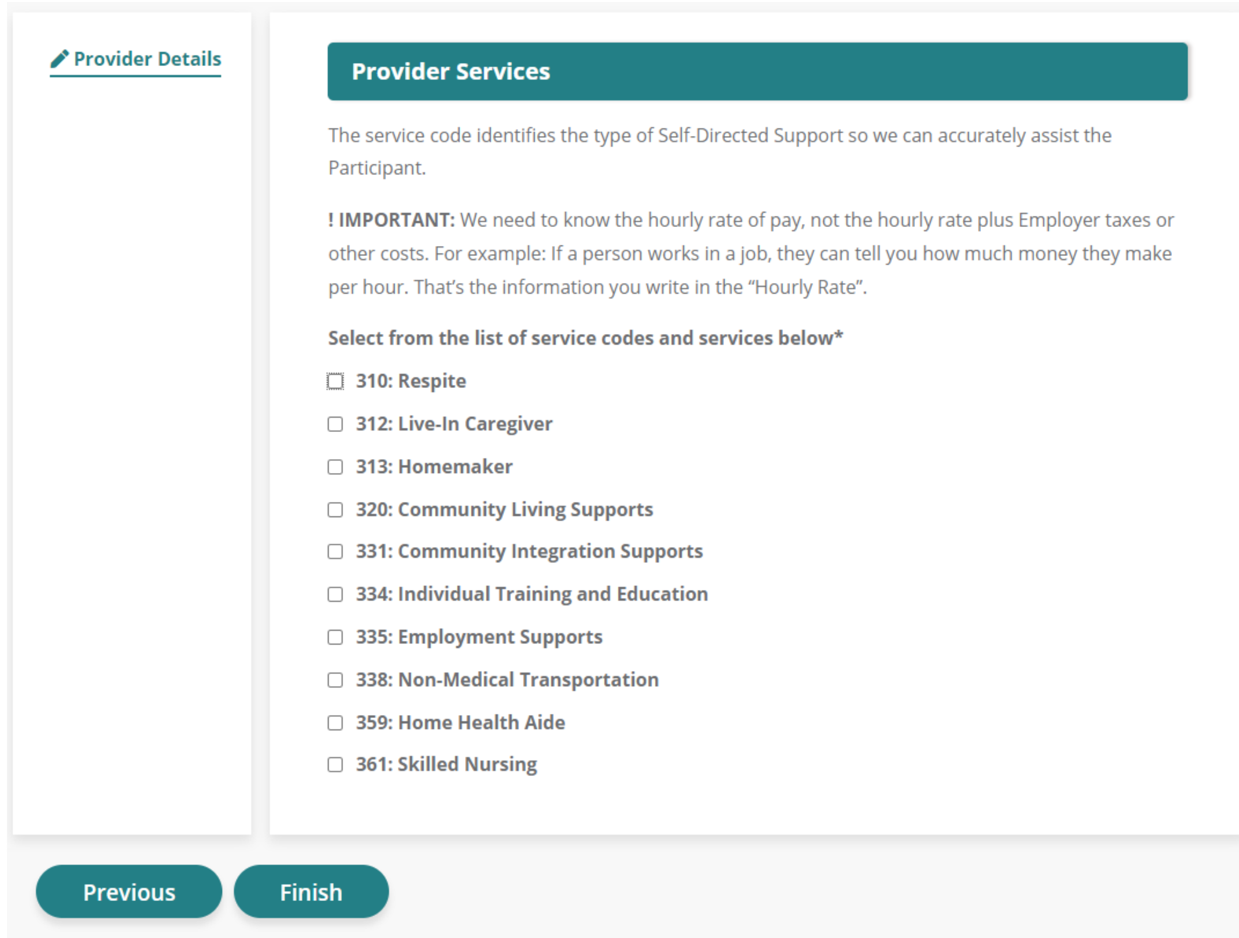
9. At the bottom, select **Next**.



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.



Disassociate a Provider

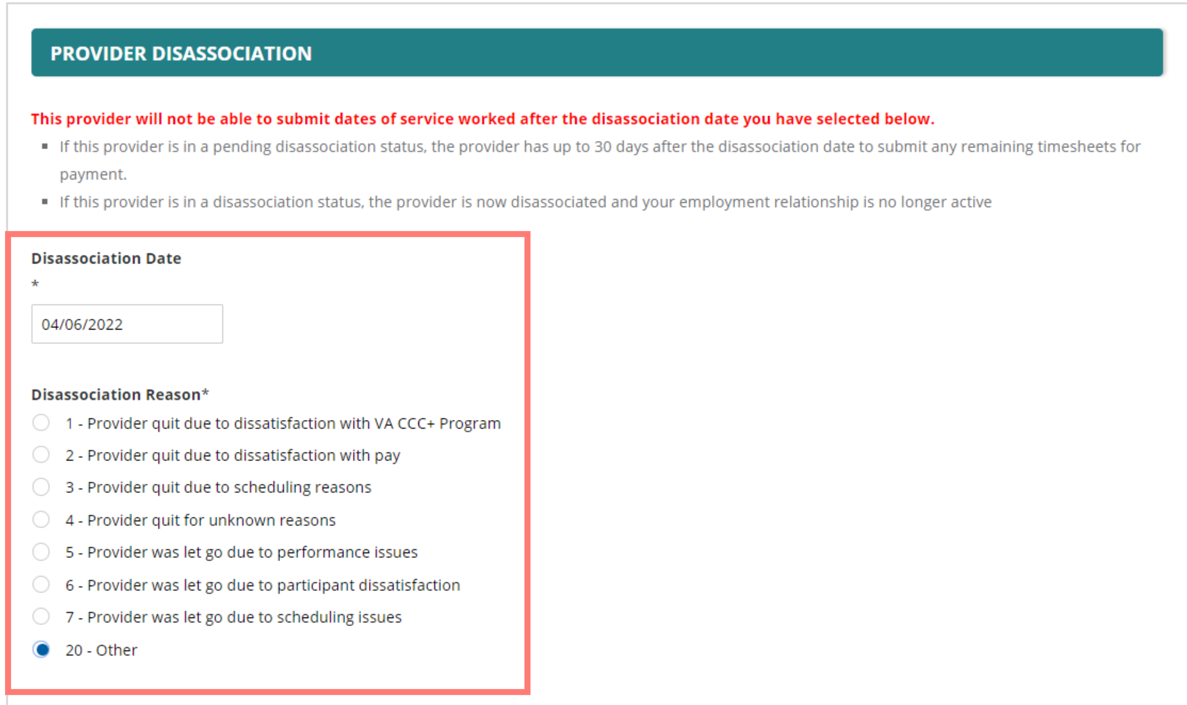
If you need to end employment for a care Provider, use the disassociate feature in MyAccount.

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.

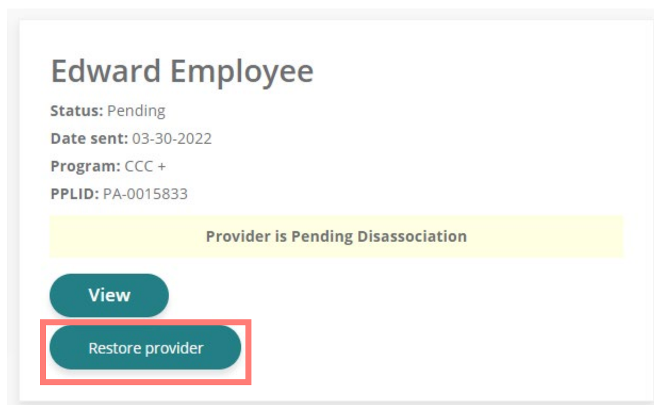


Restore a Provider

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**.

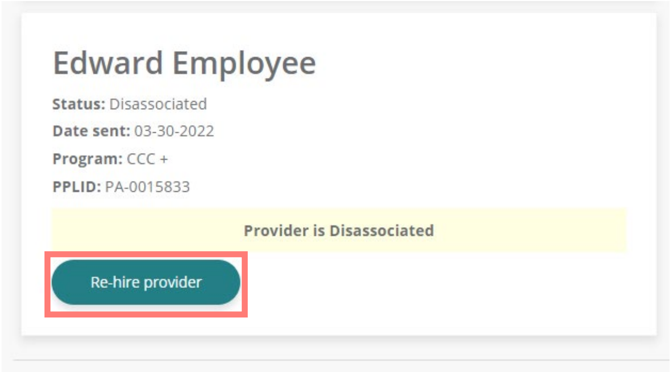


Re-hire a Provider

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.



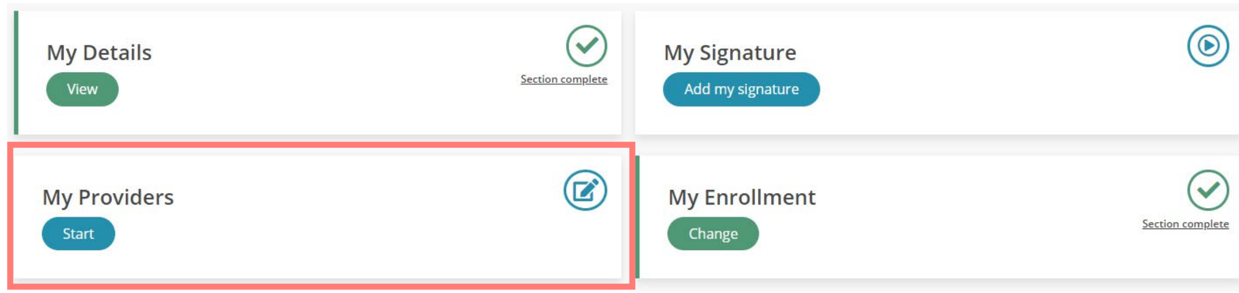
Hire a Vendor

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 (*).

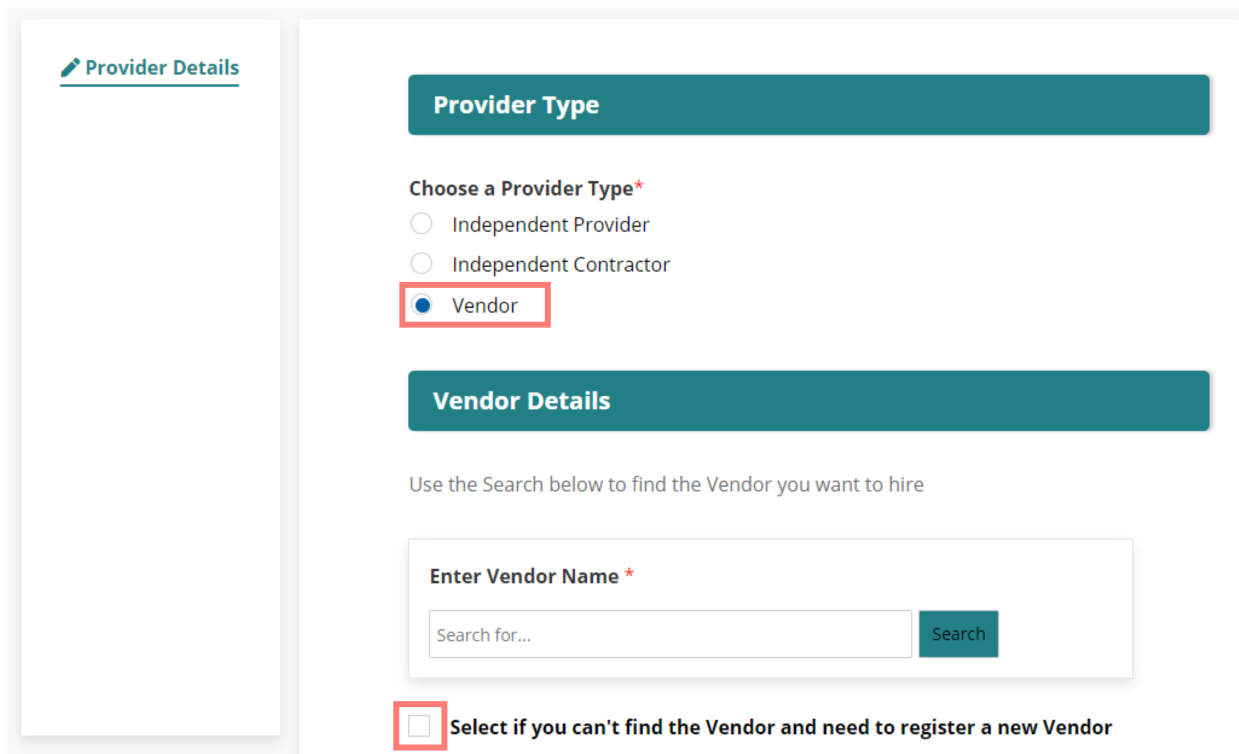
1. On the MyAccount Dashboard, select **My Providers**.



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.

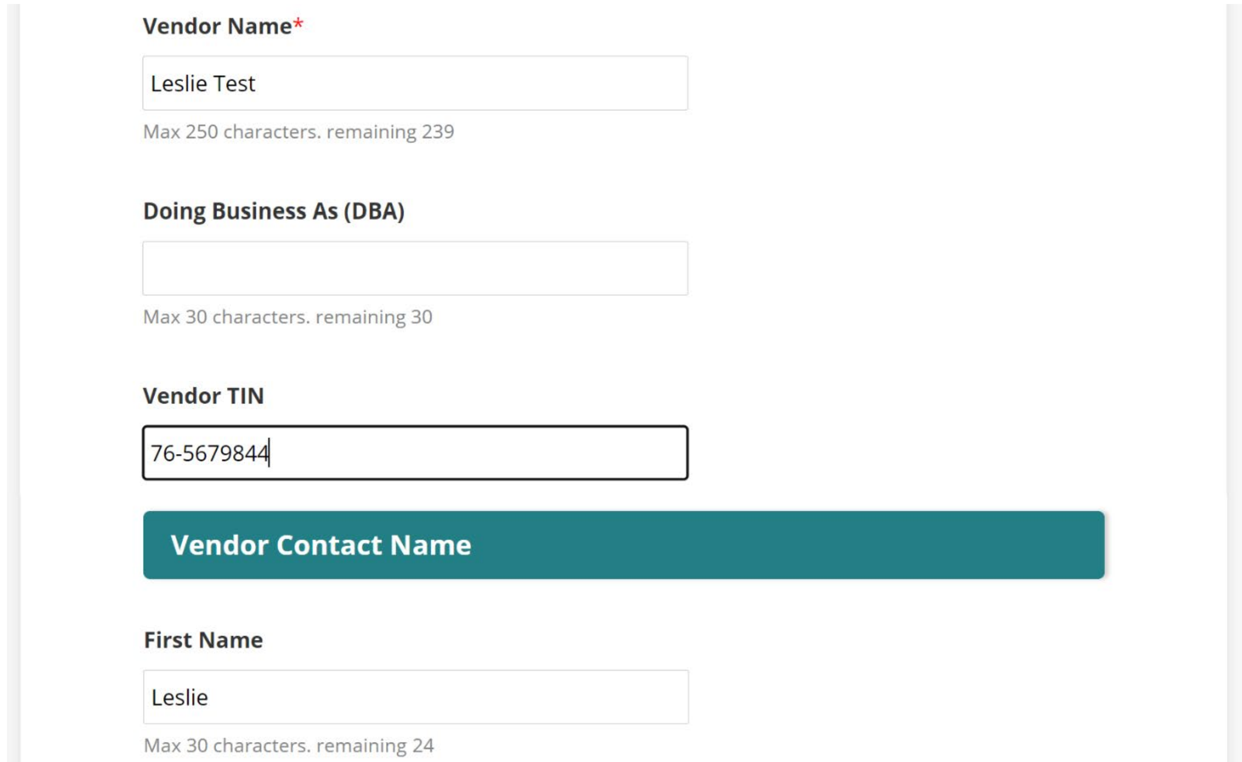
   If found, select **Next** and **Confirm**. Wait for the vendor to complete enrollment.

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



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

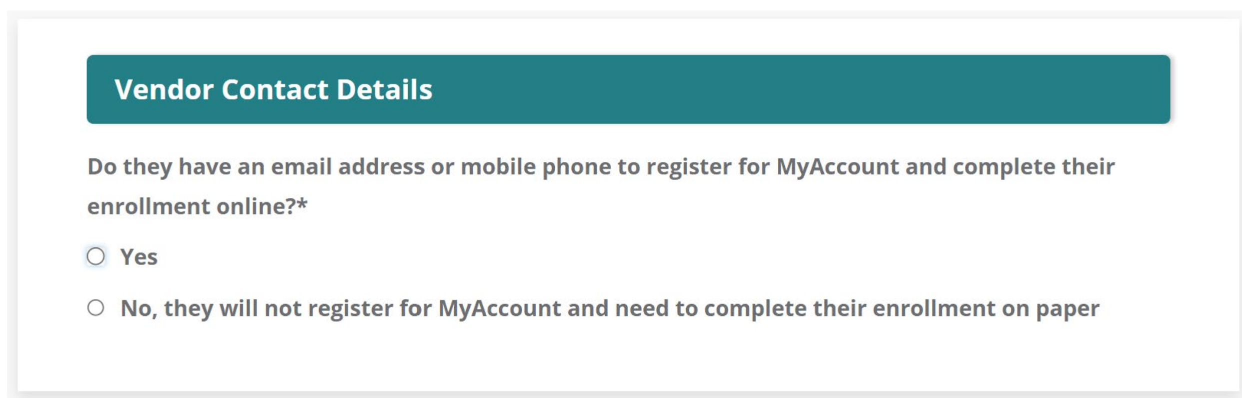
   Note: The **Vendor TIN** (Tax Identifaction Number) is required. Your vendor will need to provide it to you.



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.

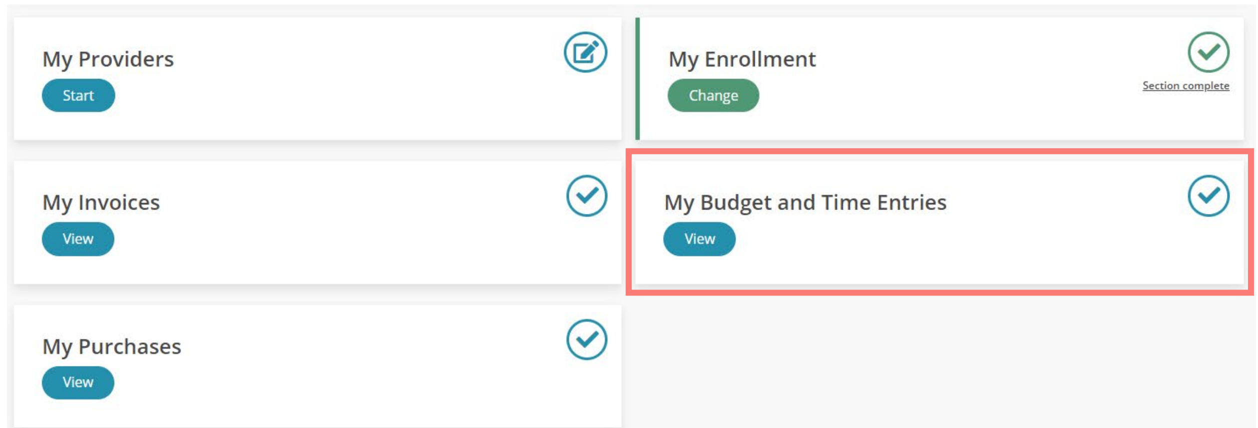


9. Complete the contact information.
10. At the bottom, select **Next**.
11. At the bottom, select **Finish**.
12. Review the summary and select **Confirm**.
13. Wait for the vendor to complete enrollment.

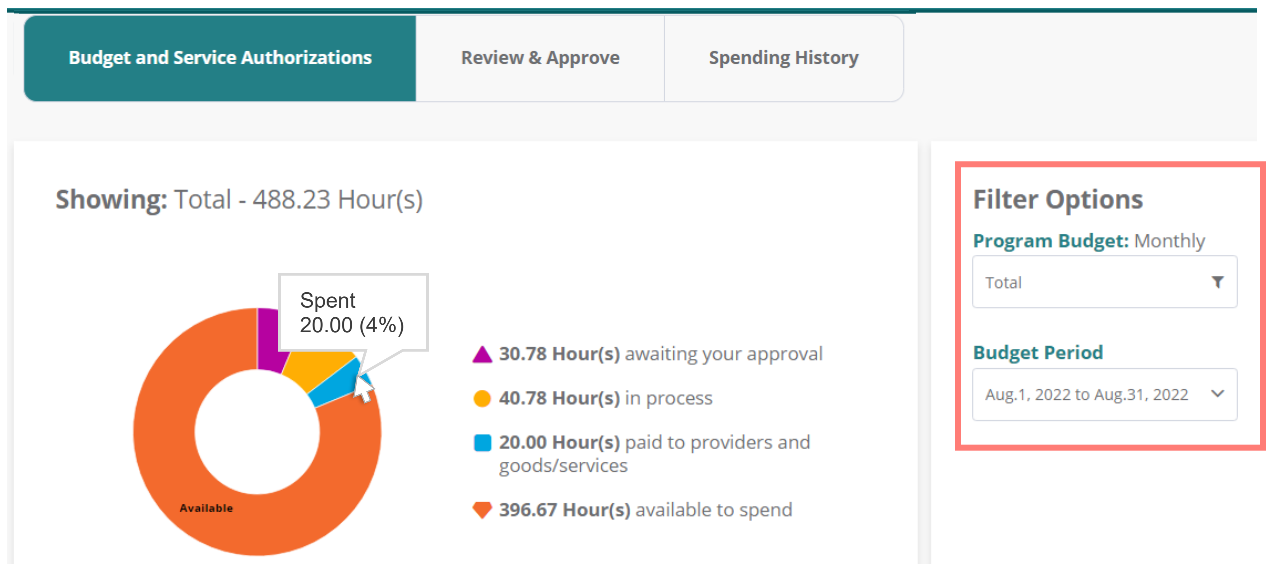
Manage Budget and Authorizations

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**.

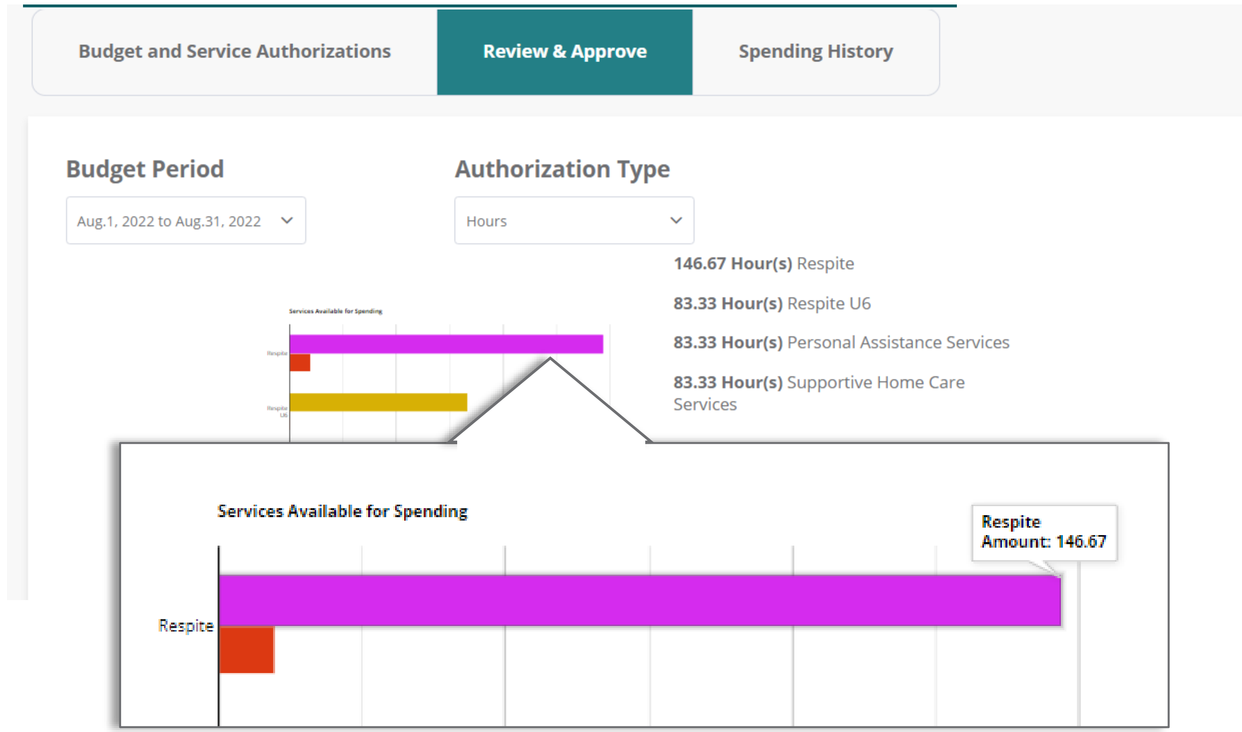


2. Under the **Budget and Service Authorizations** tab, view a summary of spending compared to your budget.
    a. To see spending for a specific service or budget period, use the **Filter Options**.
    b. To see amounts and percentages, hover your mouse over the graphic.

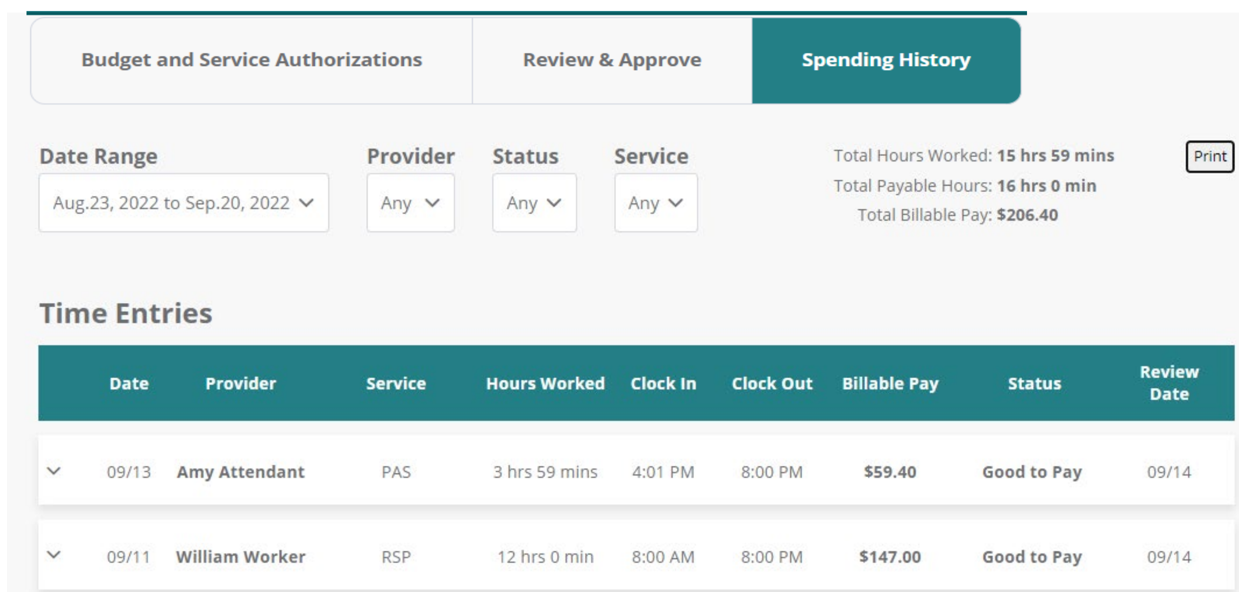


3. Under the **Review & Approve** tab, you can see how many hours or dollars you have remaining for each service type.

   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.

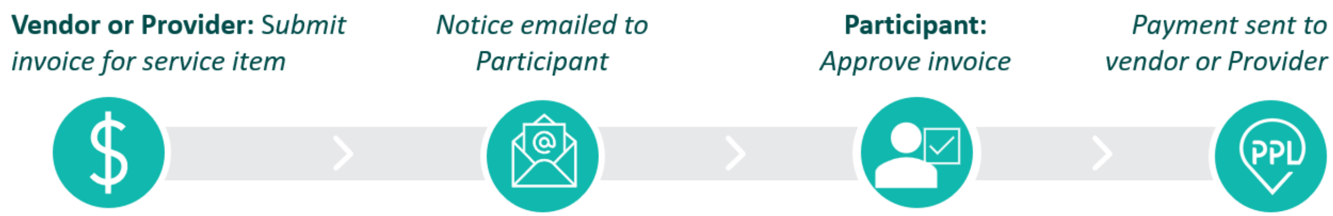


Date	Provider	Service	Hours Worked	Clock In	Clock Out	Billable Pay	Status	Review Date
09/13	Amy Attendant	PAS	3 hrs 59 mins	4:01 PM	8:00 PM	$59.40	Good to Pay	09/14
09/11	William Worker	RSP	12 hrs 0 min	8:00 AM	8:00 PM	$147.00	Good to Pay	09/14

Manage Invoices for Goods

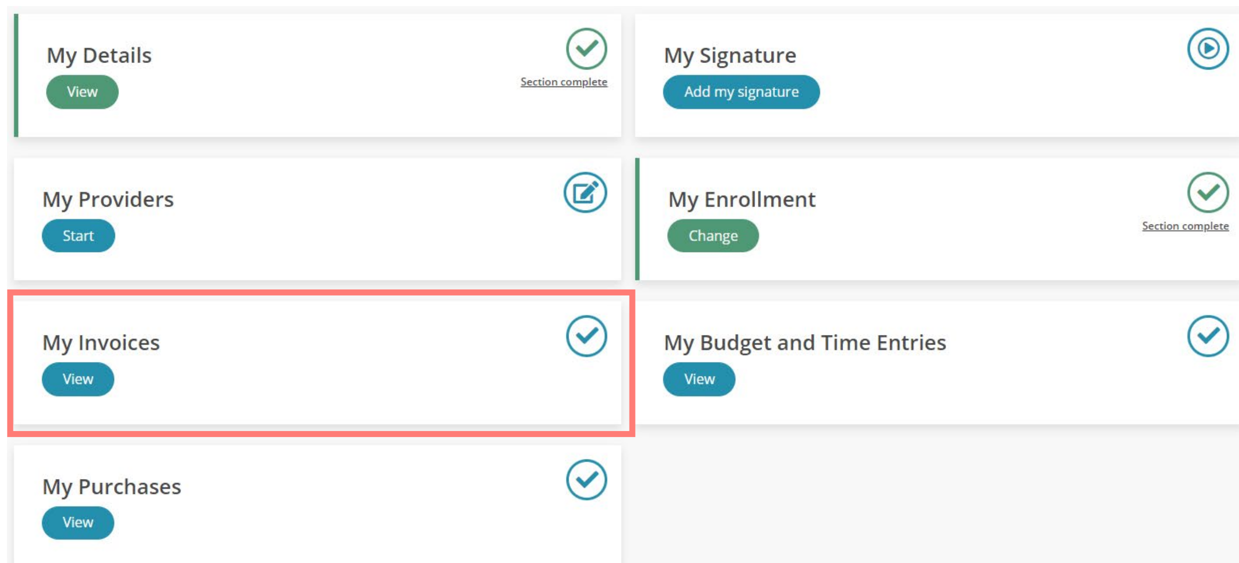
Follow these steps to approve payments for expenses like medical supplies or mileage reimbursement for your employees.

Here are the overall steps:

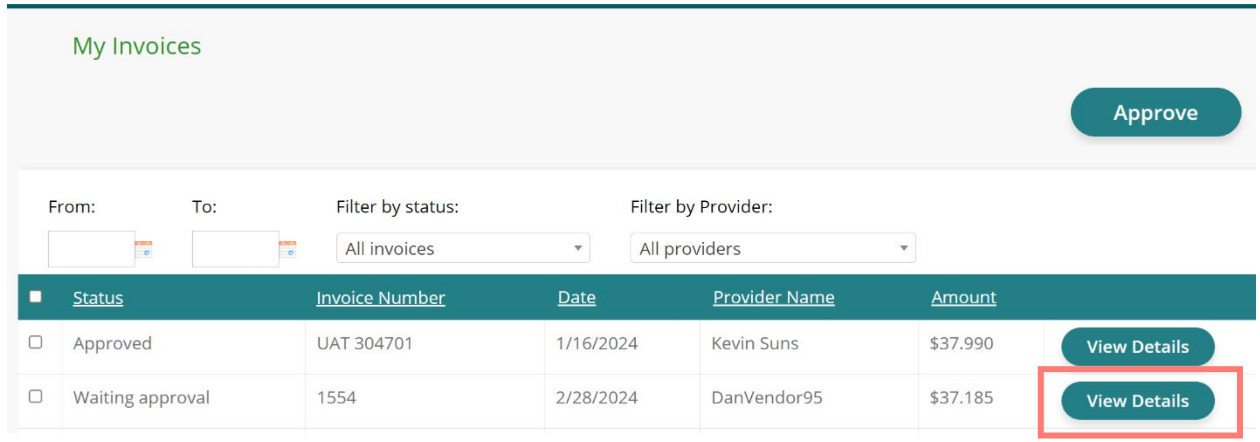


Note: If you cannot arrange for a vendor to invoice you, you could use the purchase request feature (see the next section).

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

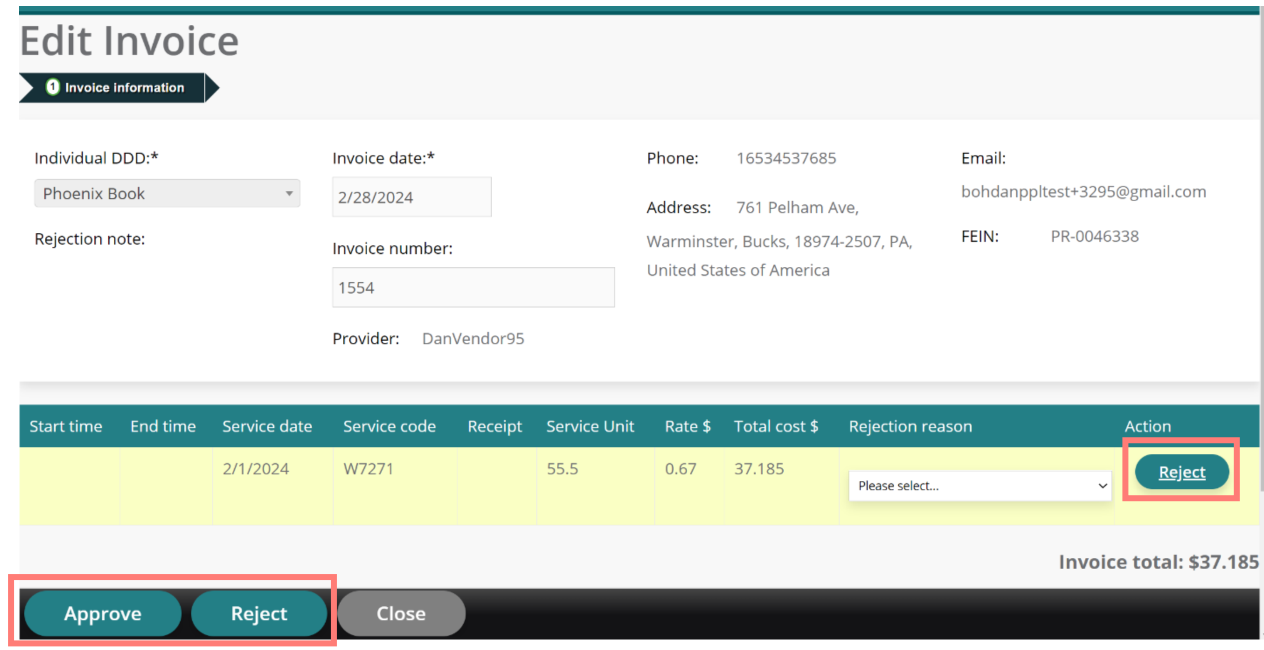


2. Under the list of invoices, find the one needing approval and select **View Details**.



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

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



4. 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.

5. 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.

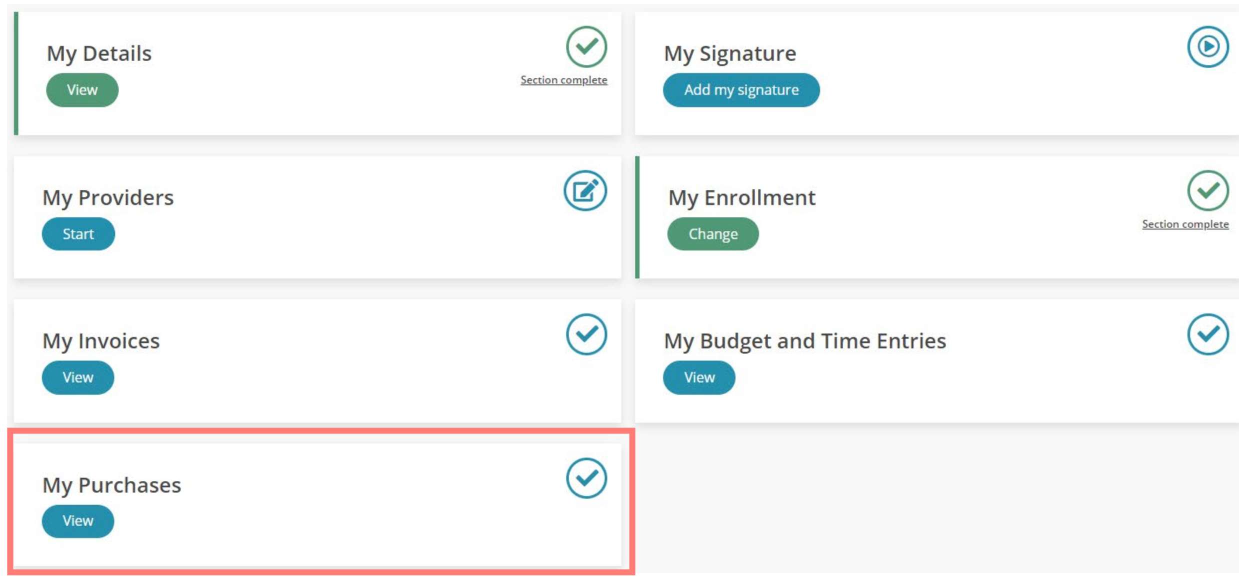
Gather Purchase Information

Here is the main information you need to obtain:

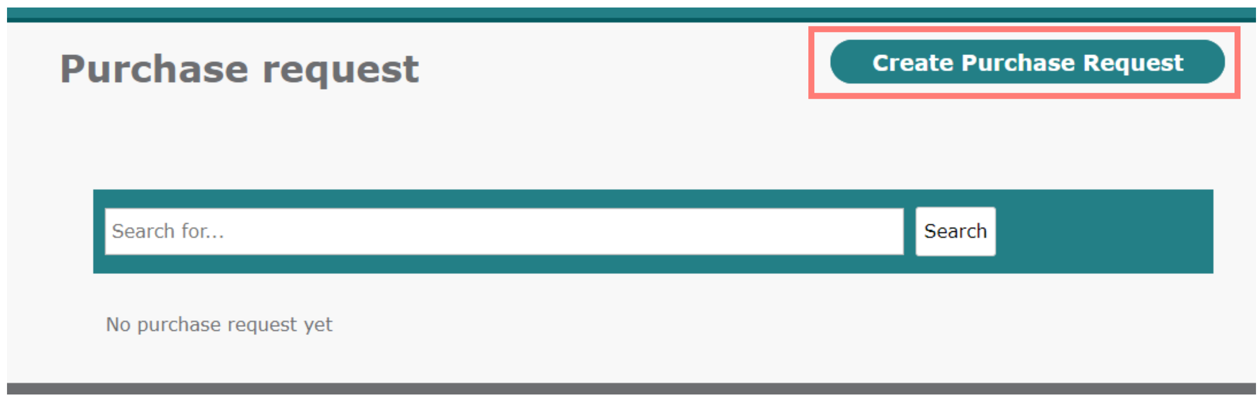
INFORMATION NEEDED	EXPLANATION
Vendor Web addresses	Obtain both the main Web address of the vendor as well as the address of each product.
Vendor's phone number	Although not required, it's useful to obtain a customer service number in case PPL has a question about the product purchase.
Service code & 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**.

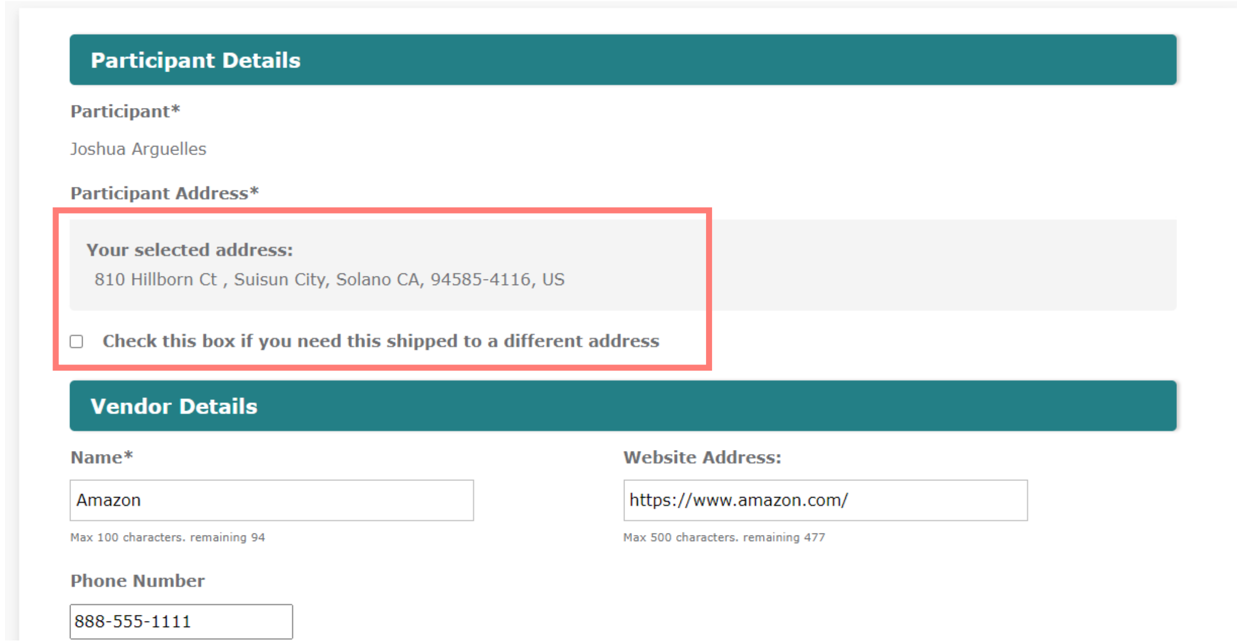


2. Select **Create Purchase Request**.



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

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



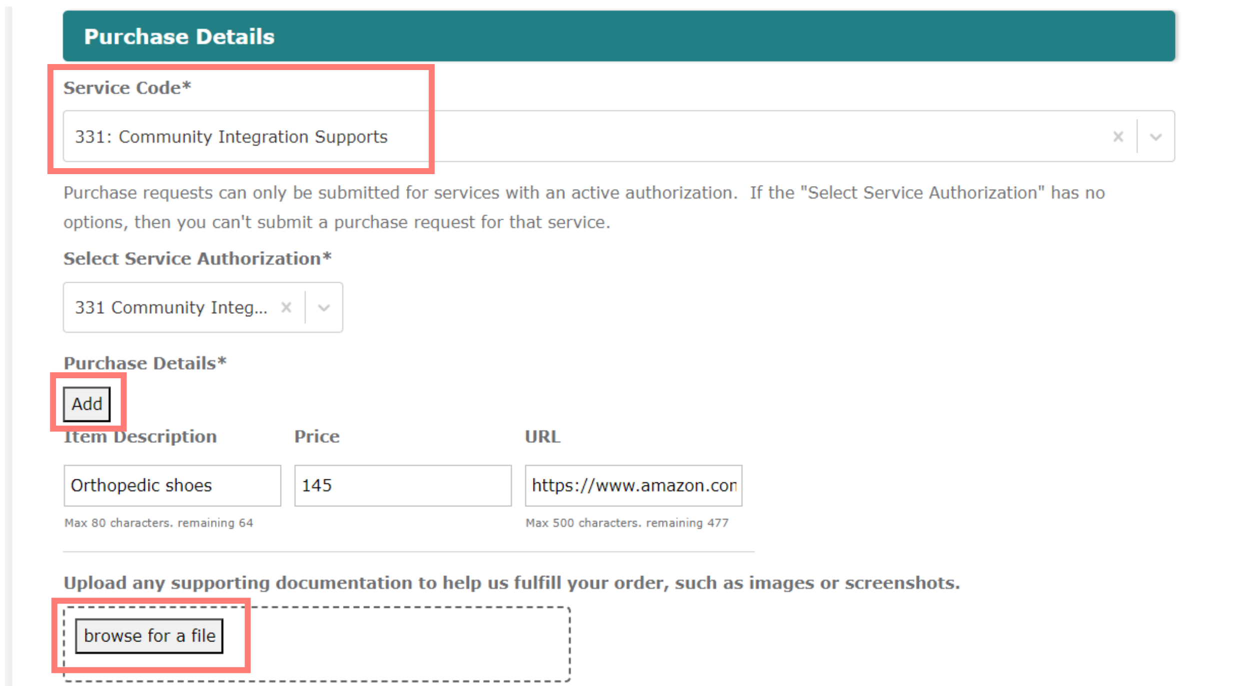
4. Under **Vendor Details**, provide the information you gathered.

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

6. 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.

7. 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.

8. Scroll down and select **Submit**.



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.