YOUR LIFE
YOUR CARE
YOUR PEOPLE

MyAccount Guide

For Vendors in California SDP

Last Updated: October 4, 2024

About This Guide

This guide instructs a business or individual how to receive payments for the products or services you provide to participants in California Self-Determination Program (SDP).

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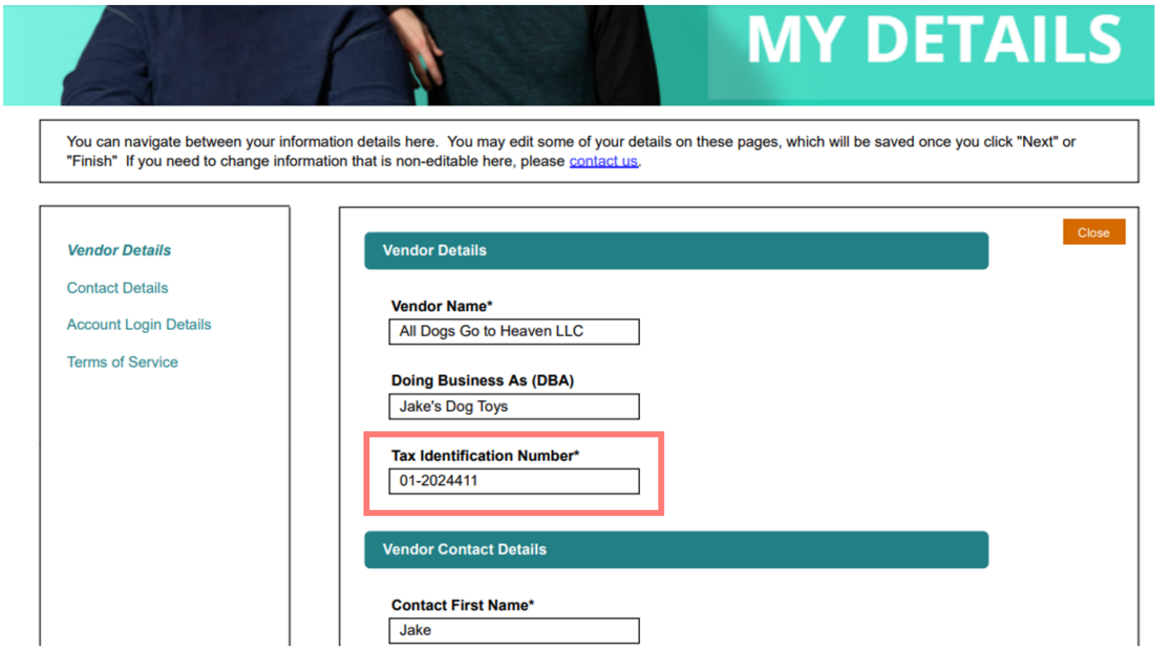
Set Up Your MyAccount Access

You will receive an email notification asking you to register for MyAccount. This email comes *after* a participant has added you as a new vendor.

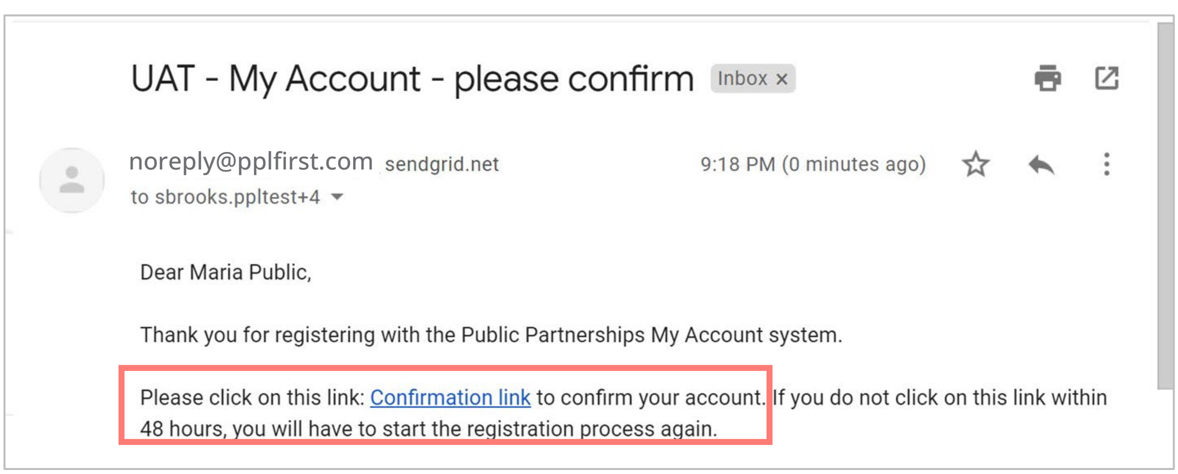
1. In your email invitation, open the MyAccount link: account.pplfirst.com (no "www").
2. Log in with the **Username** and **Password** provided in your email.
3. In MyAccount, input your identification details and check the **Tax ID Number**.



4. Under **Contact Details**, specify how to contact you.

   In the address box, use **Search** to show official addresses that match.
5. Under **Account Login Details**, type a new password and set your security questions.
6. Enable the checkbox acknowledging PPL's Terms of Service and select **Finish**.
7. Look for a "confirm" email from PPL and open the *Confirmation link*.

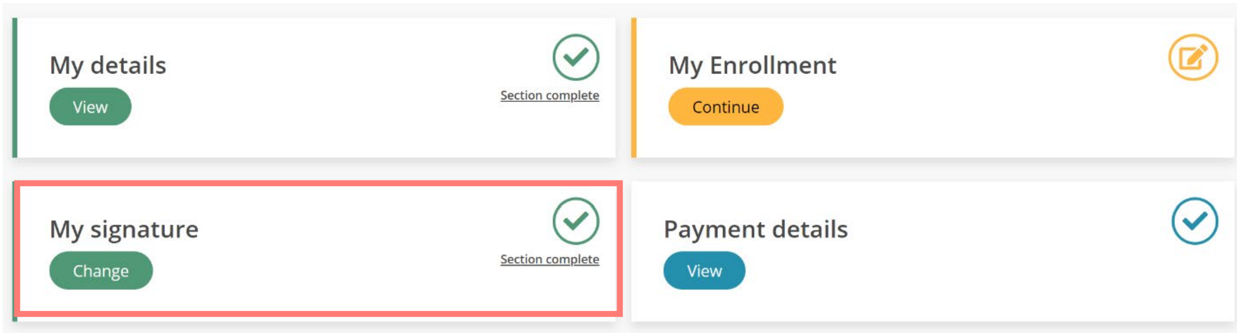
   Note: You must confirm within 48 hours.



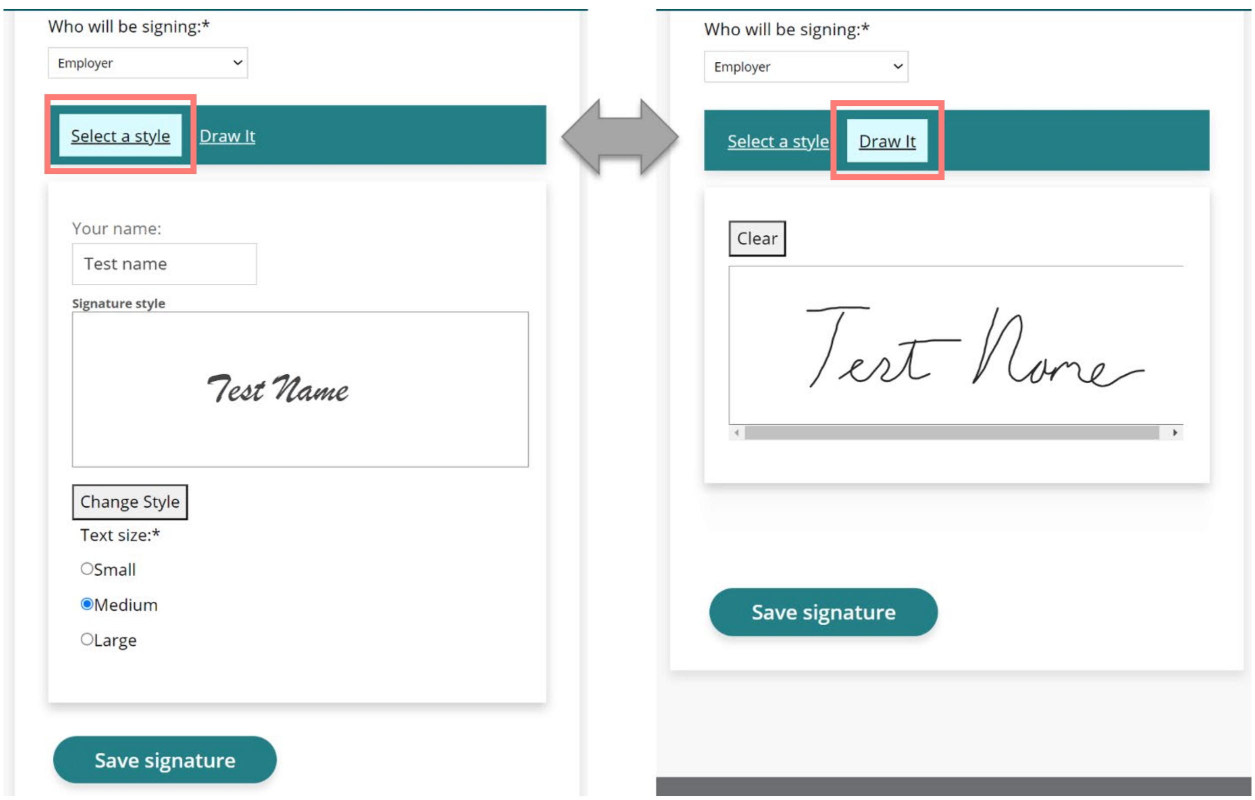
Set Up Your Signature

To complete enrollment, you will use an electronic signature.

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.

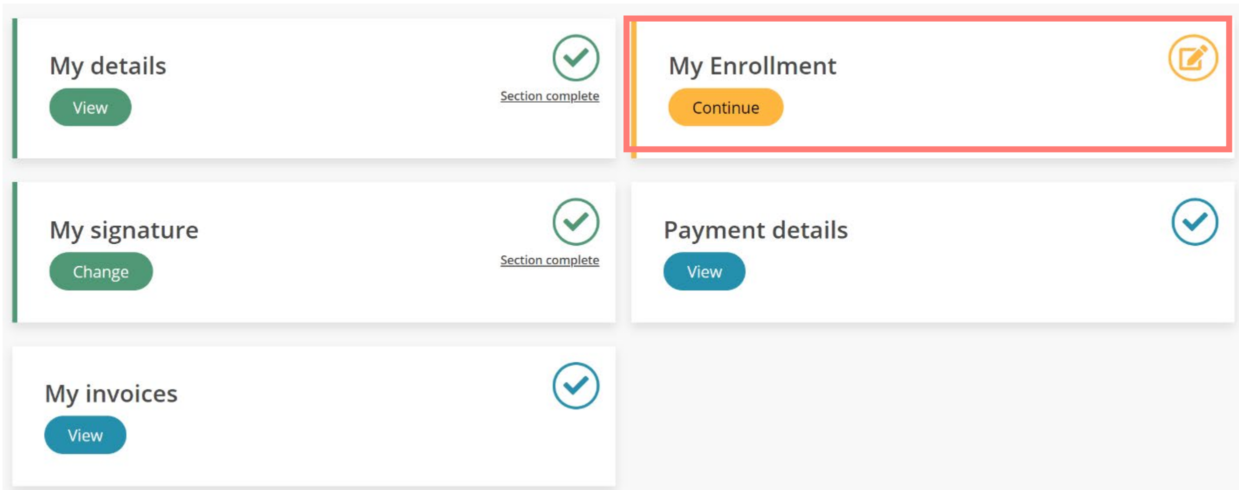


4. Select **Save signature**.

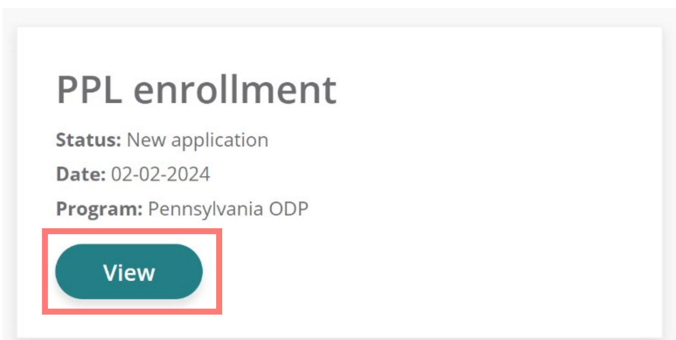
Complete Your Enrollment

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

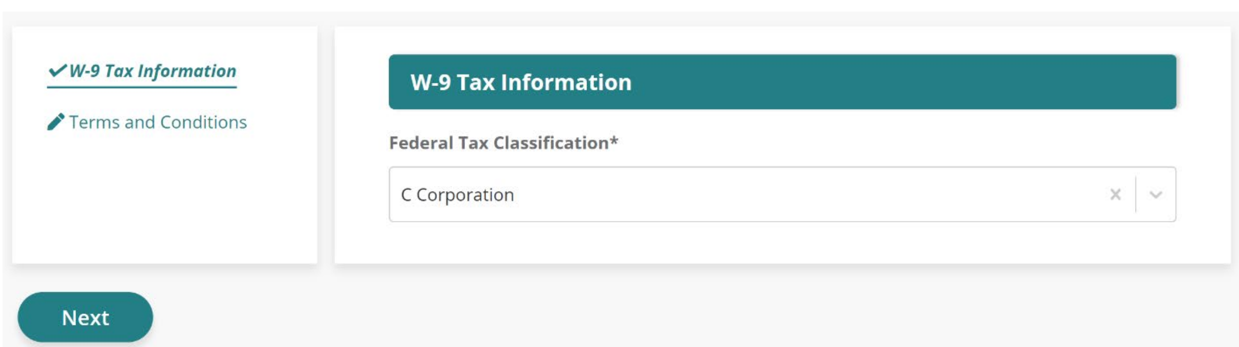
1. On the MyAccount dashboard, select **My Enrollment**.



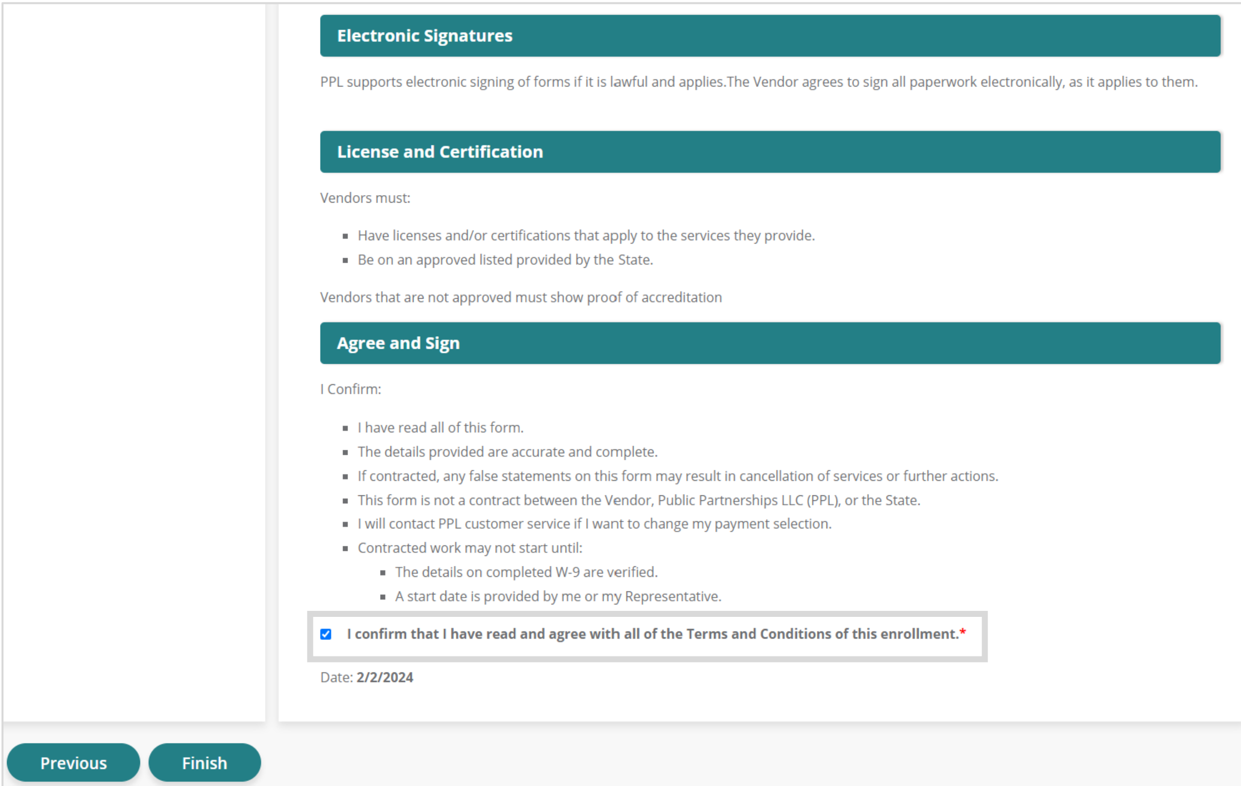
2. Under your summary information, select **View**.



3. Select which **Federal Tax Classification** you use to do business, such as sole proprietor or corporation.



4. In the **Terms and Conditions** section, read all statements and select the “I confirm” checkbox.



Electronic Signatures

PPL supports electronic signing of forms if it is lawful and applies.The Vendor agrees to sign all paperwork electronically, as it applies to them.

License and Certification

Vendors must:

- Have licenses and/or certifications that apply to the services they provide.
- Be on an approved listed provided by the State.

Vendors that are not approved must show proof of accreditation

Agree and Sign

I Confirm:

- I have read all of this form.
- The details provided are accurate and complete.
- If contracted, any false statements on this form may result in cancellation of services or further actions.
- This form is not a contract between the Vendor, Public Partnerships LLC (PPL), or the State.
- I will contact PPL customer service if I want to change my payment selection.
- Contracted work may not start until:
  - The details on completed W-9 are verified.
  - A start date is provided by me or my Representative.

☑ **I confirm that I have read and agree with all of the Terms and Conditions of this enrollment.***

Date: **2/2/2024**

Previous | Finish

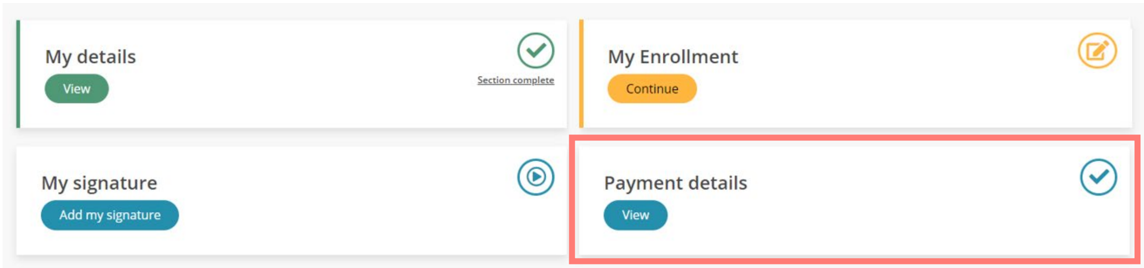
5. After you agree to the terms and conditions, select **Finish** at the bottom of the page.
6. Under the **Agency Enrollment complete** message, select **Confirm**.
7. Wait for Public Partnerships to review and verify your enrollment forms.

   You should receive an email when you’re approved.

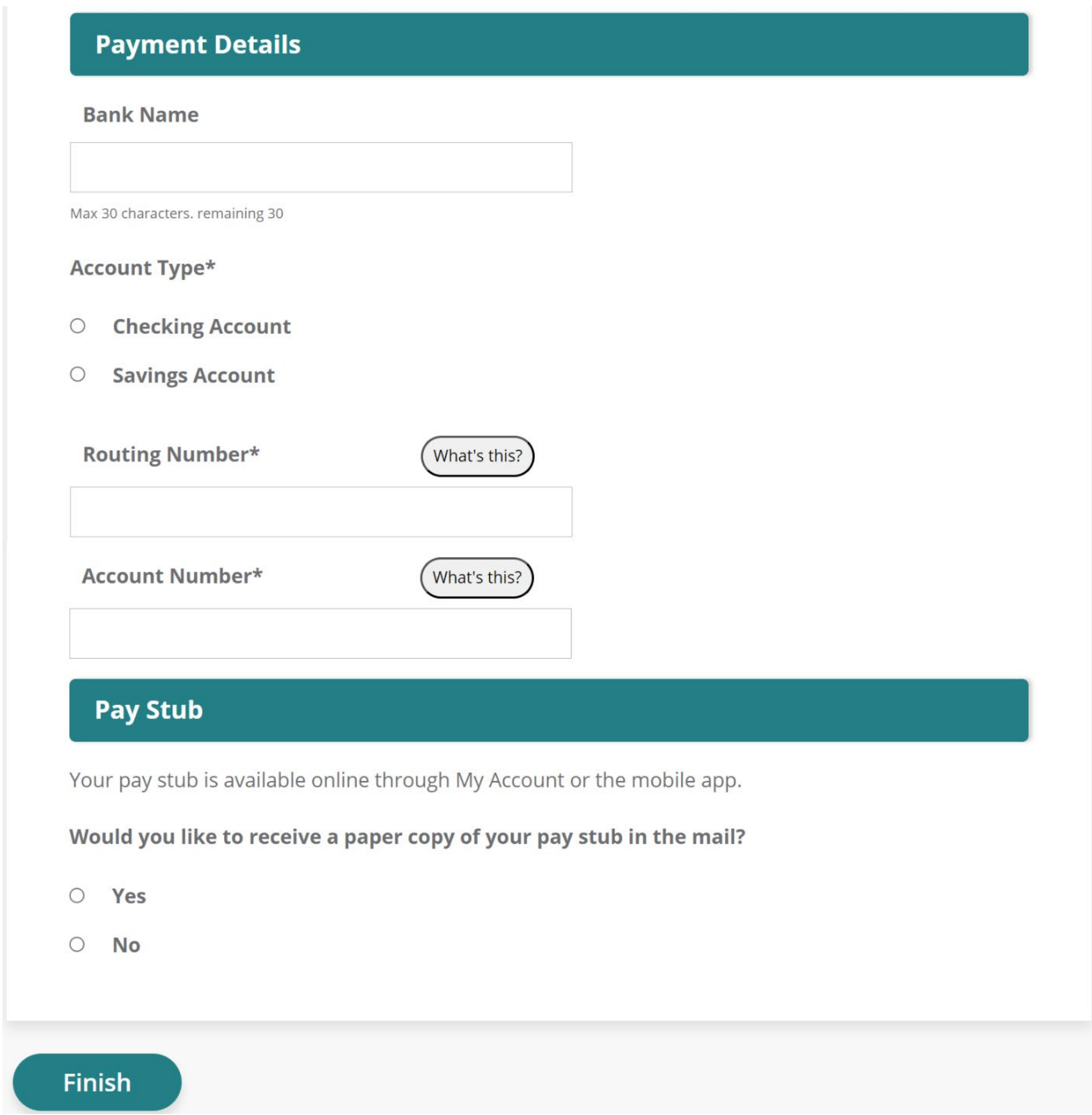
Edit Your Payment Details

At any time, you can update your preferences on how you want to be paid.

1. On the MyAccount dashboard, select **Payment details**.



2. In the Payment Details page, select **Edit**.
3. Specify how and where you want to receive payments from Public Partnerships, including bank details, if applicable.



4. Select **Finish** when complete.

Submit an Invoice for Payment

Follow these steps to submit your invoice for payment from a Participant's allocated budget. This process covers payments for things like a home upgrade or mileage reimbursement. Here is the overall process:

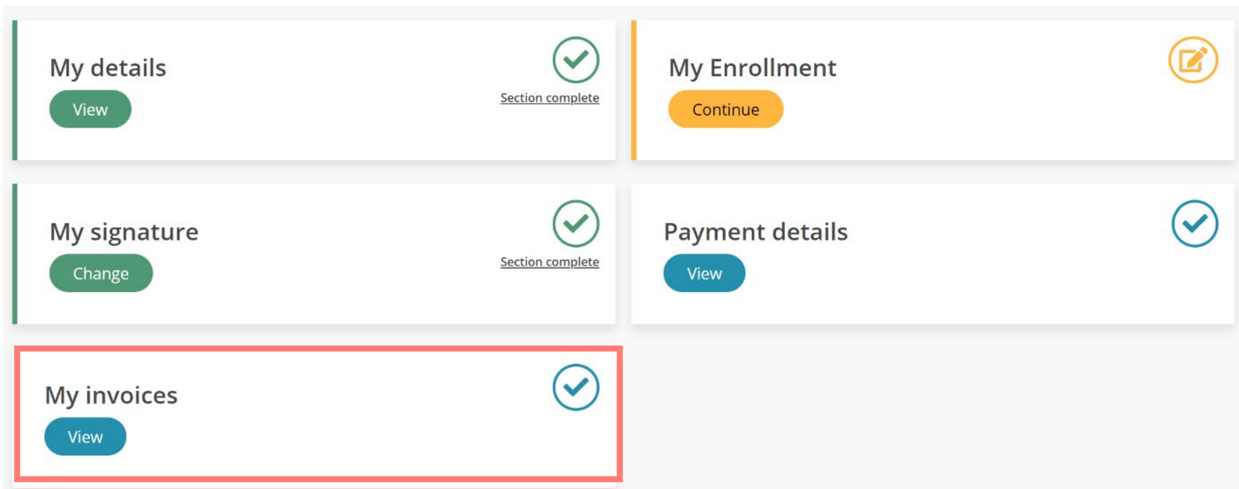
Vendor: *Submit invoice for work provided*

Automated notice emailed to Participant

Participant: *Approve invoice*

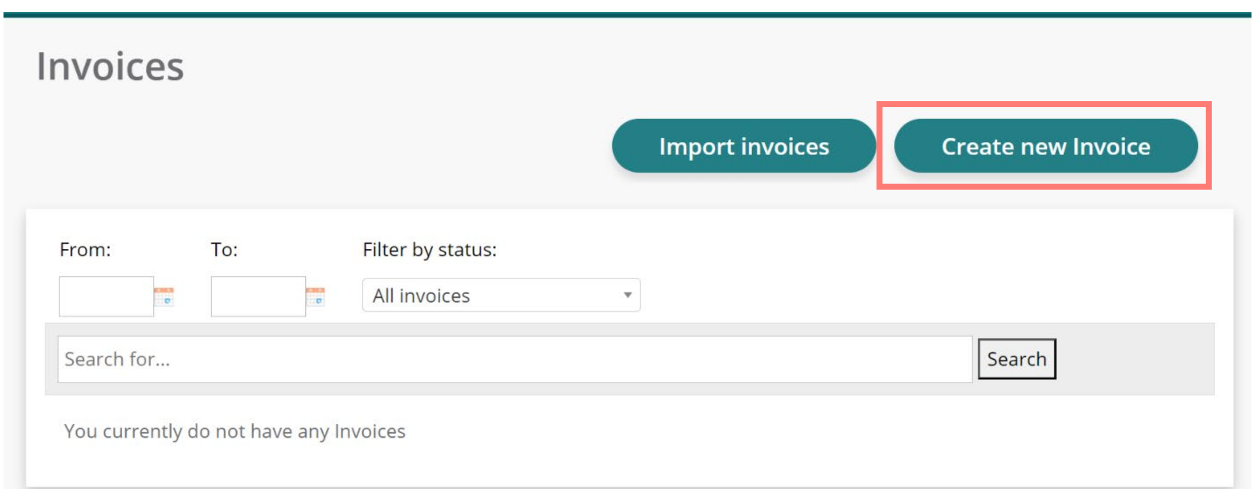
Payment sent to vendor from PPL

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

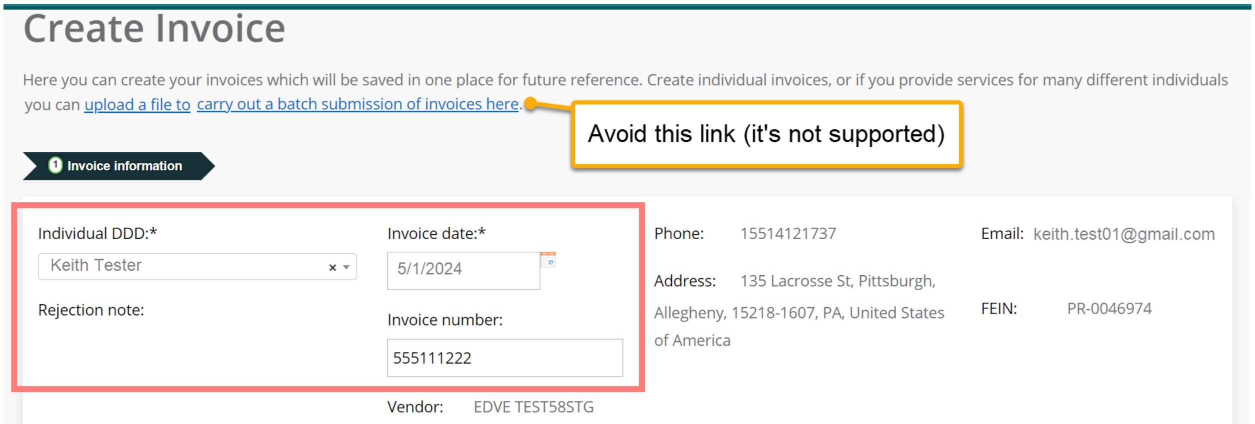


2. On the Invoices page, select **Create New Invoice**.

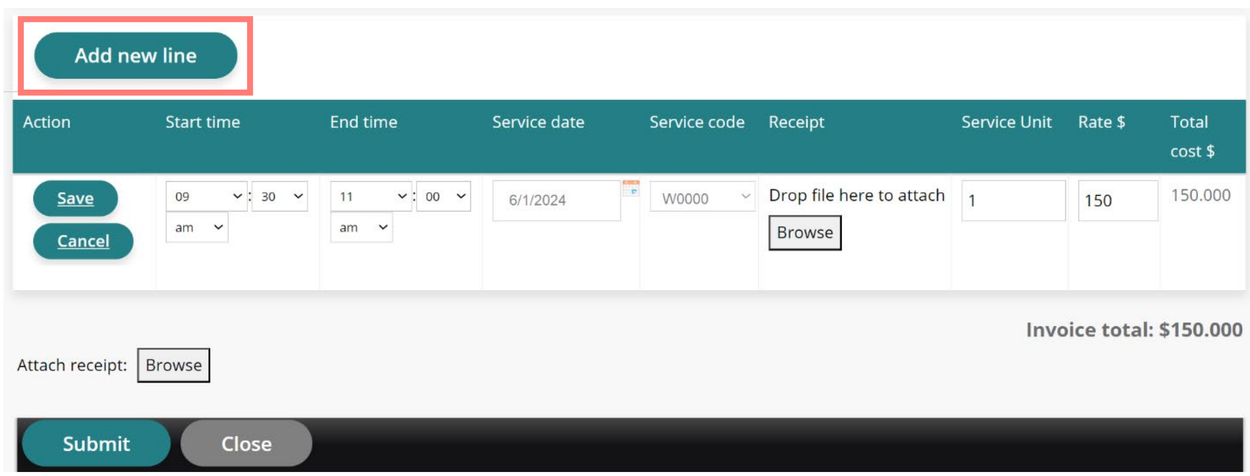
   Note: Don't use the **Import Invoices** feature. It is not configured for this program.



3. On the **Create Invoice** page, under **Individual**, enter the name of the program Participant who received services.



4. For **Invoice Date**, specify when you are submitting it (typically today's date).
5. For **Invoice Number**, you have the option to enter any number to help you track this transaction.
6. Select **Add New Line**.



7. Complete the **Start time** and **End time**, if applicable, and the **Service Date**.

   Note: This date must be within the Participant's authorized budget period.
8. From the **Service Code** menu, choose the applicable code. Only the codes allowed will appear, based on Participant and Service Date.
9. Under the **Receipt** column, you have the option to upload a document as evidence.

   Note: Alternatively, you can attach a receipt for the entire invoice by selecting Browse near the bottom.
10. For **Service Unit**, enter a quantity that will be multiplied by the **Rate $**.

    Note: You can enter mileage if you are billing for your own transportation or for public transportation.
11. Select **Save** for this line entry, add more lines as needed and select **Submit**.
12. Next, the Participant will approve this invoice. It remains pending until approved.