



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**.

You can navigate between your information details here. You may edit some of your details on these pages, which will be saved once you click "Next" or "Finish" If you need to change information that is non-editable here, please [contact us](#).

Vendor Details Close

Vendor Name*
All Dogs Go to Heaven LLC

Doing Business As (DBA)
Jake's Dog Toys

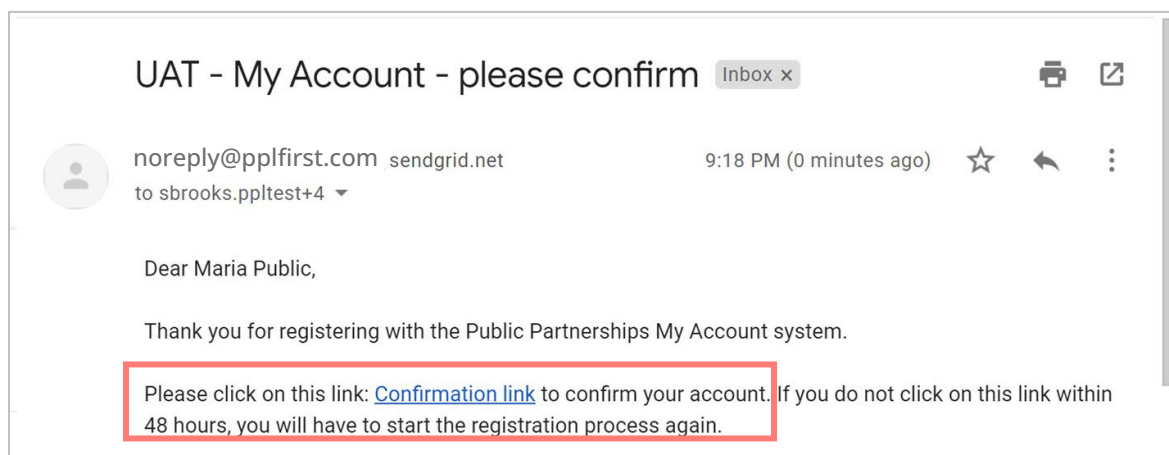
Tax Identification Number*
01-2024411

Vendor Contact Details

Contact First Name*
Jake

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*.

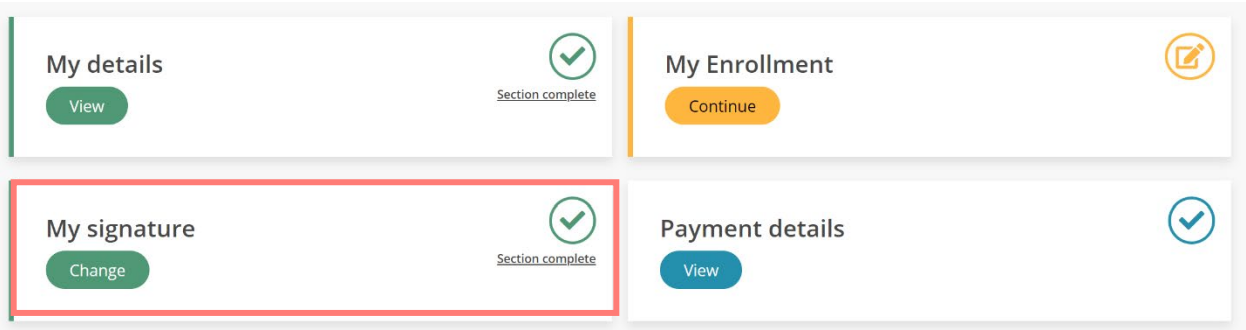
Note: You must confirm within 48 hours.



Set Up Your Signature

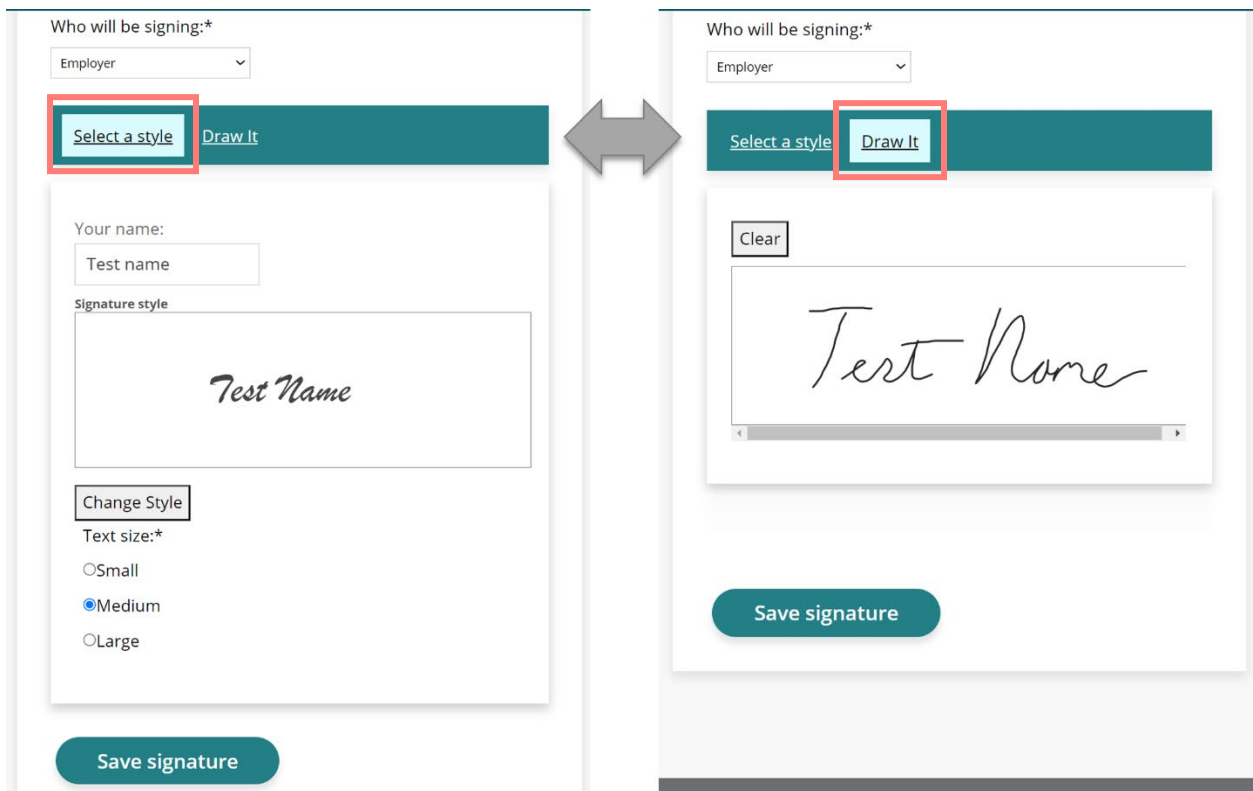
To complete enrollment, you will use an electronic signature.

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.

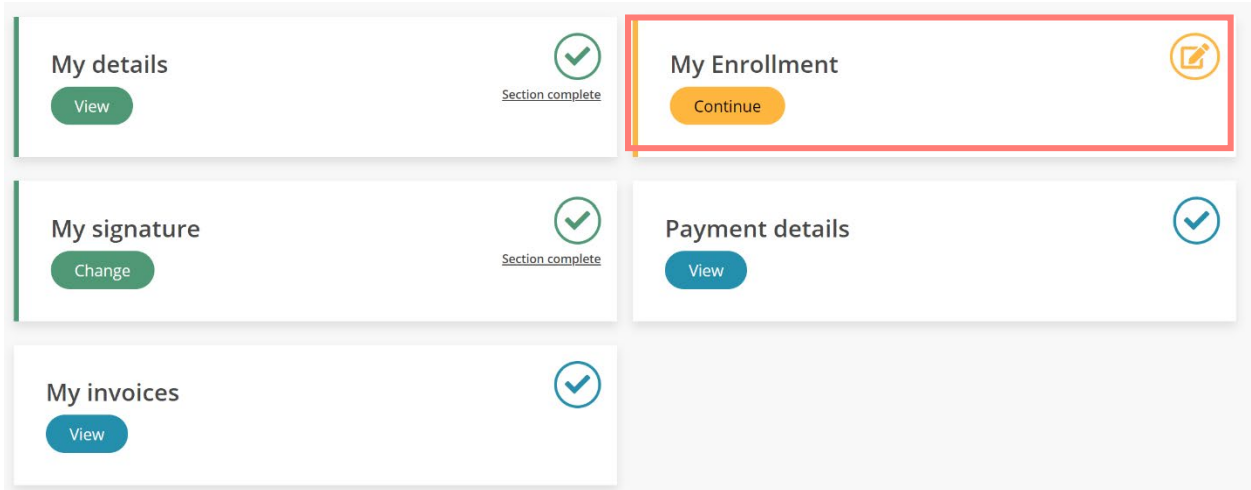


4. Select **Save signature**.

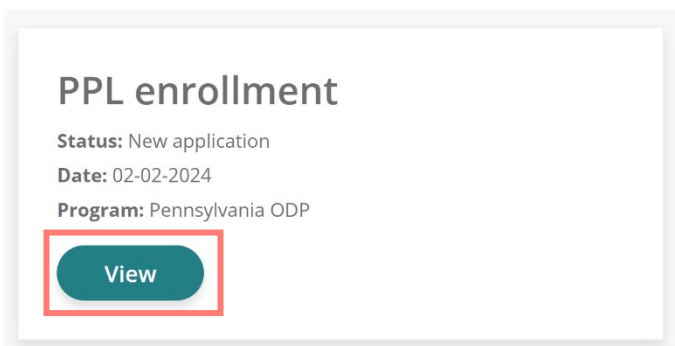
Complete Your Enrollment

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

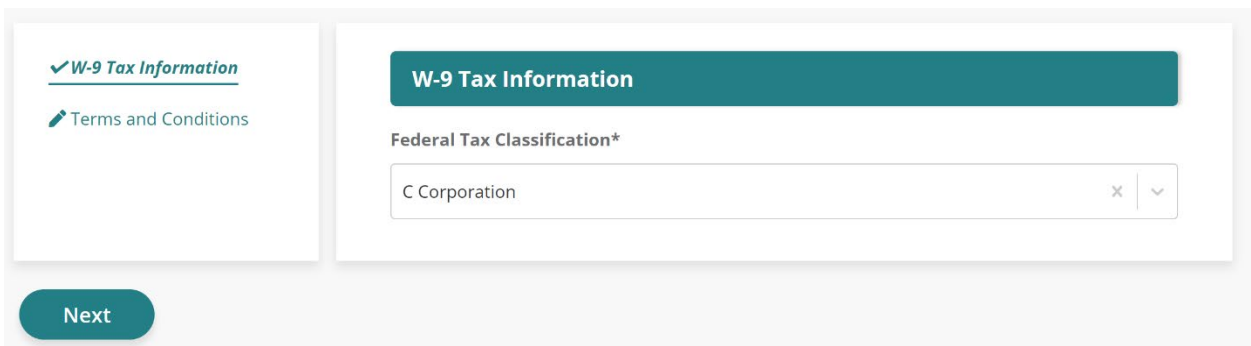
1. On the MyAccount dashboard, select **My Enrollment**.



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.

The screenshot shows a form with three main sections: **Electronic Signatures**, **License and Certification**, and **Agree and Sign**. The **Electronic Signatures** section states that PPL supports electronic signing. The **License and Certification** section lists requirements for vendors, such as having licenses and being on an approved list. The **Agree and Sign** section contains a list of confirmations, including reading the form, accuracy of details, and understanding the terms. A checkbox at the bottom of this section is checked, with the text "I confirm that I have read and agree with all of the Terms and Conditions of this enrollment.*". Below this is a date field containing "2/2/2024". At the bottom of the form are two buttons: "Previous" and "Finish".

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 list 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

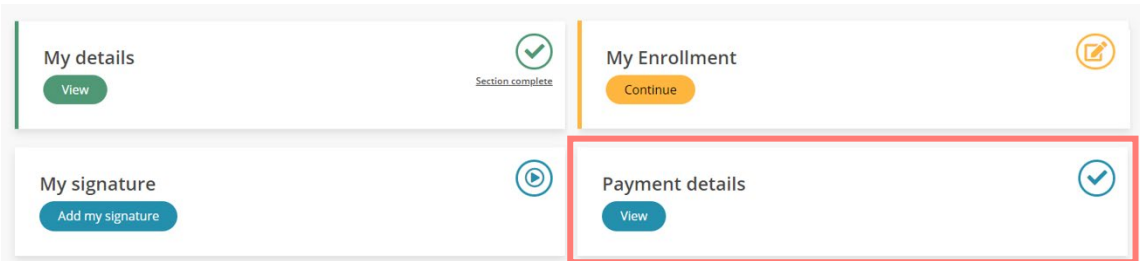
[Previous](#) [Finish](#)

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.

A screenshot of the 'Payment Details' form. The form has a teal header with the title 'Payment Details'. Below the header are four input fields: 'Bank Name' (with a 'Max 30 characters, remaining 30' note), 'Account Type*' (with radio buttons for 'Checking Account' and 'Savings Account'), 'Routing Number*' (with a 'What's this?' help button), and 'Account Number*' (with a 'What's this?' help button). Below these fields is another teal header titled 'Pay Stub'. Underneath, there is a paragraph: 'Your pay stub is available online through My Account or the mobile app.' followed by a question: 'Would you like to receive a paper copy of your pay stub in the mail?' with radio buttons for 'Yes' and 'No'. At the bottom of the form is a large teal button labeled 'Finish'.

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

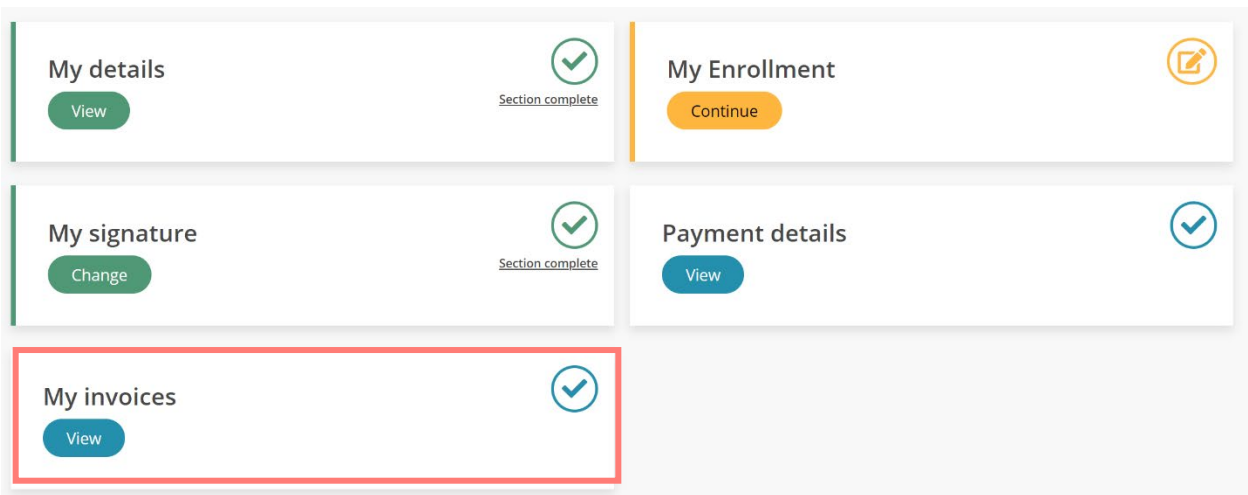
Automated notice emailed to Participant

Participant: Approve invoice

Payment sent to vendor from PPL

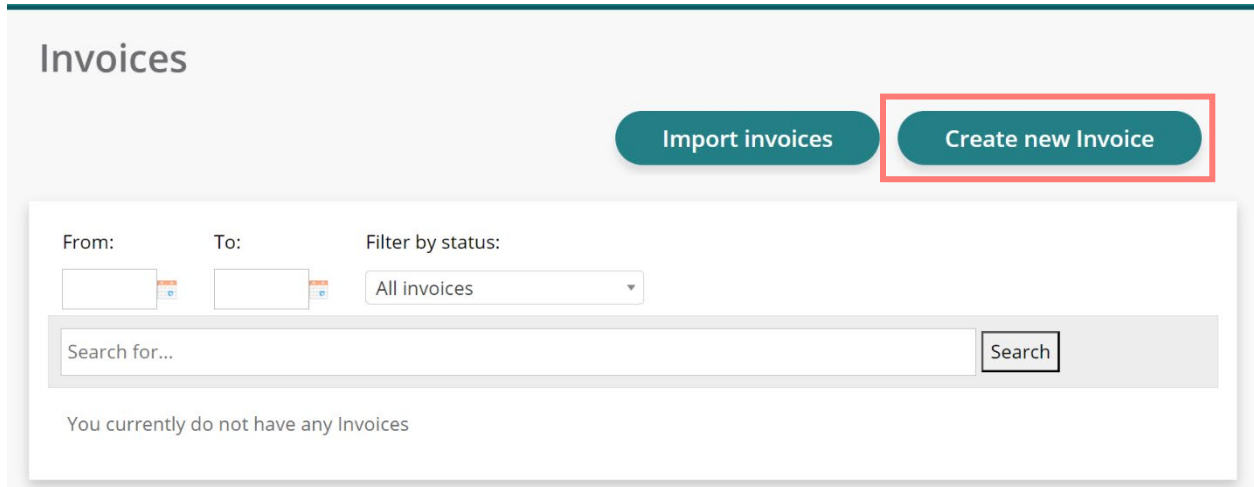


1. On the MyAccount dashboard, select **My Invoices**.



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.

Create Invoice

Here you can create your invoices which will be saved in one place for future reference. Create individual invoices, or if you provide services for many different individuals you can [upload a file to carry out a batch submission of invoices here](#).

Invoice information

Avoid this link (it's not supported)

Individual DDD:* Invoice date:*

Rejection note: Invoice number:

Phone: 15514121737 Email: keith.test01@gmail.com

Address: 135 Lacrosse St, Pittsburgh, Allegheny, 15218-1607, PA, United States of America FEIN: PR-0046974

Vendor: EDVE TEST58STG

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**.

Add new line

Action	Start time	End time	Service date	Service code	Receipt	Service Unit	Rate \$	Total cost \$
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	<input type="text" value="09"/> : <input type="text" value="30"/> <input type="text" value="am"/>	<input type="text" value="11"/> : <input type="text" value="00"/> <input type="text" value="am"/>	<input type="text" value="6/1/2024"/>	<input type="text" value="W0000"/>	Drop file here to attach <input type="button" value="Browse"/>	<input type="text" value="1"/>	<input type="text" value="150"/>	<input type="text" value="150.000"/>

Invoice total: \$150.000

Attach receipt:

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.