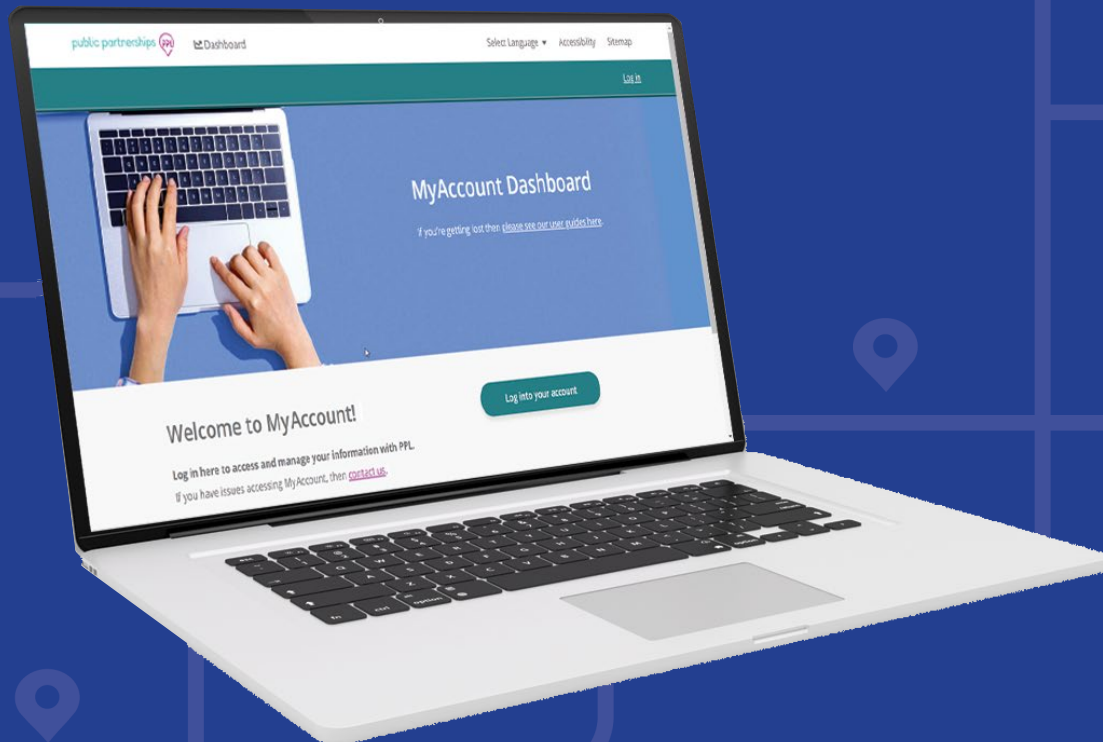


MYACCOUNT

Guide for Administrators





CONTENTS

Set Up Your MyAccount Access 4
 Create a New Account..... 5

Search for Participants / Workers 6
 Use the Filter 6
 Use Different Views 6

Create New Referrals 7

View New Referrals 9

Assist with Enrollment..... 11
 Enrollment Status 11
 View Participant Enrollment Details 12
 View Worker Enrollment Details 15

View Budget Authorizations..... 16

View Worker Time Entries 18
 Time Entry Status 19

Disenroll a Participant 20
 If needed: Reverse the Disenrollment..... 21

USER GUIDE *at a glance*

WELCOME

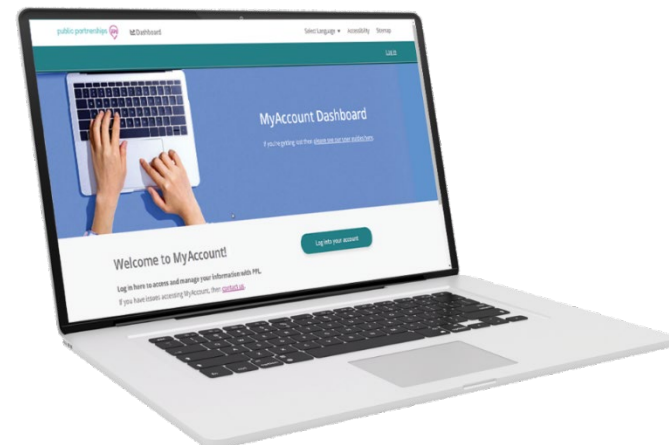
Self-direction involves many players, and the MyAccount platform from Public Partnerships (PPL) is meant to help everyone manage the necessary information.

Terminology used in MyAccount:

- *Provider* = employee
- *Participant* = person receiving care or a surrogate

If you fill an administrative role, this guide provides you what you need to use MyAccount, including:

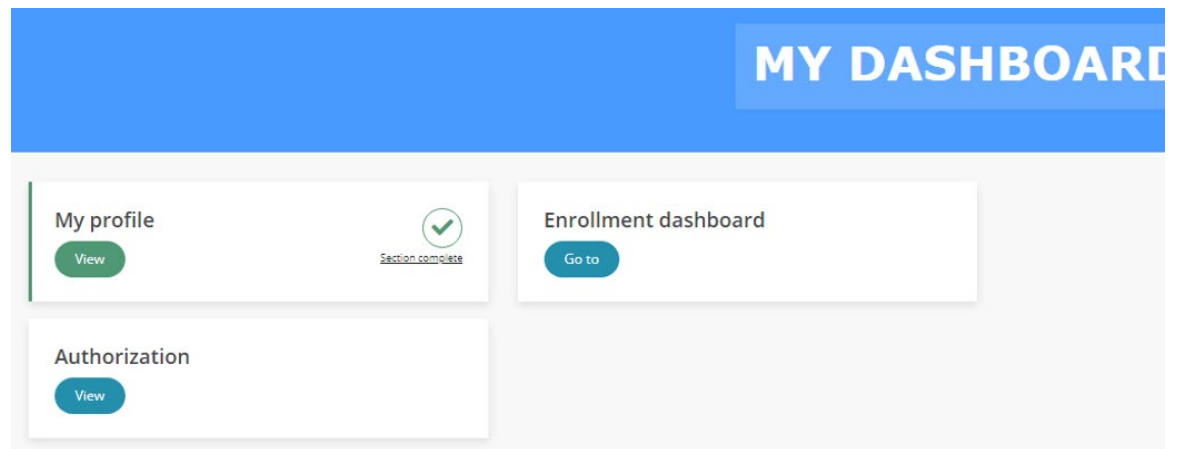
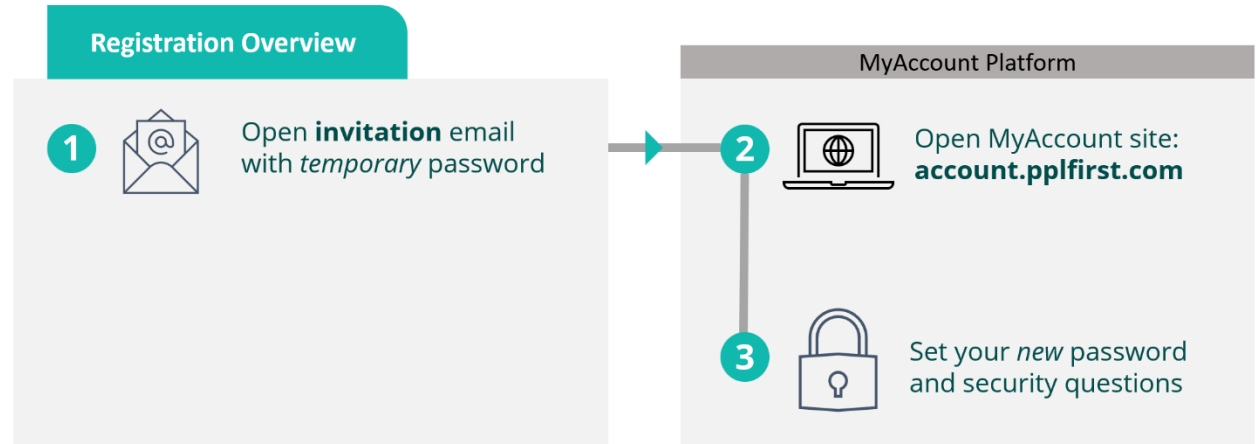
- How to set up your MyAccount access
- How to create and view referrals to the program
- How to view a Participant's enrollment details, budget, and spending
- How to view time entries for service providers



Set Up Your MyAccount Access

You will receive an email from PPL with log-in details for MyAccount.

1. In your email invitation, look for the temporary password.
2. In a browser, open the website (no “www”):
account.pplfirst.com
3. Select **Log in** and provide your credentials:
 - Username—Use your email address
 - Password—Use the temporary password
4. Under **My Profile**, type a new password and set your security questions.
5. You should see these options on your dashboard view:
 - **My profile**—Access to your account settings
 - **Enrollment dashboard**—Main tools for administration
 - **Authorization**—Access to a participant’s budget information



Create a New Account

After the initial MyAccount implementation, you can add accounts for other administrators.

1. In MyAccount, select **Work As** from the top menu.
2. On the Manage User page, select **Create**.

3. Complete the account details, including a *temporary* password.
4. Near the bottom, select **Create account**.
5. Share the log-in information.

NOTE: Tell the new user to change their password when they first log in.

Manage user
Please select the user you wish to manage or create a new one.

All organizations: [v] All roles: [v]

Search for... [] Search []

Action	First name	Last name	User email	Role	PPLid	Organization name
	Kstest7	kstest7	kstest7@yopmail.com	PPL User	PA-001308 7	Kansas

My profile [Work as](#) | [Log out](#)

Personal details
Please enter your details below.

Sign up steps
1 Personal details

Organization:
1ST IMPRESSION HOME HEALTH CARE -1164964557

First name:*
Shawney

Last name:*
Brook

Email:*
sbrooks.ppltest+29@gmail.com

Preferable contact method:
 Email
 Phone

Password & Security details
 Password:*
 []

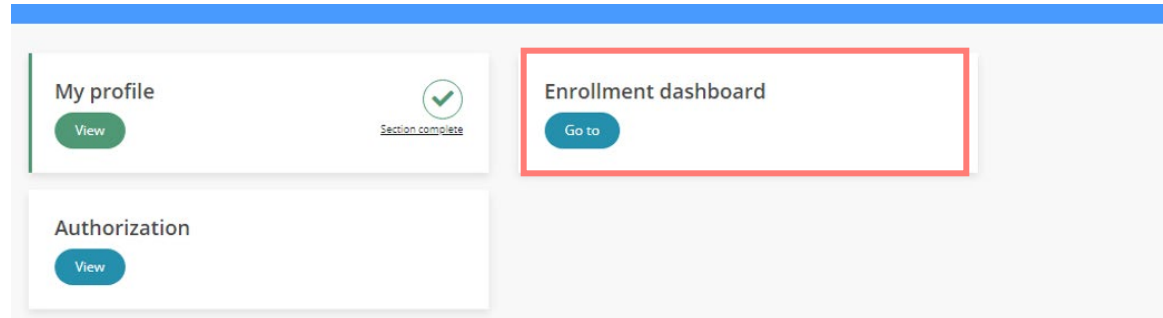
[Close](#) [Create account](#)

Search for Participants / Workers

To find an individual you are helping, use the **Enrollment Dashboard**.

Your access depends on your role:

- Care Manager—access only those associated with you
- State Administrator—access everyone in the program



Use the Filter

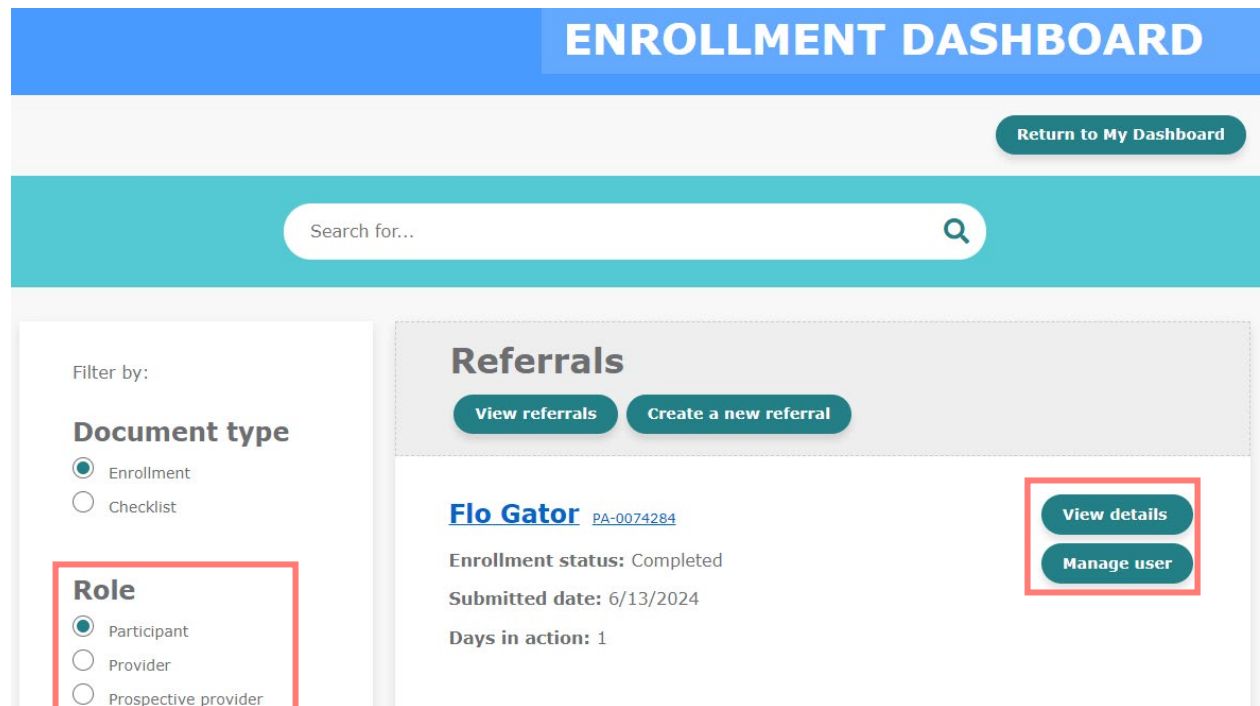
IMPORTANT: When you search, the results are filtered by the settings on the left. If you can't find someone, check the filter settings.

For example, in the **Role** options, select Participant or Worker, depending on which individual you need to find.

Use Different Views

For each individual, there are two buttons showing different kinds of information:

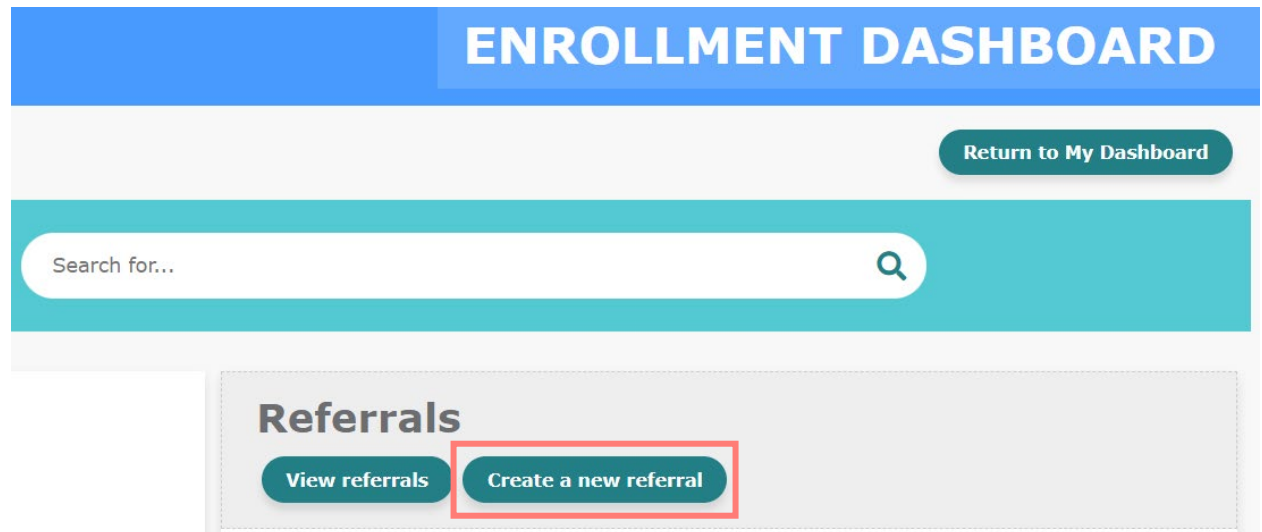
- **View details**—administrative level
- **Manage user**—same view that the individual sees when they log into MyAccount (useful when offering support, especially with the Participant's budget and spending)



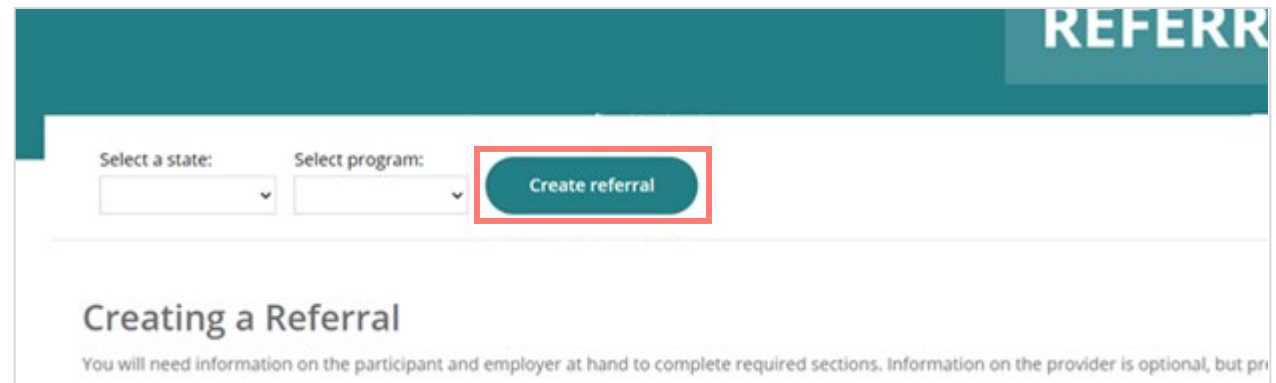
Create New Referrals

If you have the approved Care Manager role in MyAccount, you can create a referral.

1. In MyAccount, select the **Enrollment Dashboard**.
2. On the Enrollment Dashboard, select **Create a new referral**.



3. On the Referral page, select your state program and choose **Create referral**.



4. Complete the prompts that appear. See the following table for explanations.
5. Agree to the confirmation prompt under the **Support Team** section.

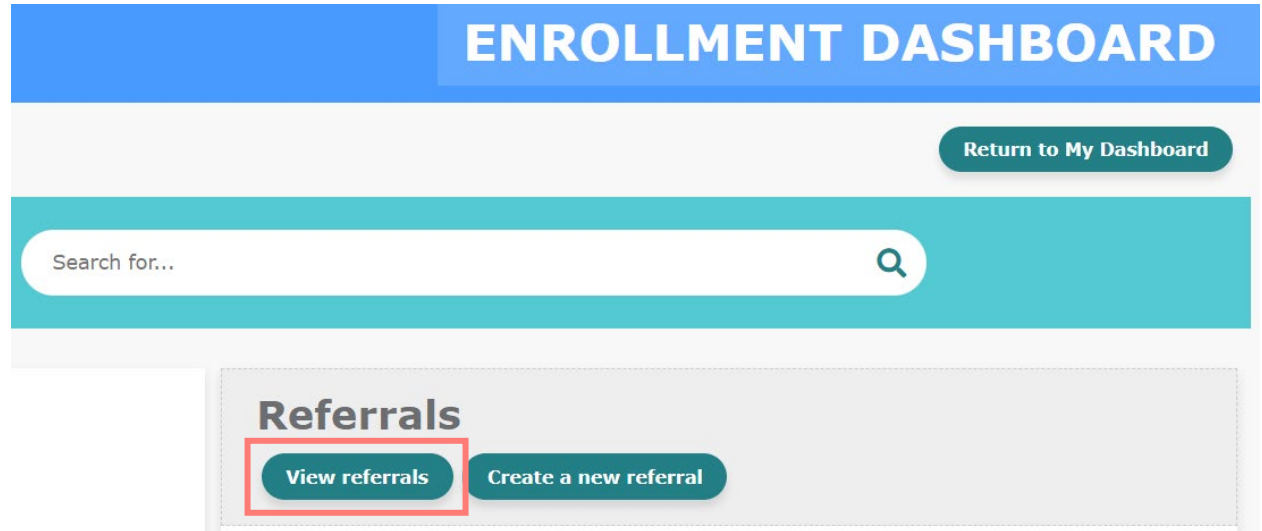
Here are the sections you must complete for a new referral:

SECTION	EXPLANATION
Social Security Number and other identifiers	When you input the identifying information, a process checks if this person already exists in MyAccount. If the person already has a referral, you can proceed to view it. If not, proceed with the other sections.
Individual Information + Contact Details	<p>Along with name and basic details, choose whether the Participant has an email address or mobile phone. Either choice is required to register in MyAccount. If the participant has no digital capability, enrollment will continue with paper forms, which is slower to enroll.</p> <p>FIPS Code: To capture the individual's tax rates, look up the FIPS code associated with their geographic location: https://thefinder.tax.ohio.gov/StreamlineSalesTaxWeb/Download/BoundaryData/OHMuniFIPSCodes.txt</p>
Employer Information	If receiving care from an employee, the Participant can choose to fill the employer role, which requires an Employer Identification Number (EIN). In that case, choose Self from the menu choices. If someone else will fill the employer role, choose who is responsible (such as a child). Add that person's information, including Social Security Number.
Authorized Representative Information	As an option, you can add an Authorized Representative to assist the Participant with employer duties. The representative will have their own log-in for MyAccount. Registering for MyAccount will require their own, separate email or mobile number.
Provider Information	<p>As an option, you can also add a Provider who will work for the Participant. The Provider can be an individual or a Vendor.</p> <p>The Provider will have their own log-in for MyAccount. Registering for MyAccount will require their own, separate email or mobile number.</p> <p>You must also select what services the Provider will offer and their hourly rate.</p>
Communication Preferences	To ensure quality service, you must input preferences, like language. Also select any special accommodations needed, such as hearing or sight impairments.
Support Team	This is an important section. It enables you to upload supporting files for future reference. It also records that you confirm the referral information. Note: You may update enrollment information after it is completed.

View New Referrals

The Enrollment Dashboard only displays referrals *after* approval. To see referrals *before* approval, follow these steps.

1. In MyAccount, select the **Enrollment Dashboard**.
2. Select **View referrals**.
3. On the Referrals page, use the search filters. For example, you can filter by status. See the definitions in the following table.
4. To see details for an individual, select **View**.



Referrals

Please select a referral you would like to manage or create a new one. Before creating a new user, you check if the user already exists in the system to transfer them.

Filters: All states, All statuses, From: [Date], To: [Date]

Search for... [Search]

Form result name	Status	State	Program	Begin date	Update date	Status	Action
OH HomeCare Part...	Awaiting Approval	Ohio	HomeCARE	8/7/2024	8/7/2024	Completed	View
OH HomeCare Part...	Awaiting	Ohio	HomeCARE	8/2/2024	8/2/2024	Completed	View
OH HomeCare Part...		Ohio	HomeCARE	7/30/2024	7/30/2024	Completed	View

Referrals move through the following status states:

STATUS	DESCRIPTION
In Progress	Referral was received but needs more information before PPL can review.
Awaiting Approval	Referral was submitted from a pre-screening.
Completed	Referral was received and the participant's enrollment is ready to proceed.
Returned	Referral cannot proceed due to missing information or due to a request from the state to stop it.
Denied	Referral is canceled per the request of the state.

Assist with Enrollment

IMPORTANT: Some sections limit you to only viewing information. These sections are maintained primarily by PPL staff.

To help find information for Participants or Workers, you can locate them on the Enrollment Dashboard and select **View Details**. The tabs that appear differ for Participants and Workers.

Enrollment Status

You can see the enrollment status on the Enrollment Dashboard:

ORDER	STATUS	FOR PARTICIPANTS
1	New Application	The enrollment packet is ready for the Participant or Worker to complete.
2	In Progress	A portion of the enrollment packet is completed but it has not yet been submitted or signed.
3	Signing	Enrollment forms are completed but not yet signed.
4	Awaiting Approval	The signed enrollment packet has been submitted for review and approval.
<p>Who Approves: For Participants, the staff at PPL approve enrollment. For Providers, enrollment is approved by the Participant.</p>		
5	Completed	Enrollment was reviewed and approved.
~	Returned	Enrollment packet is missing critical responses, so it was returned for further completion.
~	Denied	Enrollment packet is fully denied or cancelled. For example, an individual could choose not to move forward with their enrollment.

View Participant Enrollment Details

From the Enrollment Dashboard, you can choose **View Details** for a Participant to see answers to specific questions. The details are organized into tabs, as shown.

Enrollment | Other documents | Checklists | Providers | Representative | Support team | Criminal background check

Current participant enrollment status: **Awaiting approval** MCO Plan Details Manage participant status

Employer Enrollment

Display archived

Program	EOR Name	Status	Submitted date	Action
OHIO HomeCare		Awaiting approval	6/17/2024	Enrollment

Here are descriptions for each tab:

TAB	DESCRIPTION
Enrollment	<p>Displays answers to the enrollment questions. Under the Action column, select Enrollment to view details (see next example).</p> <p>Note: After enrollment is completed, the Employer of Record (EOR) options also appear: View EOR details and Change EOR. <i>Employer of Record</i> is another name for Common Law Employer (CLE).</p>

TAB

DESCRIPTION

After you open the **Enrollment details**, you can expand the **Documents** section to access enrollment forms:

Enrollment details View history Return to summary

Program: HOMECARE
Enrollment status: Awaiting approval
Create date: 6/17/2024
Update date: 6/20/2024
SUI: 2.70%
WC: 1.31%

Documents

Document type Add all

All document templates ▾ Create PDF Mail

Select all	Name	Template	Create date	Action
<input type="checkbox"/>	OH HomeCare Employer Agreement.pdf	OH HomeCare Employer Agreement	6/20/2024	Print

Other documents

For special situations, you can view or upload additional reference documents that are not part of the standard enrollment package.

Checklists

Displays key enrollment tasks that PPL staff will acknowledge as they help with enrollment. For each task, you can choose **View details** to see the Participant's responses.

NOTE: You may see an "In Progress" status even if the main Enrollment Status shows "Completed." This situation can happen if all information was submitted but PPL still has tasks to complete.

Providers

Displays all the Participant's workers. For details about the worker, select **Association details** or **Service & Rates**:

Program	Provider	Status	Submitted date	Days in action	Actions
OHIO HomeCare	DanTestingOHHC(PR-0030469)	Associated	6/20/2024	48	Association details Services & Rates

Representative

If someone was chosen to represent the Participant, their information appears here.

Support Team

Displays team members assigned to a Participant. If a change is needed, contact PPL Customer Support.

Criminal background check

Displays the status and details of each Worker's background check.

View Worker Enrollment Details

When you choose **View Details** for a worker (Provider), you can view information in the following tabs:

Participants and Enrollments

Other documents

Checklists

Criminal background check

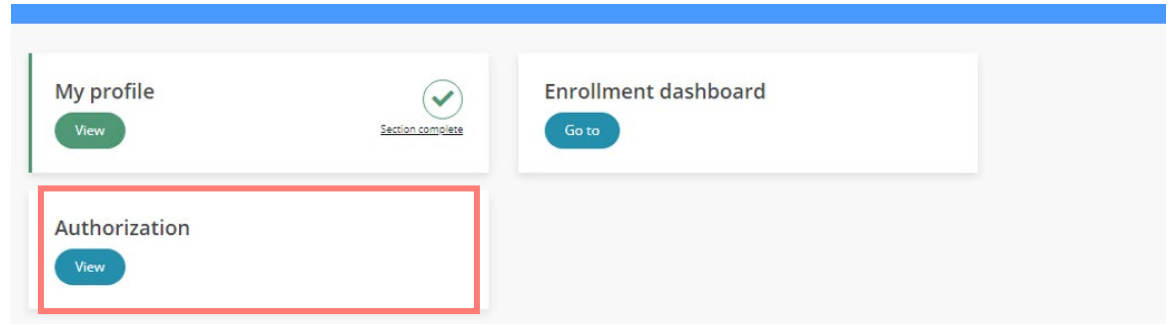
Program	Participant	Status	Submitted date	Days in action	Actions
OHIO HomeCare	Test Consuser(PA-0067422)	Completed	7/26/2024	12	<div style="display: flex; gap: 10px;"> <div style="background-color: #007a7a; color: white; padding: 5px 10px; border-radius: 5px;">Enrollment</div> <div style="background-color: #007a7a; color: white; padding: 5px 10px; border-radius: 5px;">Services & Rates</div> </div>

TAB	DESCRIPTION
Participants and Enrollments	<p>Displays all the Participants that the Worker supports.</p> <p>Select Enrollment for a specific Participant to see answers relevant to that relationship.</p> <p>NOTE: Under the Enrollment details, you can expand the Documents section or generate the enrollment forms.</p>
Other documents	<p>For special situations, you can view or upload additional reference documents that are not part of the standard enrollment package.</p>
Checklists	<p>Displays key enrollment tasks that PPL staff will acknowledge as they help with enrollment. For each task, you can choose View details to see the responses.</p> <p>NOTE: You may see an “In Progress” status even if the main Enrollment Status shows “Completed.” This situation can happen if all information was submitted but PPL still has tasks to complete.</p>
Criminal background check	<p>Displays the status and details of the Worker’s background check.</p>

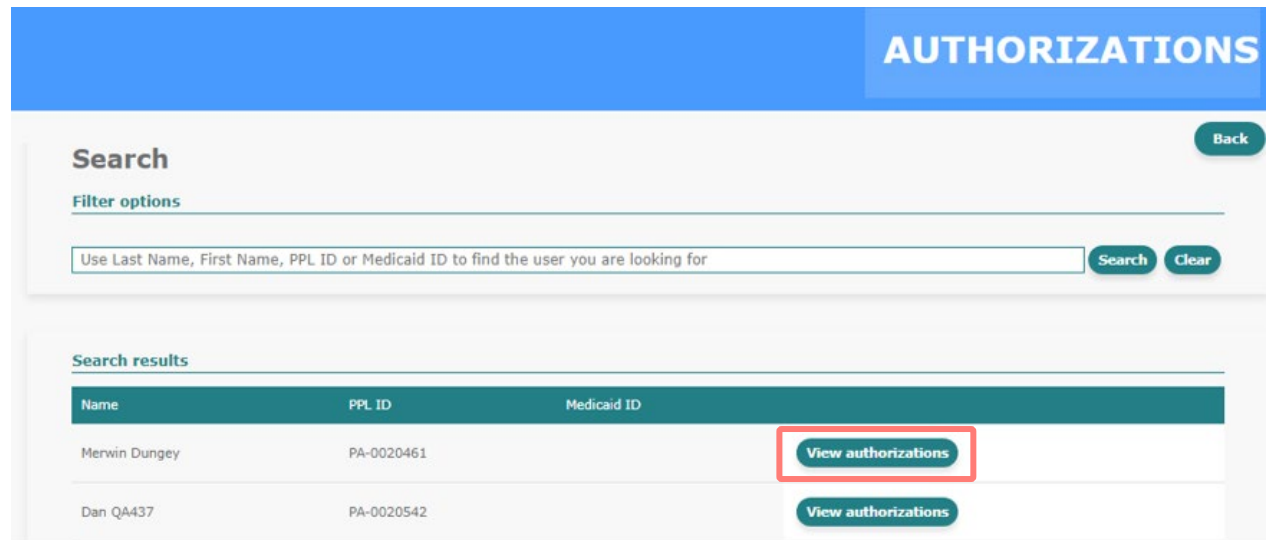
View Budget Authorizations

To help a Participant with their spending authorizations (or “budget”), you can use MyAccount to view service allocations and what was spent so far.

1. In MyAccount, select **Authorization**.



2. Under Authorizations, search for the participant and select **View authorization** by their name.



- On the authorization view, you can select **Filter options** to see matching payment totals.

Budget details

Filter options

Service: Creation date between: and:

Status: Authorization ID:

[Apply](#) [Clear filters](#)

- To see individual transactions, select **Details** next to a service authorization.

Note: You may need to scroll the horizontal bar to see hidden columns.

Service	Authorization ID	Start Date	End Date	Total Authorized Units	Paid Units	Good to Pay Units	Actions
S5130: Homemaker	AU00003803	1/1/2024	12/31/2024	10,017.00	0.00	0.00	Details
S5135: Adult Companion Care	AU00003803	1/1/2024	12/31/2024	10,017.00	0.00	0.00	Details

- On the Authorization Details view, look for **Spending details** near the bottom.

Note: You can also select **Revision history** to see any changes made for this authorization.

[Revision history](#) [Back](#)

Member information

Member name: Vesta Gaye

PPL Id: PA-0035050

External ID: AUL0013041

Plan: CCC_PLUS UNITED

General details

Service: S5126

Status: INACTIVE

Created by: FLEWIS

Created on: 12/14/2022 12:13 am

Date Range: 10/1/2022 - 12/31/2023

Unit increment: 1 unit = 0.25 hours

Authorized units: 5000.00 units

Unit type: hour

Total authorized: 1250.00 hour

Paid: 2.00 hour

Invoiced: 0.00 hour

Remaining: 4998.00 hour

Total invoiced: \$0.00

Total paid: \$28.64

Spending details

Filter service date range between: and:

ID	Provider	Service	Service Date	Units (hours)	Pay Rate	Billable Rate	Line Amount	Overtime?	Check No	Check Date
TETS16	Fairy Axtell	S5126: Service XYZ	11/30/2022	2.00	\$9.70	\$10.94	\$21.87	No	5017507	1/10/2023
TETS16	Fairy Axtell	S5126: Service XYZ	11/30/2022	-2.00	\$9.70	\$10.94	-\$21.87	No	5017508	1/20/2023

View Worker Time Entries

To help a Worker with payment questions, you can view their information directly.

IMPORTANT: When submitting timesheets, Workers should use the Time4Care app, not MyAccount. (Or use the telephony procedure if needed.) Use MyAccount to manage earnings information after submittal.

Time entries submitted through MyAccount will not be considered EVV compliant. This capability is present only as a backup to ensure a user can submit time if they fail to clock in and out.

1. Find the Worker on the **Enrollment Dashboard**.
Tip: Select **Provider** under the **Role** filter.
2. Select **Manage User**.

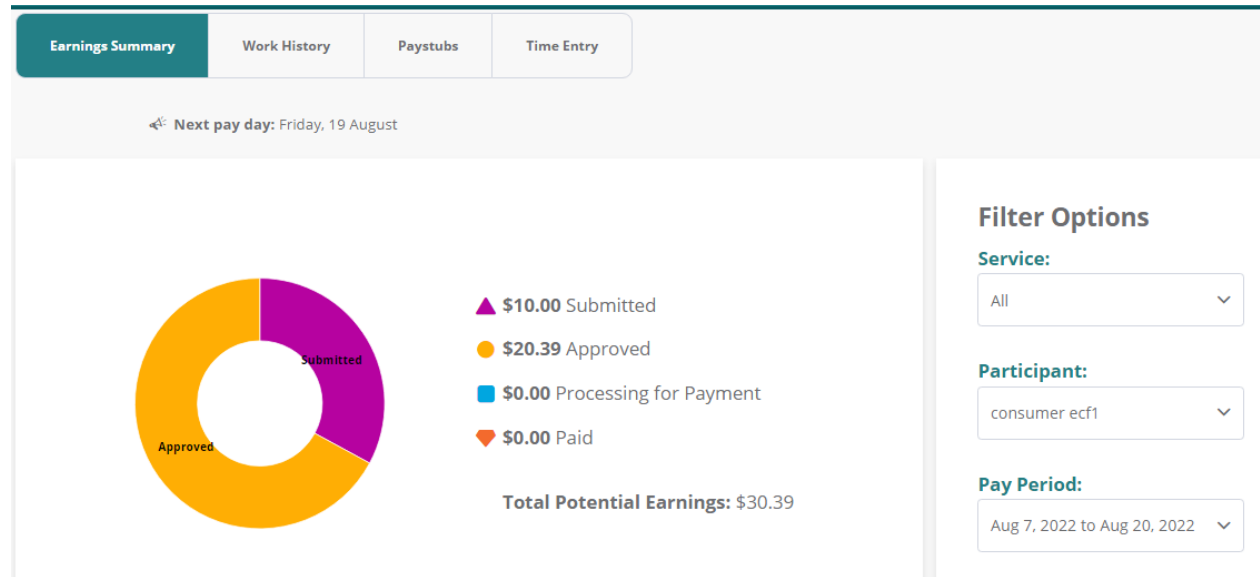
The screenshot shows the 'ENROLLMENT DASH' interface. At the top right is a 'Return to My Dashboard' button. Below the header is a search bar with the text 'Search for...'. On the left side, there are filter options. Under 'Filter by:', there are two sections: 'Document type' with radio buttons for 'Enrollment' (selected) and 'Checklist'; and 'Role' with radio buttons for 'Participant', 'Provider' (selected and highlighted with a red box), and 'Prospective provider'. On the right side, the 'Referrals' section is visible, containing buttons for 'View referrals' and 'Create a new referral'. Below these buttons, a referral for 'John Doe' (PR-0032971) is listed with details: 'Participant: Larry Smaller PA-0044758', 'Enrollment status: New application', 'Submitted date: 3/3/2023', and 'Days in action: 33'. A 'View details' button and a 'Manage user' button (highlighted with a red box) are located to the right of the referral details.

3. Under the Worker's dashboard view, select **Time Entries and Earnings**.

The screenshot shows a worker's dashboard with four main sections. Each section has a status indicator (checkmark or pencil icon) and a button. 'My Details' has a 'View' button and a 'Section complete' status. 'My Signature' has a 'Change' button and a 'Section complete' status. 'My Enrollment' has a 'Continue' button and a pencil icon. 'Time Entries and Earnings' has a 'View' button and a checkmark icon, and this entire section is highlighted with a red box.

4. In the tabs that appear, use filters to see the information needed:

- **Earnings Summary**—Interactive chart. For example, change the pay period to see earnings from a certain month.
- **Work History**—Includes filters for dates, services provided, and status.
- **Paystubs**—Lists all payments. To see the detailed time entries, select **View** next to the payment.



Time Entry Status

Here are the status labels you will see, shown in order:

ORDER	STATUS	DESCRIPTION
1	SAVED	Time entries that are started but not yet submitted. Time entries in this status are not yet available for processing.
2	SUBMITTED	Time entries that are submitted and meet the timesheet rules. In this status, the Participant must next approve payment.
3	APPROVED	Time entries that the Participant has approved. They are ready to be processed in the next pay cycle.
4	IN PROCESS	Time entries currently being processed by PPL's payroll team.
5	GOOD TO PAY	Time entries that are one step away from payment.
6	PAID	If the check number starts with "RA," then it has been paid via direct deposit. If it has only a number, it has been paid via paper check.
~	REJECTED	This time entry has been rejected by the Participant. You must correct the time entry and resubmit it for approval.
~	PENDING	This time entry has been submitted via paper and currently breaks a timesheet rule that must be corrected before payment can occur.
~	DENIED	This time entry cannot be paid or processed.

Disenroll a Participant

If needed, you can follow these instructions to remove a Participant from the system.

Or, if you need to transfer the Participant to another Ohio program, refer to the document *How to Transfer Between Programs*.

1. Contact the Participant and ask:
 - What is the last date of service?
 - Are all the timesheets submitted?
2. One or two days after the last timesheet is submitted, find the Participant's profile in My Account.
3. In the search results, select **View Details**.
4. Under **Providers** tab, open each of the Participant's Providers to confirm their timesheets are completed:
 - From the Provider's details, select **Manage this user**.
 - On the Provider's Dashboard, select **Time Entries and Earnings**.
 - Under the **Time Entry** tab, scroll down to the list of timesheets and verify the last timesheet entry is in *Good to Pay* status.

Note: If any timesheets are still in process, wait before continuing these steps.

5. Under the **Enrollment** tab, select **Manage participant status**.

The screenshot shows a navigation bar with tabs: Enrollment, Other documents, Checklists, Providers, Representative, Support team, and Criminal background check. Below the navigation bar, the text reads "Current participant enrollment status: Completed". To the right, there are two buttons: "MCO Plan Details" and "Manage participant status". The "Manage participant status" button is highlighted with a red rectangular box.

6. Select **Disenroll**.

The screenshot shows the "Enrollment Status History" page. It has the same navigation bar as the previous screenshot. The text reads "Enrollment Status History" and "Current participant enrollment status: Completed". Below this, there are three buttons: "On hold", "Disenroll", and "Return to Summary". The "Disenroll" button is highlighted with a red rectangular box.

7. For the **Effective date of disenrollment**, enter the last day that service was provided.

8. Select a **Disenrollment reason**, enter any additional description, and select **Save**.

9. After 1-2 days, you can confirm that the disenrollment is complete by opening the **Authorization** tab and verifying it is ended.

Enrollment Status History Return to Summary

Current participant enrollment status: Completed

In order to change the enrollment status to Disenrolled, you must enter the following information

Effective date of disenrollment:*

Disenrollment reason:* Other

The service needs will be better met by another program

Save
Cancel

If needed: Reverse the Disenrollment

Follow these steps if you need to cancel the disenrollment and restore the Participant's profile.

Note: This feature is only available for 30 days after disenrolling.

1. Log in to MyAccount and open the **Enrollment Dashboard**.
2. Search for the Participant profile and select **View Details**.
3. Under the **Enrollment** tab, select **Manage participant status**.
4. Select **Re-enroll** and **Confirm** to restore the Participant to active status.