YOUR LIFE
YOUR CARE
YOUR PEOPLE

MyAccount Guide

For Administrators with California SDP

Last Updated: October 4, 2024

About This Guide

This guide is intended for Service Coordinators, Independent Facilitators, and others who support the California Self-Determination Program.

Note: See the *MyAccount Participant Guide* for details on performing tasks on behalf of the Participant, including invoice approvals.

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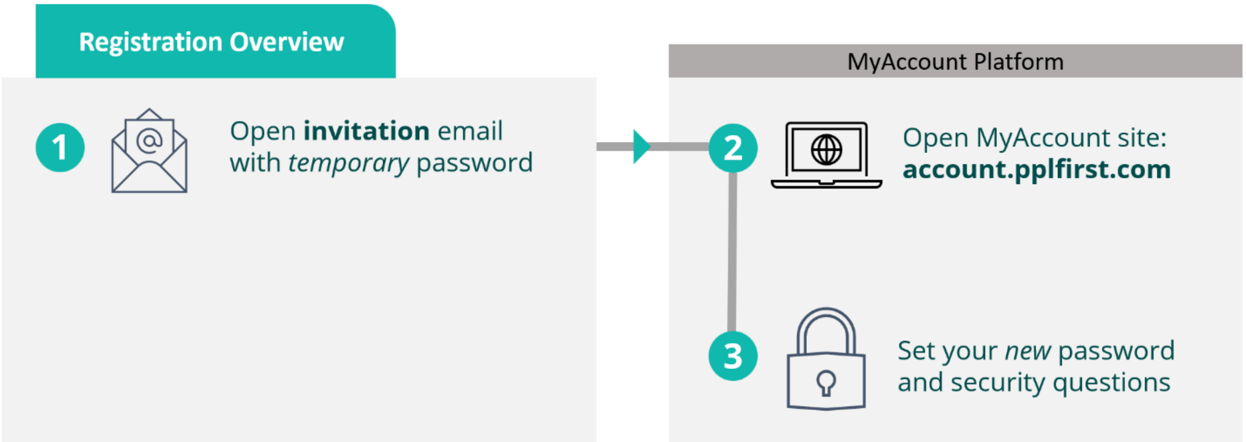
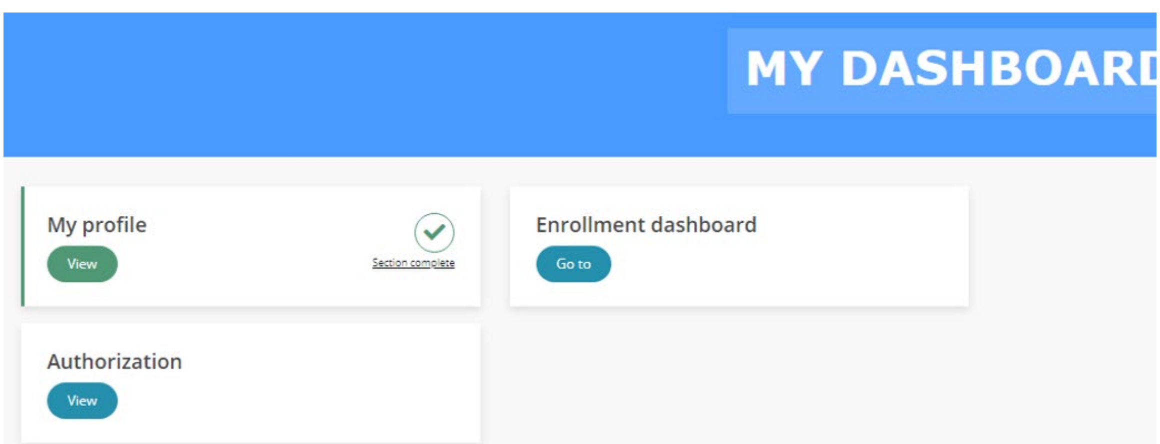
Set Up Your MyAccount Access

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



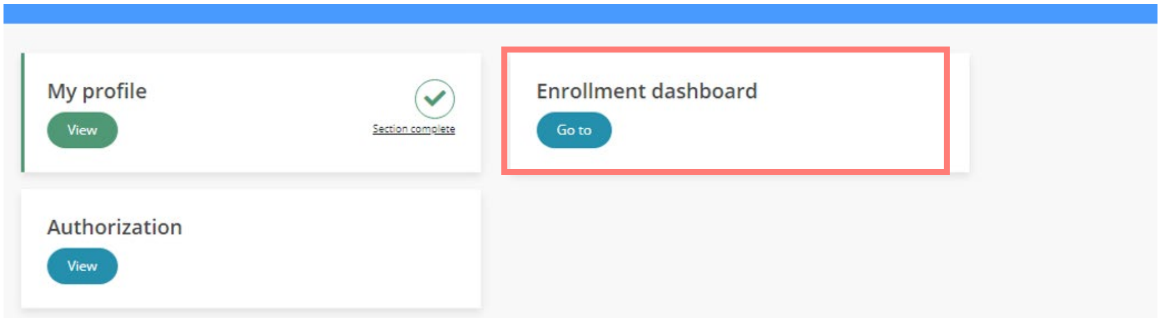
1. In your email invitation, look for the temporary password.
2. In a browser, open the website (no “www”):

   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



Search for Participants / Workers

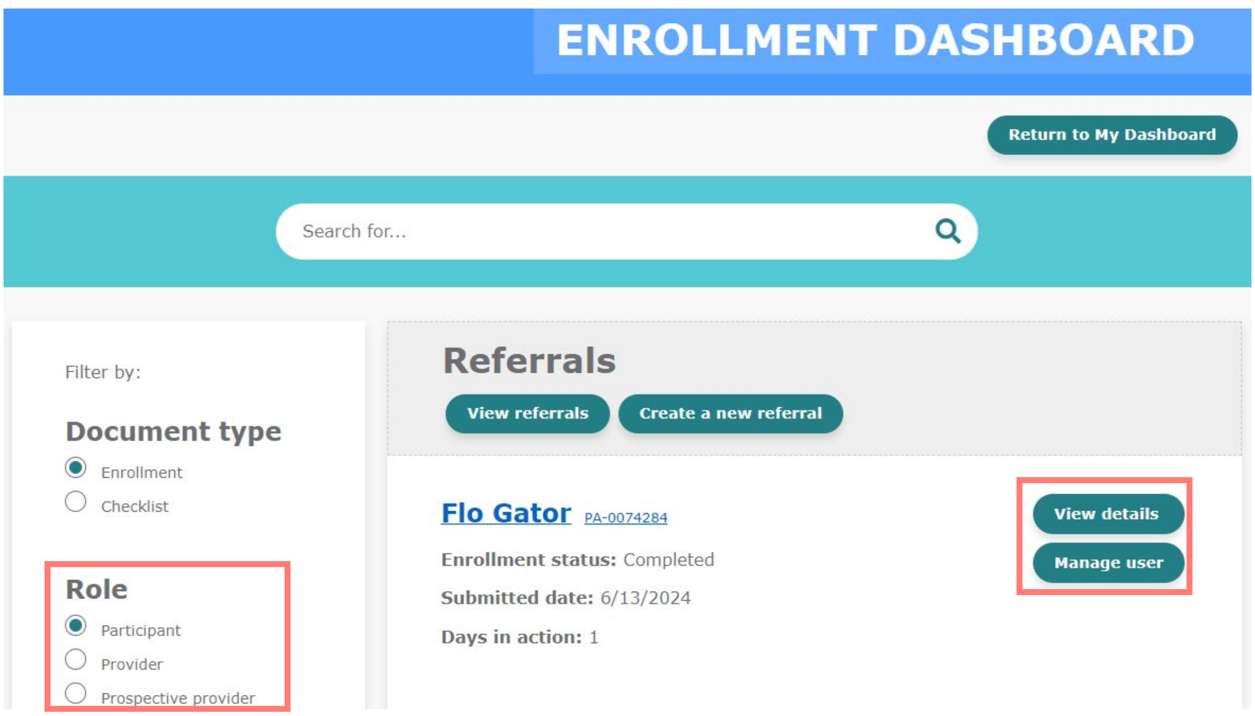
To find an individual you are helping, use the **Enrollment Dashboard**.



Use the Filter

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:

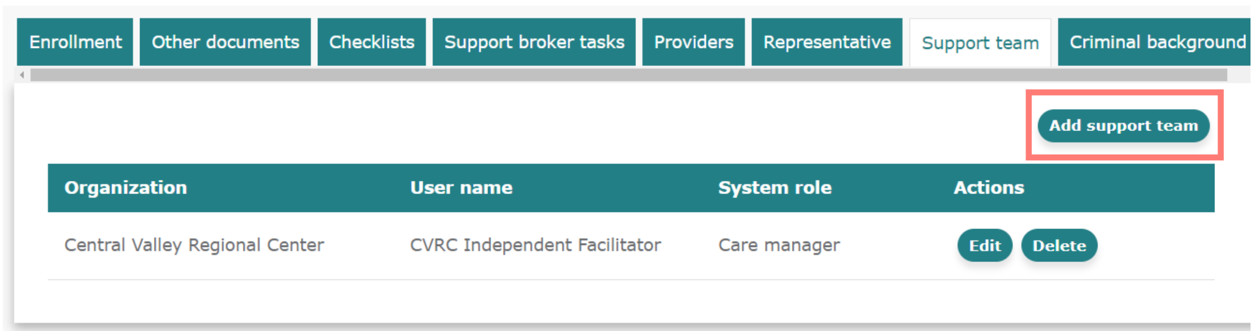
- **View details**—administrative level
- **Manage user**—same view that the individual sees when they log into MyAccount

  Note: See the *MyAccount Participant Guide* for details on performing tasks on behalf of the Participant, including invoice approvals.

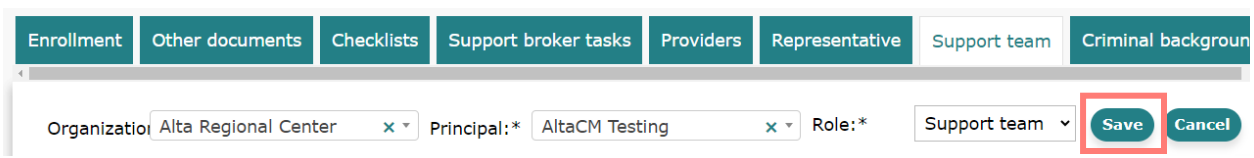
Add Yourself to Participant's Support Team

To access all applicable information, you need to be listed on their support team. Follow these steps for each participant you need to access.

1. On the **Enrollment Dashboard**, search for the Participant or Provider.
2. Select **View Details**.
3. Select the **Support Team** tab and then select **Add support team**.



4. Select the **Organization** and then you can choose your name from the list under **Principal**.

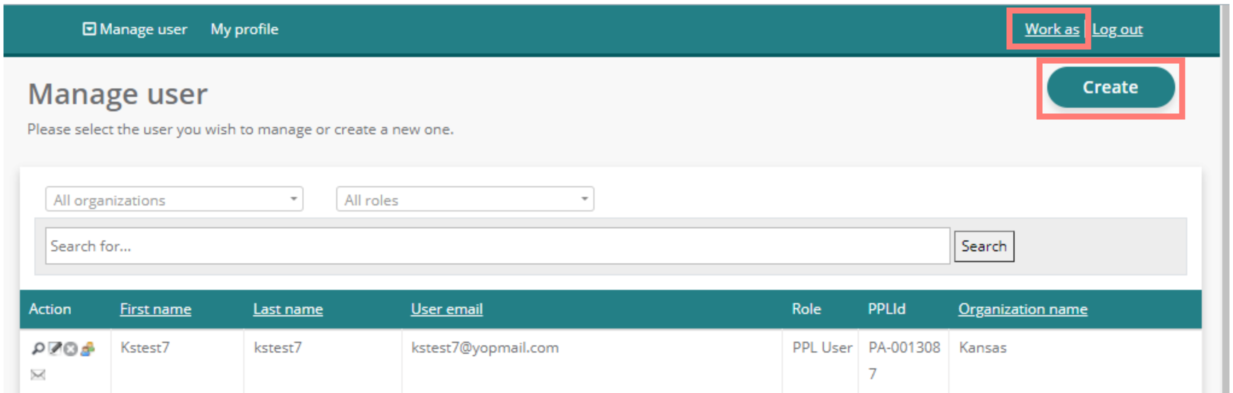


5. For the **Role**, select any name that fits and select **Save**.

Create a New Administrator Account

Depending on your security, you can add accounts for other administrators in your Regional Center or organization. (If you do not see the Create button below, you do not have the security access needed to create accounts.)

1. In MyAccount, select **Work As** from the top menu.



2. On the Manage User page, select **Create**.
3. Complete the account details using these guidelines:
    - **Organization:** Select the Regional Center where this individual operates.
    - **Email:** Use an email address unique for this role. (The email for each MyAccount profile must be different.)
    - **Contact Method:** Select **Email** for best results.
4. For the **Password**, create a *temporary* code for this person's initial login.

   During login, the individual will be prompted to change the password.
5. For the Security question and answer, use something you can remember in case you need to help with accessing this account.

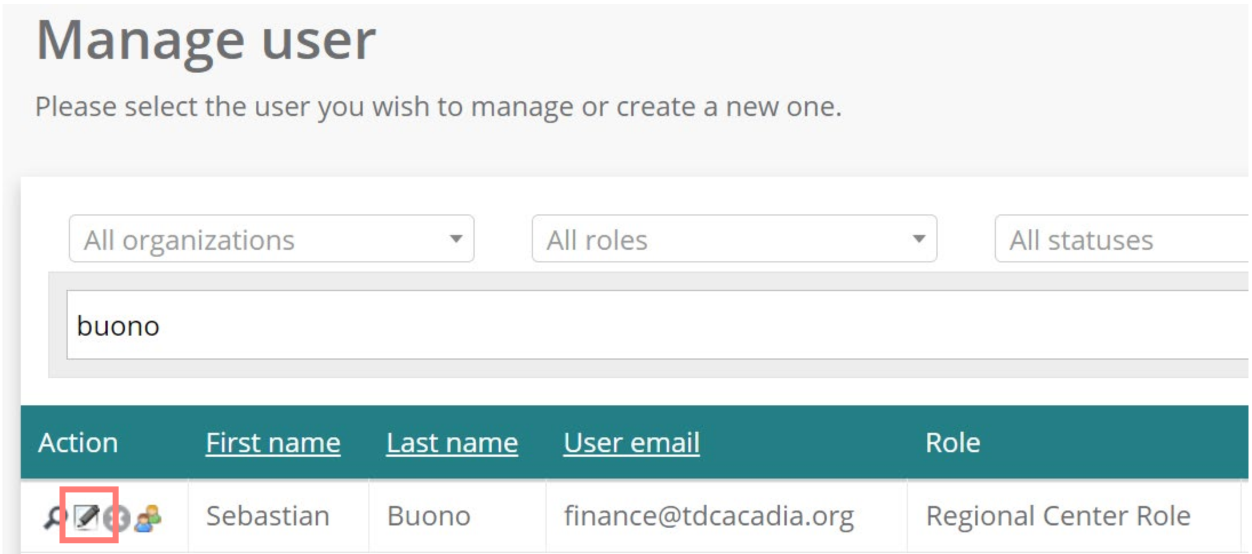
   Tip: Choose "What was your first job" and input your agency name.
6. For **Address**, use any address you have; do not leave it blank.
7. For **User type**, select the option *Is a support team*.

   This option enables you to access information for the Participants you support.
8. Near the bottom, select **Create account**.

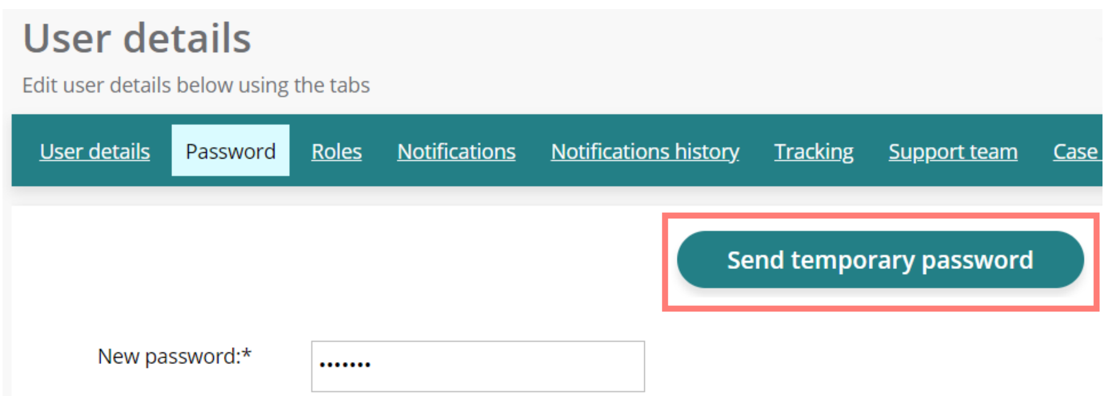
Send the MyAccount Login

With the account created, you can now provide the MyAccount login to this person.

1. From the Manage User page, search for the account you just created.
2. Select the pencil icon to open the User Details:



3. On the User Details page, select the **Password** tab.
4. Select **Send temporary password**.



Note: MyAccount will force this person to change their password from the temporary code you entered.

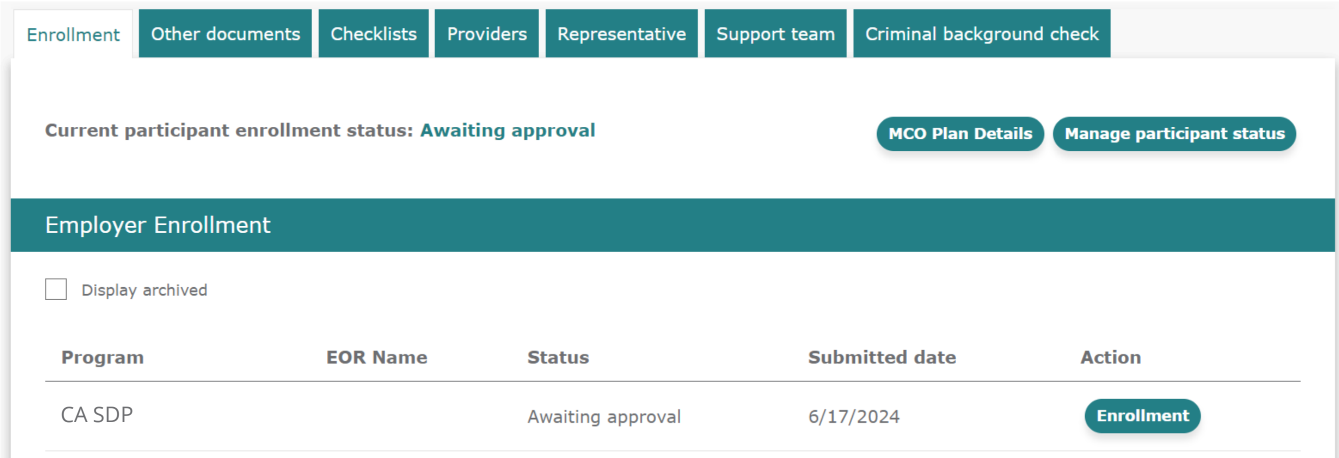
View Enrollment Status

When you can locate Participants or Providers on the **Enrollment Dashboard**, you can see their enrollment status:

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. **Who Approves:** For Participants, the staff at PPL approve enrollment. For Providers, enrollment is approved by the Participant.
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

When you select **View Details** for the person you found on the Enrollment Dashboard, the details are organized into tabs, as shown.

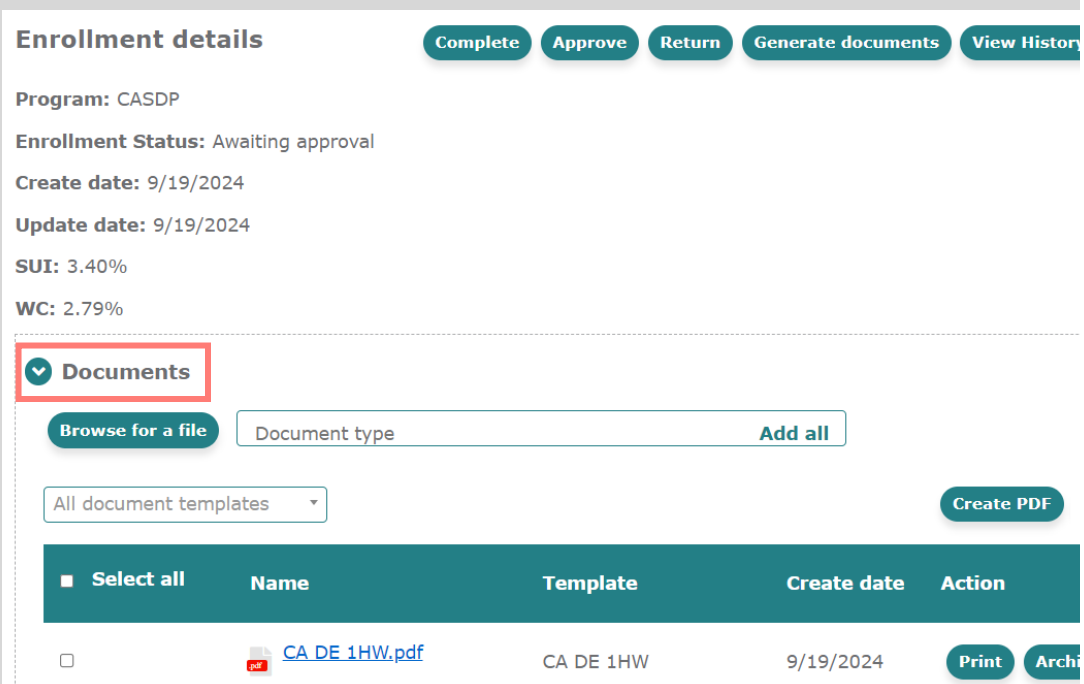


Here are descriptions for each tab:

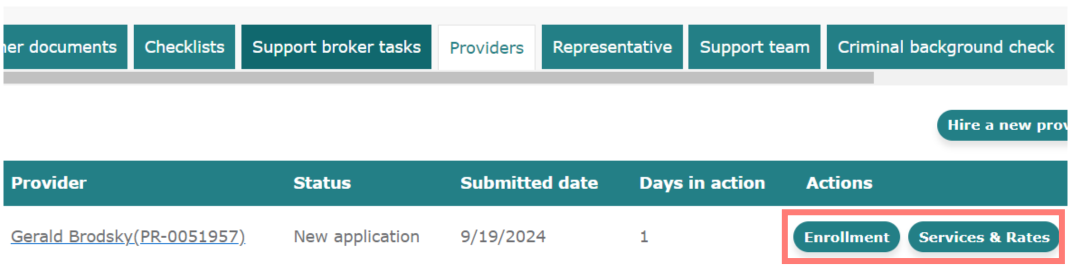
<table>
<tr><th>TAB</th><th>DESCRIPTION</th></tr>
<tr><td>Enrollment</td><td>Displays answers to the enrollment questions. Under the Action column, select Enrollment to view details (see next example).

Note: After enrollment is completed, the Employer of Record (EOR) options also appear: View EOR details and Change EOR. Employer of Record is another name for Common Law Employer (CLE).

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

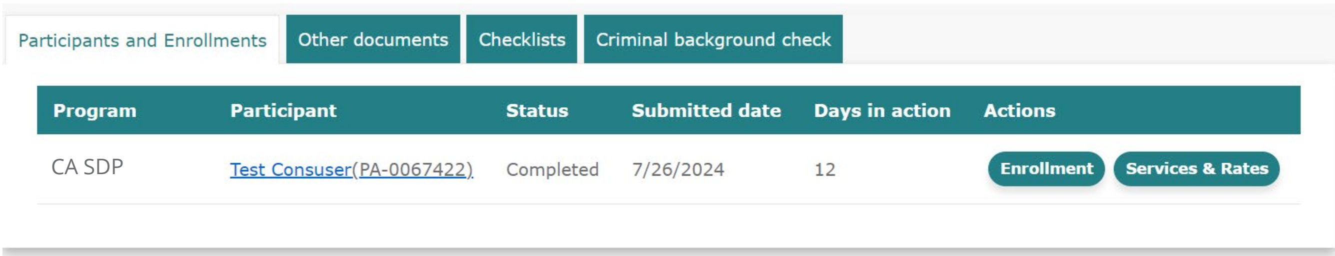

</td></tr>
</table>

<table>
<tr><th>TAB</th><th>DESCRIPTION</th></tr>
<tr><td>Other documents</td><td>For special situations, you can view or upload additional reference documents that are not part of the standard enrollment package.</td></tr>
<tr><td>Checklists</td><td>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.</td></tr>
<tr><td>Providers</td><td>Displays all the Participant’s workers. For details about the worker, select Enrollment or Service & Rates:

</td></tr>
<tr><td>Representative</td><td>If someone was chosen to represent the Participant, their information appears here.</td></tr>
<tr><td>Support Team</td><td>Displays team members assigned to a Participant. If a change is needed, contact PPL Customer Support.</td></tr>
<tr><td>Criminal background check</td><td>Displays the status and details of each Worker’s background check.</td></tr>
</table>

View Worker Enrollment Details

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

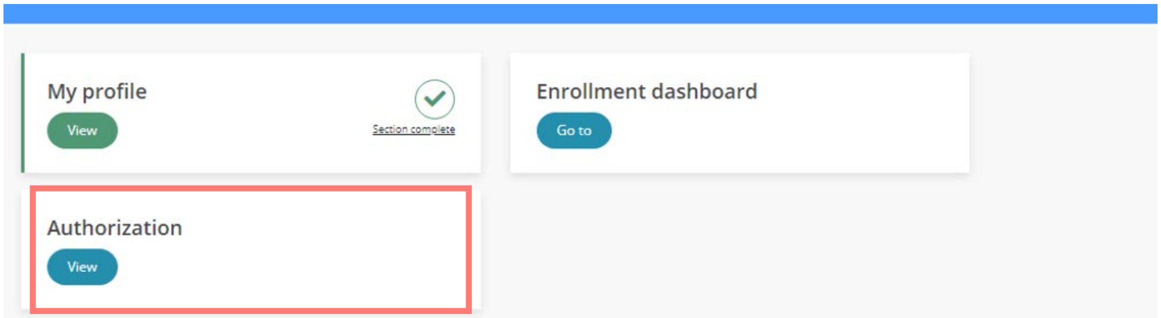


TAB	DESCRIPTION
Participants and Enrollments	Displays all the Participants that the Worker supports. Select **Enrollment** for a specific Participant to see answers relevant to that relationship. NOTE: Under the Enrollment details, you can expand the Documents section or generate the enrollment forms.
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 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.
Criminal background check	Displays the status and details of the Worker’s background check.

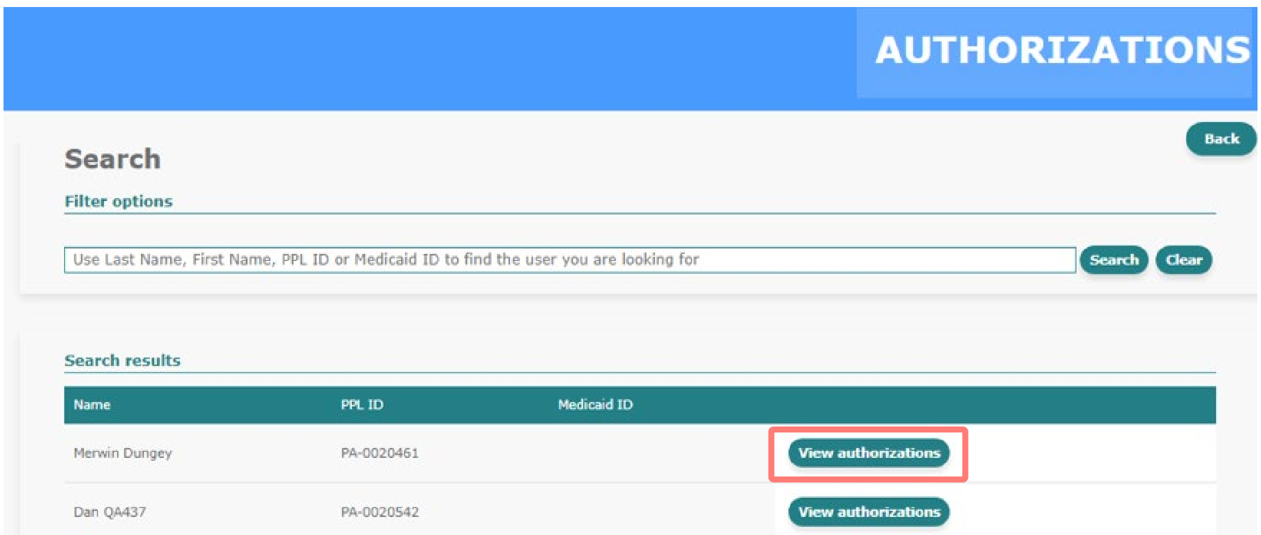
View Budget Authorizations

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

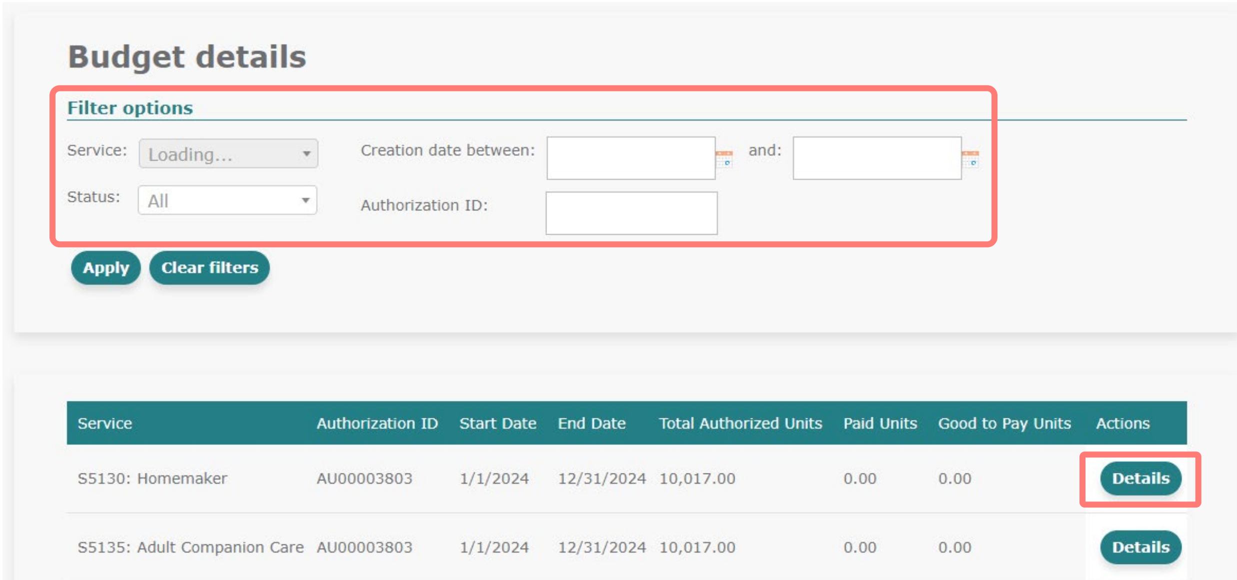
1. In MyAccount, select **Authorization**.



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



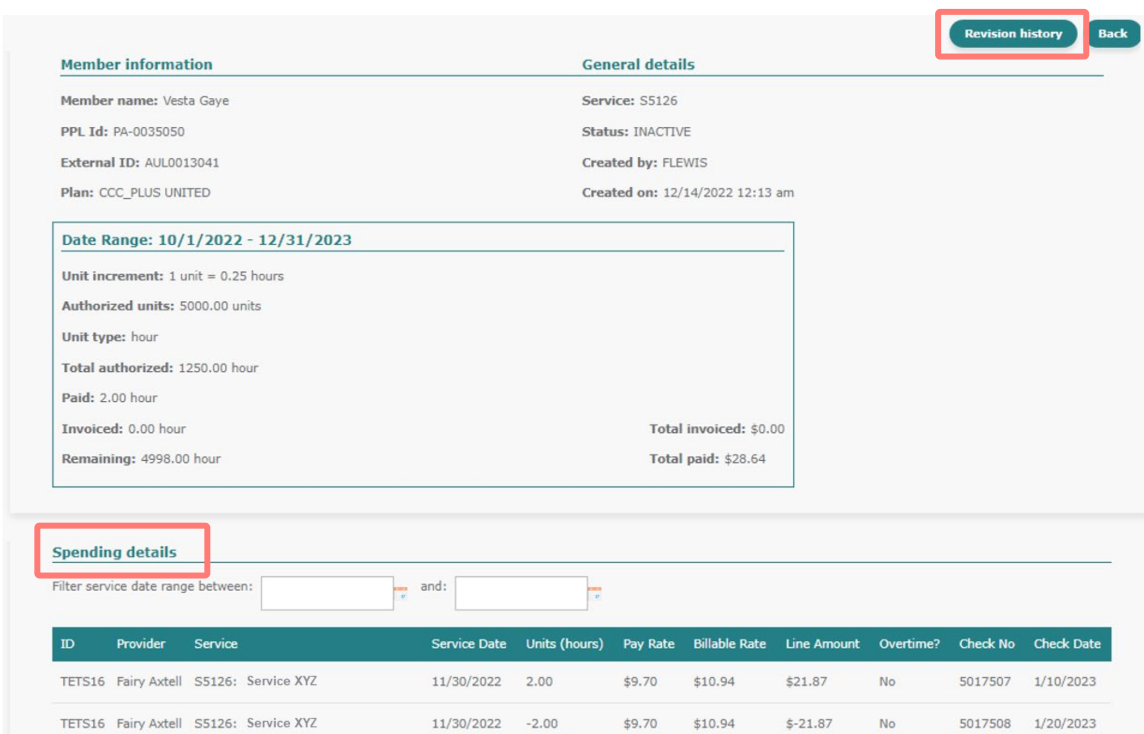
3. On the authorization view, you can select **Filter options** to see matching payment totals.



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

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

5. 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.

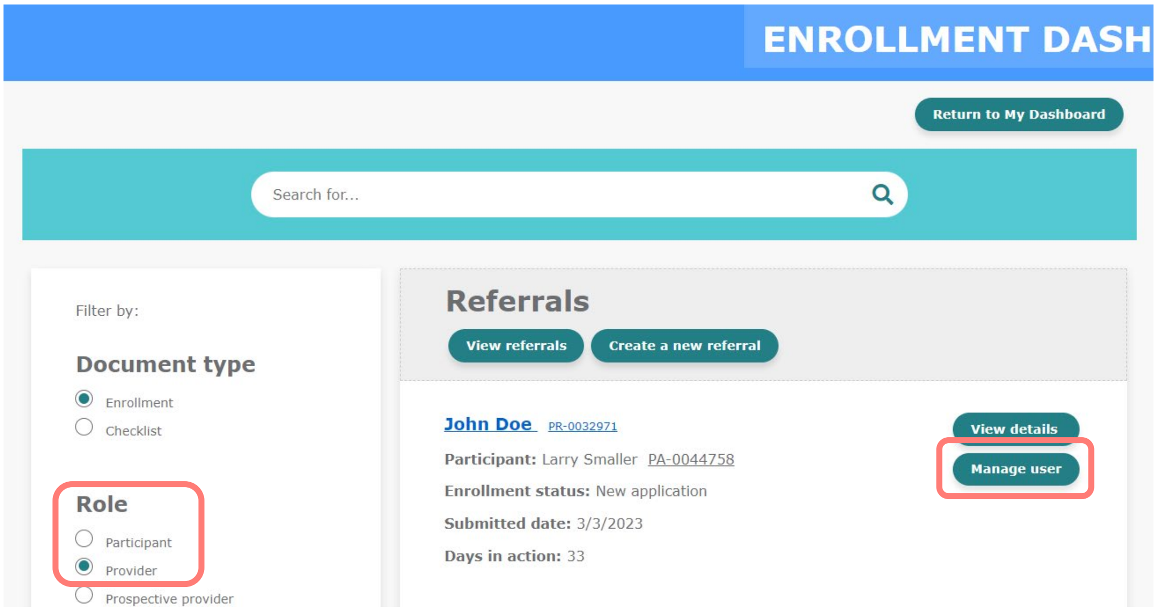
View Worker Time Entries

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

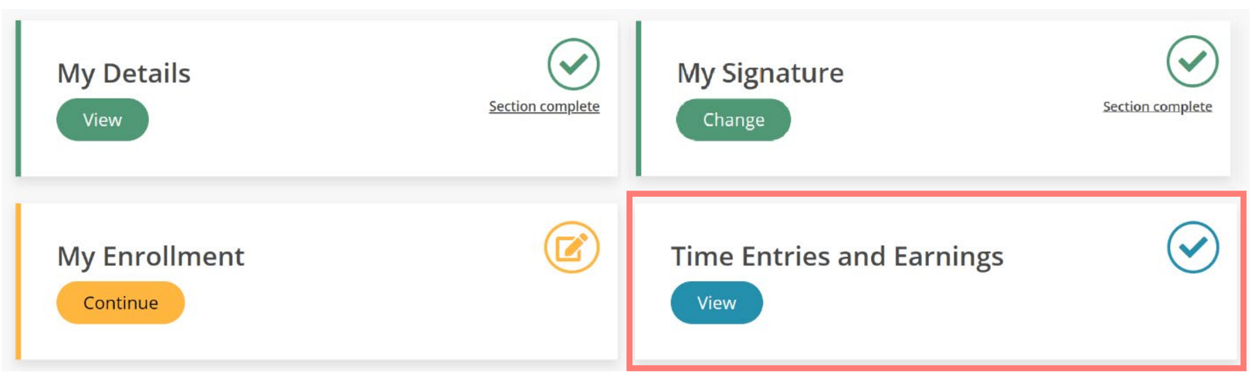
Note: When submitting timesheets, Workers should use the Time4Care app, not MyAccount. (Or use the telephony procedure if needed.) Use MyAccount to manage earnings information after submittal.

1. Find the Worker on the **Enrollment Dashboard**.

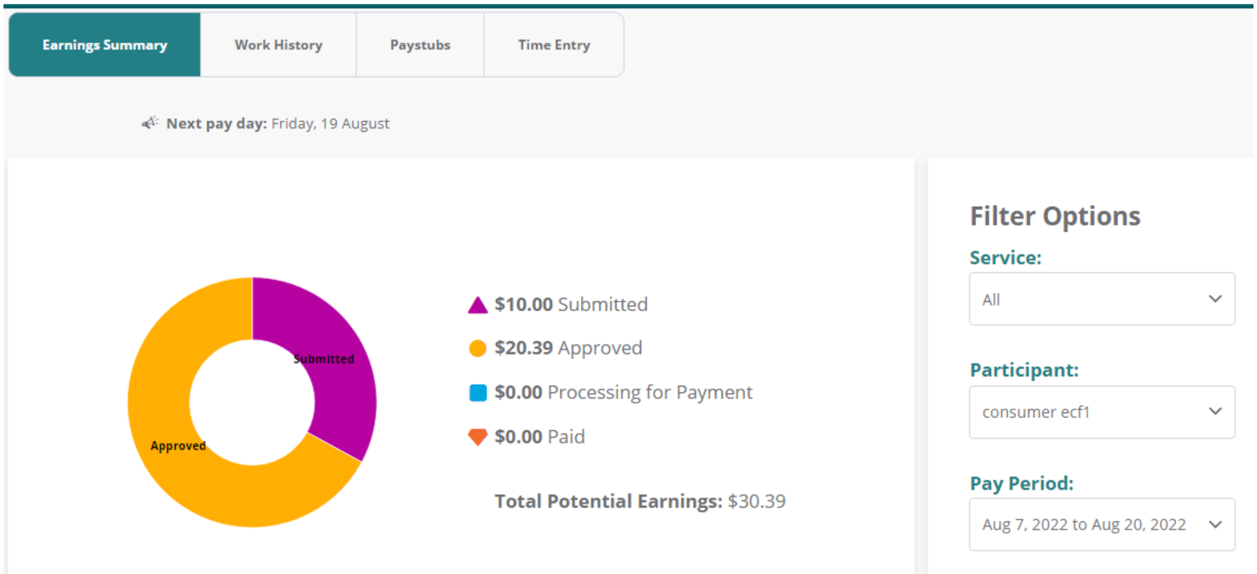
   Tip: Select **Provider** under the **Role** filter.

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

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.

ORDER	STATUS	DESCRIPTION
~	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.