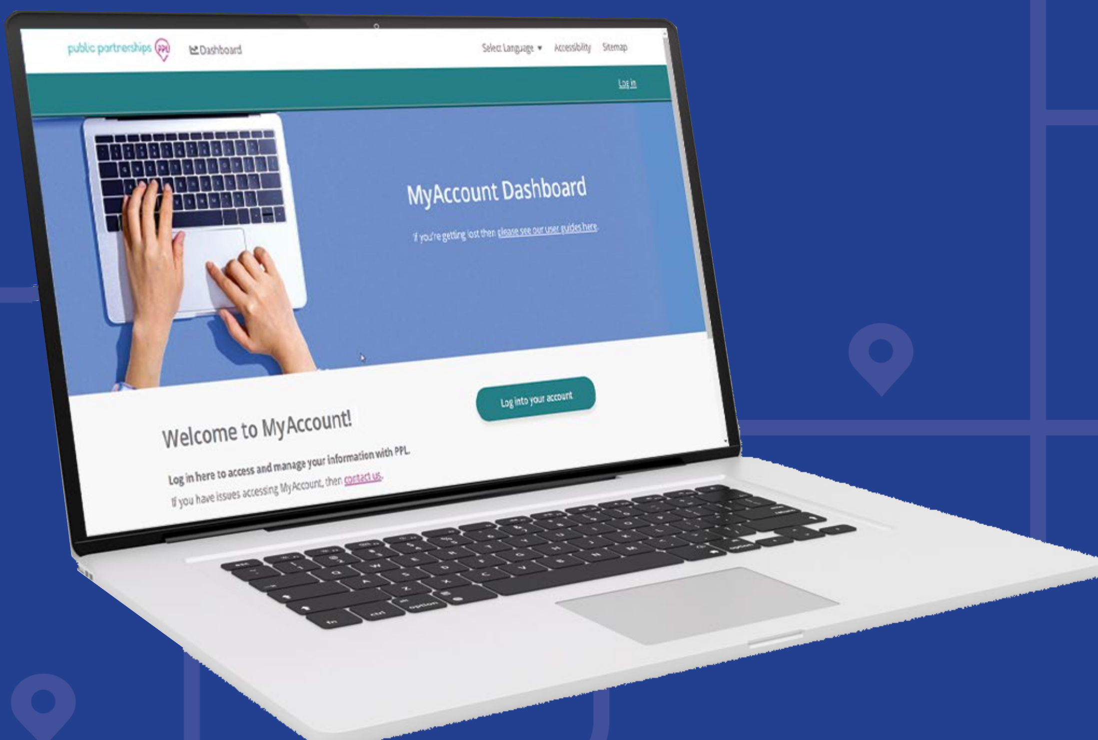
MYACCOUNT

Guide for Administrators



CONTENTS

WELCOME

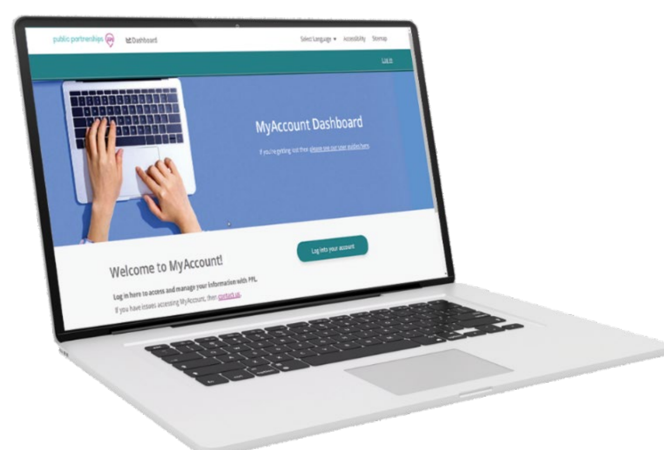
Self-direction involves many players, and the MyAccount platform from Public Partnerships (PPL) is meant to help everyone manage the necessary information.

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

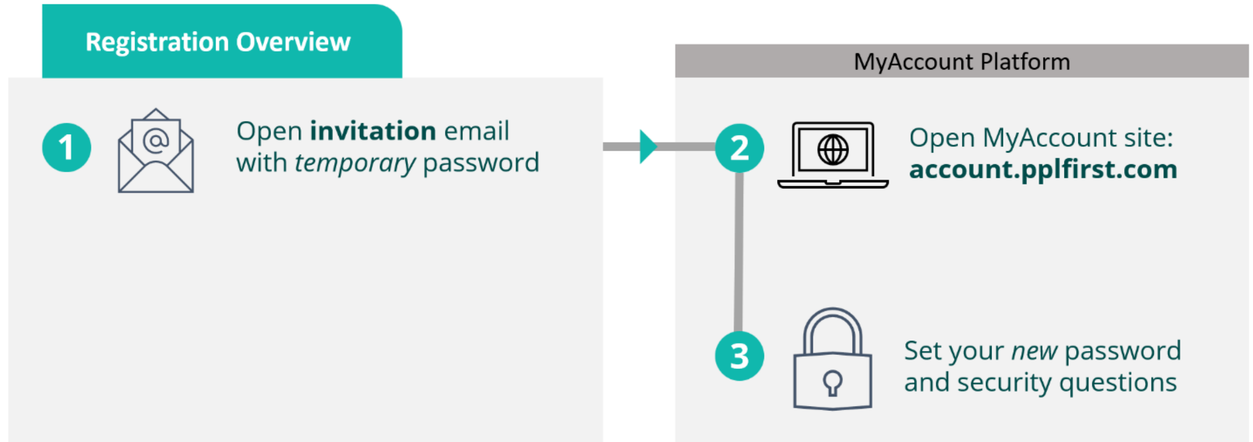


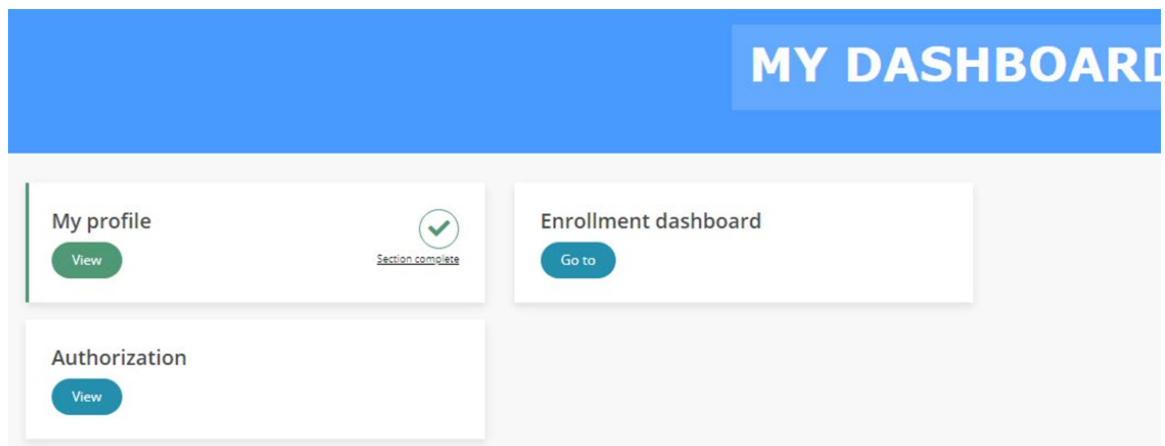
Set Up Your MyAccount Access

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

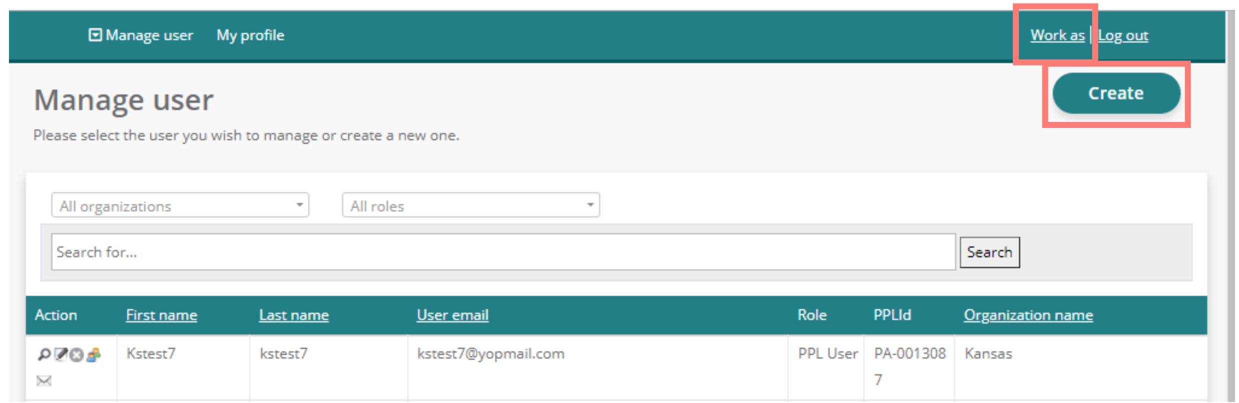




Create a New Account

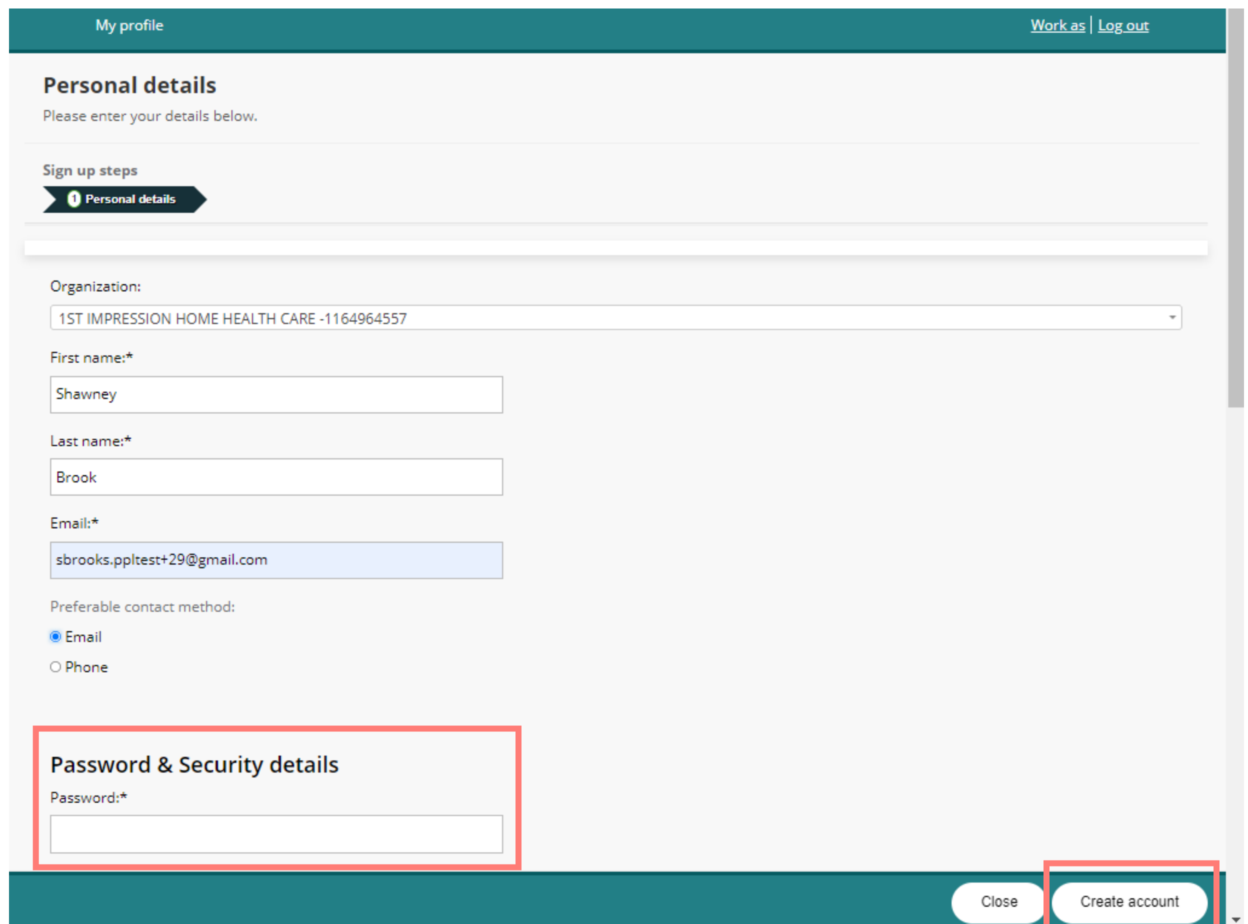
After the initial MyAccount implementation, you can add accounts for other administrators.

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.

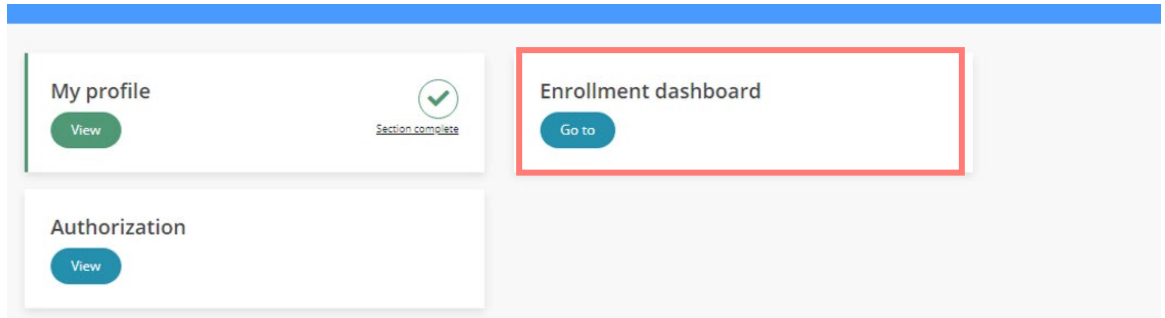


Search for Participants / Workers

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

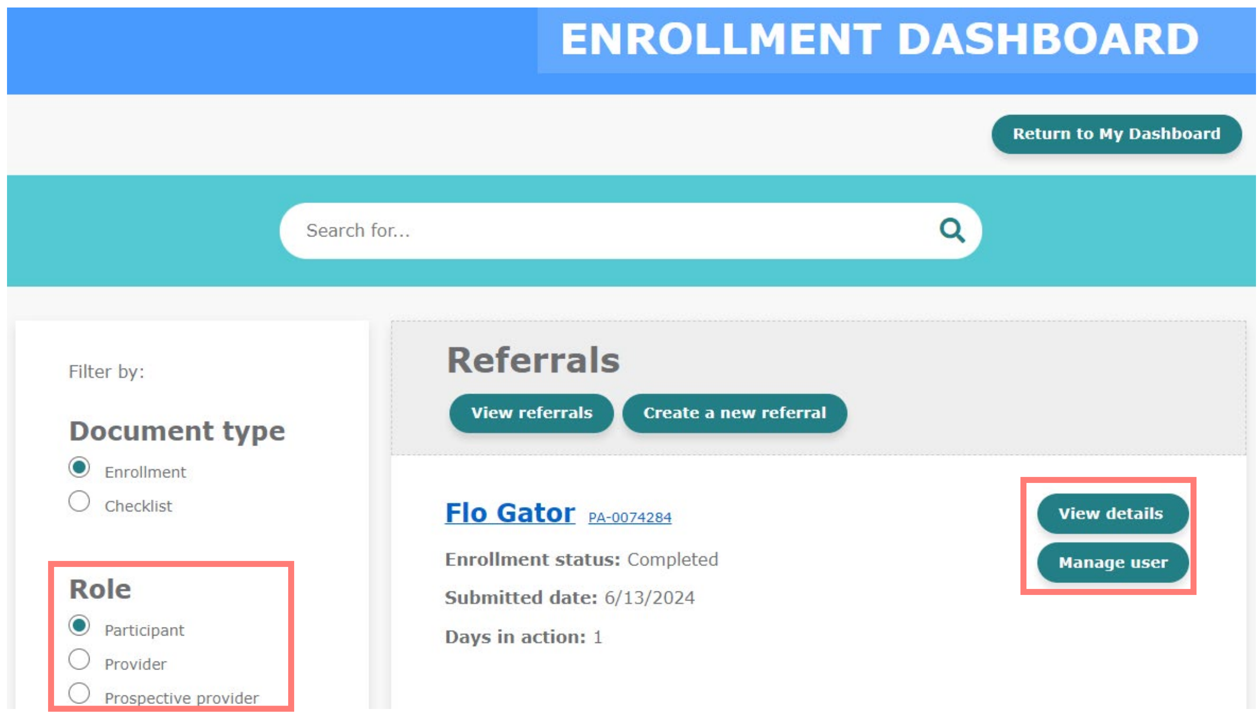
IMPORTANT: When you search, the results are filtered by the settings on the left. If you can't find someone, check the filter settings.

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:

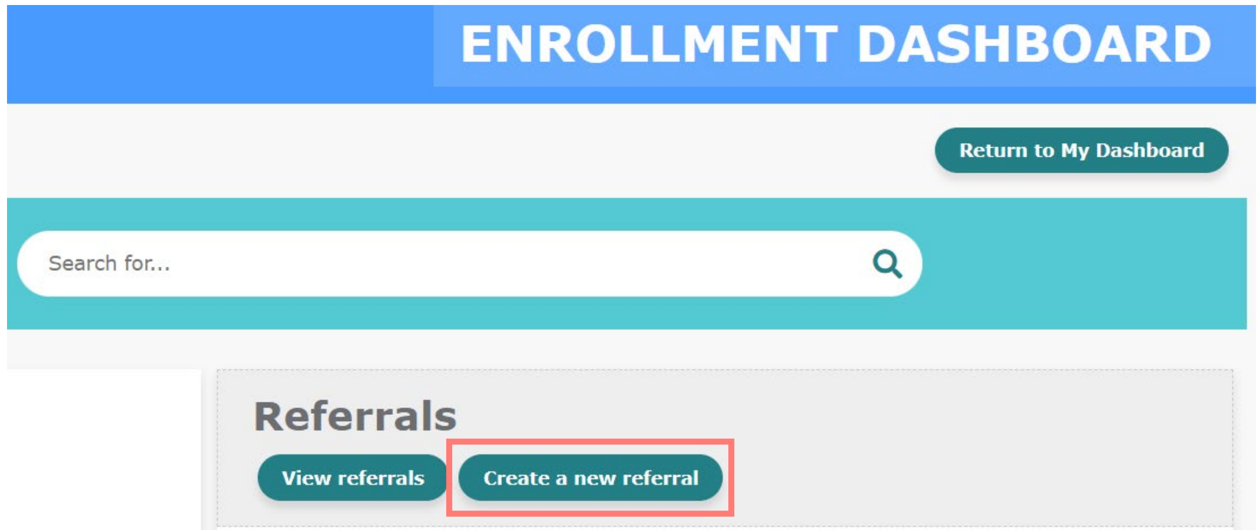
- **View details**—administrative level
- **Manage user**—same view that the individual sees when they log into MyAccount (useful when offering support, especially with the Participant's budget and spending)



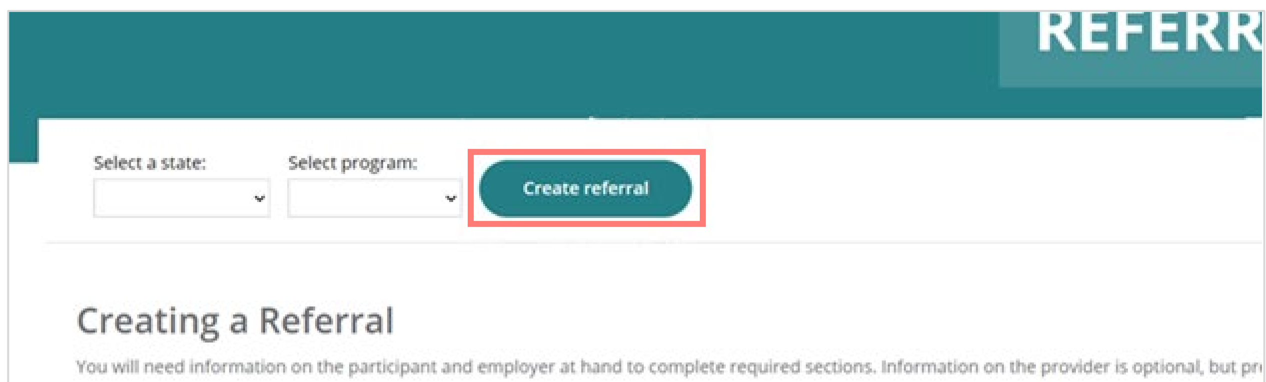
Create New Referrals

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.

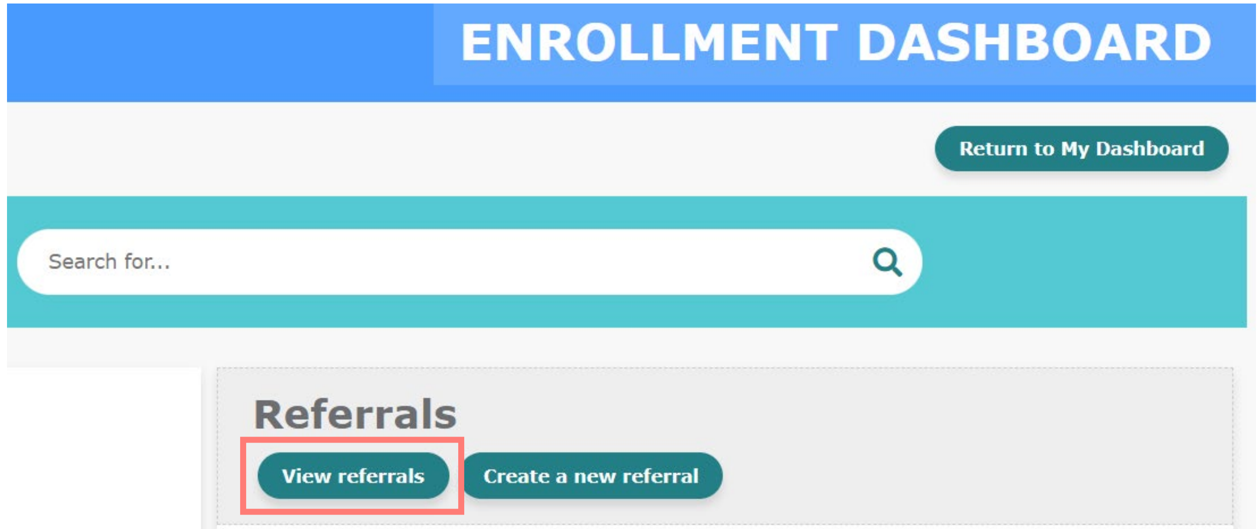
Here are the sections you must complete for a new referral:

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	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. **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
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	As an option, you can also add a Provider who will work for the Participant. The Provider can be an individual or a Vendor. The Provider will have their own log-in for MyAccount. Registering for MyAccount will require their own, separate email or mobile number. You must also select what services the Provider will offer and their hourly rate.
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

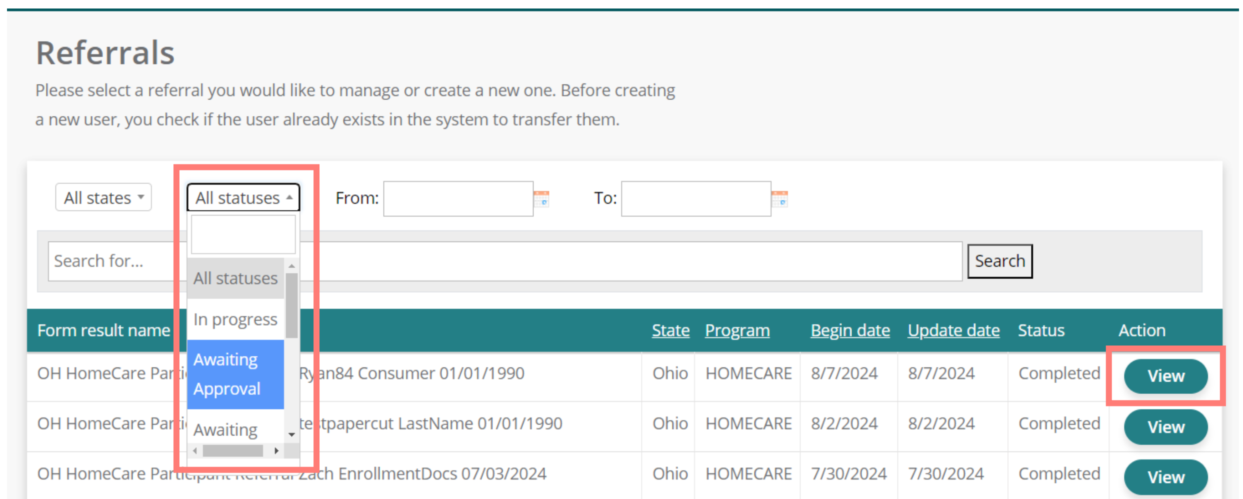
The Enrollment Dashboard only displays referrals *after* approval. To see referrals *before* approval, follow these steps.

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 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.

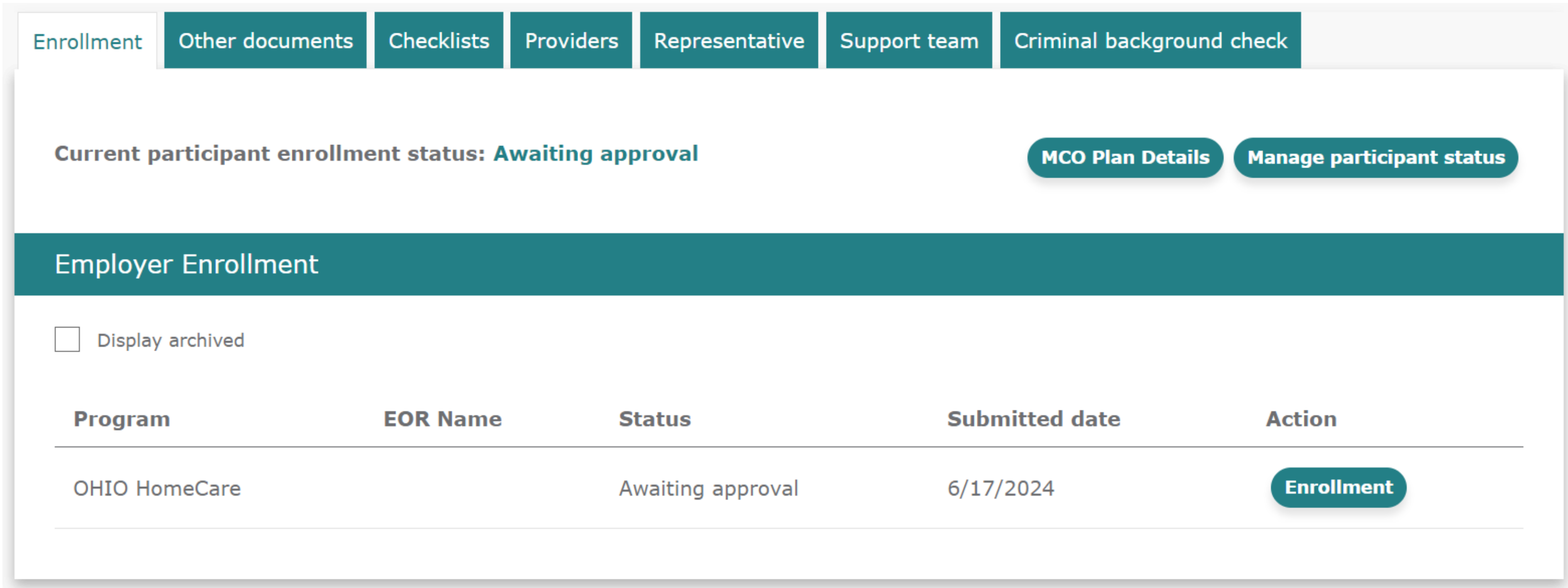
Enrollment Status

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. **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

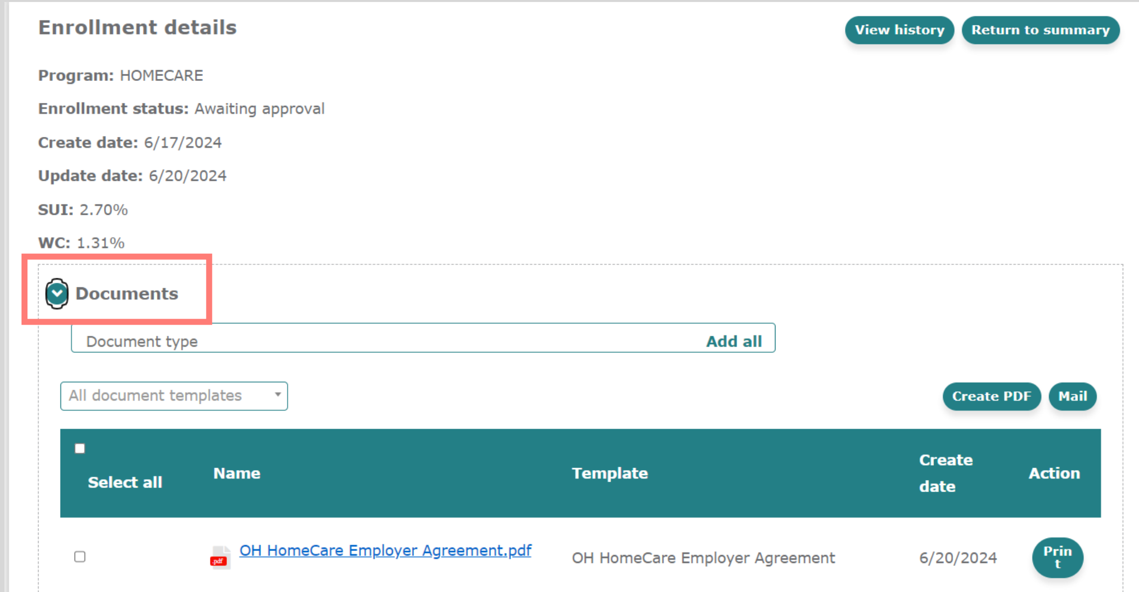
From the Enrollment Dashboard, you can choose **View Details** for a Participant to see answers to specific questions. The details are organized into tabs, as shown.



Here are descriptions for each tab:

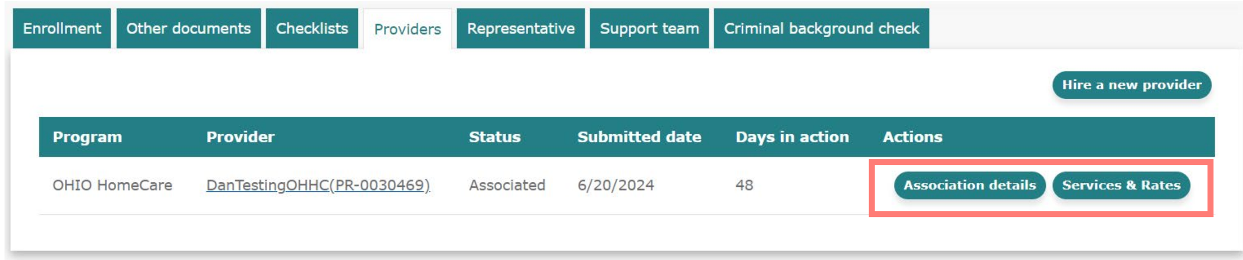
TAB	DESCRIPTION
Enrollment	Displays answers to the enrollment questions. Under the **Action** column, select **Enrollment** to view details (see next example). Note: After enrollment is completed, the Employer of Record (EOR) options also appear: **View EOR details** and **Change EOR**. *Employer of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

<table>
<tr><th>TAB</th><th>DESCRIPTION</th></tr>
<tr><td></td><td>After you open the Enrollment details, you can expand the Documents section to access enrollment forms:



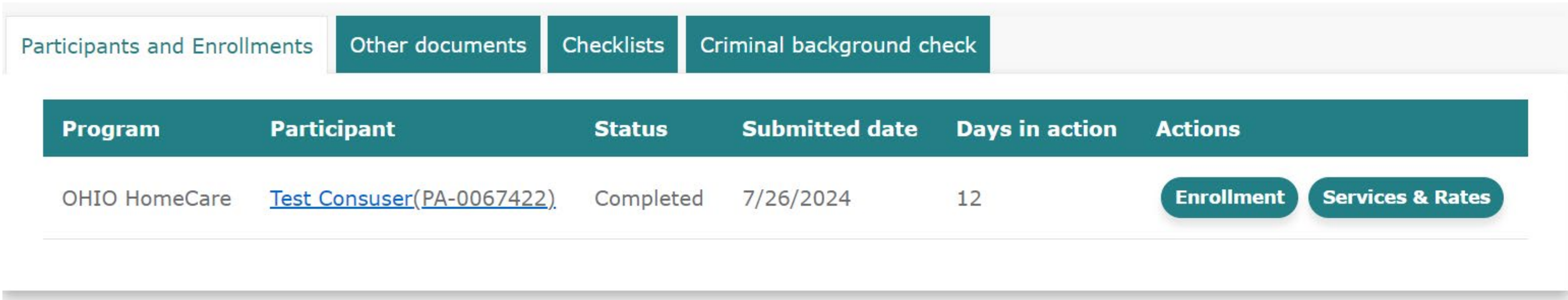
</td></tr>
<tr><td>Other documents</td><td>For special situations, you can view or upload additional reference documents that are not part of the standard enrollment package.</td></tr>
<tr><td>Checklists</td><td>Displays key enrollment tasks that PPL staff will acknowledge as they help with enrollment. 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>
</table>

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

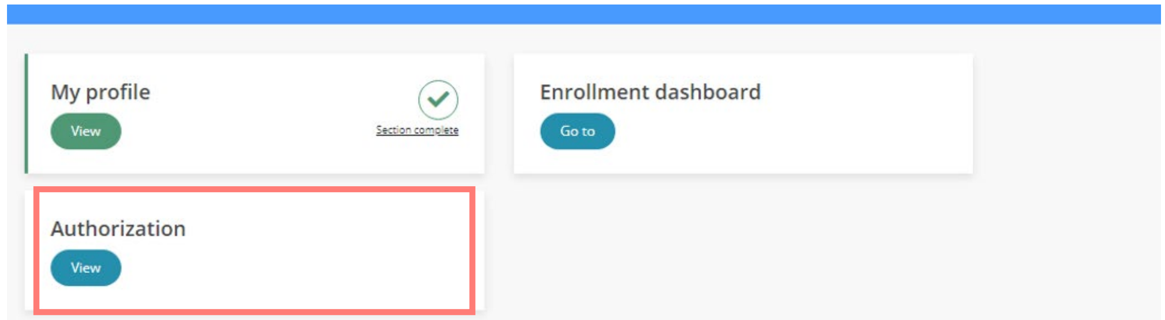


TAB	DESCRIPTION
Participants and Enrollments	Displays all the Participants that the Worker supports. Select **Enrollment** for a specific Participant to see answers relevant to that relationship. NOTE: Under the Enrollment details, you can expand the Documents section or generate the enrollment forms.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

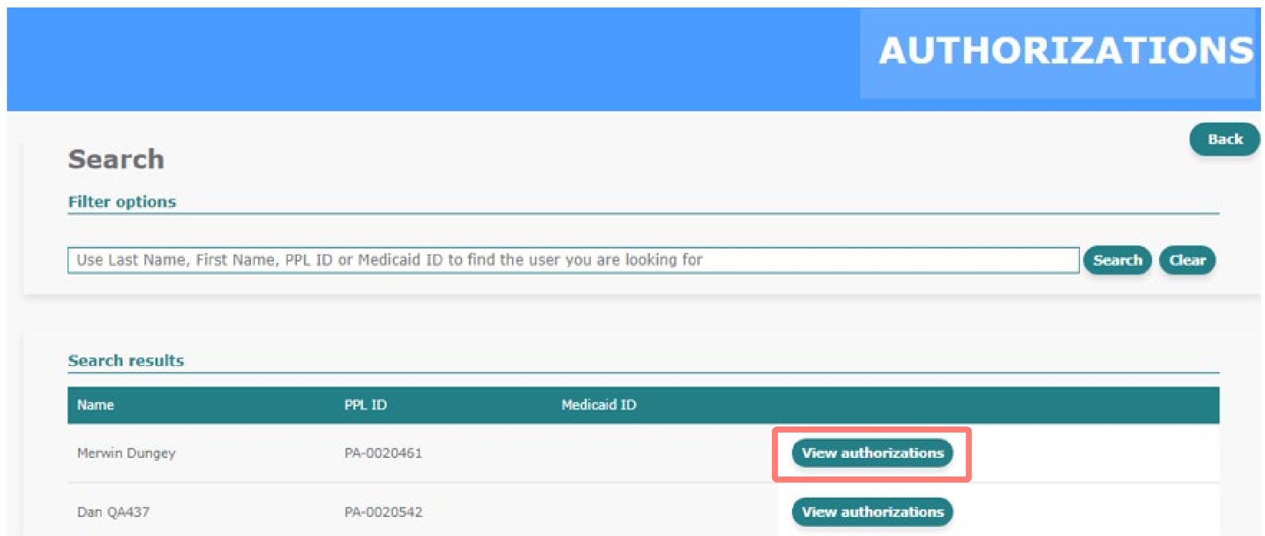
View Budget Authorizations

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

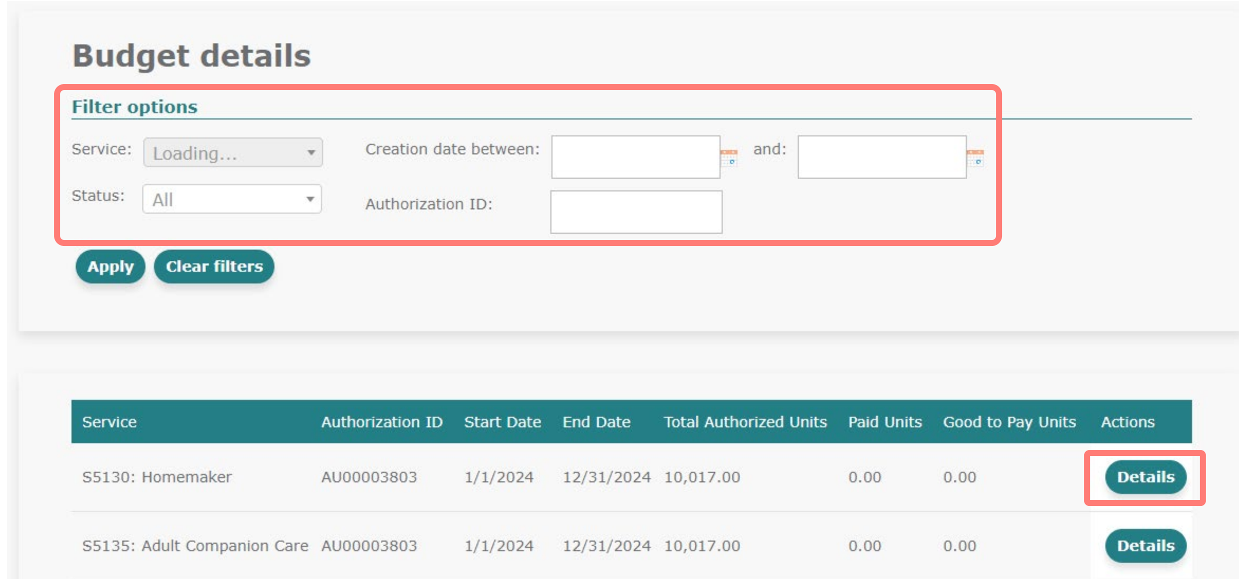
1. In MyAccount, select **Authorization**.



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.

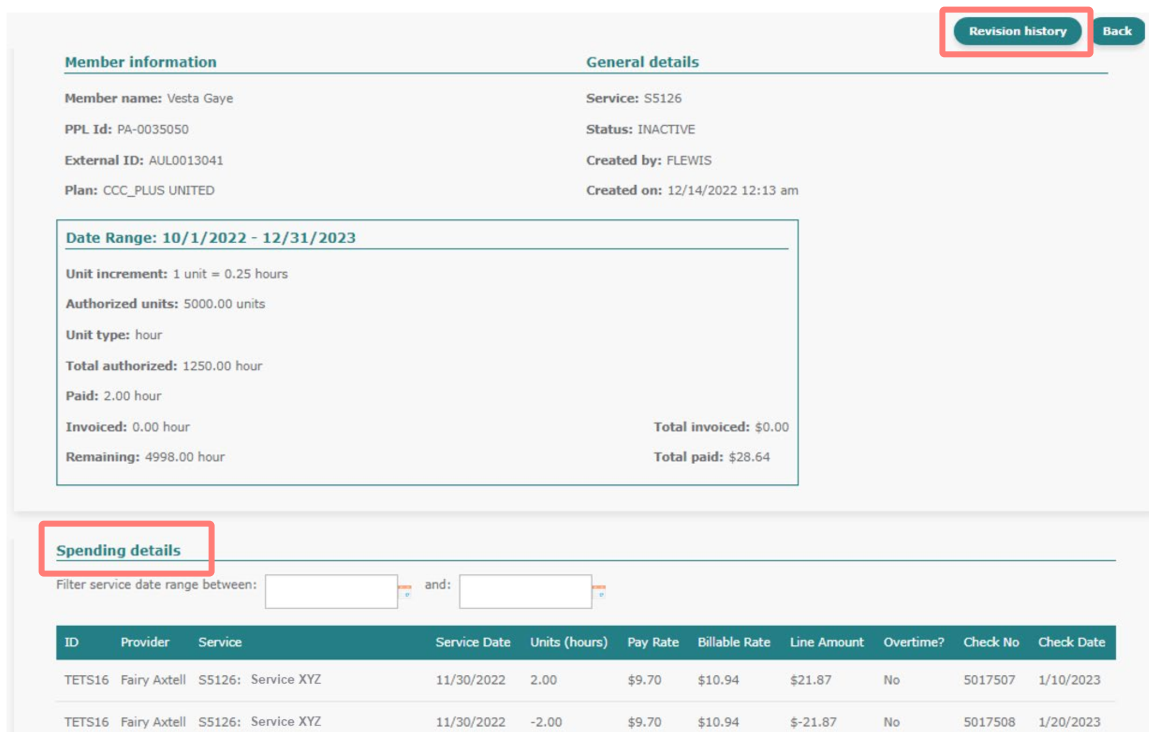


4. To see individual transactions, select **Details** next to a service authorization.

   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.

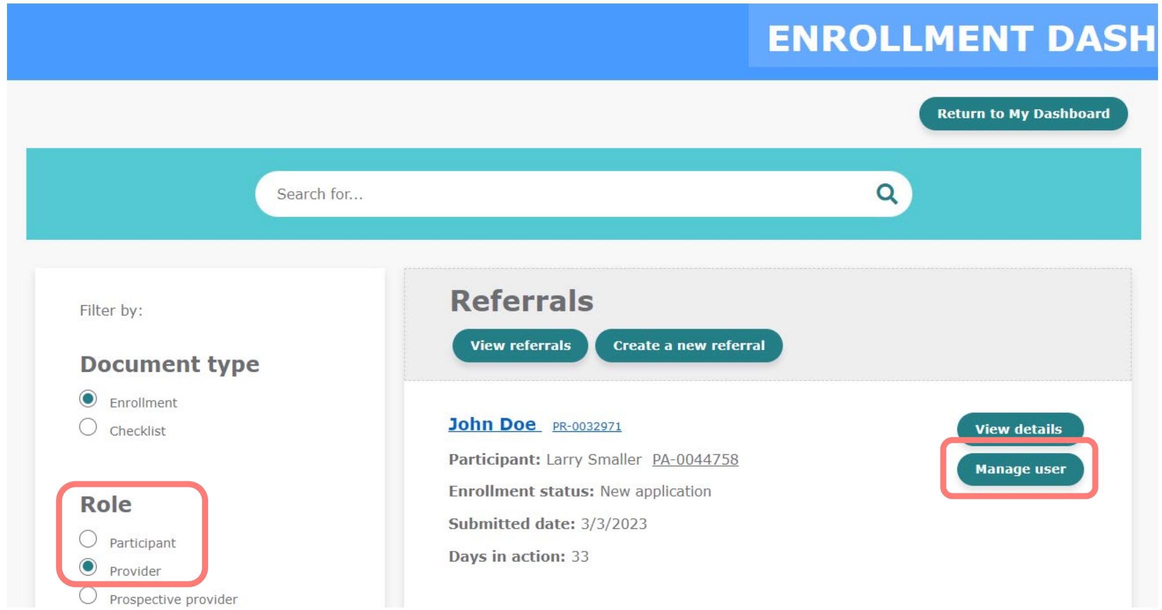
IMPORTANT: When submitting timesheets, Workers should use the Time4Care app, not MyAccount. (Or use the telephony procedure if needed.) Use MyAccount to manage earnings information after submittal.

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.

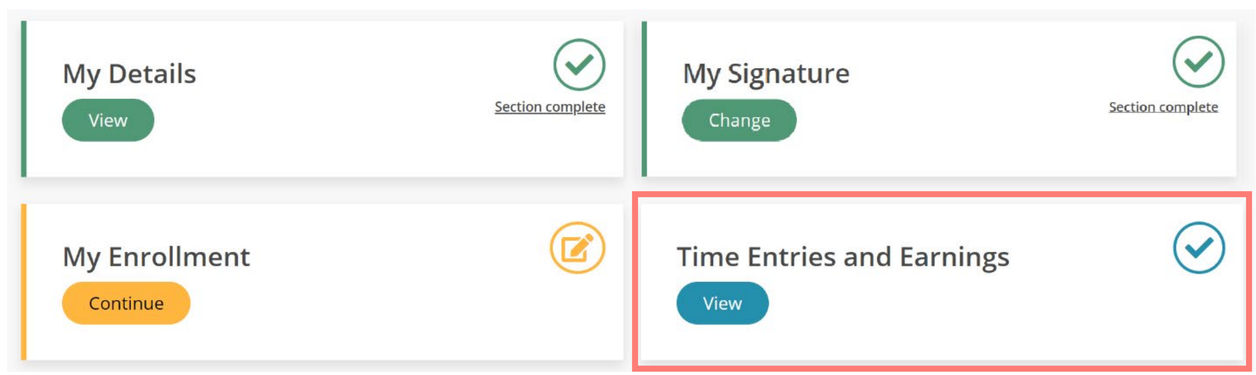
1. Find the Worker on the **Enrollment Dashboard**.

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

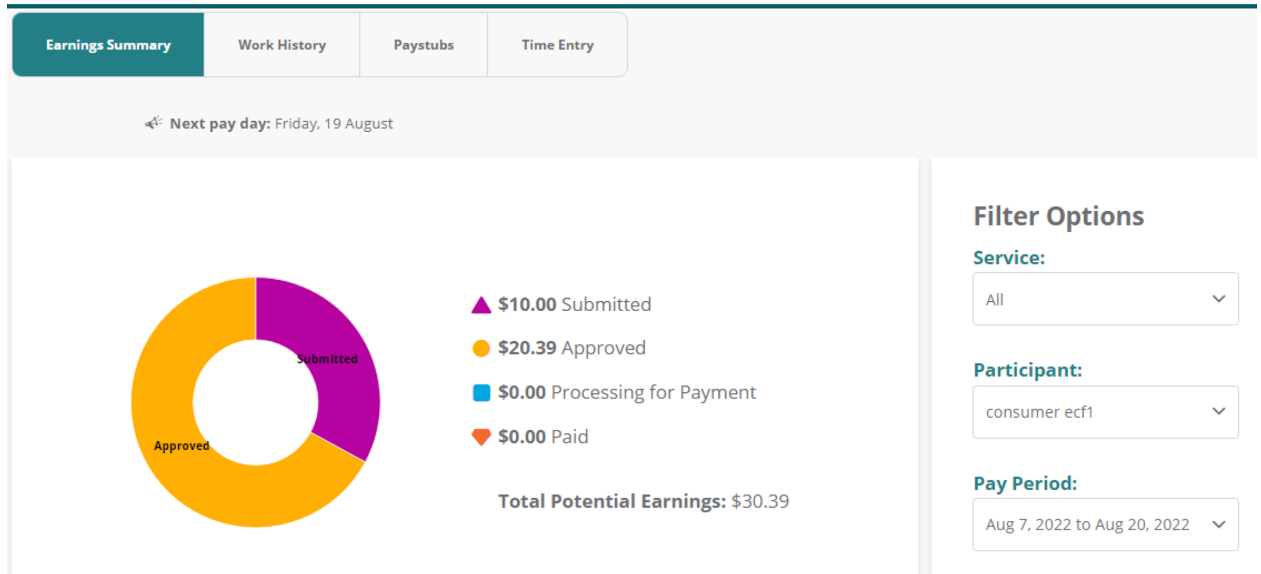
2. Select **Manage User**.



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.
~	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

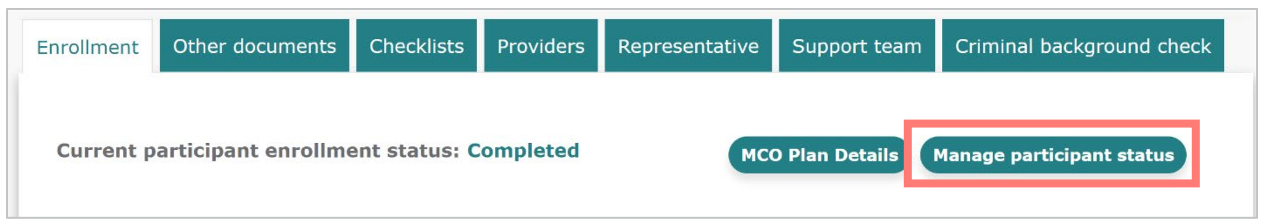
If needed, you can follow these instructions to remove a Participant from the system.

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**.

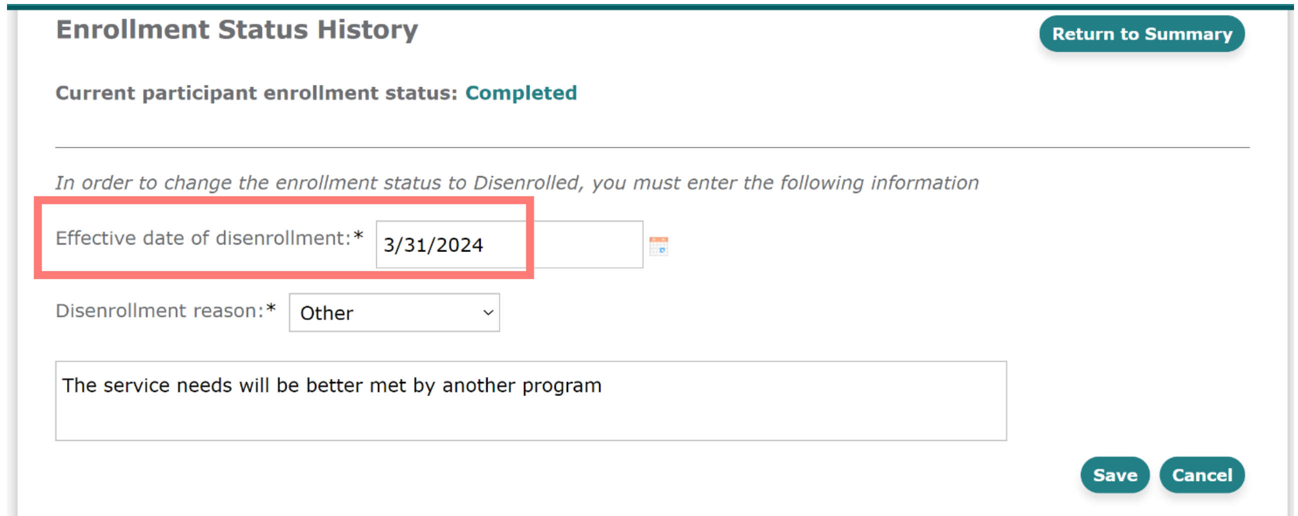


6. Select **Disenroll**.

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.



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.