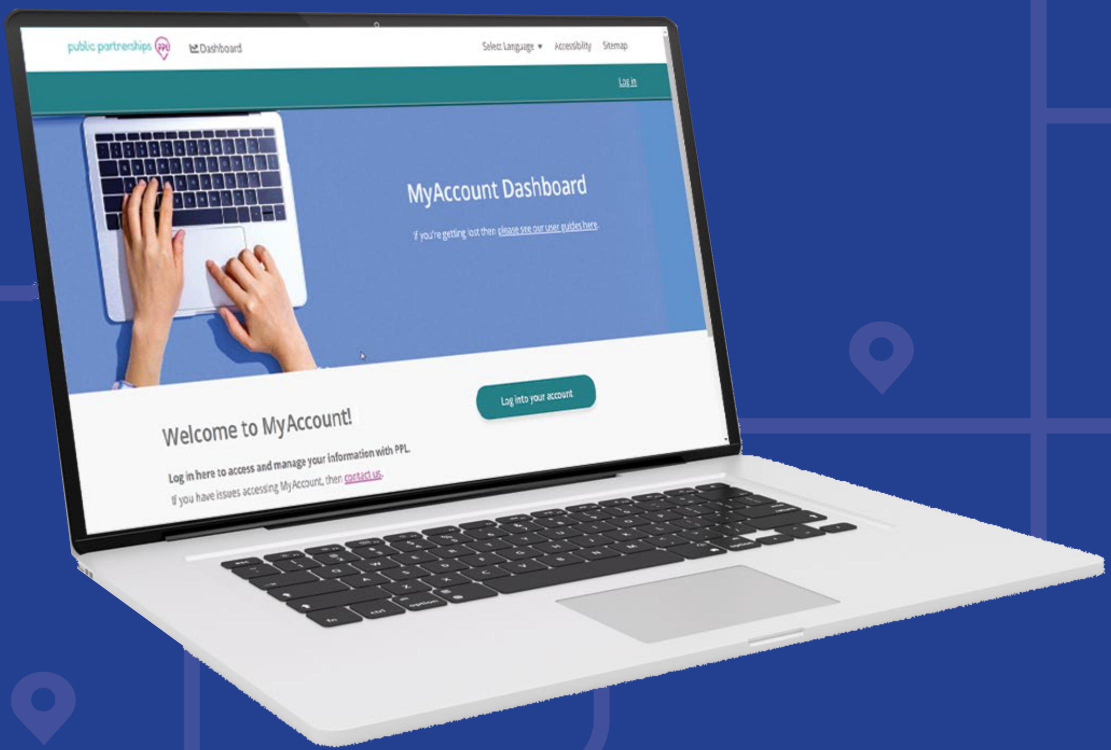
MYACCOUNT

Guide for Participants



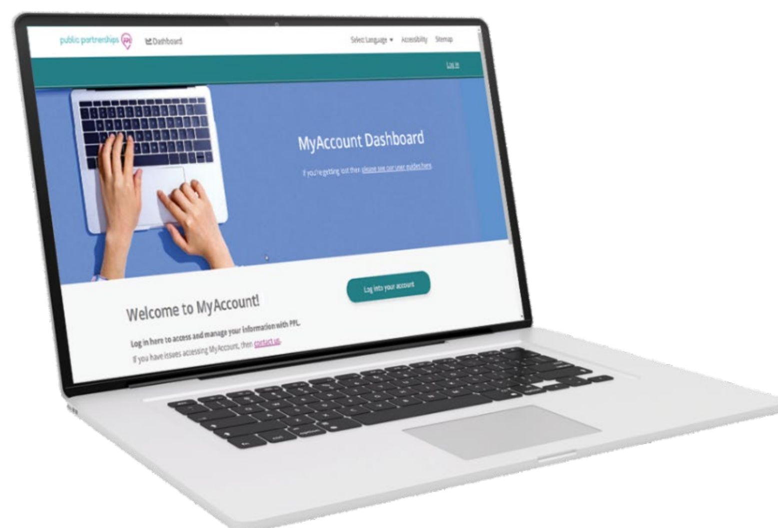
CONTENTS

WELCOME

The MyAccount platform from Public Partnerships (PPL) is where you'll manage your self-direction information. You will also use it to view information about your employees.

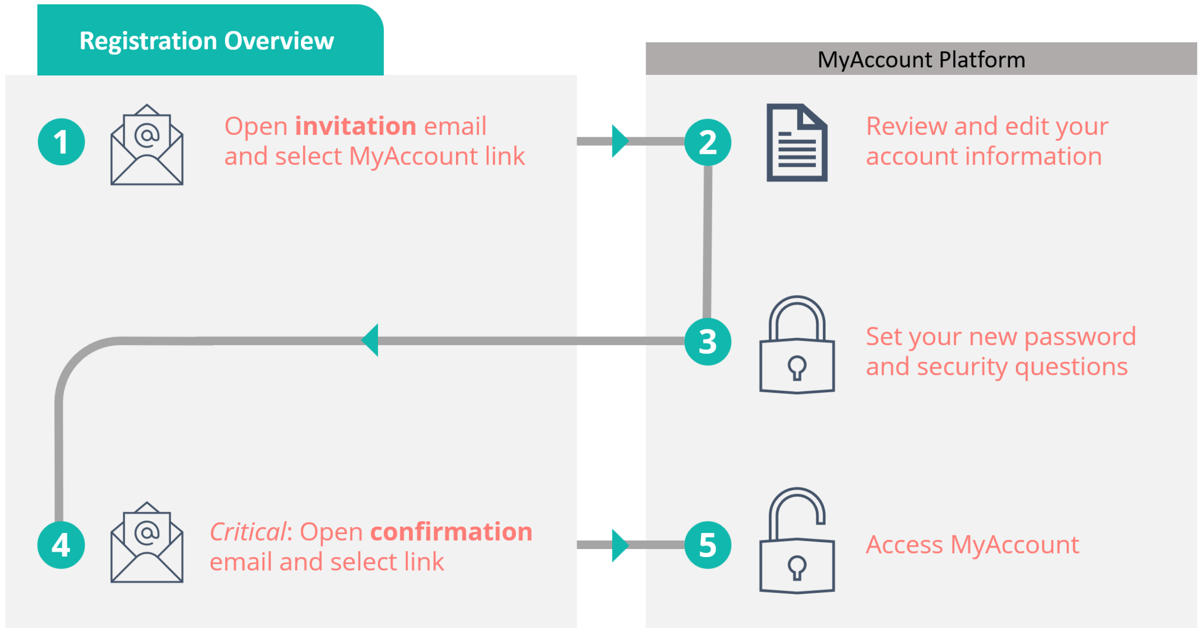
This guide provides:

- How to set up your MyAccount access
- How to enroll as an employer
- How to view and manage your budget



Set Up Your MyAccount Access

Here are the major actions to register in MyAccount:

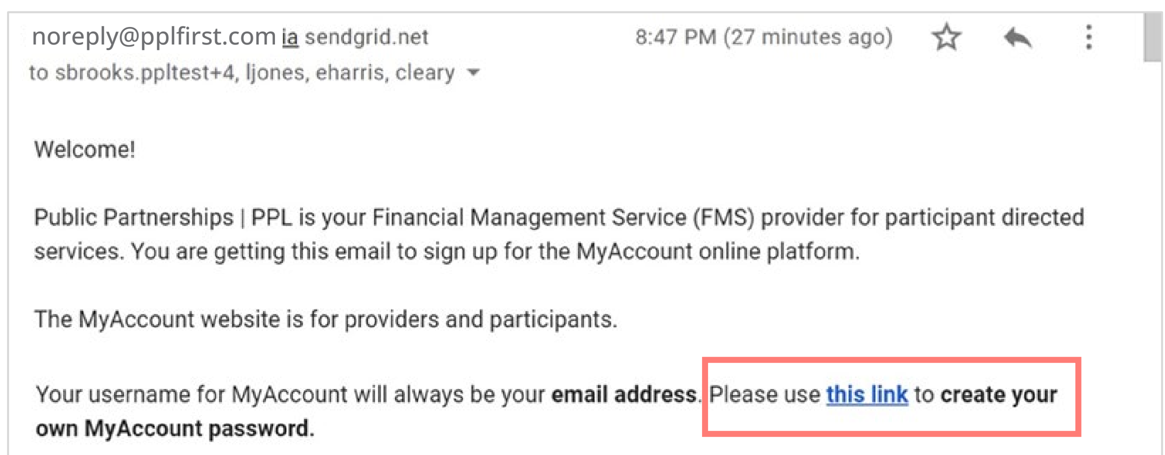


1. Look for an email asking you to register for MyAccount.

   Note: This email must be your own—do not share an email with your Provider.

2. In your email, open the MyAccount link.
3. In MyAccount, review and edit your details.
4. Under **MyAccount Login Details**, type a new password and set your security questions.

   NOTE: Your new password will also apply to the Time4Care™ app.



noreply@pplfirst.com ia sendgrid.net 8:47 PM (27 minutes ago)

to sbrooks.ppltest+4, ljones, eharris, cleary

Welcome!

Public Partnerships | PPL is your Financial Management Service (FMS) provider for participant directed services. You are getting this email to sign up for the MyAccount online platform.

The MyAccount website is for providers and participants.

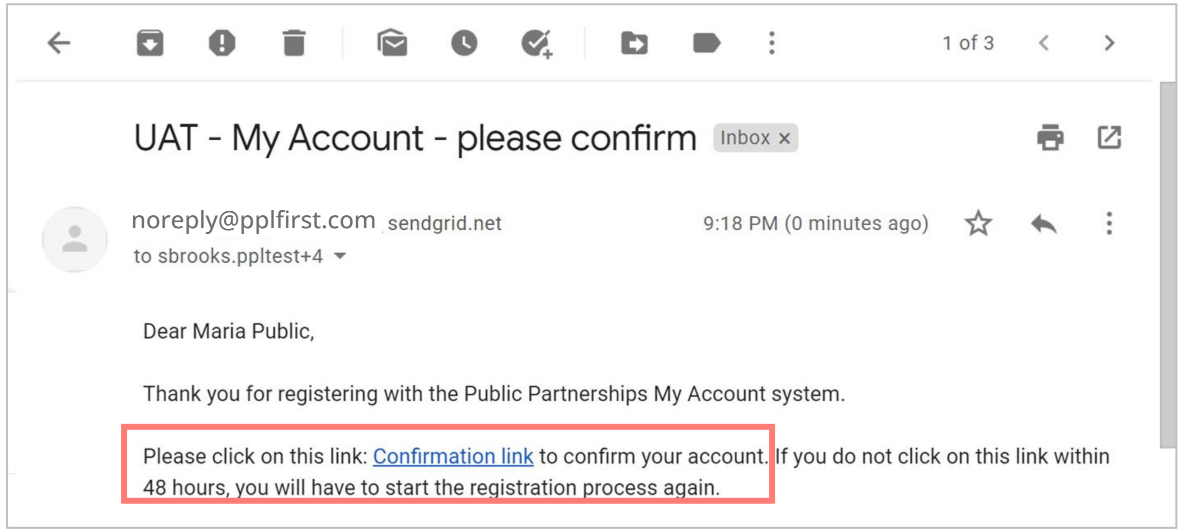
Your username for MyAccount will always be your **email address**. Please use this link to **create your own MyAccount password.**

5. Look for a “confirm” email and open the *Confirmation link*.

   NOTE: Must confirm within 48 hours.

6. Now you have MyAccount access. Continue with enrollment or other tasks.

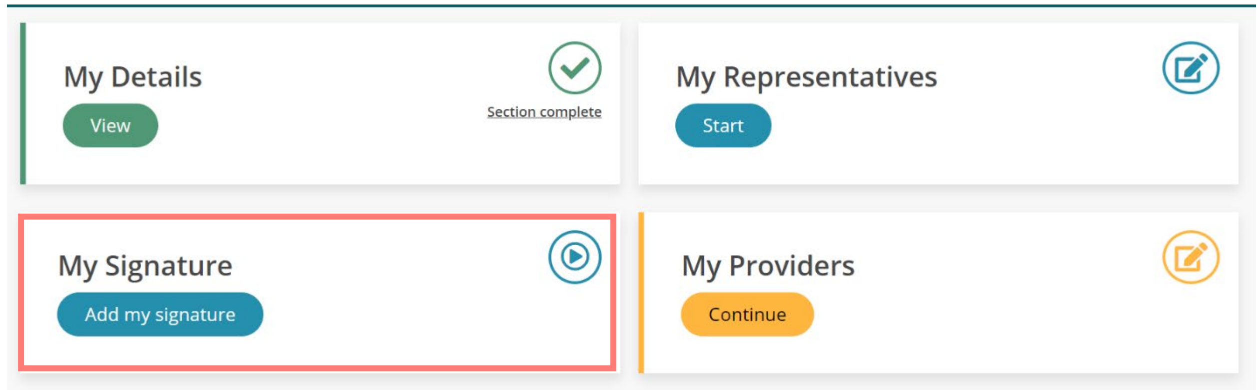
   NOTE: If you previously used BetterOnline, your enrollment is already completed.



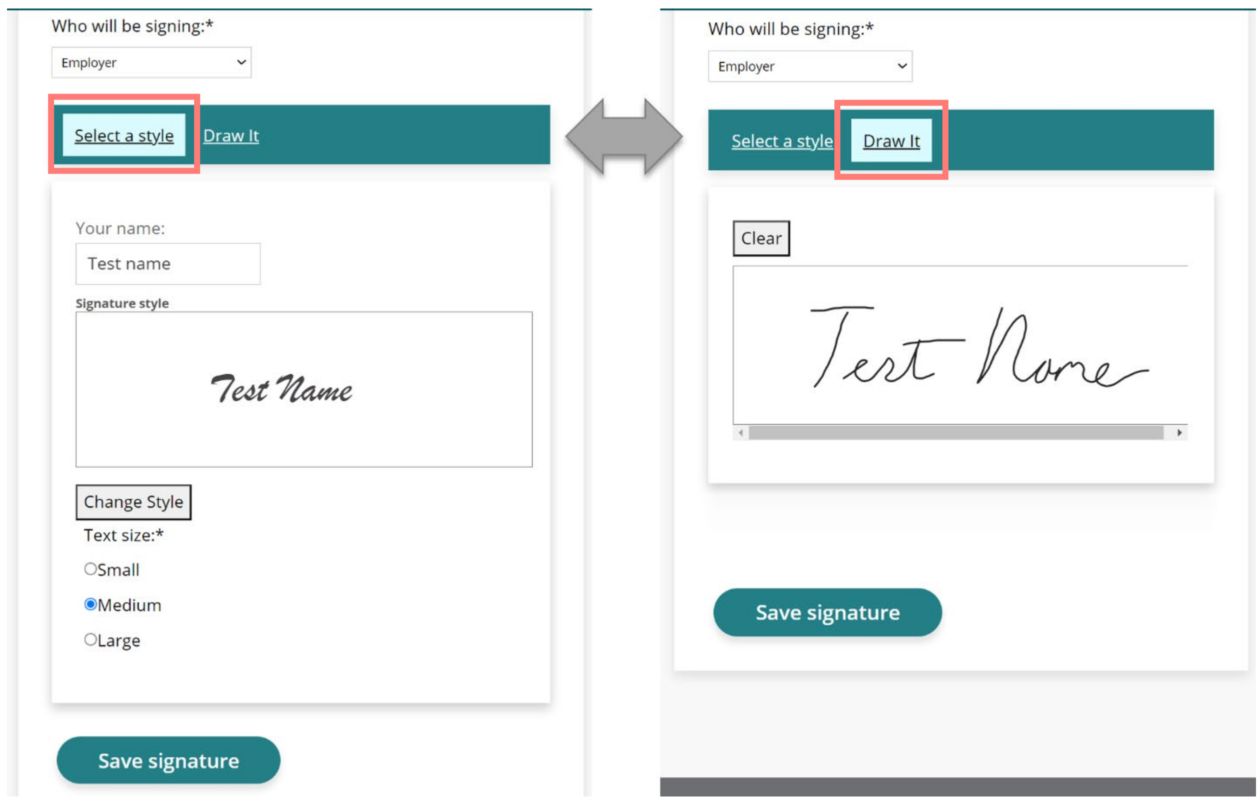
Set Up Your Signature

To complete enrollment, you will use an electronic signature. You can receive help, but no other person can create it for you.

1. On your MyAccount dashboard, select **My signature**.



2. Under *Who will be signing*, select **Employer**.
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**.

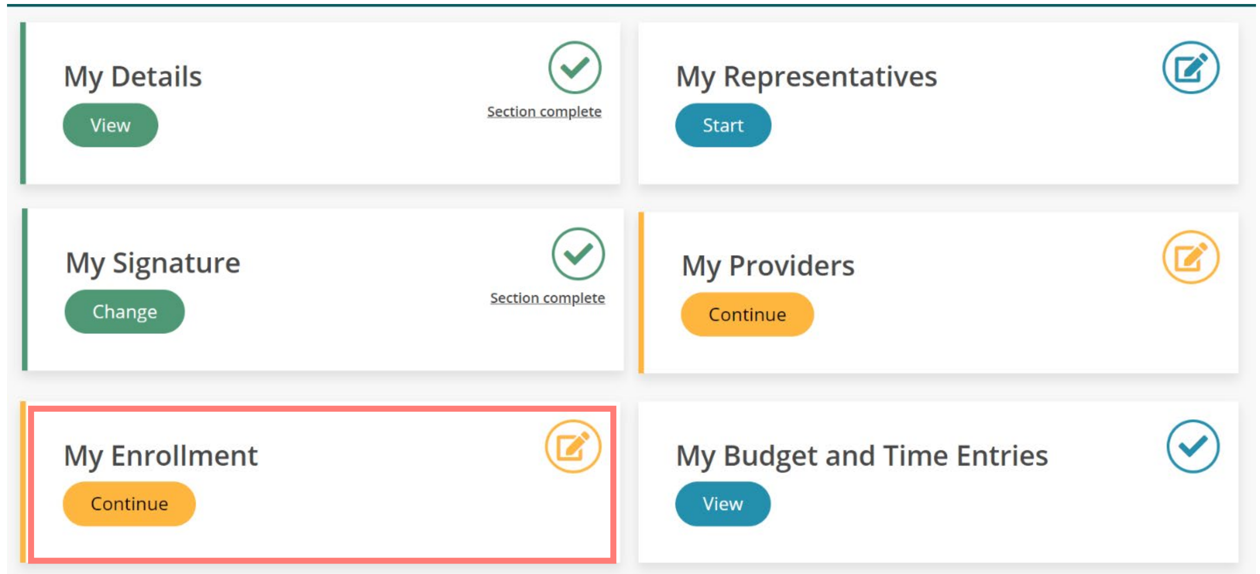


Complete Your Enrollment

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

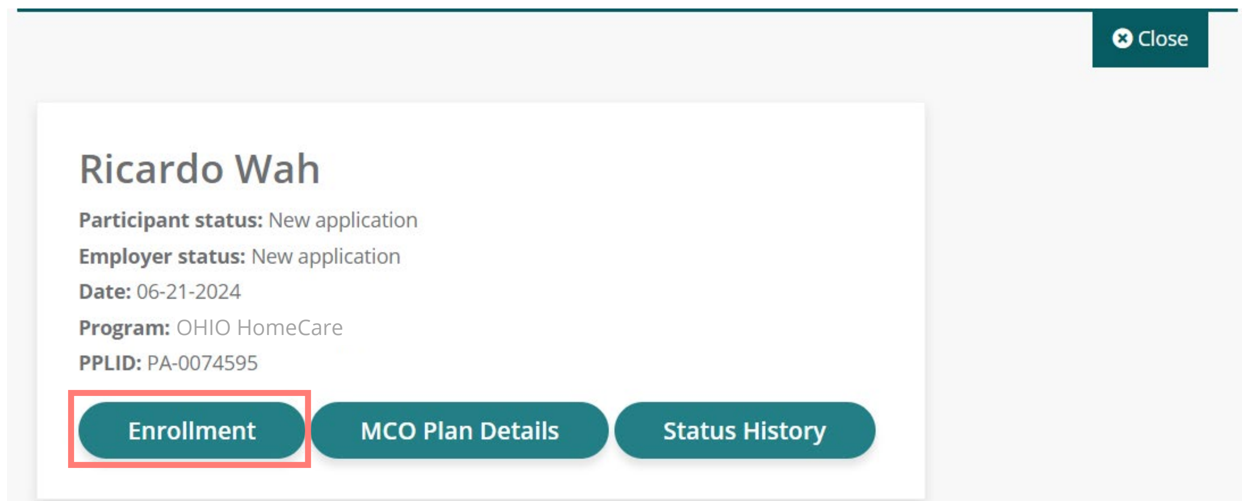
NOTE: If you previously used BetterOnline, your enrollment is already completed.

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



2. Under your summary details, select **Enrollment**.

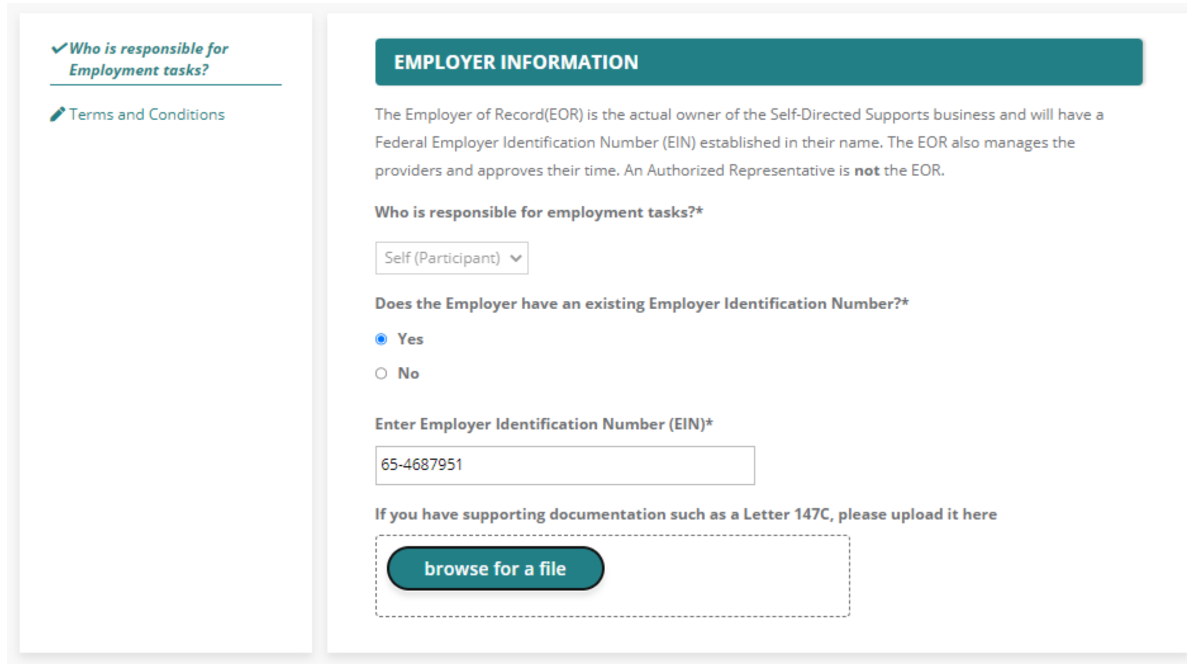
   The other options, like MCO Plan Details, are for reference only.



3. Under Employer Information, specify **Who is responsible for employment tasks**.

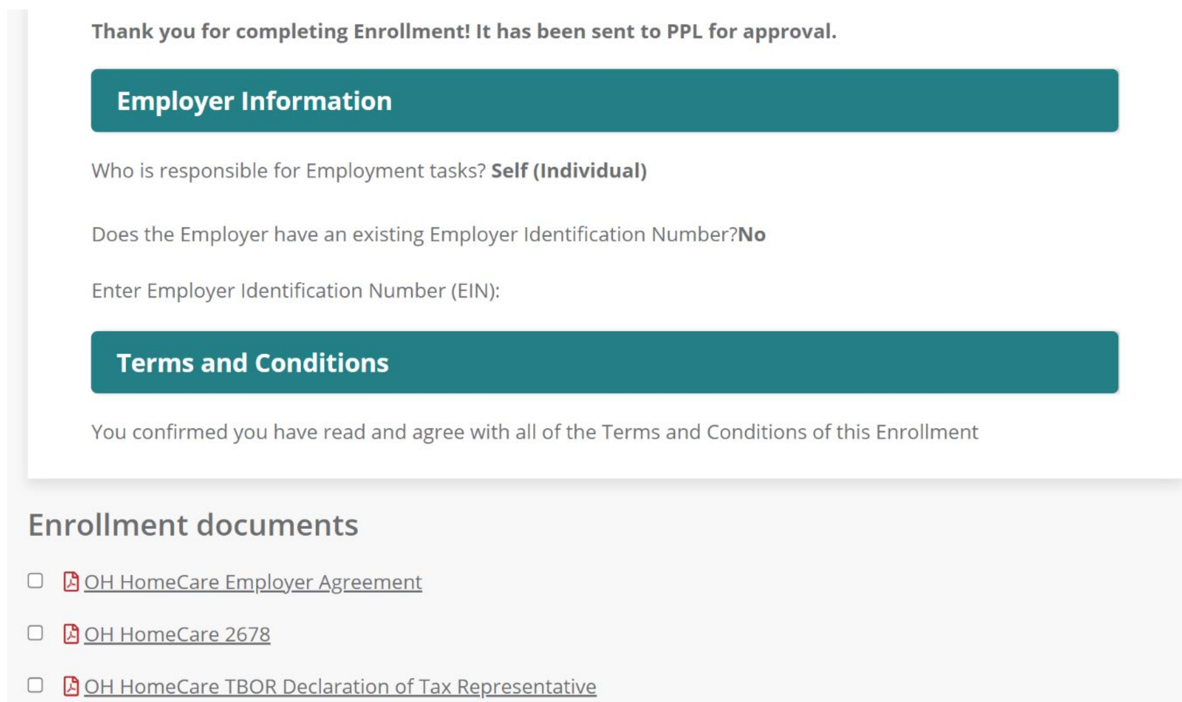
   If you can take responsibility for your employees, select **Self**. If needed, someone else can fill this role, which is called *Employer of Record (EOR)*.

   NOTE: The Employer of Record is different from a Designated Representative. The people filling these roles cannot be your Provider (employee).
4. Enter the **Employer Identification Number (EIN)**.
5. After you agree to the terms and conditions, select **Finish** at the bottom of the page.



6. In the next section, you can review PDF documents that MyAccount generates from your answers.

   NOTE: You do not need to print the forms. They will remain available at any time.
7. Select **Close**.
8. Wait for Public Partnerships to review and verify your enrollment forms.



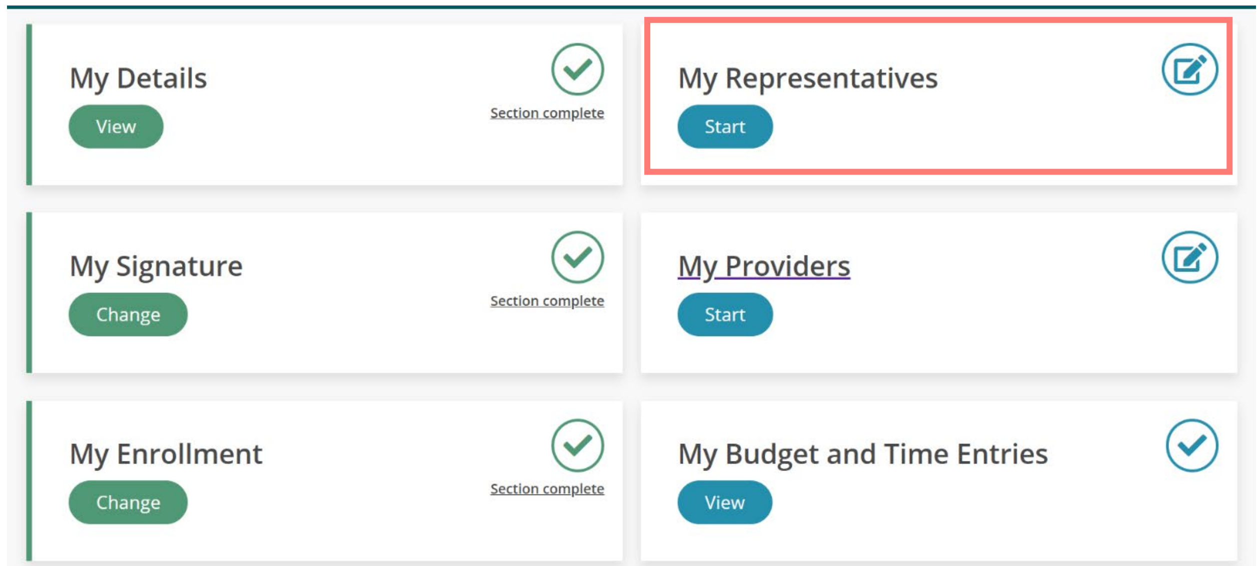
Assign a Representative

If needed, you may ask someone to assist you with your duties. This person is called Designated Representative (or Authorized Representative). Your representative can be any trusted person over the age of 18, including a family member or friend.

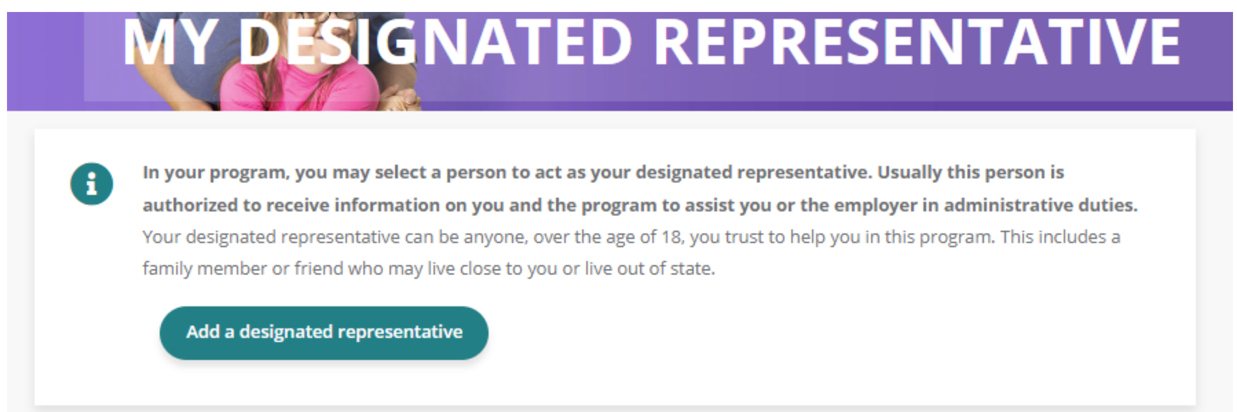
Important Information:

- Appointing a Designated Representative is not mandatory.
- The Designated Representative cannot be the Provider.

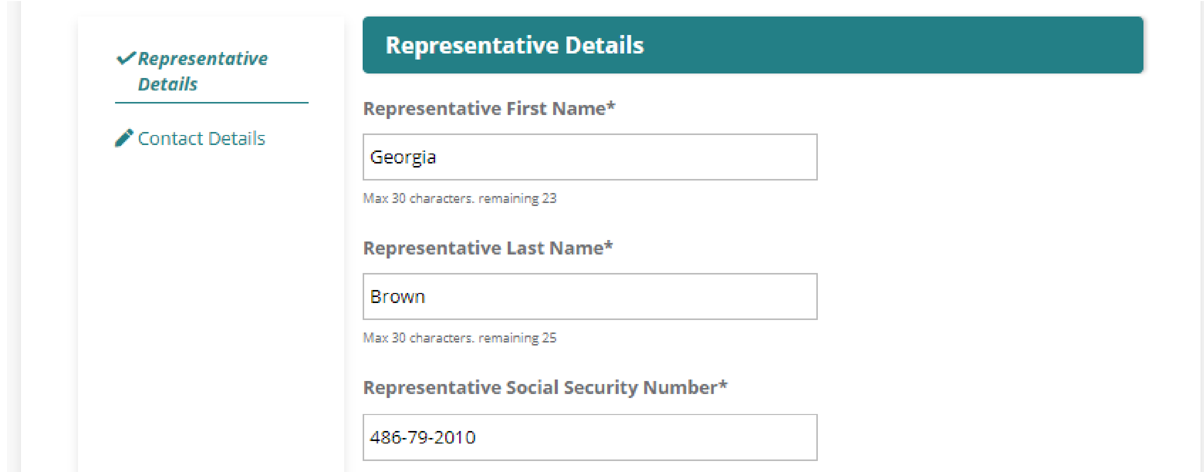
1. From the MyAccount Dashboard, select **My Representatives**.



2. Select **Add a designated representative**.
3. Select **Create my designated representative**.



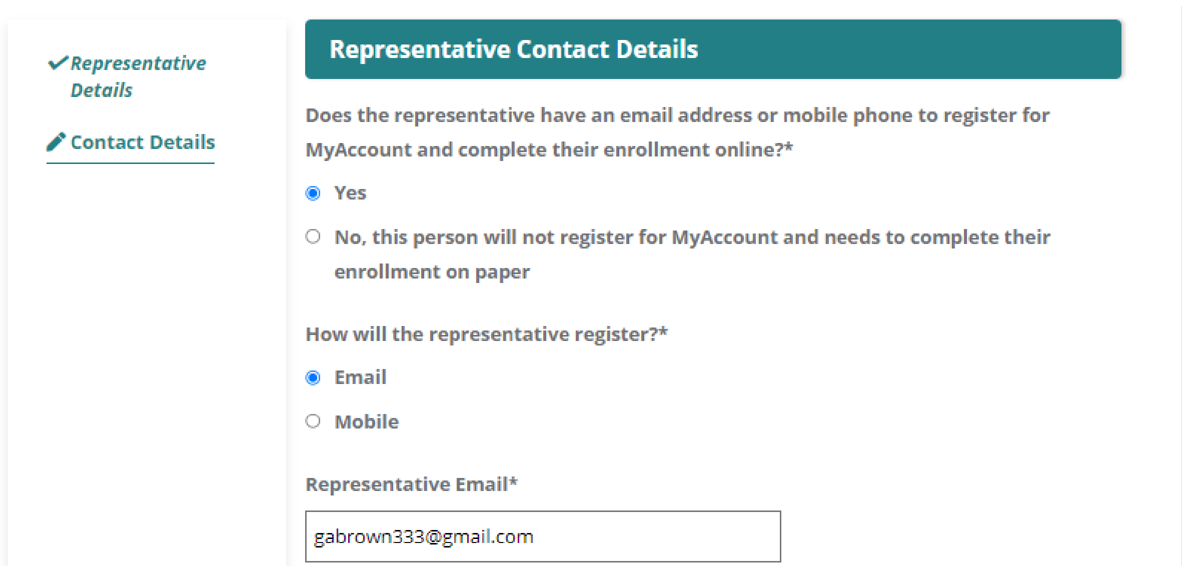
4. Enter the representative's details.



5. Under **Contact Details**, confirm if the representative can receive email.

   The representative will receive an invite to the email you enter.

6. Select **Finish** at the bottom of the page.
7. Tell the Designated Representative to open the email and find the link to MyAccount.



Disassociate a Designated Representative

If needed, you can select the Disassociate button to remove the Designated Representative from your account.

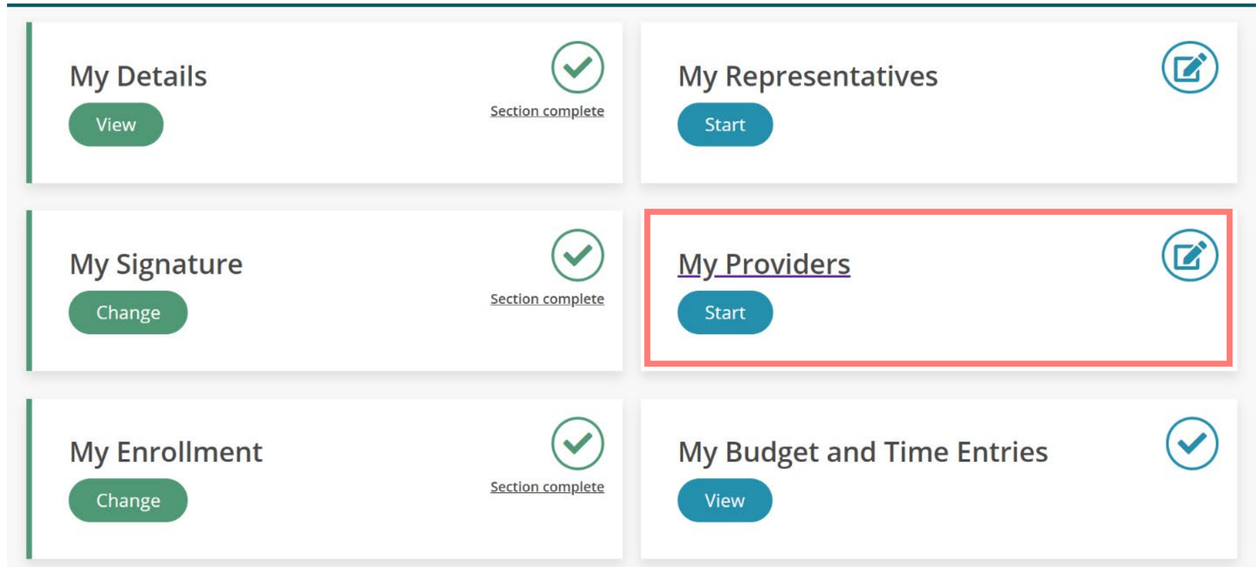
This action is instant. The representative will no longer have access.

But, the representative will still appear in your records with "Disassociated" status.

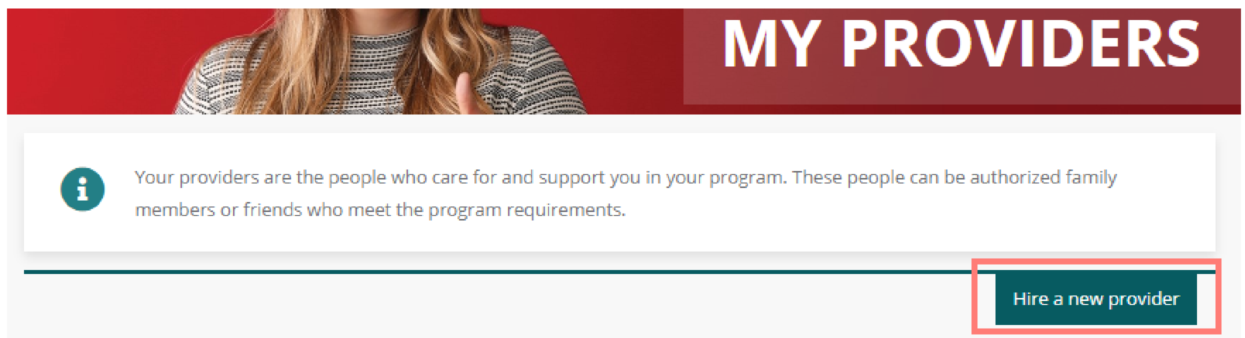
Hire a Care Provider

As a Participant, you can hire one or more care Providers. The Provider can be a family member, friend, or anyone who meets the program requirements.

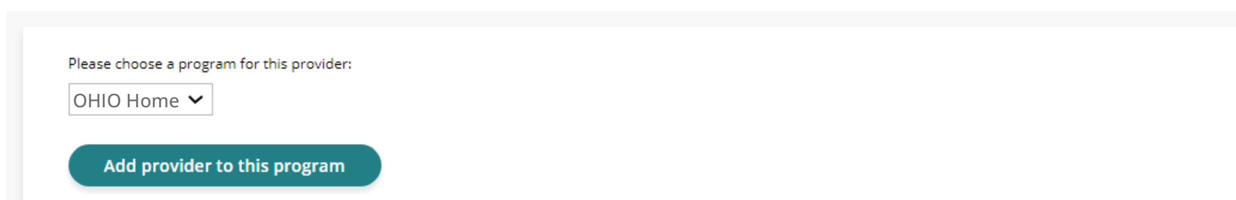
1. On the MyAccount Dashboard, select **My Providers**.



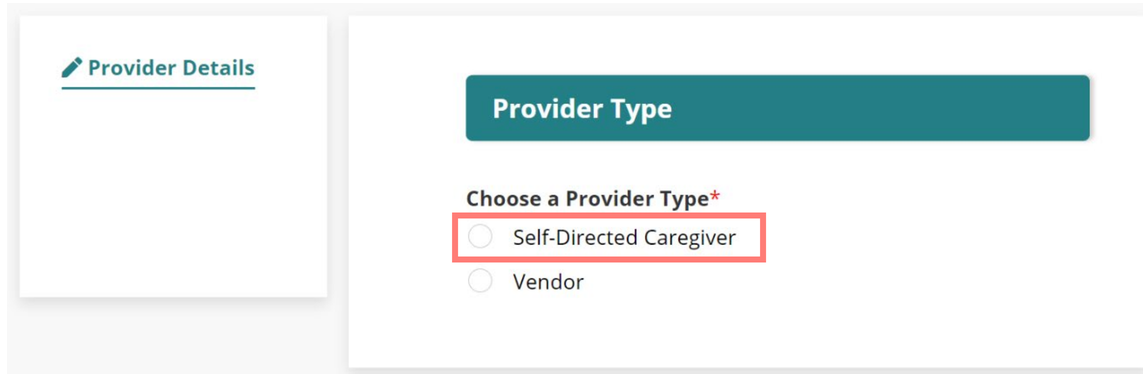
2. Select **Hire a New Provider**.



3. Select **Add provider to this program**.



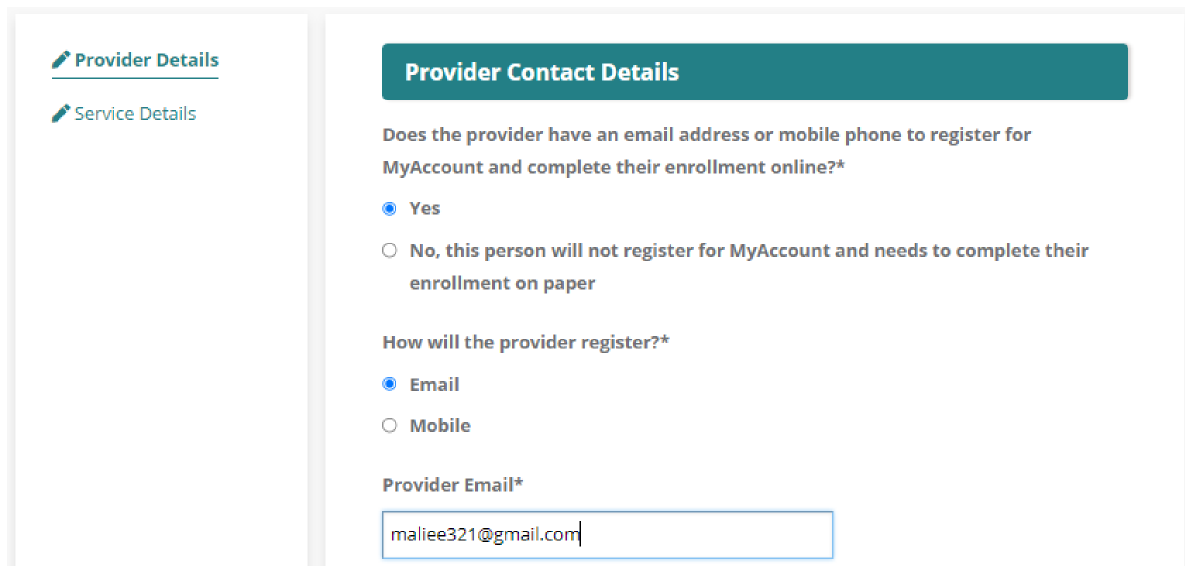
4. Under Provider Type, select **Self-Directed Caregiver.**



5. Complete the basic Provider information.

6. Choose whether the Provider has an email address for online enrollment.

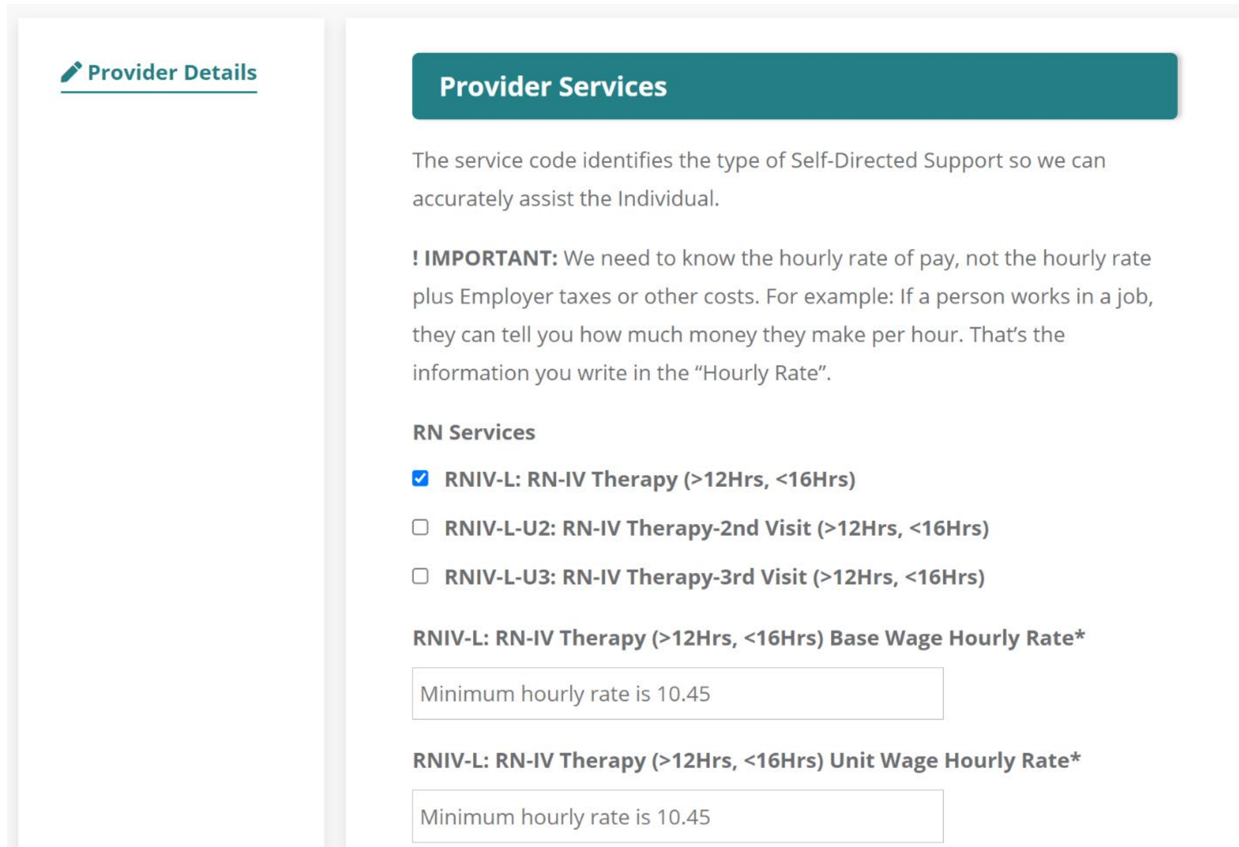
   NOTE: Using email (choosing **Yes**) provides the fastest enrollment. If you select **No**, tell your Provider to contact Public Partnerships for enrollment instructions.



7. Under **Provider Services**, specify your authorized services and pay rates.

   NOTE: Be sure the services and rates meet your authorized service plan. If your pay rate needs to be changed after enrollment, contact your PPL Customer Service.

8. Wait for the Provider to complete enrollment.



NEXT STEPS:

- View your provider's enrollment progress
- Approve your provider's enrollment

View Provider Enrollment Progress

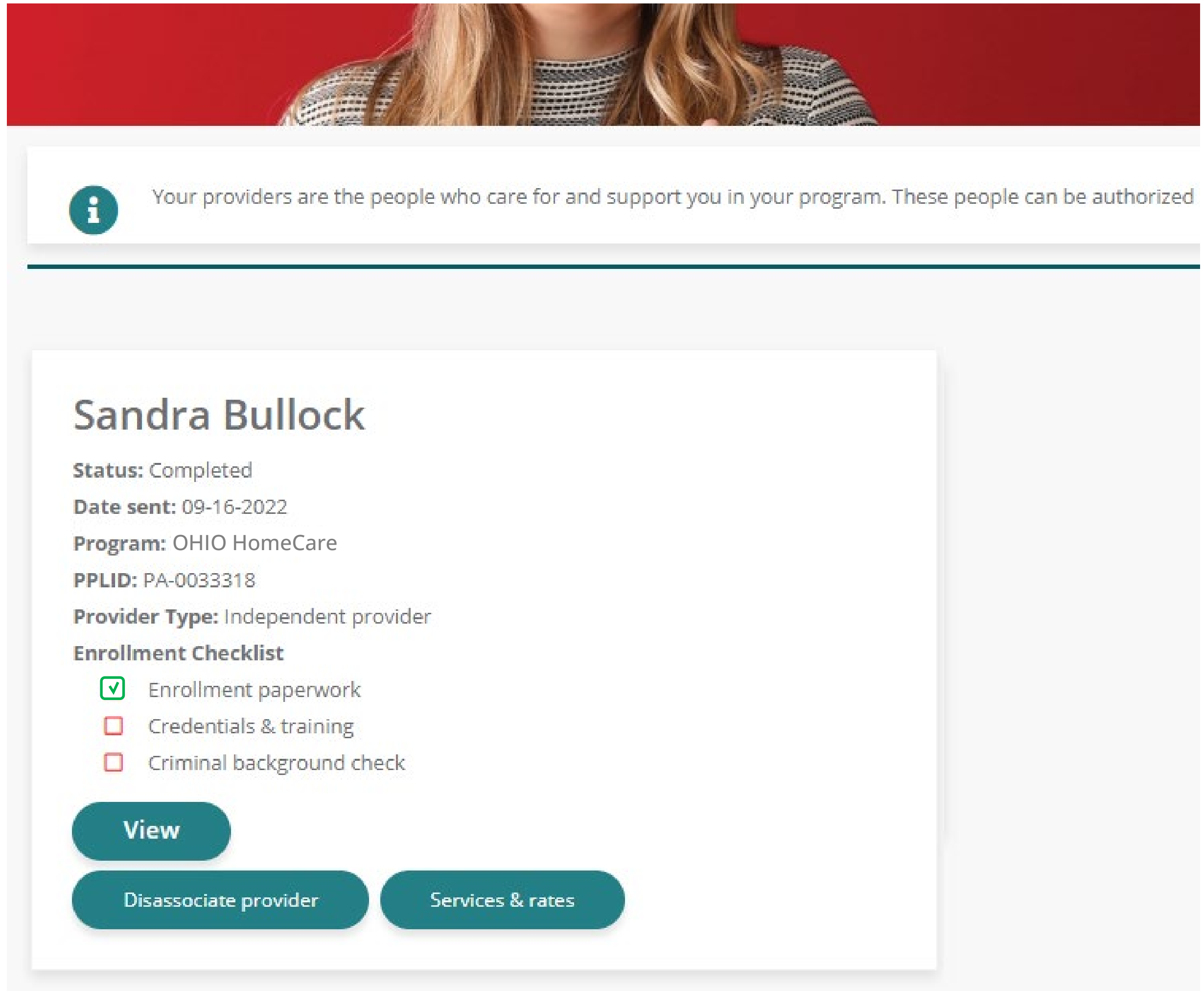
You can view the enrollment progress of your provider.

1. As before, select **My providers** from the MyAccount dashboard.
2. For a quick status, look at the enrollment checkboxes:

   Red—Still incomplete.

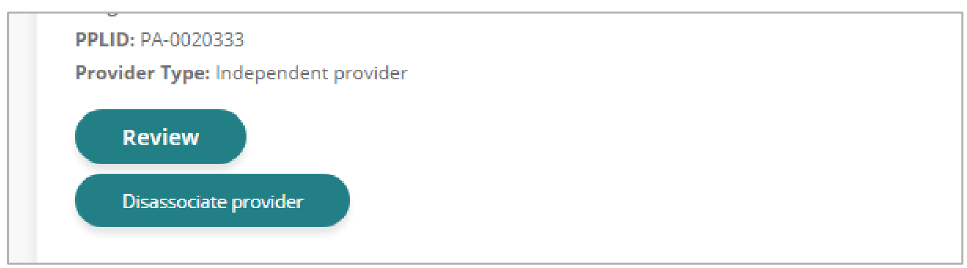
   Green—All steps completed.
3. For more details, select **View**.

   NOTE: If you notice inaccurate information, ask your provider to update it and resubmit their enrollment.



Approve Provider Enrollment

1. Once your Provider has submitted the enrollment documents, return to the My providers page and select **Review**.
2. After you verify the enrollment information, scroll to the bottom and select **Sign and submit**.



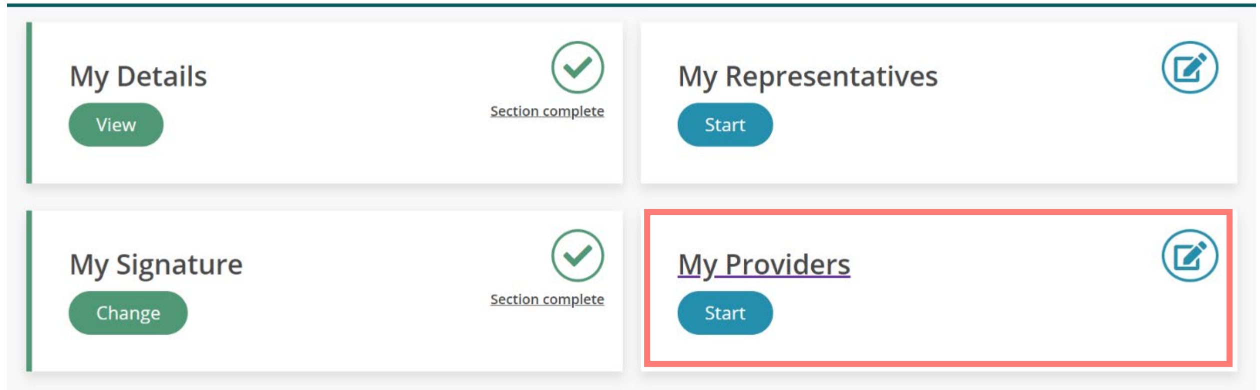
Hire a Vendor

If you receive services from a vendor, you will need to hire them through MyAccount.

Note: In MyAccount, a vendor is also known as a "Provider."

You are required to complete all information marked with an asterisk (*).

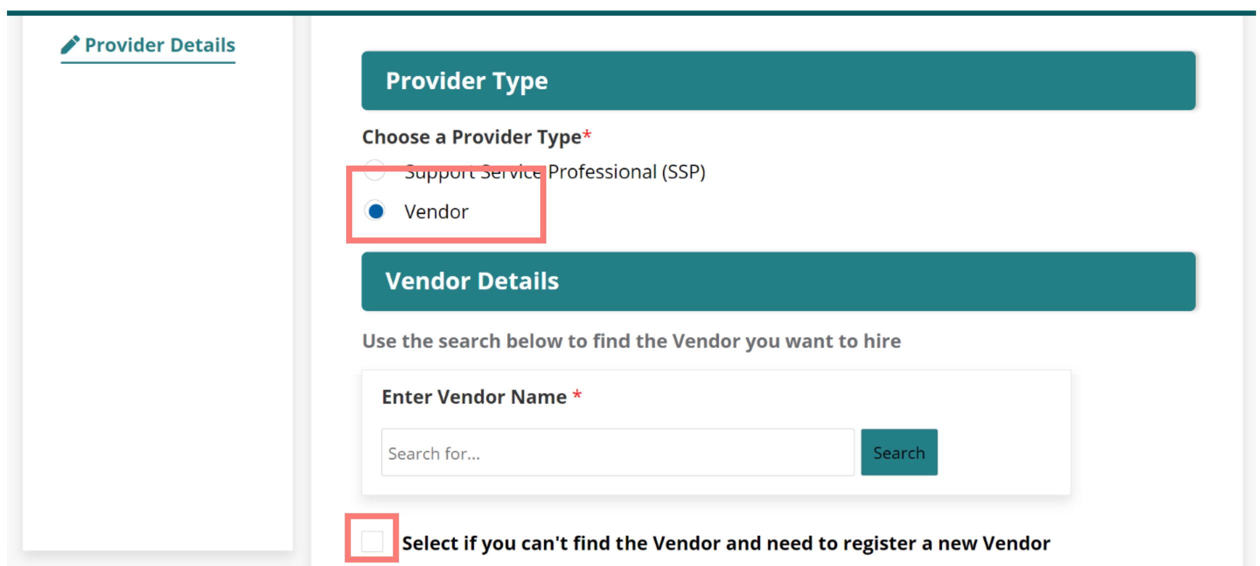
1. On the MyAccount Dashboard, select **My Providers**.



2. Select **Hire a New Provider**.
3. Select **Add provider to this program**.
4. Under Provider Type, select **Vendor**.
5. In the search box, enter the vendor's name because they may already exist in the system.

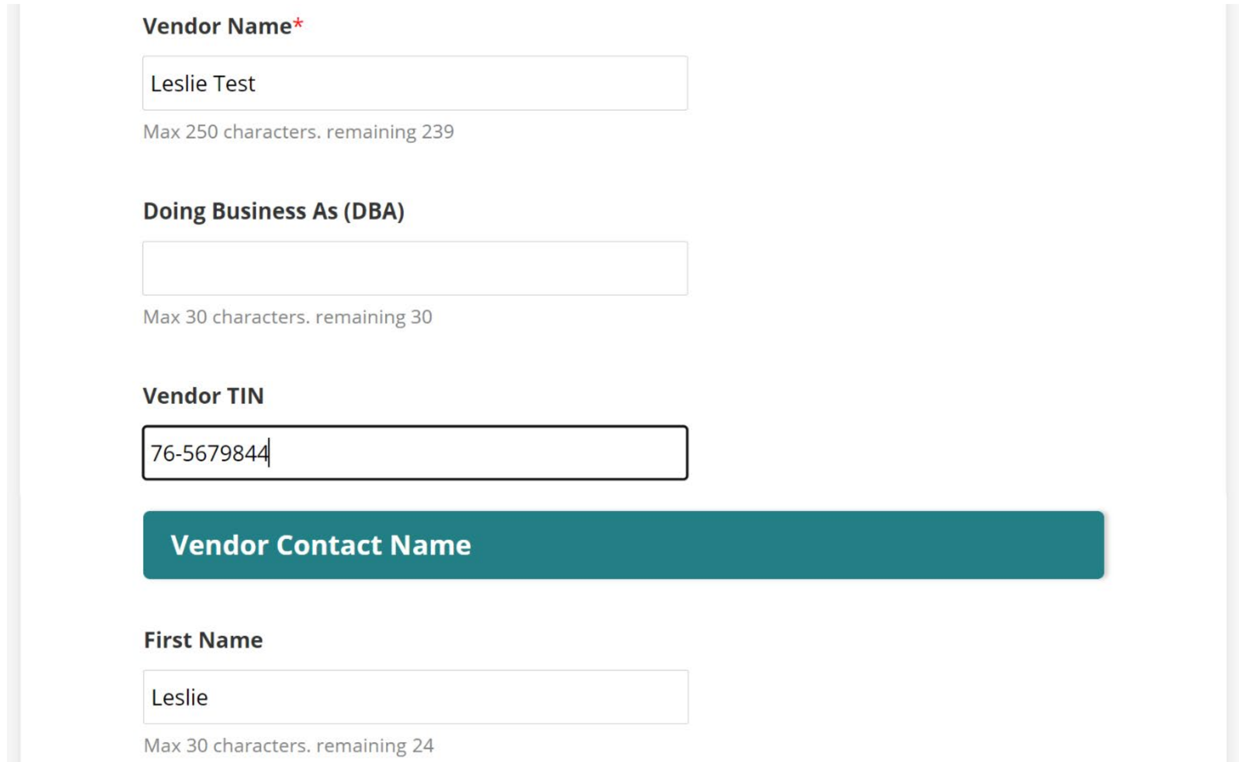
   If found, select **Next** and **Confirm**. Wait for the vendor to complete enrollment.

   If not found, select the option to register a new vendor.



6. If adding this vendor, complete the basic information.

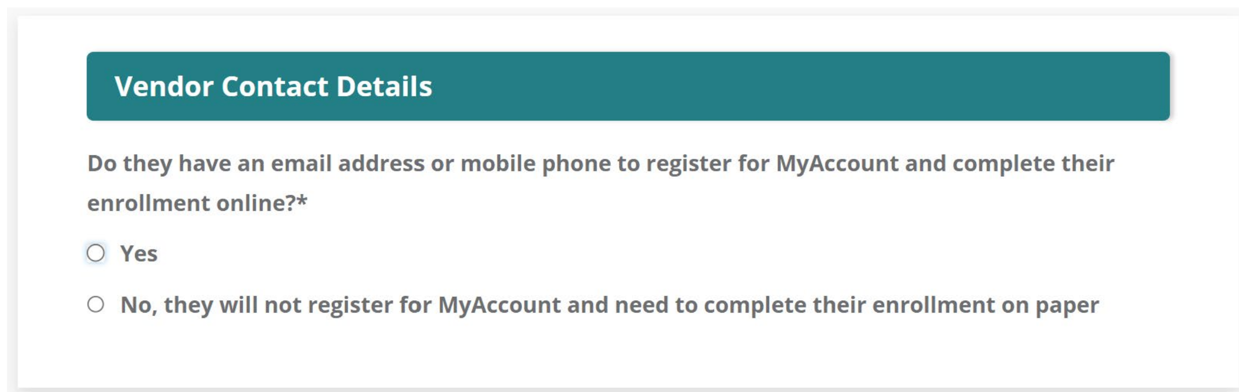
   Note: The **Vendor TIN** (Tax Identifaction Number) is required. Your vendor will need to provide it to you.



7. At the bottom, select **Next**.
8. Choose whether the vendor can complete enrollment online.

   Choosing **Yes** and providing an **Email** is the fastest enrollment method.

   If you choose **No**, or do not provide an Email, then tell your vendor to contact Public Partnerships for enrollment instructions.
9. Complete the contact information.
10. At the bottom, select **Next**.
11. At the bottom, select **Finish**.
12. Review the summary and select **Confirm**.
13. Wait for the vendor to complete enrollment.



Disassociate a Provider

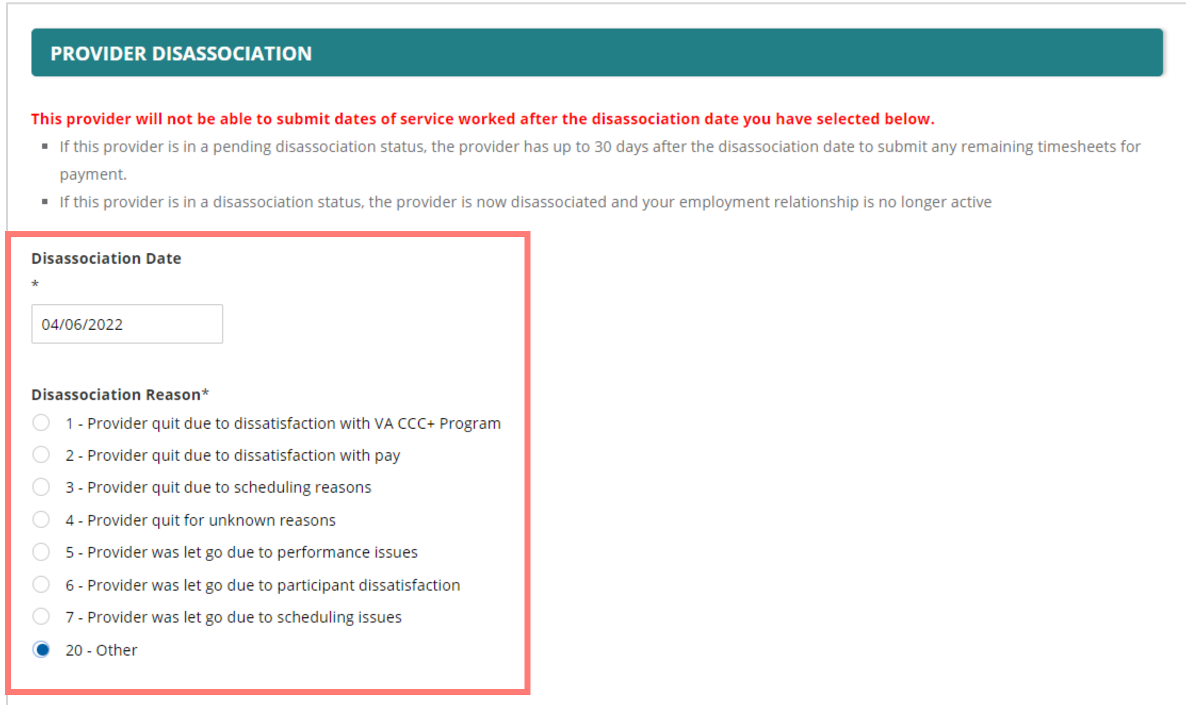
If you need to end employment for a care Provider, use the disassociate feature in MyAccount.

After disassociation, the Provider remains in MyAccount in case you need to restore or rehire that person.

1. On the MyAccount dashboard, select **My Providers**.
2. Under the Provider's name, select **Disassociate provider**.
3. Enter a **Disassociation Date** when the Provider will no longer provide care.

   After this date, the Provider can no longer submit time entries.
4. Choose a **Disassociation Reason** and select **Finish**.
5. Select **Confirm**.

   NOTE: The dismissed Provider will continue to appear under your information, as required by the program.

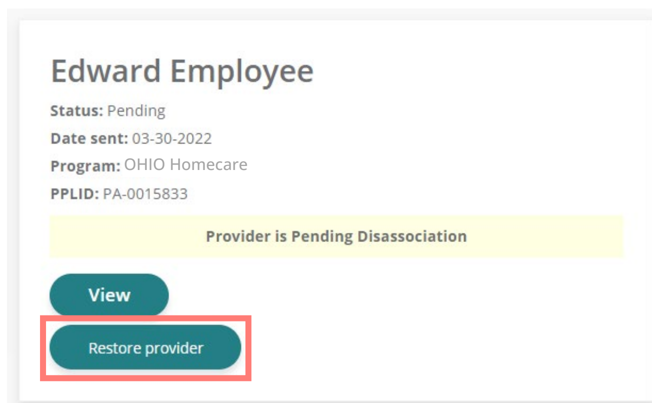


Restore a Provider

If the Provider was disassociated recently (less than 6 months), you can Restore their employment.

The Provider will not need to do anything.

1. On the MyAccount dashboard, select **My Providers**.
2. Under the Provider's name, select **Restore provider**.
3. Select **Review** to check that the Provider information is still valid.
4. Select **Sign and Submit**.

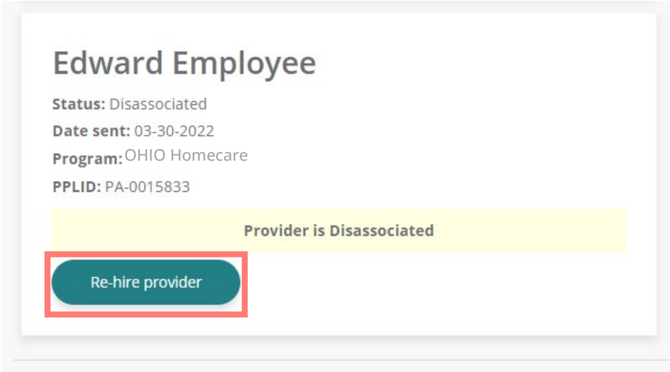


Re-hire a Provider

For a Provider disassociated longer than 6 months ago, you can use the re-hire feature.

The Provider will need to complete the enrolment information again.

1. On the MyAccount dashboard, select **My Providers**.
2. Under the Provider's name, select **Re-hire provider**.
3. The Provider can now open MyAccount and complete the enrollment questions.

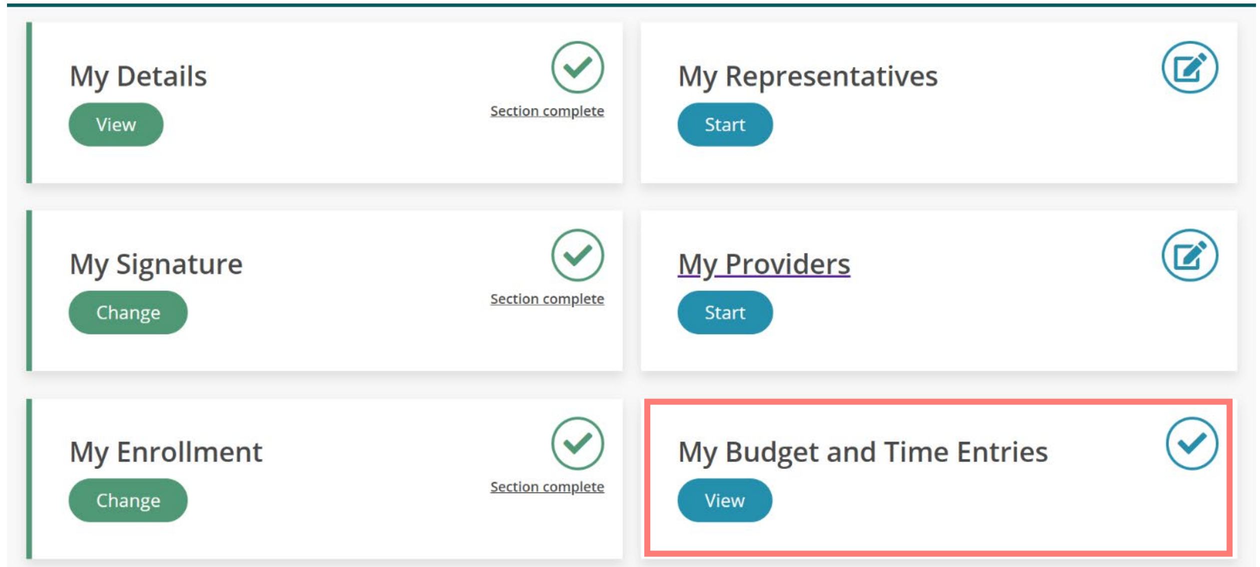


Manage Budget and Time Entries

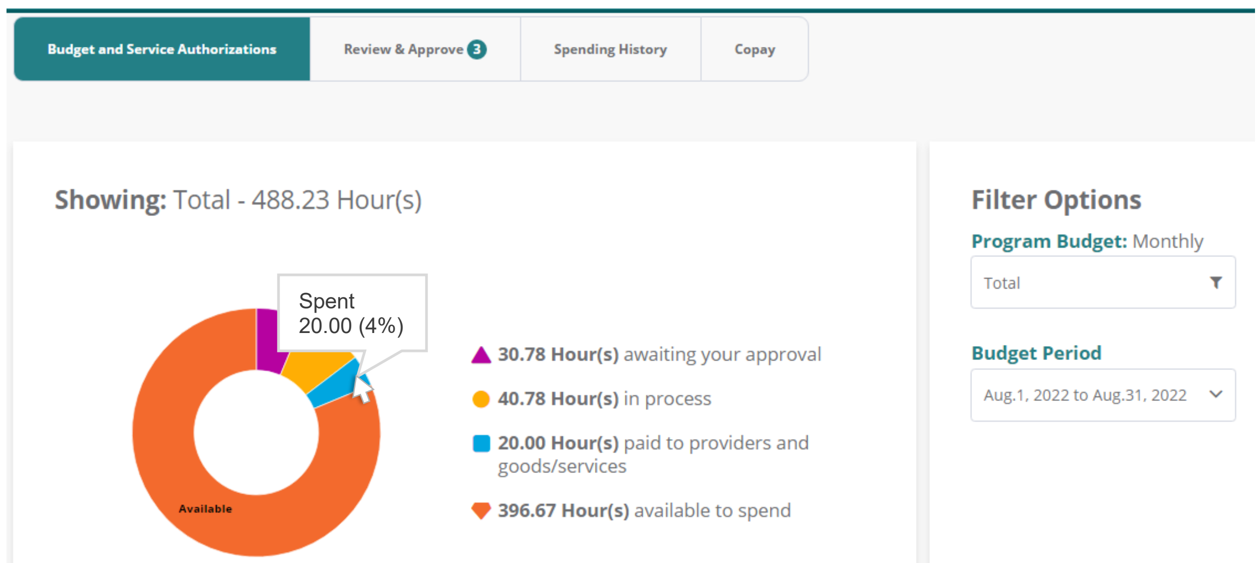
IMPORTANT: For approving timesheets, you should *not* use MyAccount. Instead, use your Electronic Visit Verification (EVV) system to satisfy EVV requirements.

Use MyAccount to view interactive charts that help you manage your authorizations, or “budget.”

1. Under the MyAccount dashboard, select **My Budget and Time Entries**.

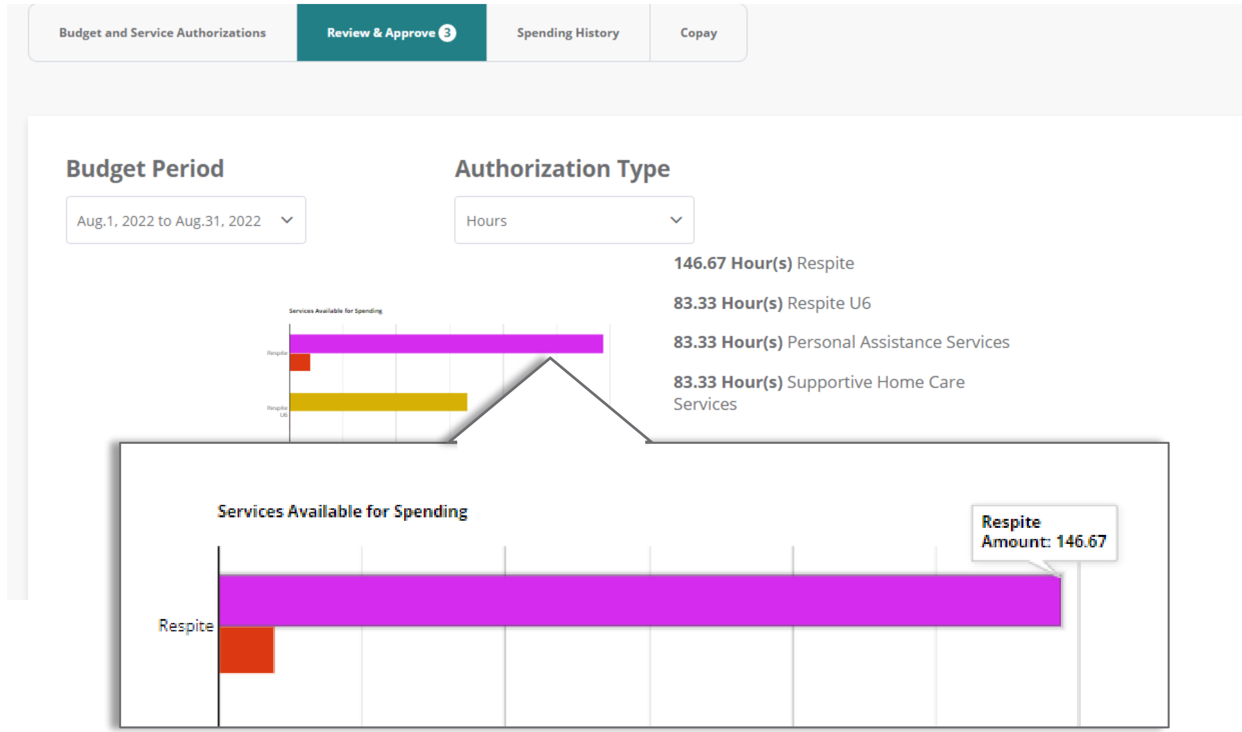


2. Under the **Budget and Service Authorizations** tab, view a summary of spending compared to your budget.
   a. To see spending for a specific service or budget period, use the **Filter Options**.
   b. To see amounts and percentages, hover your mouse over the graphic.

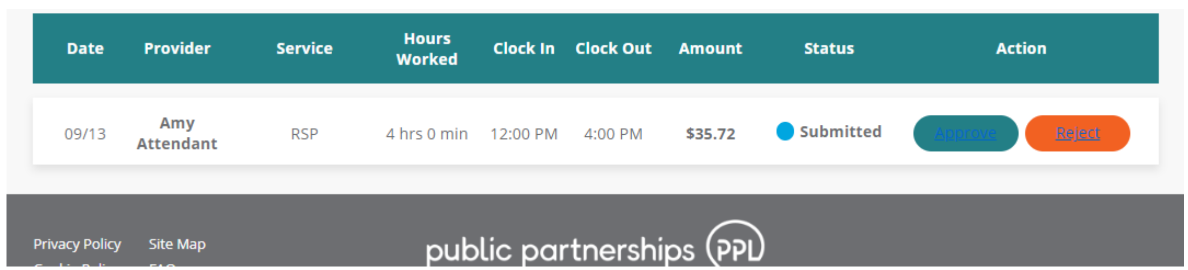


3. Under the **Review & Approve** tab, you can see how many hours you have remaining for each service type.

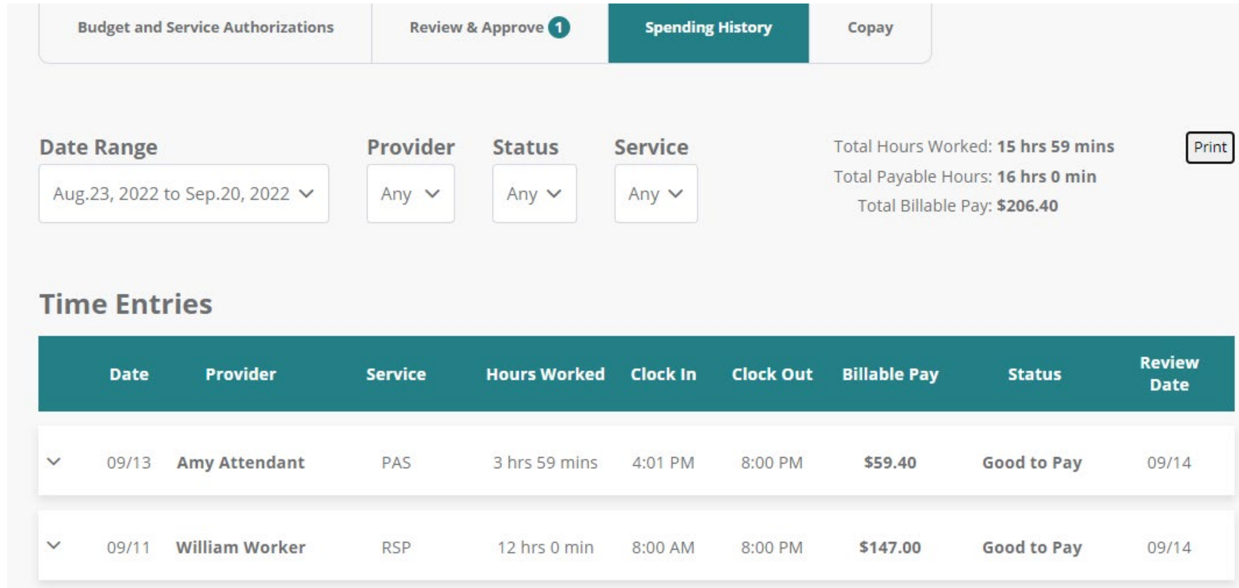
   NOTE: If you see an orange bar below the service bar, it shows you how much time has been submitted for approval.



Note: At the bottom of the page, you have the option to approve a time entry. However, you should use your EVV system instead.



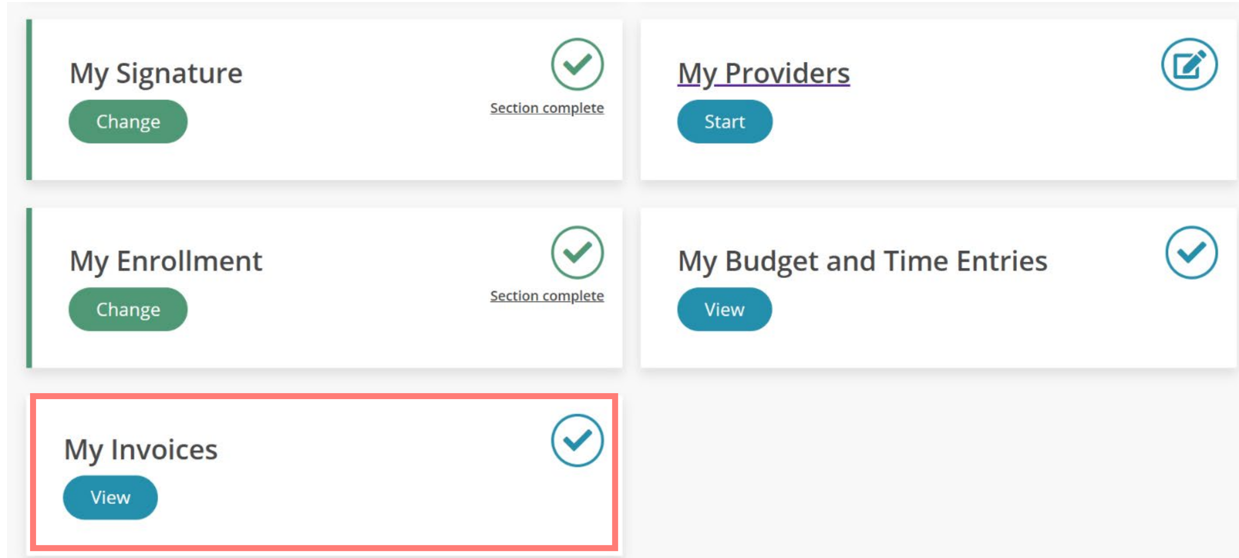
4. Under the **Spending History** tab, you can view all the time entries from your employee.
    a. Use the filters to limit what appears.
    b. Use the **Print** button to export the information to a spreadsheet.



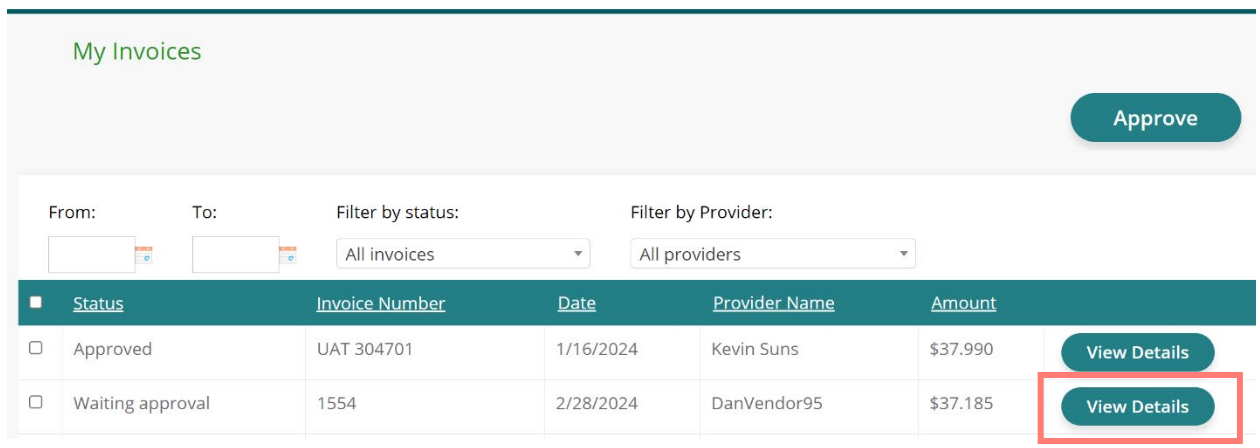
Approve Expense Invoices

Follow these steps to approve payments for expenses like a home upgrade.

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



2. Under the list of invoices, find the one needing approval and select **View Details**.



3. Check the details for correct dates, amounts, and service code.

4. If needed, select **Reject** next to a line item (you must also select a Rejection reason).

   This individual item will be returned to the vendor or provider, along with the reason for rejection.

5. For the entire invoice, select either **Approve** or **Reject** at the bottom.

   Caution: Choosing Reject sends the entire invoice back.