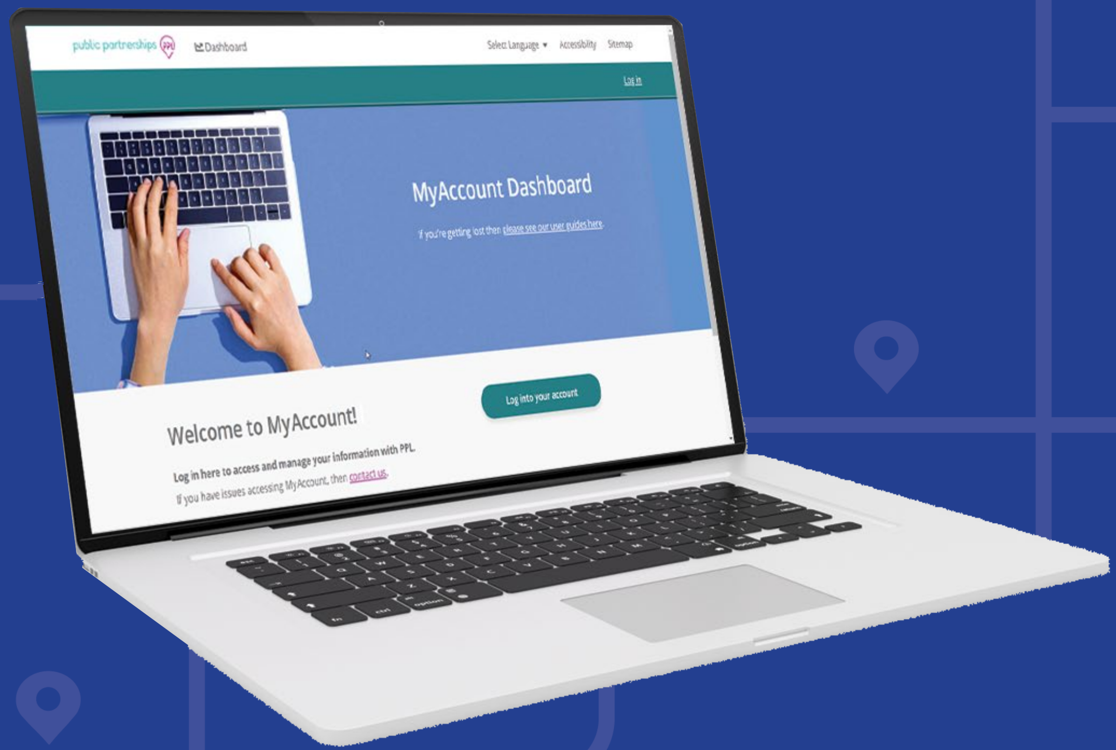
MYACCOUNT

Guide for Vendors



CONTENTS

Set Up Your MyAccount Access 4
Set Up Your Signature 5
Complete Your Enrollment 6
Edit Your Payment Details............................. 8
Submit an Invoice for Payment 9

WELCOME

The MyAccount platform from Public Partnerships (PPL) is where you can register to receive payments for the self-direction services you provide.

This guide shows:

- How to set up your MyAccount access and enrollment
- How to specify your payment preferences
- How to submit an invoice

Here are the key setup tasks:

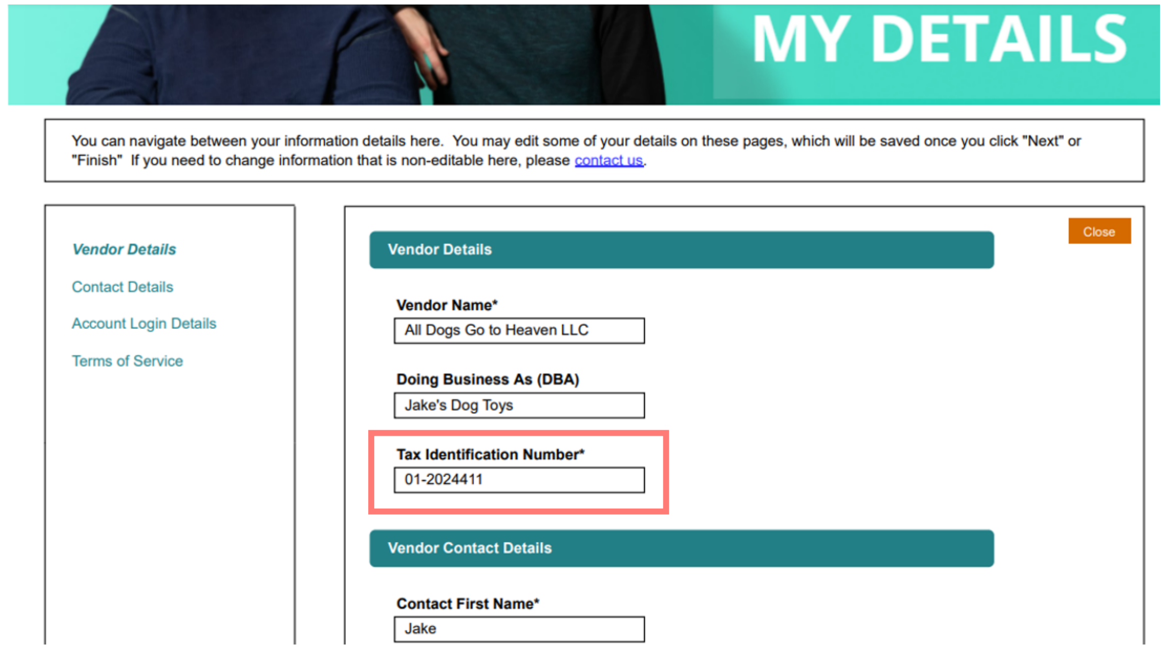
- ☑ Get a confirmation email with a link to MyAccount
- ☑ Add your electronic signature
- ☑ Upload your W9 and enrollment details
- ☑ Receive approval from PPL

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.
2. In MyAccount, input your identification details, including **Tax ID Number**.

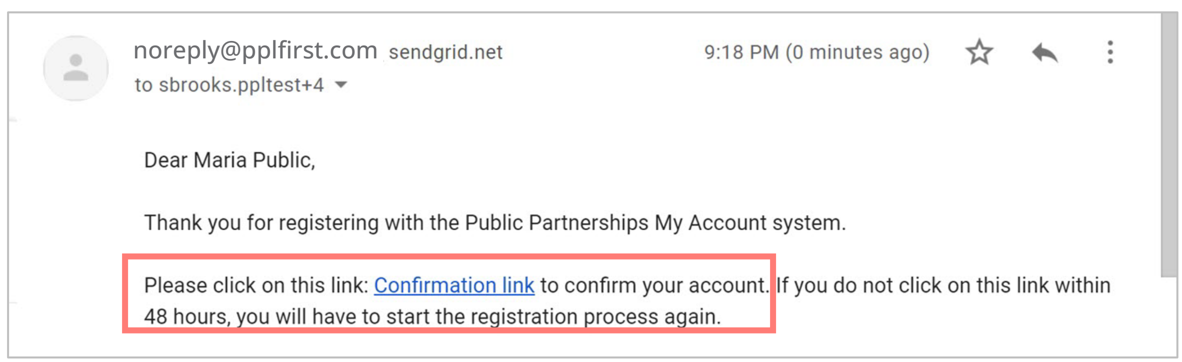
   Note: Your tax ID can be a Social Security Number.



3. Under **Contact Details**, specify how to contact you.

   In the address box, use **Search** to show official addresses that match.
4. Under **Account Login Details**, type a new password and set your security questions.
5. Enable the checkbox acknowledging PPL's Terms of Service and select **Finish**.
6. Return to your email and look for a confirmation message from PPL.
7. Look for a "confirm" email and open the *Confirmation link*.

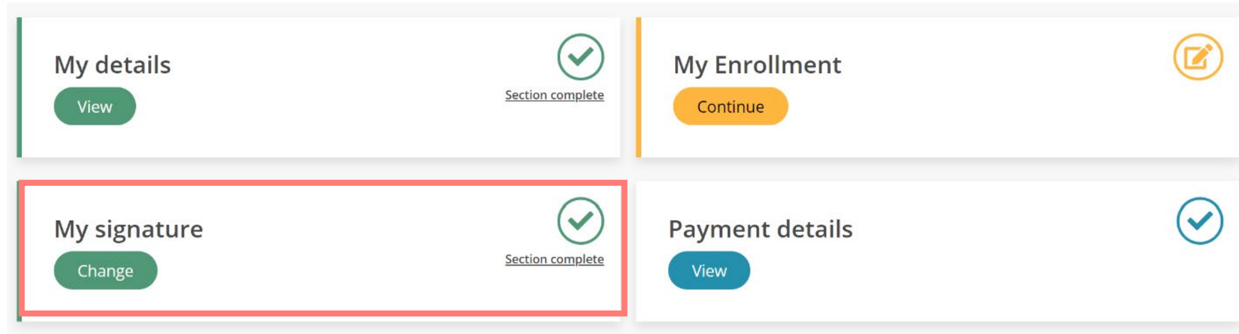
   NOTE: Must confirm within 48 hours.



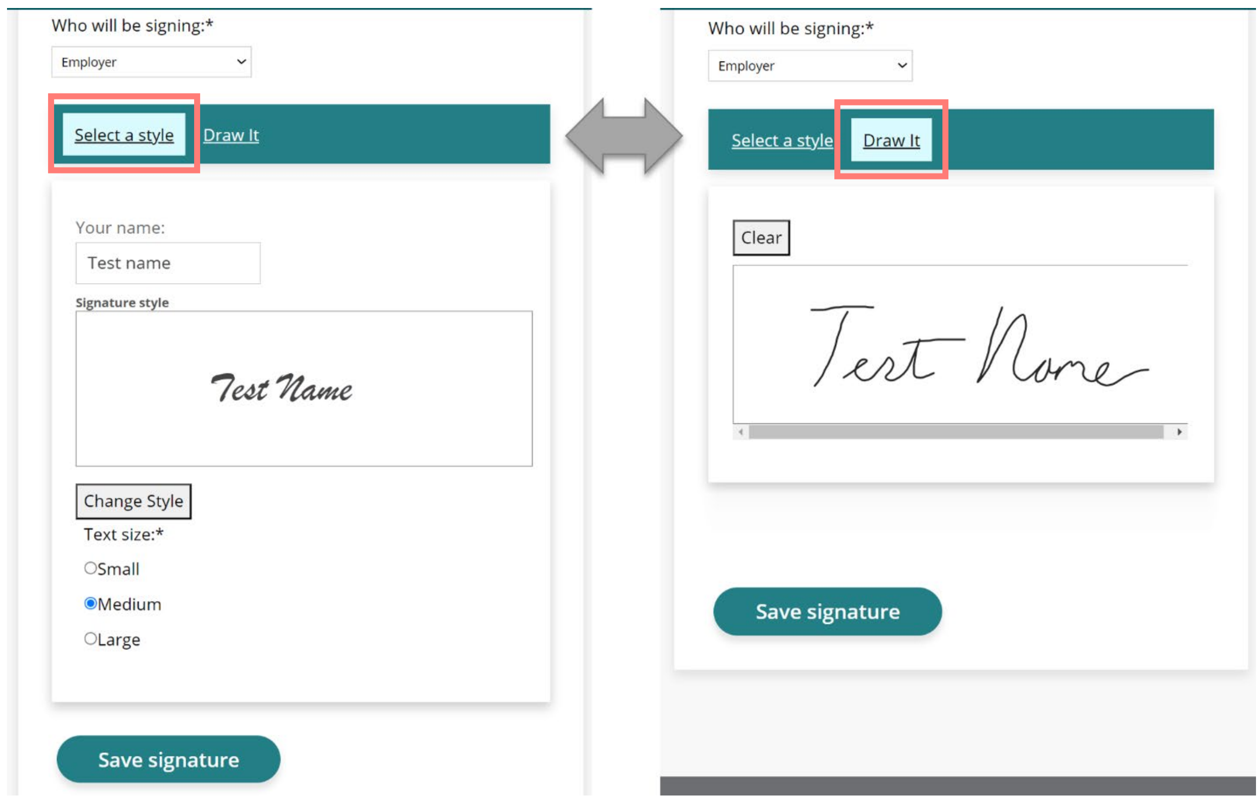
Set Up Your Signature

To complete enrollment, you will use an electronic signature.

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



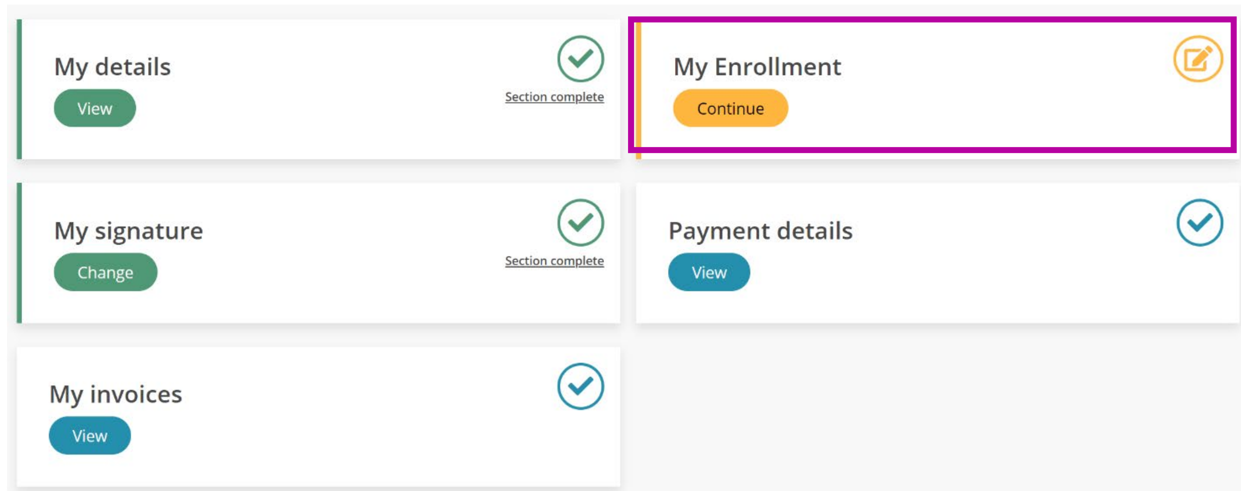
2. Under **Who will be signing**, select which role you are serving.
3. Choose between these options:
   - **Select a Style** – Useful if you can only type your name. You can select different styles and sizes to your liking.
   - **Draw It** – Useful if you have a touch screen device.
4. Select **Save signature**.



Complete Your Enrollment

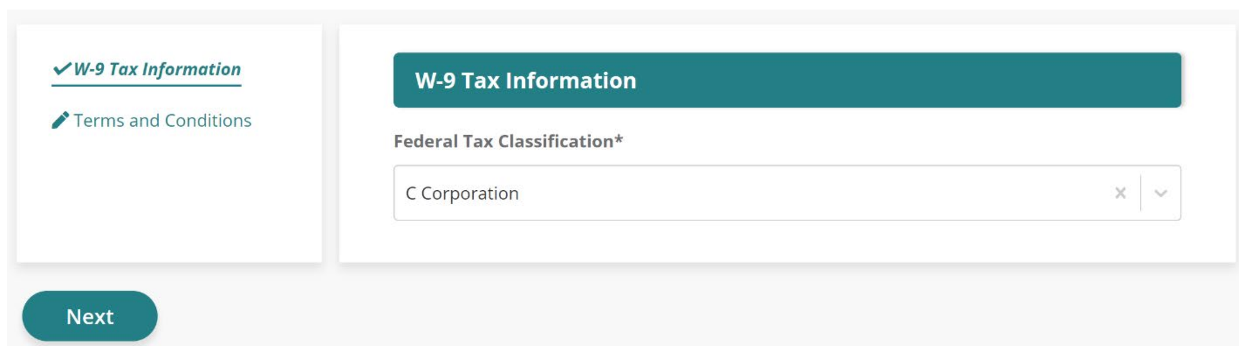
When you are just starting with Public Partnerships (PPL), you need to complete your enrollment.

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

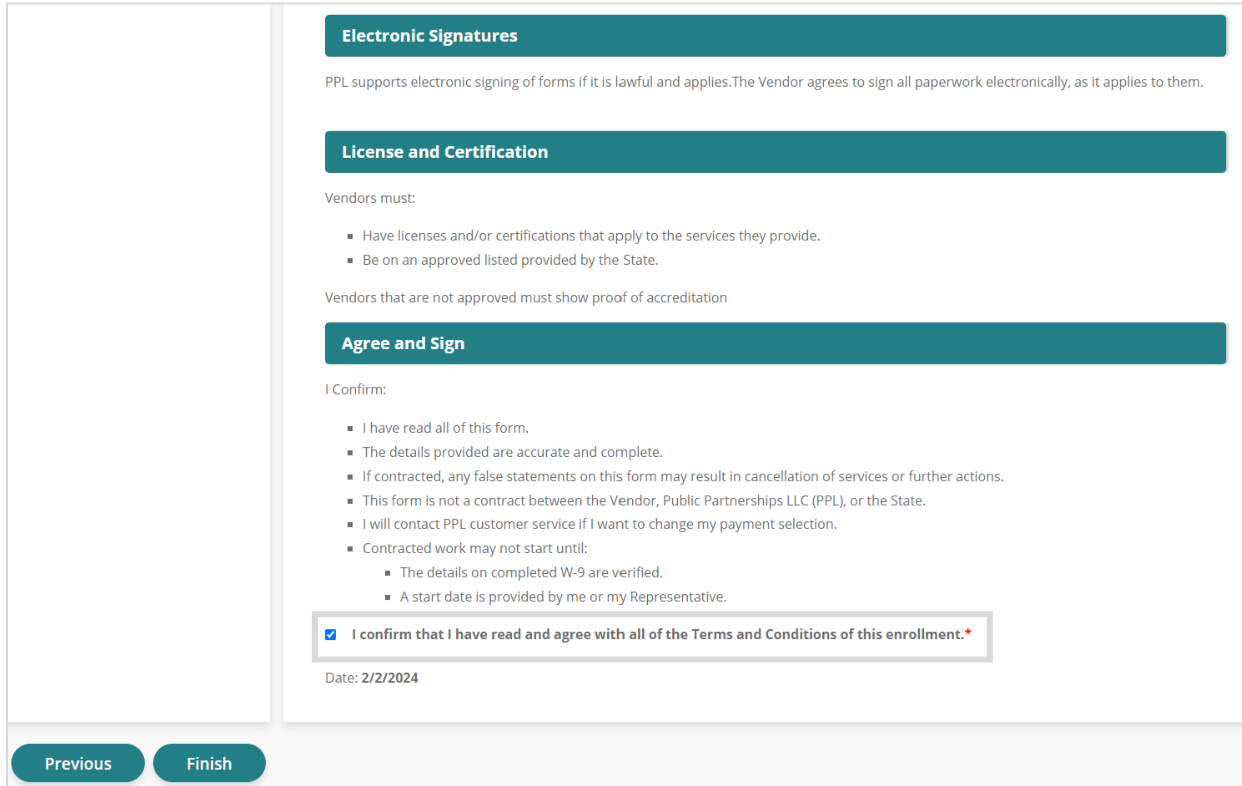


2. Under your summary information, select **View**.

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.



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**.

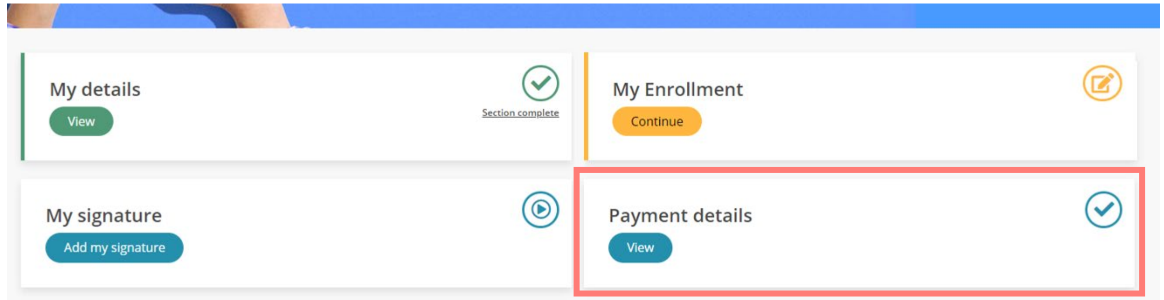
7. Wait for Public Partnerships to review and verify your enrollment forms.

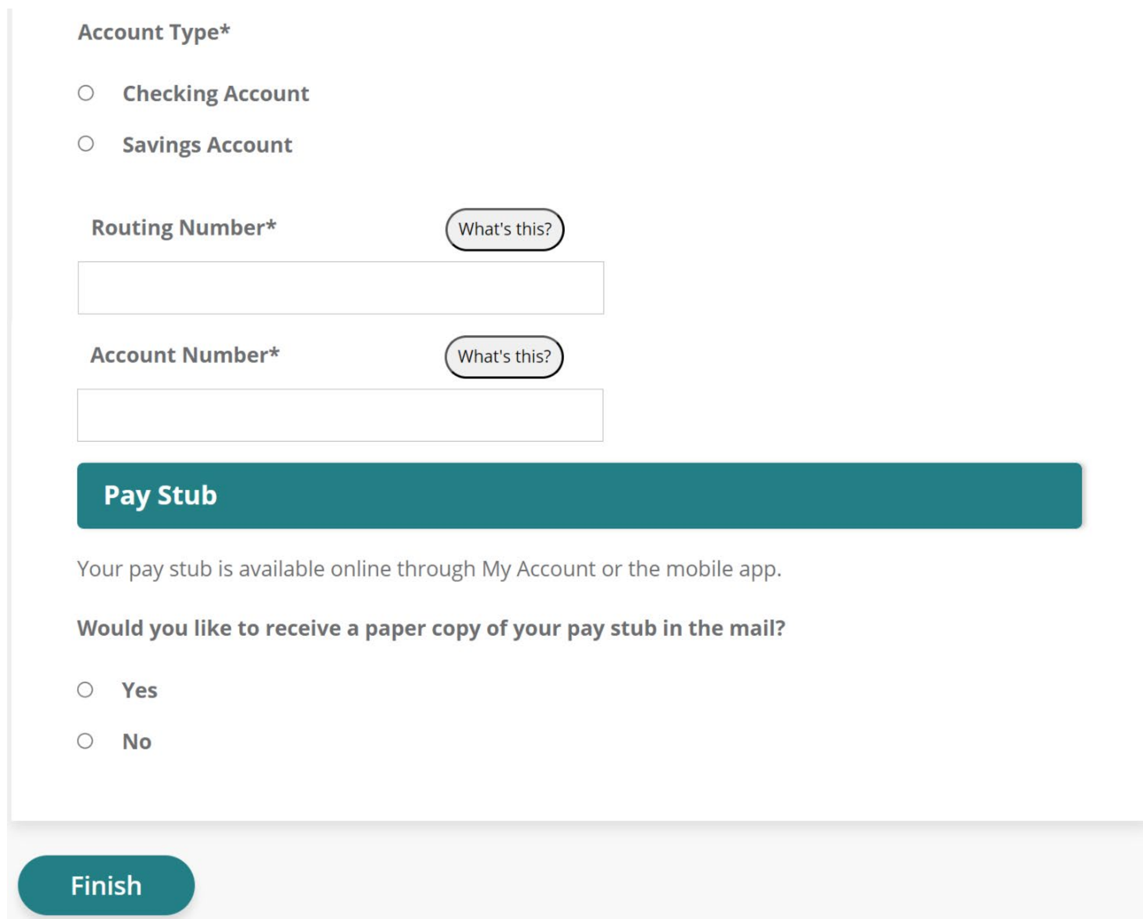
   You should receive an email when you're approved.

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.
4. Specify how and where you want to receive payments from Public Partnerships, including bank details, if applicable.
5. Select **Finish** when complete.

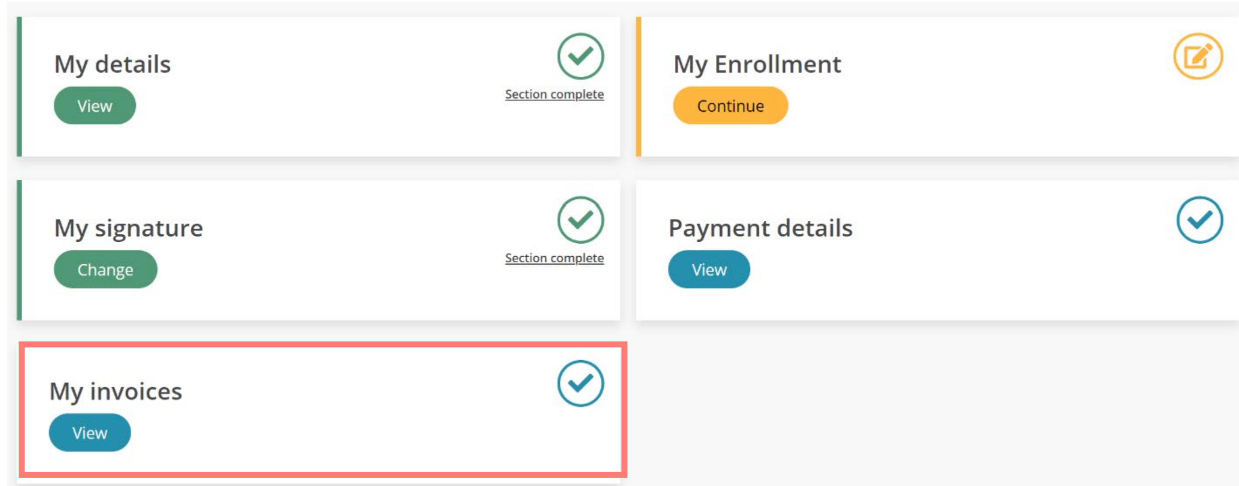




Submit an Invoice for Payment

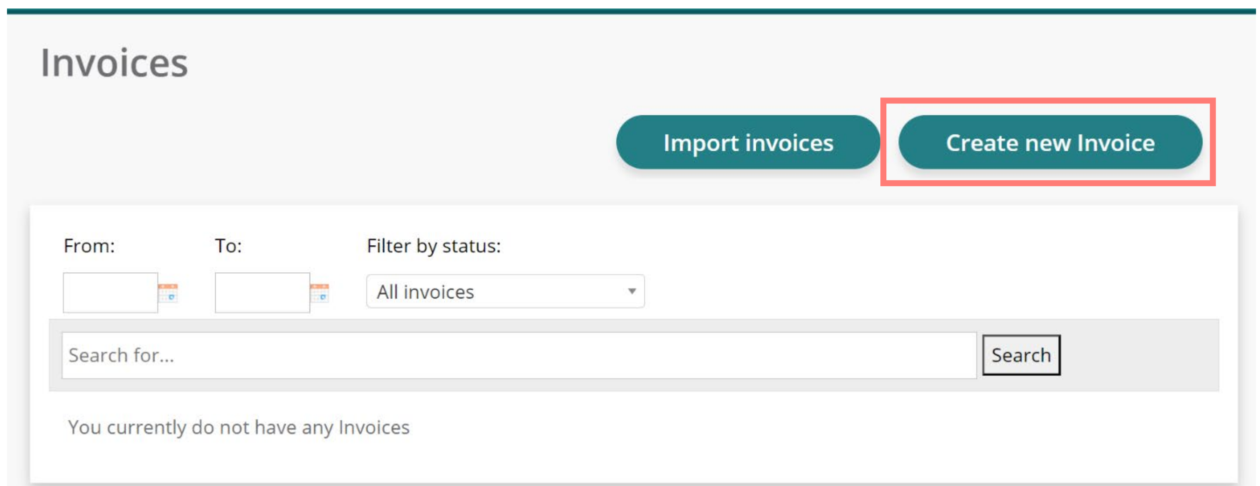
Follow these steps to submit your invoice for payment from a Participant's allocated budget.
This process covers payments for things like a home upgrade or mileage reimbursement.

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

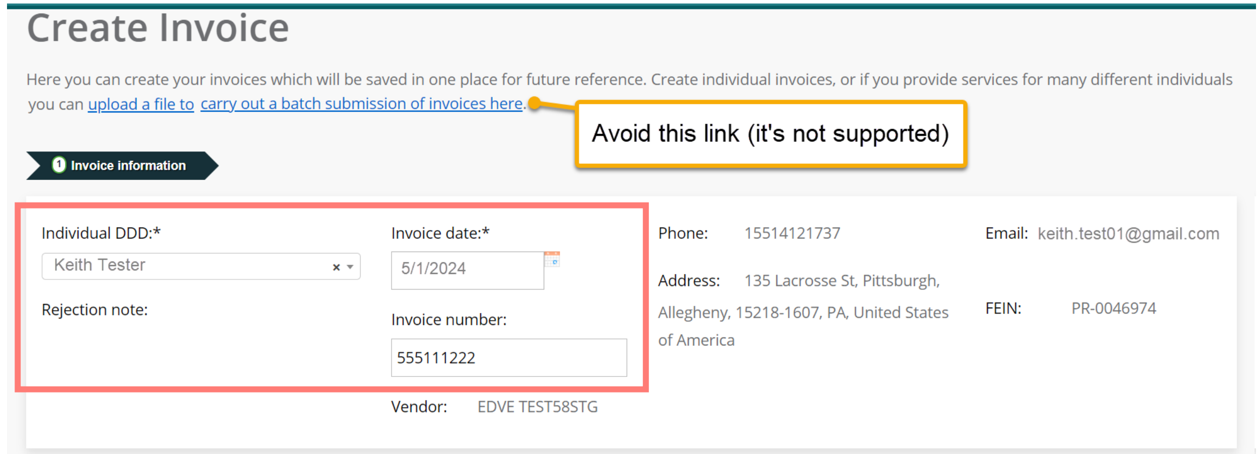


2. On the Invoices page, select **Create New Invoice**.

   Note: Don't use the **Import Invoices** feature. It is not configured for this program.

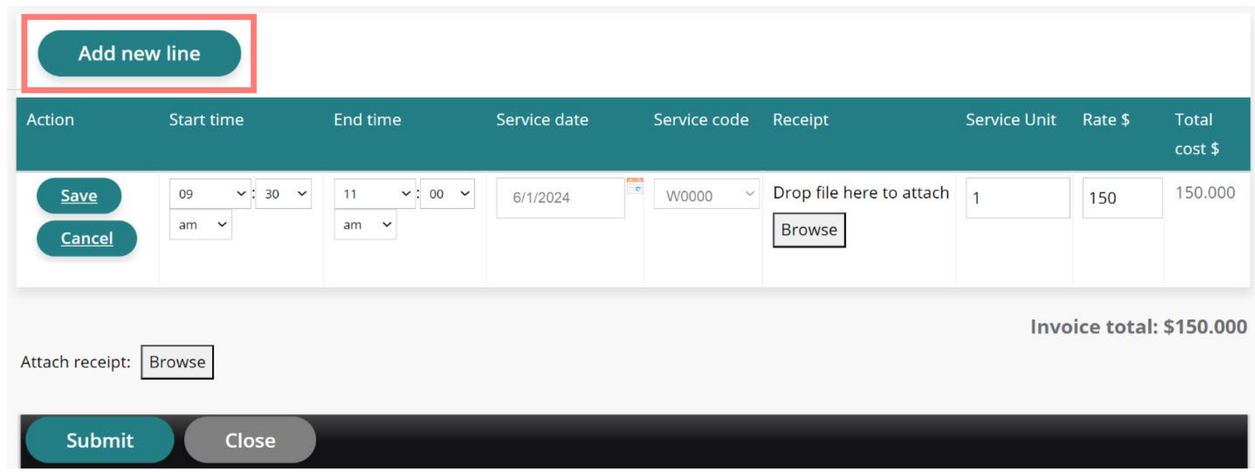


3. On the **Create Invoice** page, under **Individual**, enter the name of the program Participant who received services.
4. For **Invoice Date**, specify when you are submitting it (typically today's date).
5. For **Invoice Number**, you have the option to enter any number to help you track this transaction.



6. Select **Add New Line**.
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.