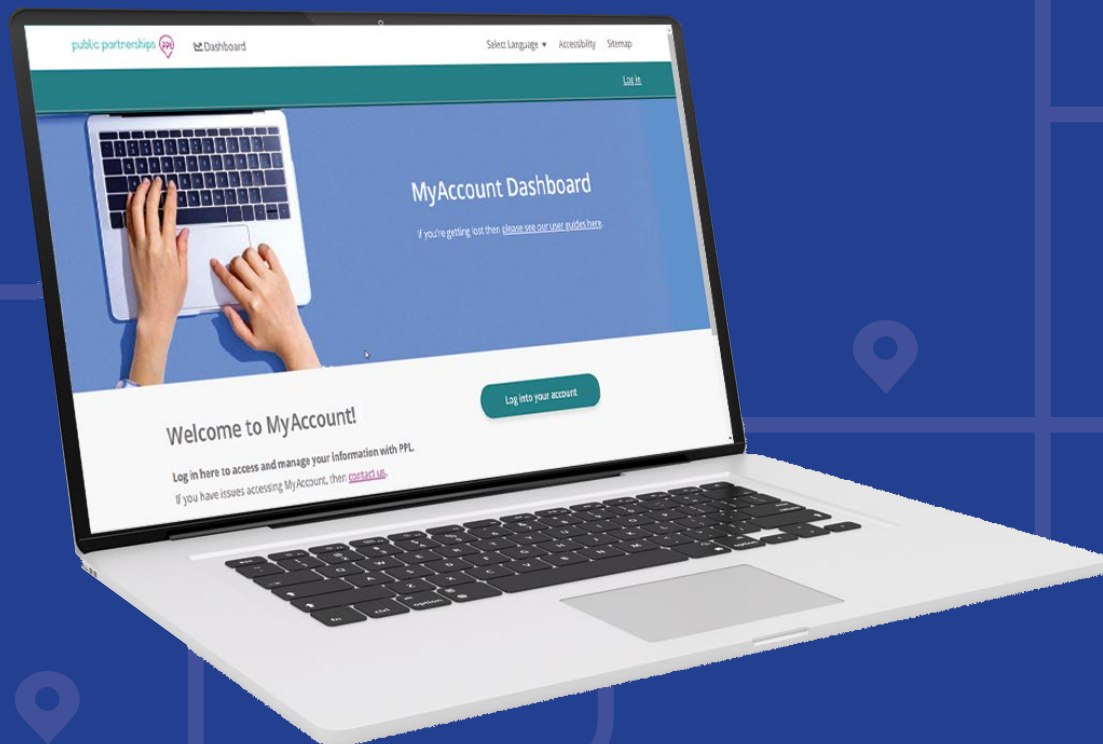
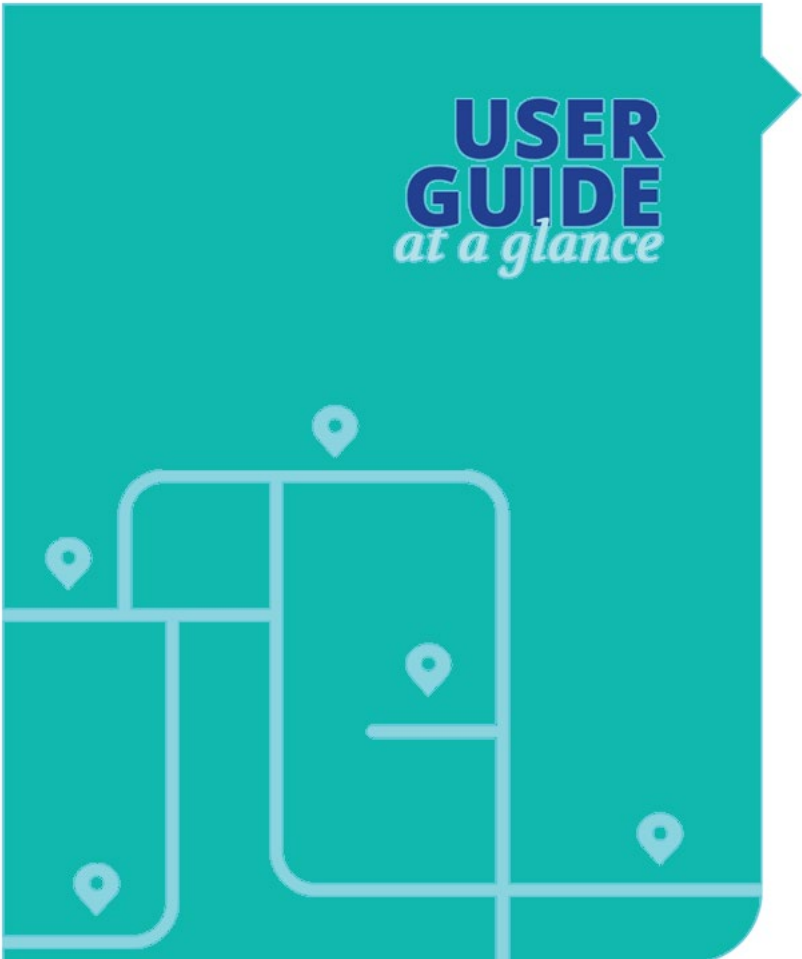


# MYACCOUNT

## Guide for Vendors





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## USER GUIDE *at a glance*

### 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**.

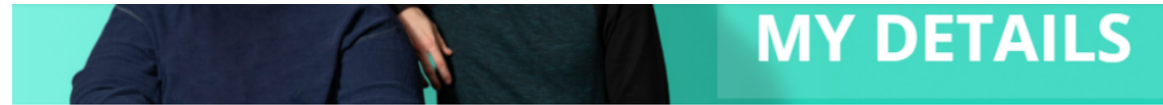
**Note:** Your tax ID can be a Social Security Number.

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.



You can navigate between your information details here. You may edit some of your details on these pages, which will be saved once you click "Next" or "Finish". If you need to change information that is non-editable here, please [contact us](#).

**Vendor Details**

Contact Details

Account Login Details

Terms of Service

Vendor Details
Close

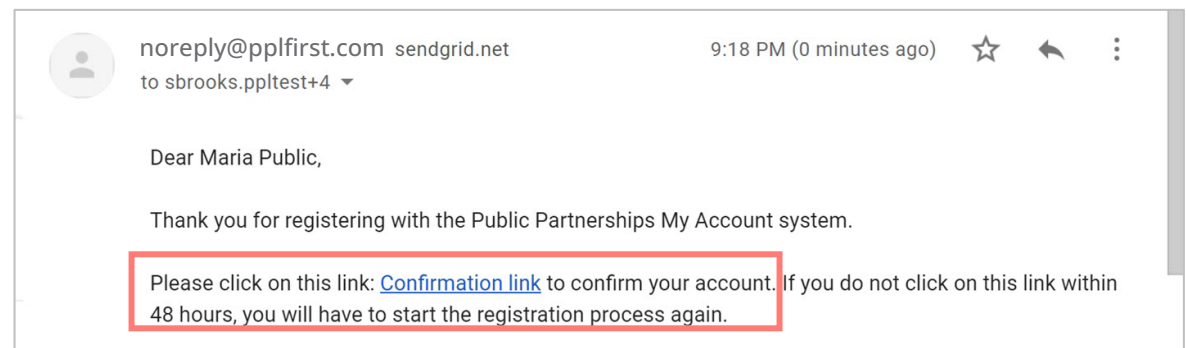
**Vendor Name\***

**Doing Business As (DBA)**

**Tax Identification Number\***

Vendor Contact Details

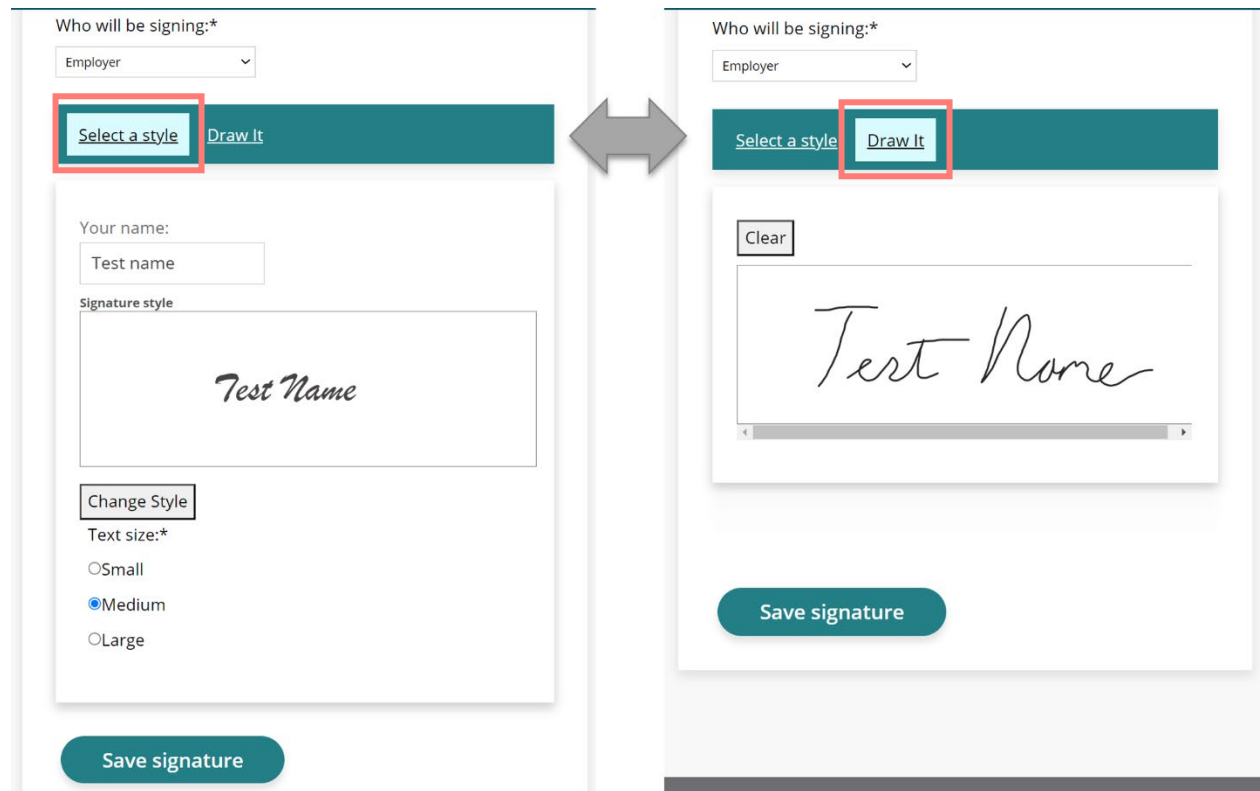
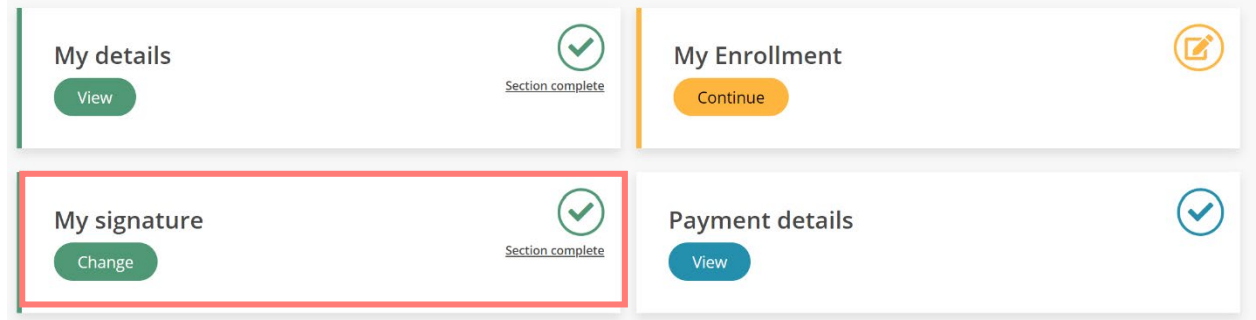
**Contact First Name\***



## Set Up Your Signature

To complete enrollment, you will use an electronic signature.

- On your MyAccount dashboard, select **My signature**.
- Under **Who will be signing**, select which role you are serving.
- 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.
- 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**.

The screenshot shows a dashboard with four main sections:

- My details**: Includes a 'View' button and a 'Section complete' status with a checkmark icon.
- My Enrollment**: This section is highlighted with a purple border and contains a 'Continue' button. It also has a pencil icon in the top right corner.
- My signature**: Includes a 'Change' button and a 'Section complete' status with a checkmark icon.
- Payment details**: Includes a 'View' button and a checkmark icon.
- My invoices**: Includes a 'View' button and a checkmark icon.

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

3. Select which **Federal Tax Classification** you use to do business, such as sole proprietor or corporation.

The screenshot shows the 'W-9 Tax Information' section with the following elements:

- W-9 Tax Information**: A teal header bar.
- Federal Tax Classification\***: A dropdown menu with 'C Corporation' selected. There is a close button (x) and a dropdown arrow (v) on the right side of the menu.
- Next**: A teal button at the bottom of the section.

- In the **Terms and Conditions** section, read all statements and select the “I confirm” checkbox.

- After you agree to the terms and conditions, select **Finish** at the bottom of the page.

- Under the **Agency Enrollment complete** message, select **Confirm**.

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

You should receive an email when you're approved.

**Electronic Signatures**

PPL supports electronic signing of forms if it is lawful and applies. The Vendor agrees to sign all paperwork electronically, as it applies to them.

**License and Certification**

Vendors must:

- Have licenses and/or certifications that apply to the services they provide.
- Be on an approved listed provided by the State.

Vendors that are not approved must show proof of accreditation

**Agree and Sign**

I Confirm:

- I have read all of this form.
- The details provided are accurate and complete.
- If contracted, any false statements on this form may result in cancellation of services or further actions.
- This form is not a contract between the Vendor, Public Partnerships LLC (PPL), or the State.
- I will contact PPL customer service if I want to change my payment selection.
- Contracted work may not start until:
  - The details on completed W-9 are verified.
  - A start date is provided by me or my Representative.

I confirm that I have read and agree with all of the Terms and Conditions of this enrollment.\*

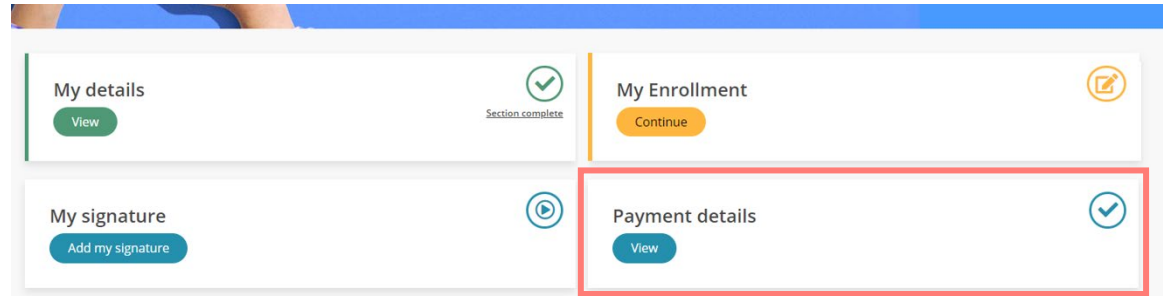
Date: 2/2/2024

Previous
Finish

## 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.



**Account Type\***

**Checking Account**

**Savings Account**

**Routing Number\*** What's this?

**Account Number\*** What's this?

**Pay Stub**

Your pay stub is available online through My Account or the mobile app.

**Would you like to receive a paper copy of your pay stub in the mail?**

**Yes**

**No**

**Finish**



## 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**.

The screenshot shows a grid of six dashboard cards. The 'My Invoices' card is highlighted with a red border. Each card includes a title, a button, and a status indicator (checkmark or pencil icon).

<b>My details</b> <a href="#">View</a> <span>Section complete</span>	<b>My Enrollment</b> <a href="#">Continue</a> <span>✎</span>
<b>My signature</b> <a href="#">Change</a> <span>Section complete</span>	<b>Payment details</b> <a href="#">View</a> <span>✓</span>
<b>My invoices</b> <a href="#">View</a> <span>✓</span>	

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

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

The screenshot shows the 'Invoices' page interface. At the top right, there are two buttons: 'Import invoices' and 'Create new Invoice'. The 'Create new Invoice' button is highlighted with a red box. Below the buttons are filters for 'From:', 'To:', and 'Filter by status:'. The 'Filter by status:' dropdown is set to 'All invoices'. At the bottom, there is a search bar with the text 'Search for...' and a 'Search' button. Below the search bar, it says 'You currently do not have any Invoices'.

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

## Create Invoice

Here you can create your invoices which will be saved in one place for future reference. Create individual invoices, or if you provide services for many different individuals you can [upload a file to carry out a batch submission of invoices here](#).

**Avoid this link (it's not supported)**

**Invoice information**

Individual DDD:* Keith Tester	Invoice date:* 5/1/2024	Phone: 15514121737	Email: keith.test01@gmail.com
Rejection note:	Invoice number: 555111222	Address: 135 Lacrosse St, Pittsburgh, Allegheny, 15218-1607, PA, United States of America	FEIN: PR-0046974
Vendor: EDVE TEST58STG			

- Select **Add New Line**.

- 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.

**Add new line**

Action	Start time	End time	Service date	Service code	Receipt	Service Unit	Rate \$	Total cost \$
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	09 : 30 am	11 : 00 am	6/1/2024	W0000	Drop file here to attach <input type="button" value="Browse"/>	1	150	150.000

Invoice total: \$150.000

Attach receipt:

- From the **Service Code** menu, choose the applicable code. Only the codes allowed will appear, based on Participant and Service Date.
- 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.

- 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.

- Select **Save** for this line entry, add more lines as needed and select **Submit**.
- Next, the Participant will approve this invoice. It remains pending until approved.