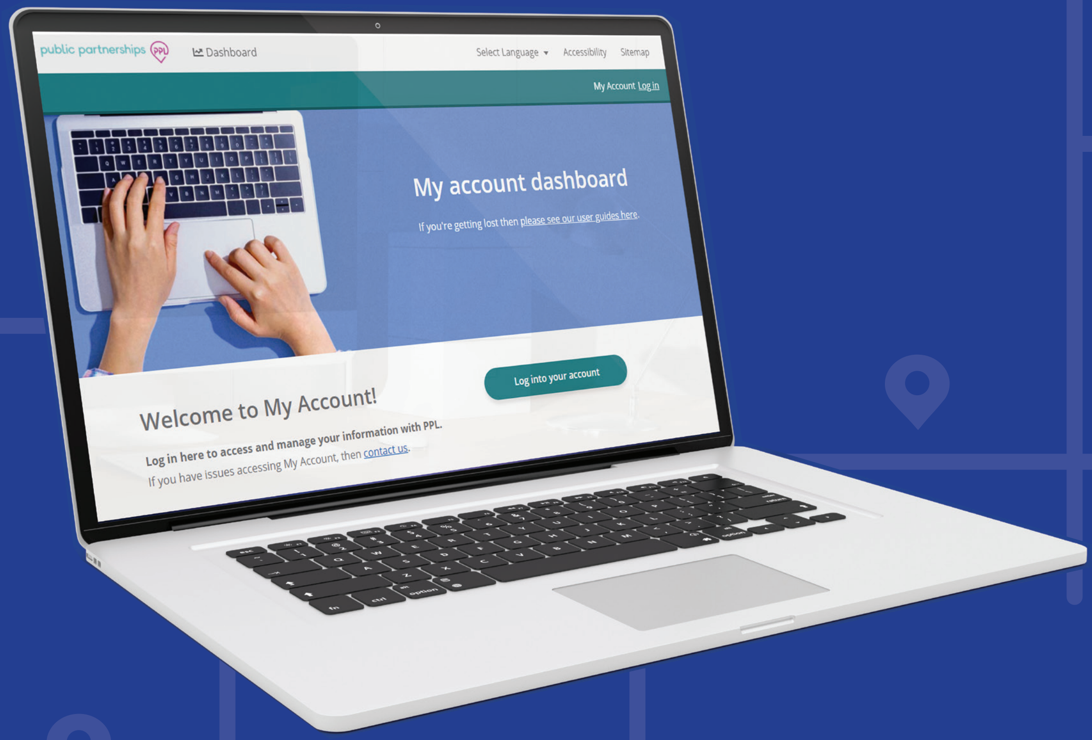
USER GUIDE

MYACCOUNT

Guide for Service Facilitators



public partnerships PPL

Your #1 choice for self-directed care™

USER GUIDE *at a glance*

This document will provide a walkthrough of the Service Facilitator role within the MyAccount System.

ACCOUNT ACCESS

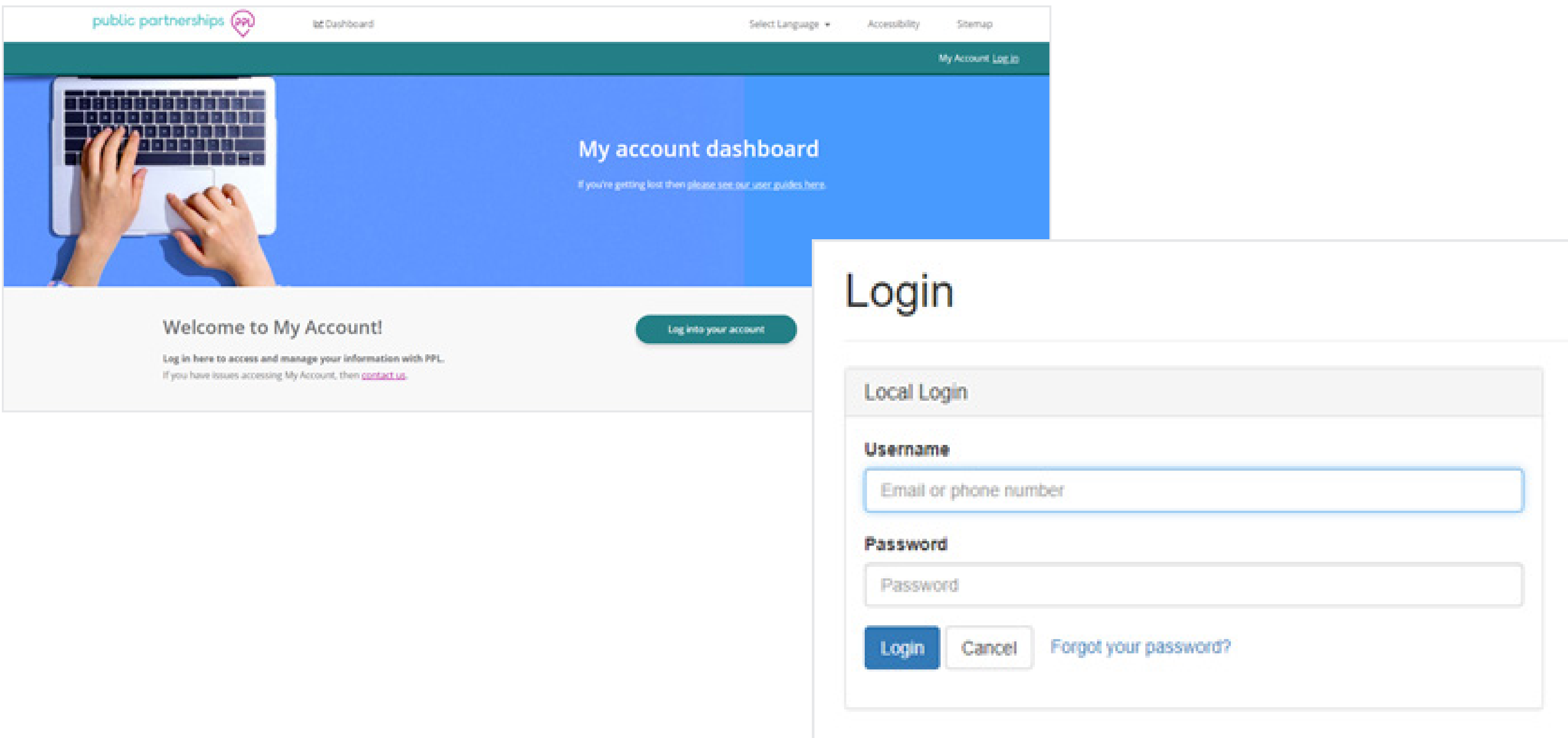
If you are a new user needing access, please send an email to PPL (mgregory@pcgus.com) with your name, phone number and email address. PPL will send you an email confirmation with a temporary password once your account has been activated.

Once you receive your login information, open your web browser and enter the following URL into the web browser: account.publicpartnerships.com.

Next, click the link to login to your account. Your username will be your email address. Once you have logged in for the first time, you will be able to change your password.

Internet Explorer is not supported and should not be used. Please use the following web browsers: Chrome, FireFox, or Edge.

This website can be added as a Favorite in your web browser for quick access.

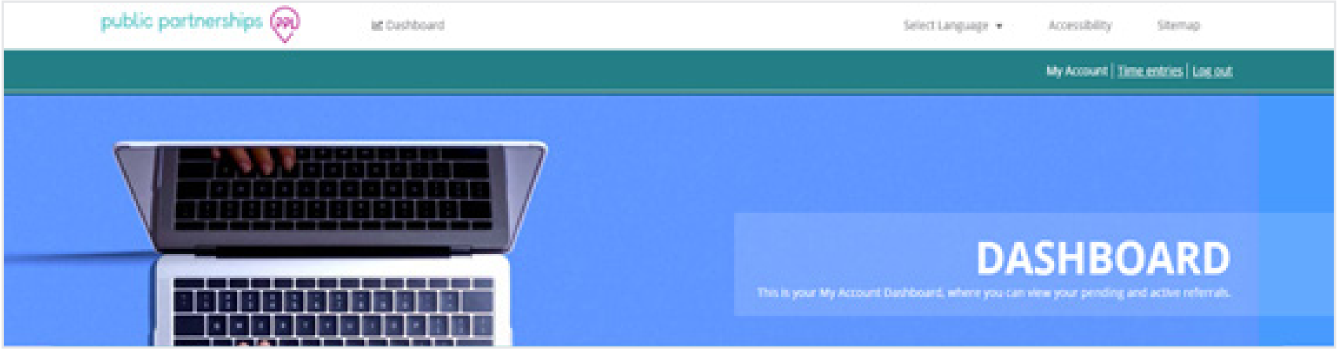


DASHBOARD

When you login, you will see your Service Facilitator dashboard page first.

Here you can:

- View referrals
- Create a new referral
- Monitor Participant and Provider enrollment for individuals assigned to your agency



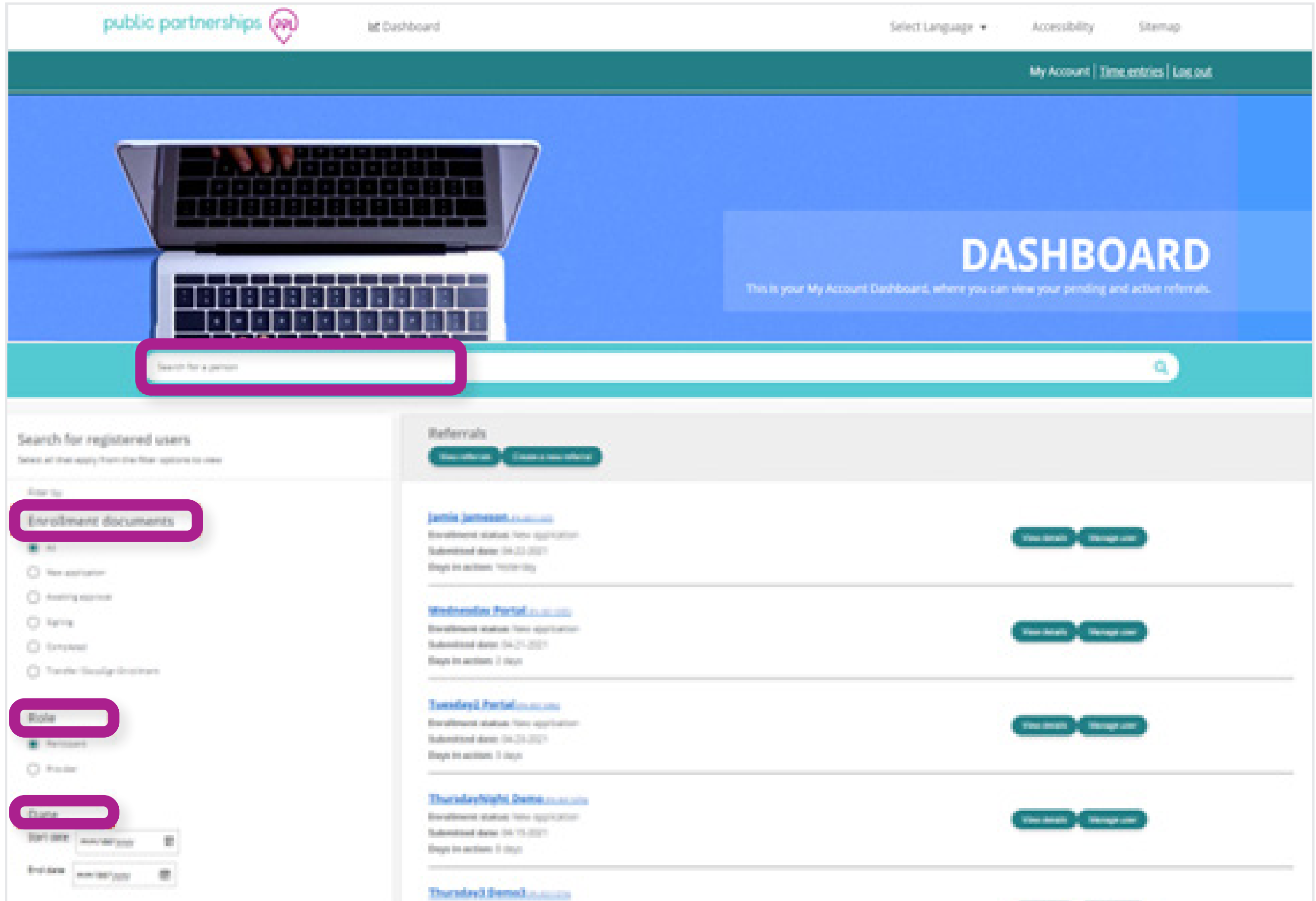
As a matter of policy, PPL does not delete records, so any inactive or disenrolled program Participants will also continue to be searchable in MyAccount, should you need to retrieve their records. You will only have access to Participants that are assigned to your agency.

SEARCH & FILTERS

You can search for a Participant or Provider assigned to your Agency using the search bar at the top of the page or you can use the filter options on the left-hand side of the dashboard.

HOW TO RETURN TO THE DASHBOARD

If you need to navigate back to your dashboard, click the 'Dashboard' link at the top of the page next to the Public Partnerships logo.



PARTICIPANT REFERRALS

As a Service Facilitator, you can create new referrals as well as view and edit saved referrals.

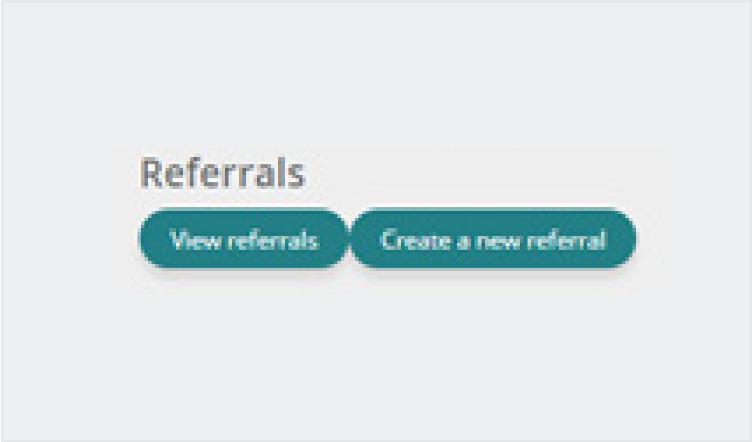
On your Dashboard, you will see two hyperlinks at the top of the page beneath the search bar to either 'View Referrals' or 'Create a Referral".

VIEW REFERRALS

Click 'View Referrals' to view details of referrals that are an in progress, awaiting approval and completed status.

Referral Statuses:

- **In Progress:** The Service Facilitator has started and saved the referral so they can come back later to finish and submit for approval.
- **Awaiting Approval:** The referral has been submitted by the Service Facilitator to PPL for review and approval.
- **Rejected:** PPL has returned the referral to the Service Facilitator for corrections.
- **Completed:** The referral has been reviewed and approved by PPL and the Participant can register for MyAccount to complete their enrollment.



If you are searching for a Participant and they do not appear, this could be because they are not linked to your agency.

Narrow your search by selecting the Program or searching for a Participant's name in the search bar.

PARTICIPANT REFERRALS

CREATE A NEW REFERRAL

Click 'Create a new referral' to refer a new Participant. You will be directed to the 'Creating a Referral" screen

The state and program will be set to Virginia and CCC+.

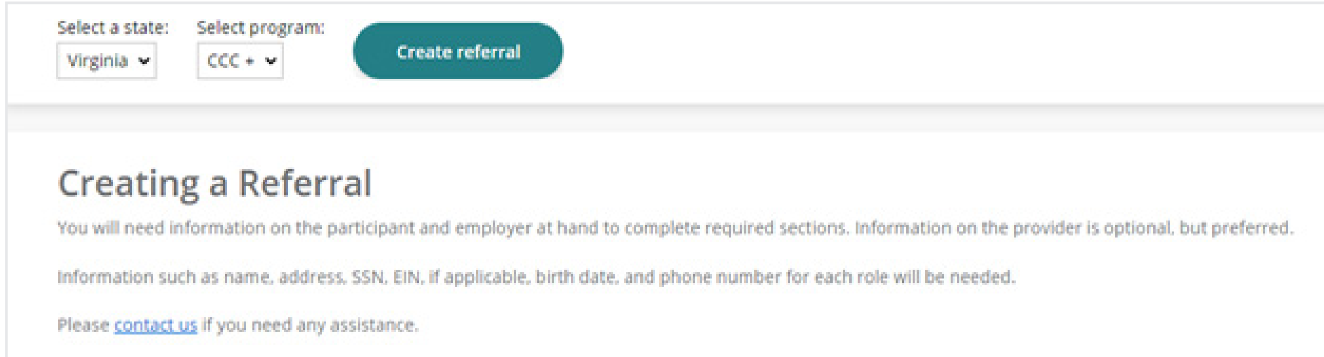
Click 'Create Referral' and fill out the required fields.

Once you have completed the referral, select 'finish.' You will then receive confirmation that the referral has been sent to PPL for processing.

The referral will now be in the 'awaiting approval' status. When PPL completes their review and approves the referral, the referral will be moved to the 'Completed' status.

Once a referral is approved and Completed, the Participant will receive an invitation email with a link to register for MyAccount.

If you do not have all of the required information at this time, you may save the referral so you can come back and complete it later. Select 'save and close' at the bottom of the referral page and the referral will be saved as 'In Progress.' Please see the Edit an 'In Progress' Referral section below for more details.



IMPORTANT

You will need the name, address, SSN, Date of Birth, and phone number for the Participant when creating a new referral.

If the Employer is someone other than the Participant, their information will need to be entered.

If the Participant is choosing to appoint a Designated Representative, their information can be entered on the referral, but this is not required. A Designated Representative can be appointed at any point during a participant's enrollment and can be added through the Participant's dashboard.

It is not required to add the Provider on the referral, but if known, it is recommended to enter their information on the referral so the Provider can begin their enrollment as soon as possible.

PARTICIPANT REFERRALS

EDITING AN 'IN PROGRESS' REFERRAL

On your Dashboard, click 'View Referrals' to see referrals in all statuses.

Open the referral you want to edit.

Once you have entered all required information, select 'finish.' You will then receive confirmation that the referral has been sent to PPL for processing.

The referral will now be in the 'awaiting approval' status. When PPL completes their review and approves the referral, the referral will be moved to the 'Completed' status.

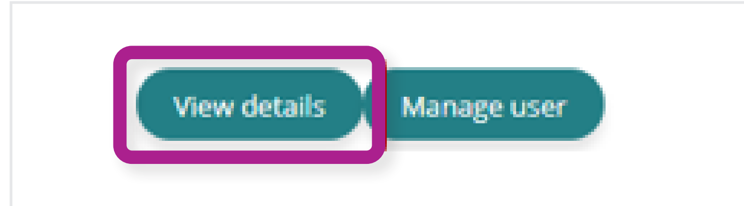
Once a referral is approved and Completed, the Participant will receive an invitation email with a link to register for MyAccount.

Note: the referral will be in an 'In Progress' status

PARTICIPANT ENROLLMENTS

On your Dashboard, you will see Participants in various enrollment statuses who are assigned to your Agency. You will also be able to see the date they were submitted to PPL, and the number of days they have been active in the program.

You can further view a Participant's details by selecting 'View Details', as well as manage their enrollment by selecting 'Manage User'.



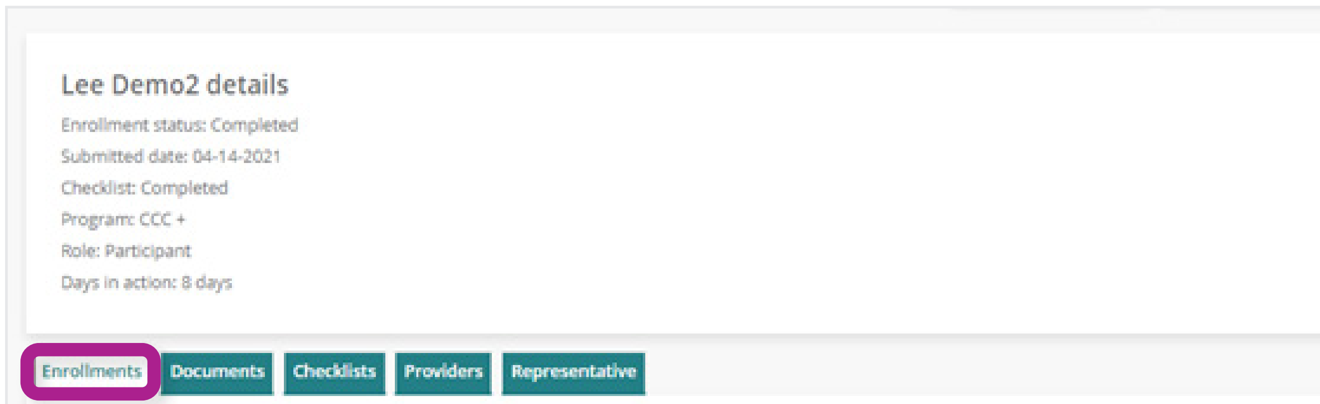
IMPORTANT

If a Participant has not registered for MyAccount yet, they will not appear for you to see these details.

VIEW DETAILS

Click on 'View Details' to view:

- A Participant's Enrollment details, Documents, Checklists, Associated Provider(s), and Designated Representative (if one has been appointed).
- From the View Details page, you can assist the Participant with Hiring a New Provider as well as access the Participant's dashboard by clicking 'Manage this user.' Please see the Manage User section below for more information.
- Each green tab expands to show more information for that Participant
- To return to your main Dashboard, select the red 'Close' button.



IMPORTANT

As a Service Facilitator, these details are for viewing purposes only and cannot be edited.

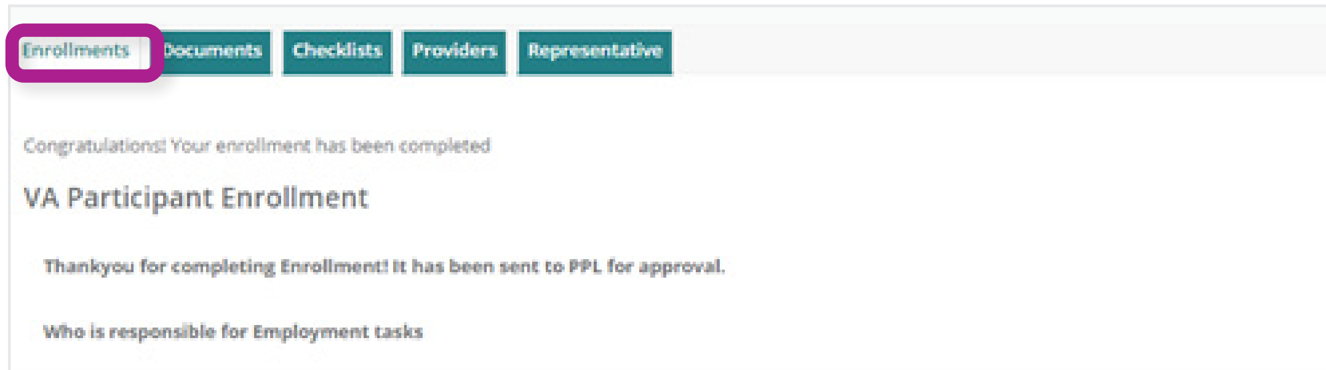
PARTICIPANT ENROLLMENTS

ENROLLMENTS

Select the 'Enrollments' tab to view details pertaining to the Participant's enrollment.

IMPORTANT

If the Participant's enrollment status is 'New Application' this page will be blank.



DOCUMENTS

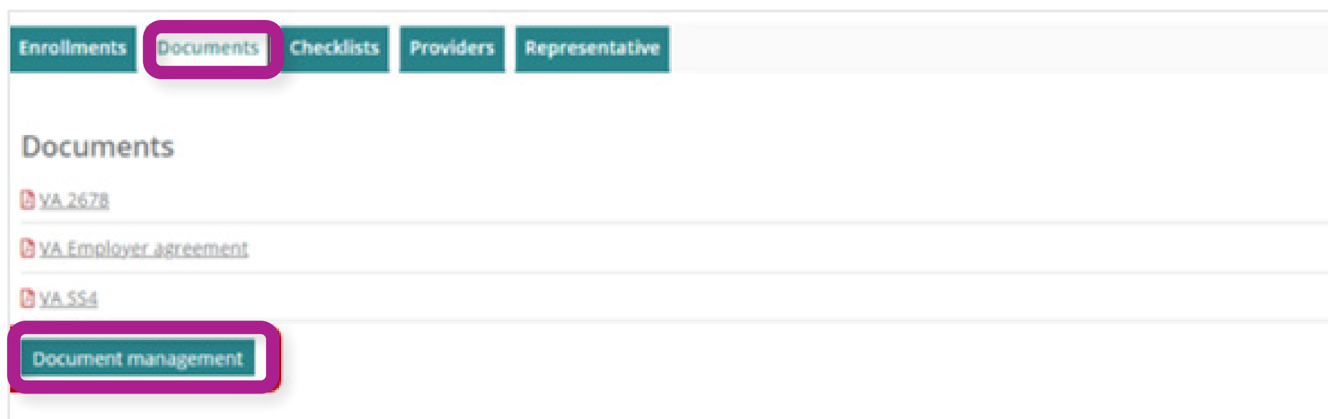
Select the 'Documents' tab to view the Participant's enrollment documents as PDF's, as seen in the image below.

IMPORTANT

If the Participant is enrolling electronically and their enrollment status is 'New Application,' you will not be able to access these forms yet.

If the Participant is enrolling through paper because they are not able to register for MyAccount, their completed enrollment forms will be uploaded here once they are received and processed by PPL.

If the Participant enrolled prior to the migration to MyAccount, a 'Document Management' link will be available for you to access historical documentation.

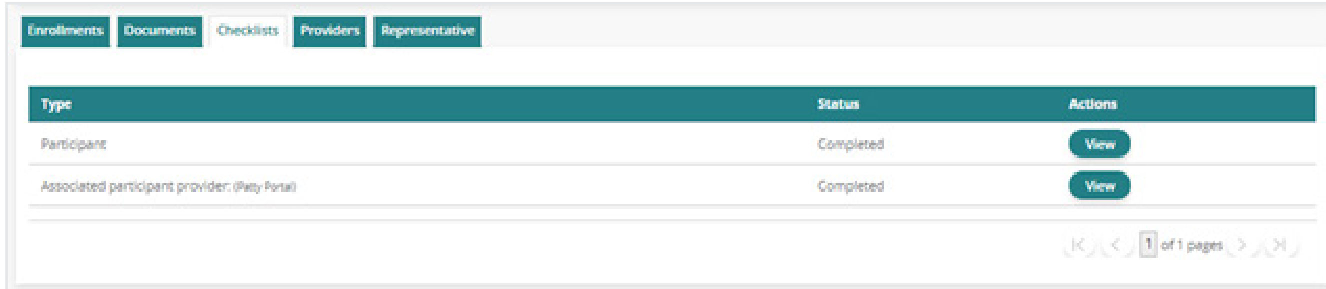


PARTICIPANT ENROLLMENTS

CHECKLISTS

Select the “Checklists” tab to view the status of the Participant and their corresponding Provider’s checklist items, as seen in the image below. If all program requirements have been met for enrollment, the checklist status will be ‘Completed’.

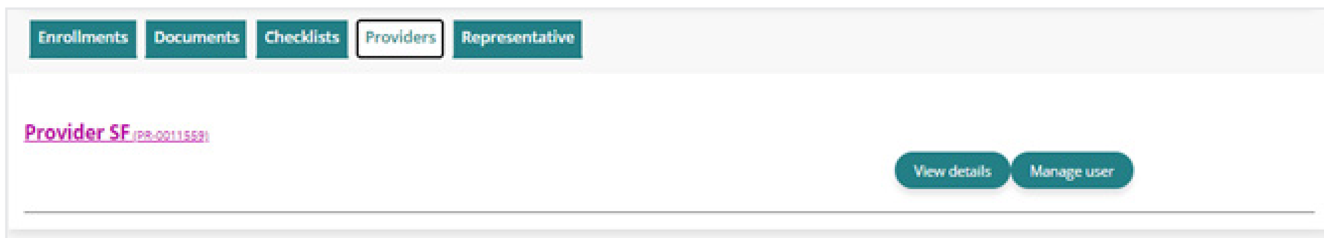
Click ‘view’ beneath Actions to expand the individual’s checklist. You will then be able to view each specific checklist item.



PROVIDERS

Select the ‘Providers’ tab to view the Participants corresponding Provider(s), as seen in the image below.

Refer to the Provider Enrollment section to learn more about how to navigate through the Provider ‘View Details’ and ‘Manage User’ pages.



PARTICIPANT ENROLLMENTS

REPRESENTATIVE

Select the 'Representative' tab to view the Participant's corresponding Designated Representative(s).

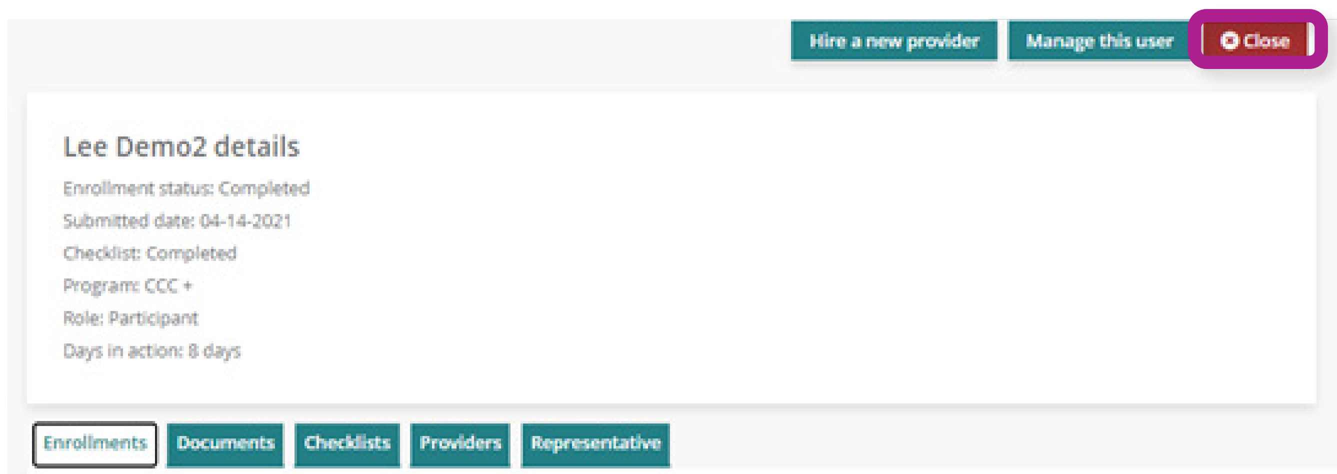
IMPORTANT

The Designated Representative page will appear blank if a Designated Representative has not yet been identified.

If you are assisting the Participant with enrolling a Designated Representative, please reference the Manage User section under Participant Enrollment.

RETURNING TO YOUR DASHBOARD

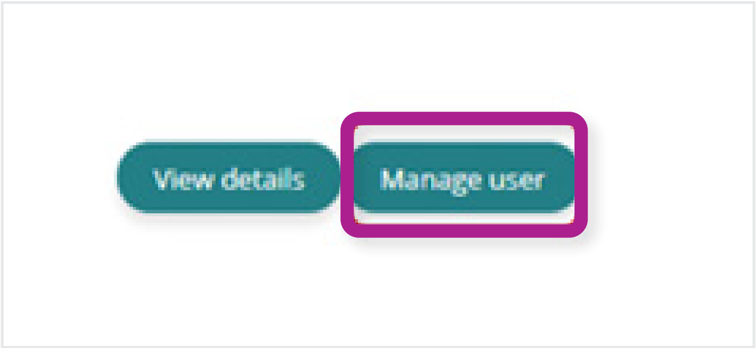
To return to your main Dashboard, select the red 'Close' button.



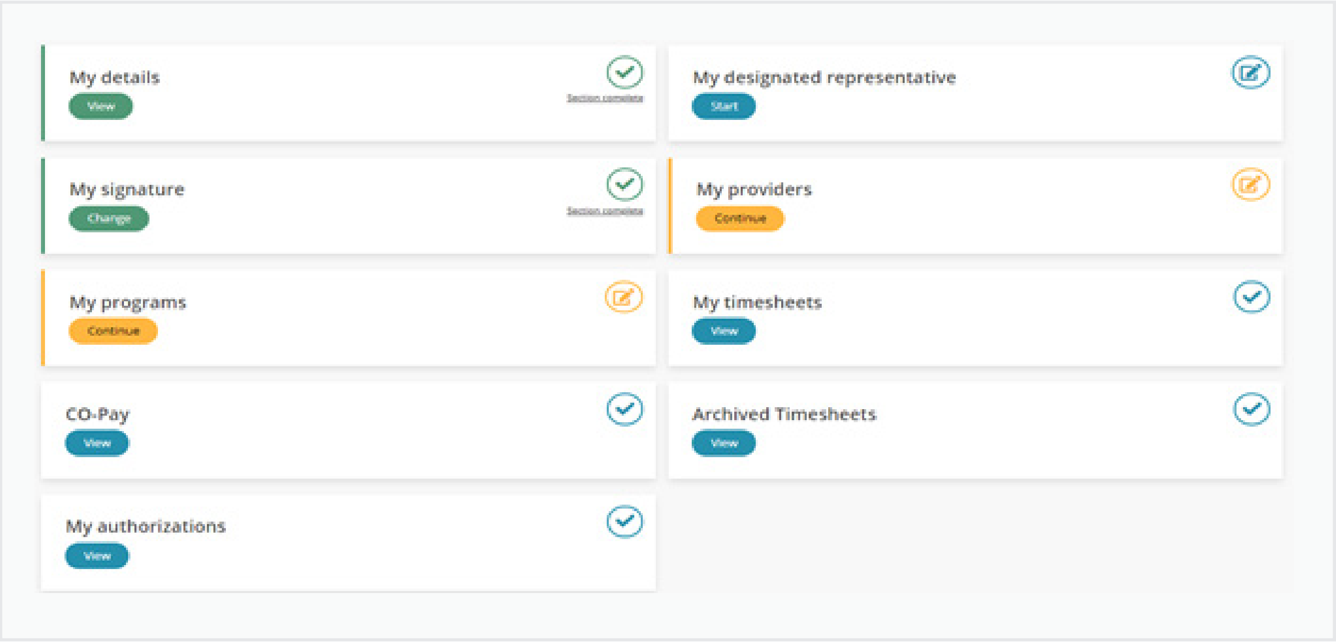
MANAGE USER - PARTICIPANT

Click on 'Manage user' to access a Participant's Dashboard. Here you will be able to:

- View details and update the Participant's personal information, account details (password and security questions and answers) and contact details
- View, edit and start the enrollment for the Participant
- View, edit and start the enrollment for a Designated Representative
- View, edit and start the enrollment for a Provider
- Hire new Providers
- View timesheets
- View authorizations
- View co-pay details



Once you have selected 'Manage User', you will be directed to the Participant's Dashboard. A detailed description of each of the Participant's dashboard selections is listed on the following pages.



MANAGE USER - PARTICIPANT

MY DETAILS

To navigate to the Participant's details page, click on 'My Details.' From here you will be able to assist the Participant with making updates to their:

- Personal Information
- Account Details
    - Password
    - Security Questions
    - Security Question Answers
- Contact Details
    - Home phone or Alternate phone
    - Mobile
    - Best time to contact
    - Physical and Mailing Address

IMPORTANT

If you find that are unable to change a data field, this means that only program administrators may change that data.

MY SIGNATURE

To navigate to the Participant's signature page, click on 'My Signature.' From here you will be able to view the Participant's digital signature, if they have created it. If the Participant hasn't created their digital signature yet, you will see a message noting the Participant needs to add one.

IMPORTANT

Only the Participant can create their own digital signature to use for submitting documents through MyAccount.

MANAGE USER - PARTICIPANT

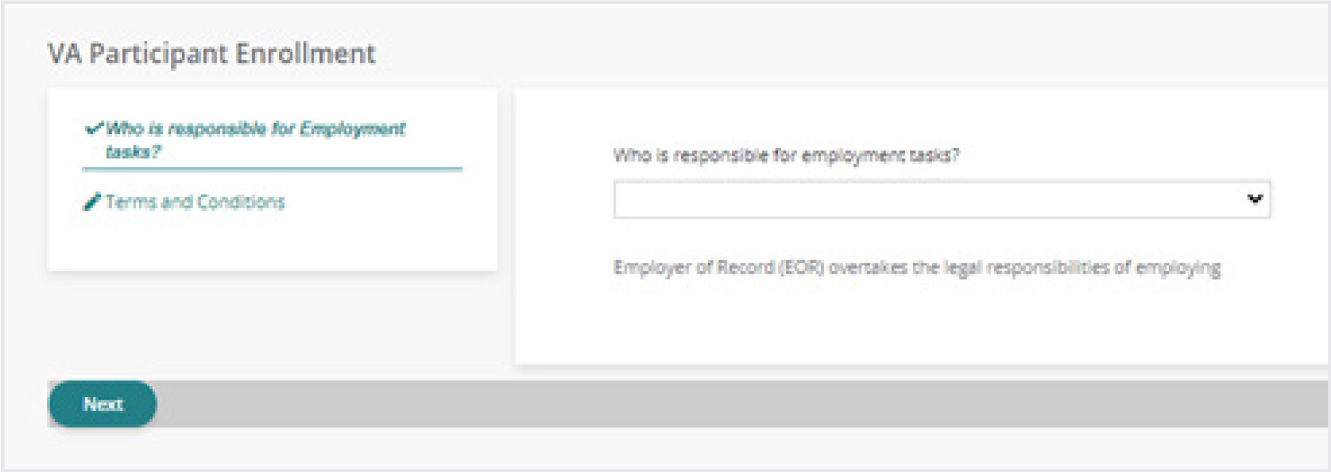
MY PROGRAM

To navigate to the Participant's programs page, click on 'My Programs.' From here you will be able to view the Participant's enrollment status and details. You can also support the Participant in populating these enrollment pages if they need assistance.

IMPORTANT

Only the Participant will be able to digitally sign and submit their electronic enrollment forms through MyAccount.

If the Participant is enrolling through paper because they are not able to register for MyAccount, you will be able to pre-populate enrollment forms for them here. Once you have gone through all enrollment pages and answered the required questions, the pdf documents will generate for you to print and obtain physical signatures from the Participant/Employer of Record. Once the physical signatures are obtained, please send the forms back to PPL by fax or mail.



MY CO-PAY

To navigate to the Participant's Co-Pay page, click on 'My Co-Pay.' A new page will open for you to view the Participant's Co-Pay details including, start date, end date, Participation Amount, and Participation Amount.

MY AUTHORIZATIONS

To navigate to a Participant's authorization page, click on 'My Authorizations.' A new page will then open with the Participant's authorization details.

Authorization Table Column	What does it mean?
SERVICE	The Service Code name for the authorization line
PLAN	The MCO the participant is associated to
AUTHORIZATION ID	The ID number assigned to the authorization in PPL's system
START DATE	This is the first date that this authorization is approved; dates of service must fall on or within this date of service in order to utilize these approved units.
END DATE	This is the last date that this authorization is approved; dates of service must fall on or within this date of service in order to utilize these approved units.
UNIT TYPE	This is the total authorized units in hours
AUTHORIZED UNITS	This is the total authorized units
TOTAL AUTHORIZED UNITS	This is the total authorized unit amount displayed as 15 min increments.
PAID UNITS	These are the units that have been paid out and are no longer available to spend.
GOOD TO PAY UNITS	These are the units that PPL is processing
REMAINING UNITS	These are the remaining units available for payment
STATUS	If an authorization remains active, it will show in approved status; if it has been deactivated or is no longer approved to pay from, it will display as INACTIVE.
ACTIONS	View additional details of the authorization

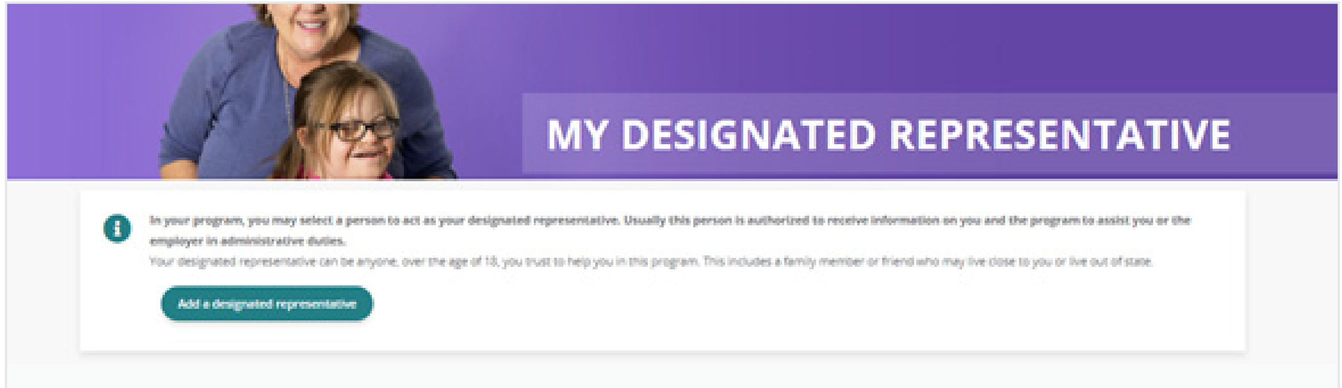
MANAGE USER - PARTICIPANT

MY DESIGNATED REPRESENTATIVE

To navigate to the Participant's Designated Representative page, click on 'My Designated Representatives.' From here you will be able to view the enrollment status and details for the Participant's Designated Representative. If the Participant hasn't appointed a Designated Representative yet, you can assist them with this step.

To appoint a Designated Representative

- Click 'Add a Designated Representative' then select 'Create My Designated Representative.'
- On the pre-registration page, complete all the required data fields.
- Once you click finish, an invitation will be sent to the Designated Representative to register for MyAccount so they can complete their enrollment.



MANAGE USER - PARTICIPANT

MY PROVIDERS

To navigate to the Participant's Provider(s) page, click on 'My Providers.' From here you will be able to view the enrollment status and details for the Participant's Provider(s). If the Participant hasn't hired a Provider yet or they need to hire a new Provider, you can assist them with this step.

To hire a Provider:

- Click 'Hire a New Provider' then select 'Add Provider to This Program.'
- On the pre-registration page, complete all of the required data fields.
- Once you click finish, an invitation will be sent to the Provider to register for MyAccount so they can complete their enrollment.

MY TIMESHEETS

To navigate to the Participant's timesheet page, click on 'My Timesheets.' A new page will open with the Participant's timesheet history. From here you can:

- Search for new time entries
- Navigate through time entries that have been submitted
- Monitor the payment progress of each of the time entries that have been submitted
- Track the progress of a time entry through to payment by selecting the 'view details' hyperlink

If a time entry is in "Submitted" status, it Is awaiting the Participant/Employer of Record's approval before PPL can process it.

If a time entry is in a 'pending' status, you can view the Pend History to see why payment may have been delayed.

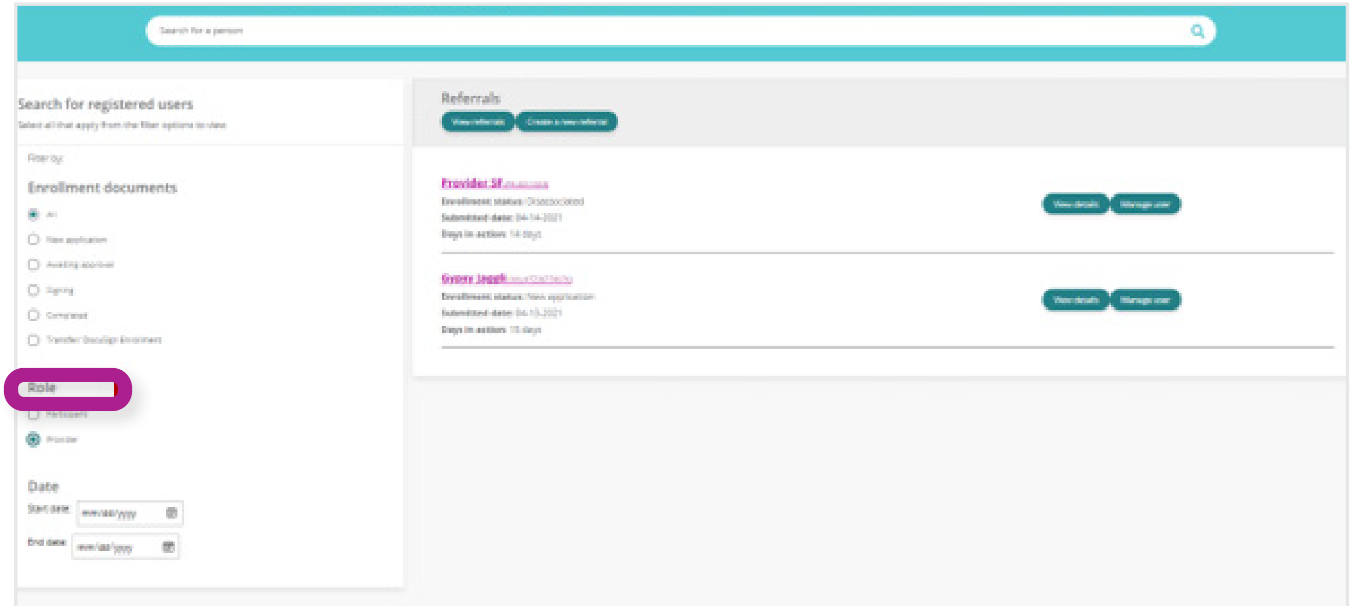
MANAGE USER - PARTICIPANT

Please see the chart below for Time Entry Status terminology:

Authorization Table Column	What does it mean?
SAVED	This time entry has been started by a provider but has not been submitted. Time entries in Saved status are not available for Participant's to Approve and PPL cannot yet process them.
SUBMITTED	This time entry has been submitted and has successfully passed all of the timesheet rules. It is now awaiting the Participant's approval before PPL can process it.
APPROVED	This time entry has been approved and will be processed in the next pay cycle.
IN PROCESS	This time entry is currently being processed by PPL's payroll team.
GOOD TO PAY	This time entry is one step away from payment.
PAID	This time entry has been paid, if the Check # starts with RA it has been paid via direct deposit; if it has a number value it has been paid via paper check.
REJECTED	This time entry has been rejected by the Participant. It requires that you 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 and has denied.

PROVIDER ENROLLMENTS

On your Dashboard, you will need to set the 'Role' filter on the righthand side of the page to Provider. This will update your Dashboard view to show a list of Providers in various enrollment statuses who are associated to Participants assigned to your Agency. Within the list of Providers, you will be able to see the date they were submitted to PPL and the number of days they have been active in the program.



IMPORTANT

If a Provider hasn't registered for MyAccount yet, they will not appear for you to see these details.

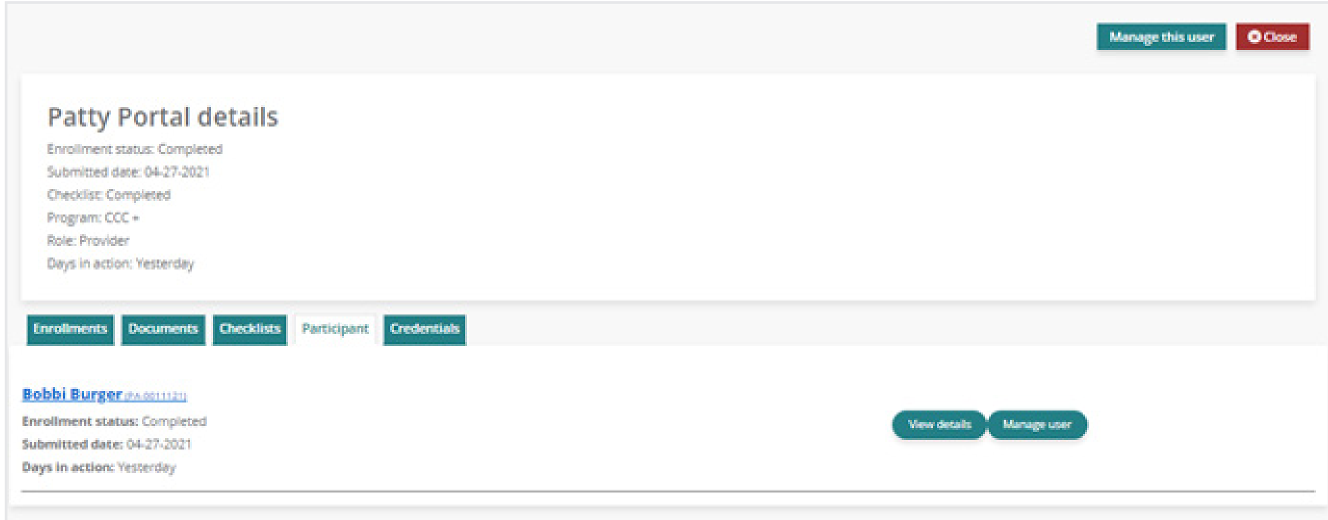
Providers will not receive their invitation to register for MyAccount until their associated Participant has completed their registration.

You can further view a Provider's details by selecting 'View Details', as well as manage their enrollment by selecting 'Manage User".

VIEW DETAIL

Click on 'View Details' to view:

- A Provider's Enrollment details, Documents, Checklists, and Associated Participant(s). Please note, the Credentials page will be blank.
- From the View Details page, you can also access the Provider's dashboard by clicking 'Manage this user.' Please see the Manage User section below for more information.
- Each green tab expands to show more information for that Provider.
- To return to your main Dashboard, select



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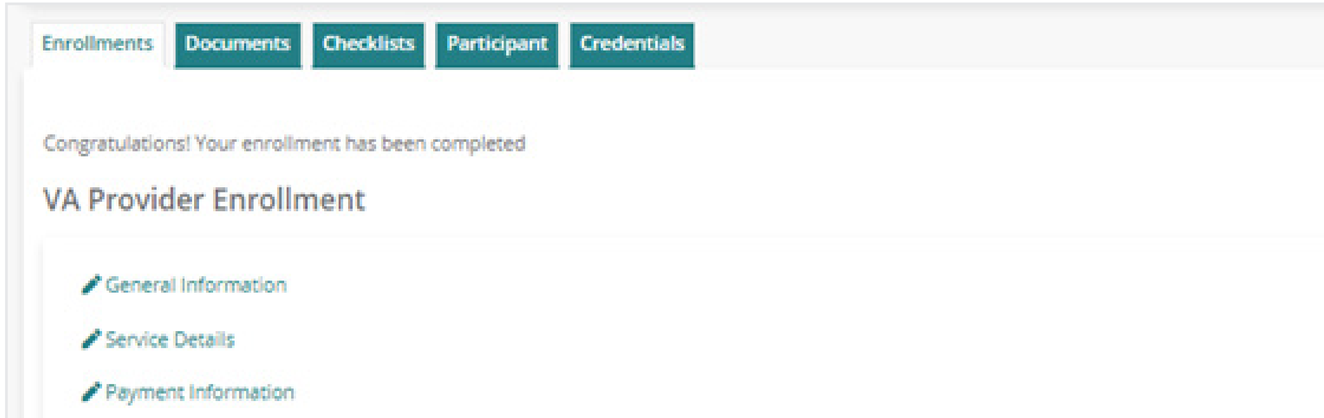
PROVIDER ENROLLMENTS

ENROLLMENTS

Select the ‘Enrollments’ tab to view details pertaining to the Provider’s enrollment.

IMPORTANT

If the Provider’s enrollment status is ‘New Application’ this page will be blank.



DOCUMENTS

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If the Provider is enrolling electronically and their enrollment status is ‘New Application,’ you will not be able to access these forms yet.

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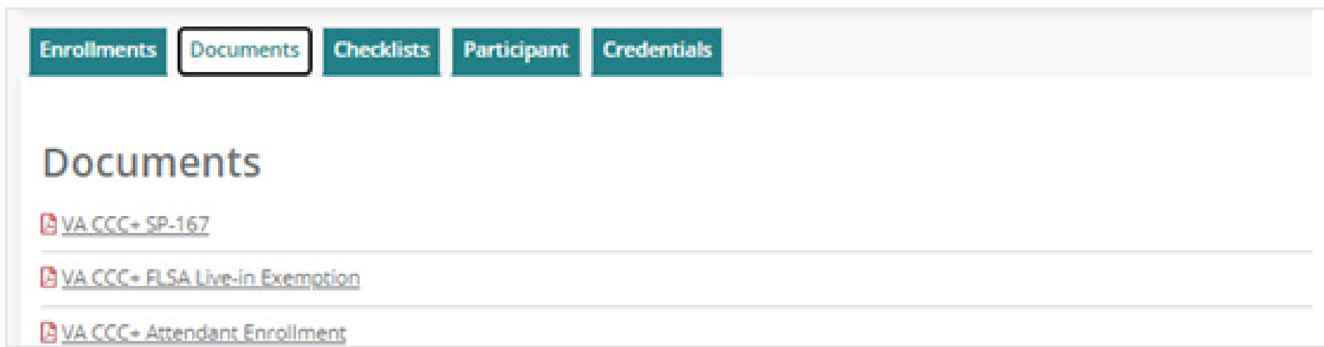
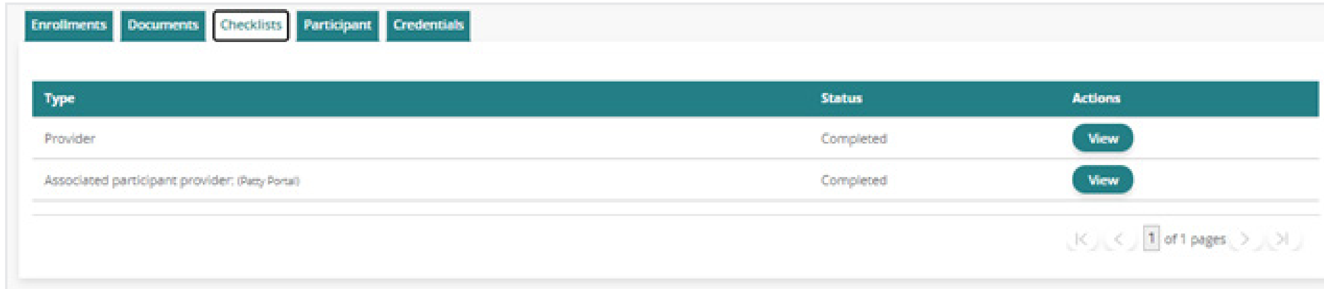


PROVIDER ENROLLMENTS

CHECKLISTS

Select the “Checklists” tab to view the status of the Provider and association checklist items, as seen in the image below. If all program requirements have been met for enrollment, the checklist status will be ‘Completed.’

Click ‘view’ beneath Actions to expand the individual’s checklist. You will then be able to view each specific checklist item.



PARTICIPANTS

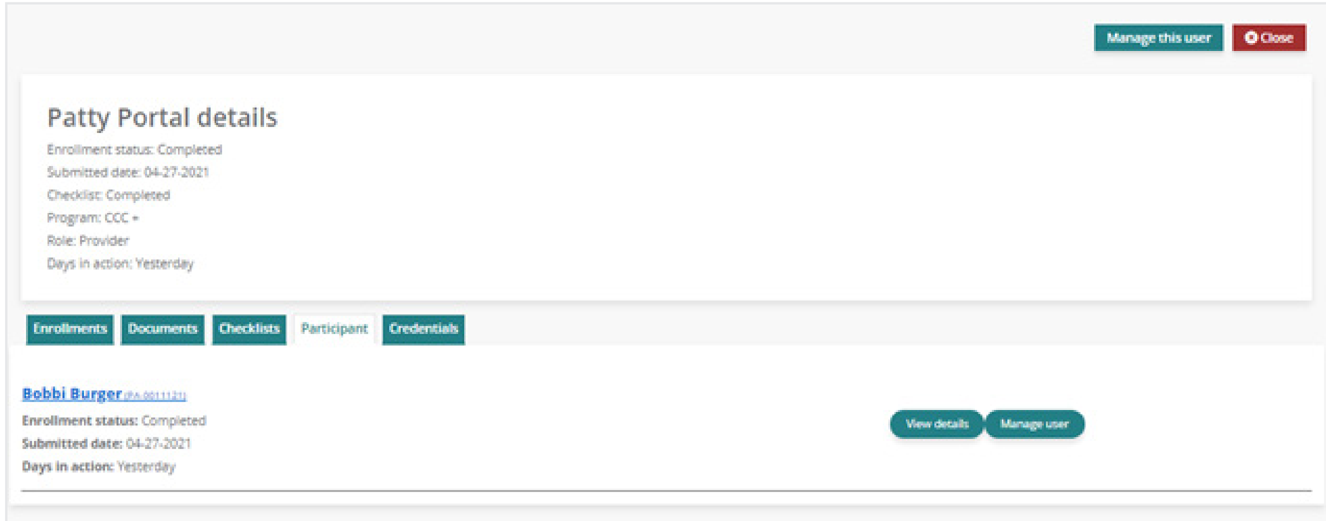
Select the ‘Participants’ tab to view the Provider’s associated Participant(s), as seen in the image below.

Refer to the Participant Enrollment section to learn more about how to navigate through the Participant ‘View Details’ and ‘Manage User’ pages.

PROVIDER ENROLLMENTS

RETURNING TO YOUR DASHBOARD

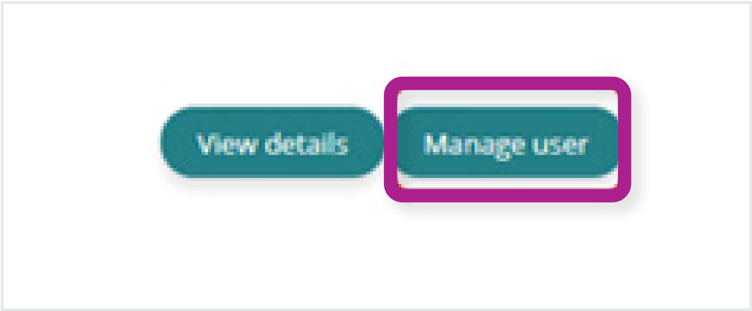
To return to your main Dashboard, select the red 'Close' button.



MANAGE USER - PROVIDER

Click on 'Manage user' to access a Provider's Dashboard. Here you will be able to:

- View details and update the Provider's personal information, account details (password and security questions and answers) and contact details
- View, edit and start the enrollment for the Provider
- View timesheets
- View paystubs
- View W-2s



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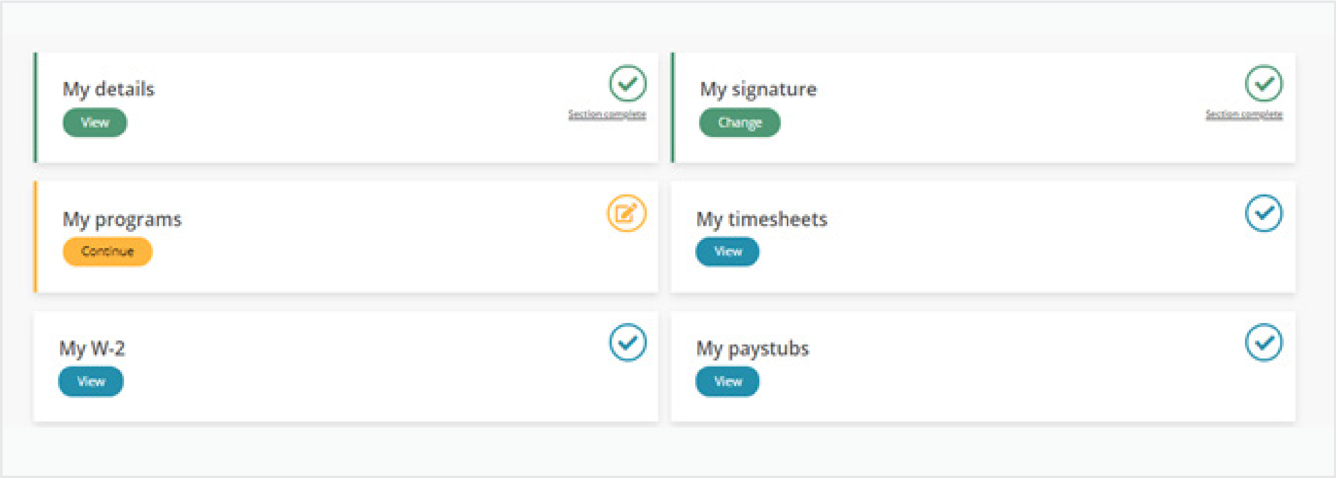

MANAGE USER - PROVIDER

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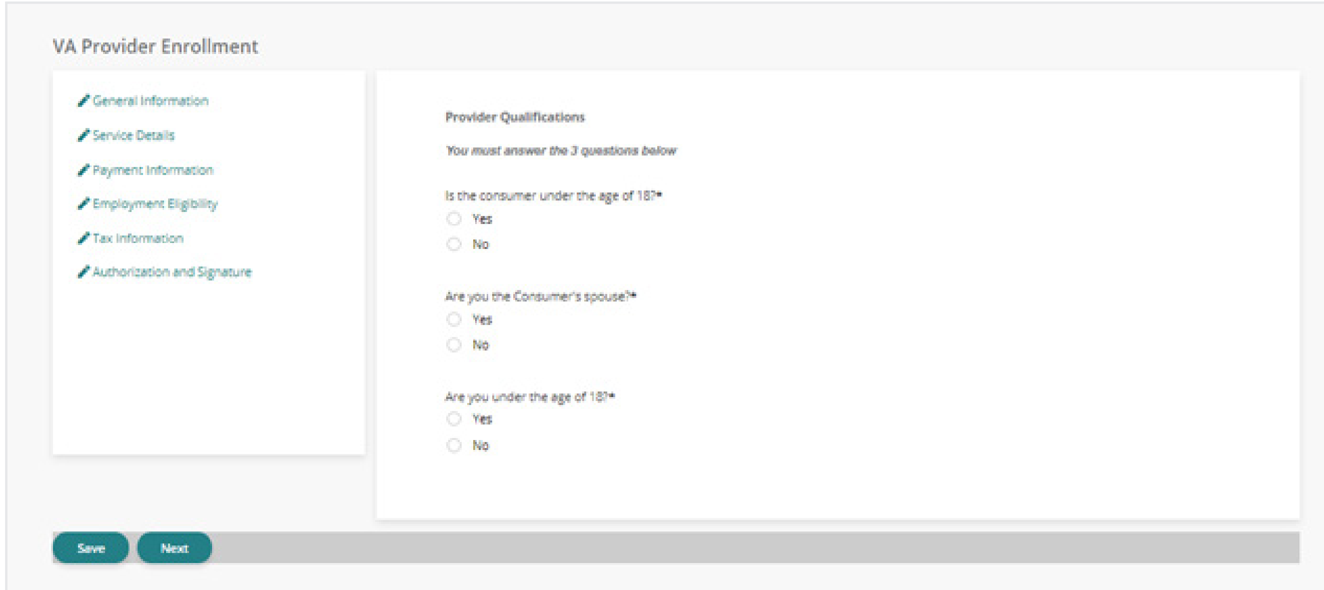

MANAGE USER - PROVIDER

MY TIMESHEETS

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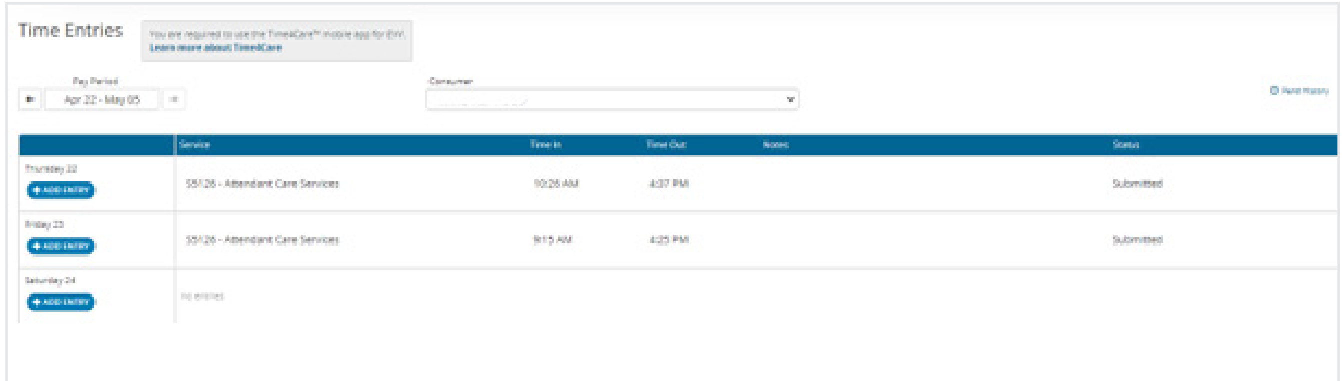

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Authorization Table Column	What does it mean?
SAVED	This time entry has been started by a provider but has not been submitted. Time entries in Saved status are not available for Participant's to Approve and PPL cannot yet process them.
SUBMITTED	This time entry has been submitted and has successfully passed all of the timesheet rules. It is now awaiting the Participant's approval before PPL can process it.
APPROVED	This time entry has been approved and will be processed in the next pay cycle.
IN PROCESS	This time entry is currently being processed by PPL's payroll team.
GOOD TO PAY	This time entry is one step away from payment.
PAID	This time entry has been paid, if the Check # starts with RA it has been paid via direct deposit; if it has a number value it has been paid via paper check.
REJECTED	This time entry has been rejected by the Participant. It requires that you 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 and has denied.

HOW TO CONTACT US

The contact us page is a helpful tool where you can:

- View the customer service center hours of operation
- Retrieve contact information such as phone number, fax and email for the program
- Submit a question or comment directly to the program email box from MyAccount

To navigate to this page, select 'Contact Us' on the website's footer.

Contact Us

Hours of Operation:	8:00am - 8:00pm EST Mon-Fri and 9:00am - 1:00pm EST Saturday
Phone Customer Service:	1-833-549-5672
Fax:	1-866-709-3319
Email:	PPLVA@pcgus.com

Submit a question or comment

Your PPL ID:	UAT1-80E2874X
State:	VA
Program Name:	Virginia Consumer Directed Services
User Role:	ServiceFacilitator
Your Name*	
Your Contact Phone*	
Your Email*	
Subject*	
Comments*	

SUBMIT

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Your Name*

Your Contact Phone*

Your Email*

Subject*

Comments*

SUBMIT

NEED HELP?

Our customer service team is ready to help!

---CS hours--- M-F 0am - 0pm 0

---CS number---

---CS email---@pcgus.com

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