# MY ACCOUNT

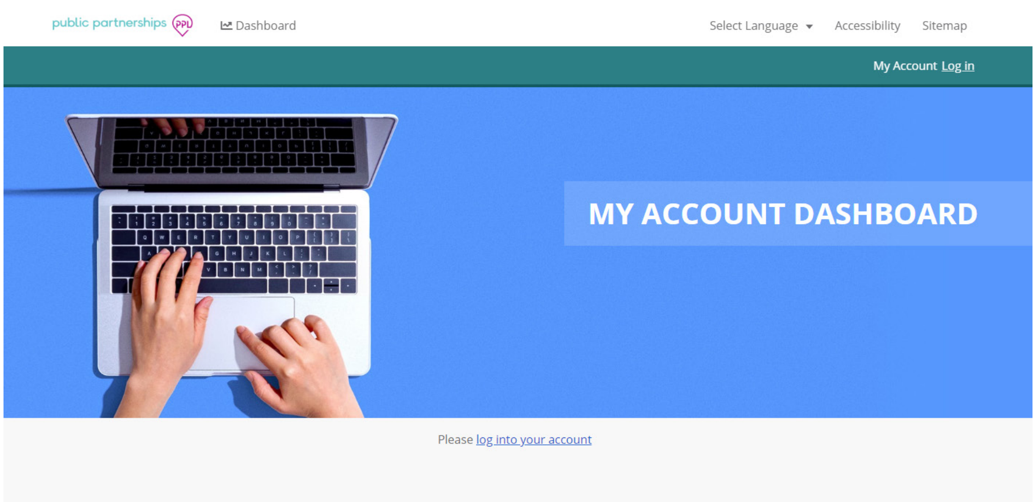
## *How-to Guide for Service Advisors (SA)*

### ACCESS

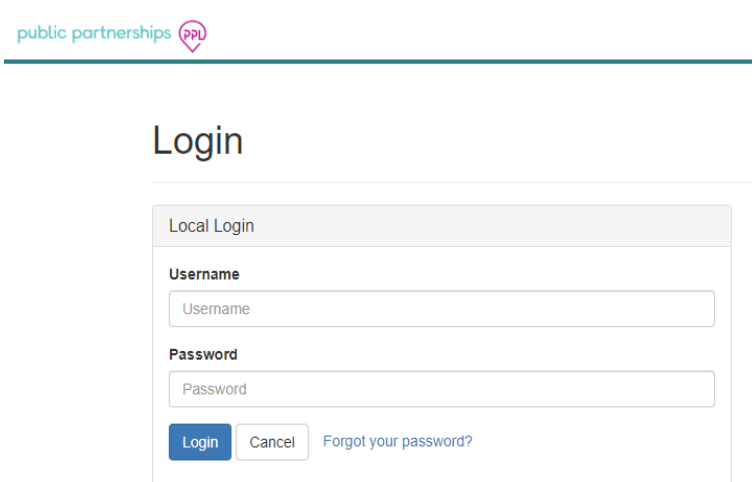
**01** Your system credentials for the Service Advisor role will be issued Public Partnerships staff. Open web browser (e.g., Chrome, FireFox, Edge) and enter the following URL into the web browser: account.publicpartnerships.com

**TIP**

- Internet Explorer is not supported and should not be used.
- This website can be added as a Favorite in your web browser for quick access.




**02** Next, click the link to login to your account and enter the username and password provided to you.




public partnerships PPL

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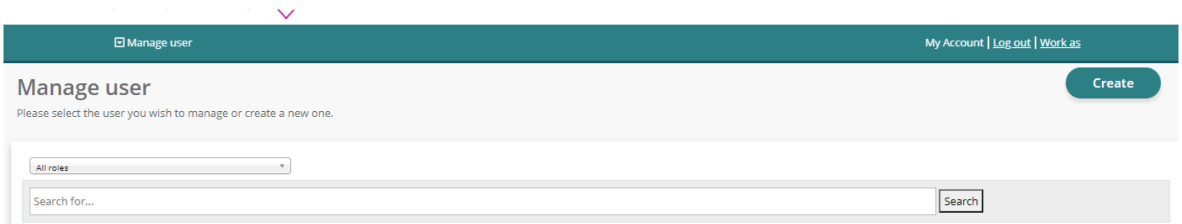
## SERVICE ADVISOR ACCESS

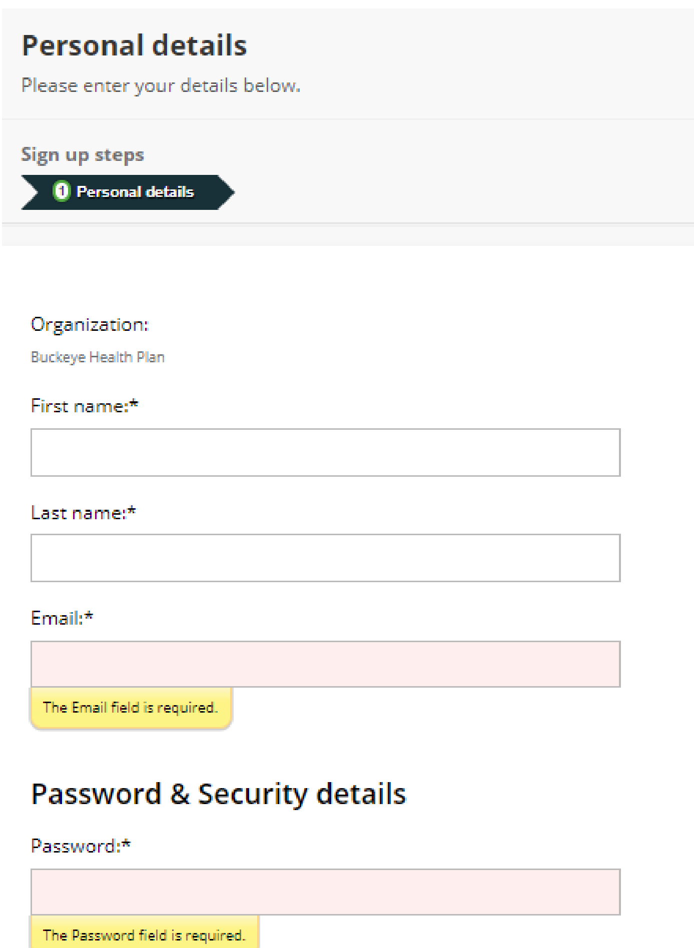
You have the ability to create user credentials for the other Service Advisors in your agency.
To do so follow the steps below:

**01** When you login, click on Work as in the top right corner of the page.

**02** Search for the Service Advisor by using the search bar to ensure they do not already have an account created. If they do not, select Create.

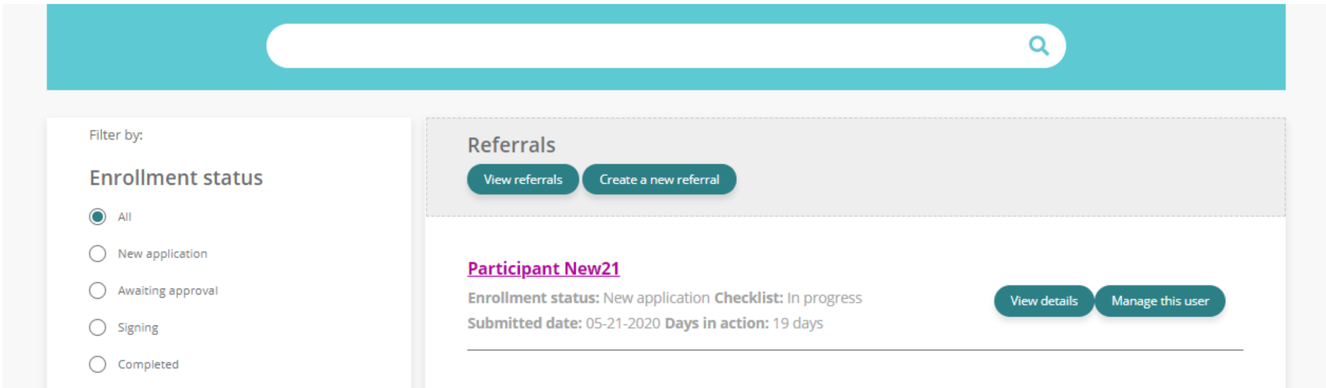



**03** Next, enter the required demographic and account details for the Service Advisor and select Create Account at the bottom of the page.



## CONSUMER REFERRALS & ENROLLMENT

When you login, you will see your dashboard page first. Here you can view referrals, create a new referral and monitor Consumer and PCA enrollment for individuals linked to your name and agency. As a matter of policy, PPL does not delete records, so any inactive or disenrolled program Consumers will also continue to be searchable in MyAccount, should you need to retrieve their records.




**TIPS**

- If you are searching for a Consumer and they do not appear, this could be because they are not linked to your agency or your name.
- Use the search bar to find a specific Consumer in your caseload or the filter options on the left-hand side of the page.

**01** Select the 'View referrals' hyperlink to:

- View details of referrals that are in progress, awaiting approval and completed

**02** Select the 'Create a new referral' hyperlink to:

- Refer a new Consumer
- If the Employer is someone other than the Consumer, their information will need to be entered
- If the Consumer will have an Authorized Representative, their information will need to be entered
- It is not required to enter the PCA's information, but if known, it is recommended that it be added

**03** Select the 'View Details' hyperlink to view:

- A Consumers Enrollment details, Documents and Checklists
- If a Consumer hasn't started their enrollment yet, they will not appear for you to see these details
- If a service advisor has been identified and assigned to a Consumer, you will see their name at the bottom of the Consumer profile.

**04** Select the 'Manage this user' hyperlink to:

- Access a Consumer's account to:
  - View details and update the Consumer's personal information, account details and contact details
  - View, edit and start the enrollment for a Representative
  - View, edit and hire new PCAs
  - View timesheets
  - View authorizations

## CONSUMER AUTHORIZATIONS

Once a Consumer's enrollment is complete, you will be able to access their authorizations. To navigate to a Consumer's authorization page, select 'Manage this user' and then click view under 'My authorizations.' A new page will then open with the Consumer's authorization details.

| Authorization Table Column | What does it mean? |
|---|---|
| **SERVICE** | The Service Code name for the authorization line |
| **SERVICE 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. |
| **RATE** | This is the billable rate of each unit |
| **AUTHORIZED UNITS** | This is the total authorized unit increment 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 |

| Service Authorization ID | Start Date | End Date | Authorized Units | Total Hours | Paid Hours | Good to Pay Hours | Remaining Hours | External Authorization No | Status |
|---|---|---|---|---|---|---|---|---|---|
| AUL0000004 | 9/27/2020 | 10/3/2020 | 54.00 units | 13.50 hours | 0.00 hours | 0.00 hours | 13.50 hours | | Approved |
| AUL0000002 | 9/20/2020 | 9/26/2020 | 54.00 units | 13.50 hours | 11.50 hours | 0.00 hours | 2.00 hours | | Timesheet Partially Subm |
| AUL0000006 | 9/19/2020 | 9/19/2020 | 54.00 units | 13.50 hours | 2.00 hours | 0.00 hours | 11.50 hours | | Timesheet Partially Subm |
| | | | 162.00 | 40.50 | 13.50 | 0.00 | 27.00 | | |

# TIME ENTRIES

Once a Consumer's enrollment is complete, you will be able to access their timesheets. To navigate to a Consumer's timesheets, select 'Manage this user' and then click view under 'My timesheets.' A new page will then open and you can:

- Search for time entries
- See any time entries that have been submitted
- Monitor the payment progress for each of the time entries that have been submitted.
- You can track the progress of a time entry through to payment by selecting VIEW DETAILS this page.
- If a time entry is in SUBMITTED status, it is awaiting the Employer's approval before PPL can process it.

Participant Name or PPL Participant ID# or Participant Medicaid ID#

Provider Name or PPL Provider ID# or Provider Medicaid ID#

Check Number

Date Range Dec 8, 2019 - Jun 8, 2020

SEARCH

| Pay Period | Participant Name (PPL Participant ID#) | Participant Medicaid ID#... | Provider Name (PPL Provider ID#) ... | Gross Amount | Check Amount | Action |
|---|---|---|---|---|---|---|
| 6/1/2020 - 6/15/2020 | Consumer (PA-0010125) | 00110125 | Provider (PR-0010086) | $20.00 | $17.72 | View Details |

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| Time Entry Status | What does it mean? |
|---|---|
| **SUBMITTED** | This time entry has been submitted and has successfully passed all the timesheet rules. It is now awaiting the Consumer'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 Consumer. 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. |

**TIPS**

- If at any point the time entry was pended, you can view the Pend History to see why payment may have been delayed.

## 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 My Account

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

### Contact Us

| | |
|---|---|
| Hours of Operation: | Monday to Friday 9:00 AM to 4:30 PM Eastern Time |
| Phone No: | 1-833-976-1856 |
| Fax: | 1-833-757-0992 |
| Email: | RI_IP-cs@pcgus.com |

**Submit a question or comment**

| | |
|---|---|
| Your PPL ID: | CM-0010168 |
| State: | RI |
| Program Name: | RI IP |
| User Role: | CaseManagerConsumerSearch |
| Your Name* | |
| Your Contact Phone* | |
| Your Email* | |
| Subject* | |
| Comments* | |

SUBMIT

***We hope you enjoy using My Account!***

**Questions?**

If you have any questions, please call Customer Service and a representative will be happy to assist.

**Customer Service:**

1-844-842-5891