MYACCOUNT

Guide for Participants / Employers
of Record (EORs) - Addendum

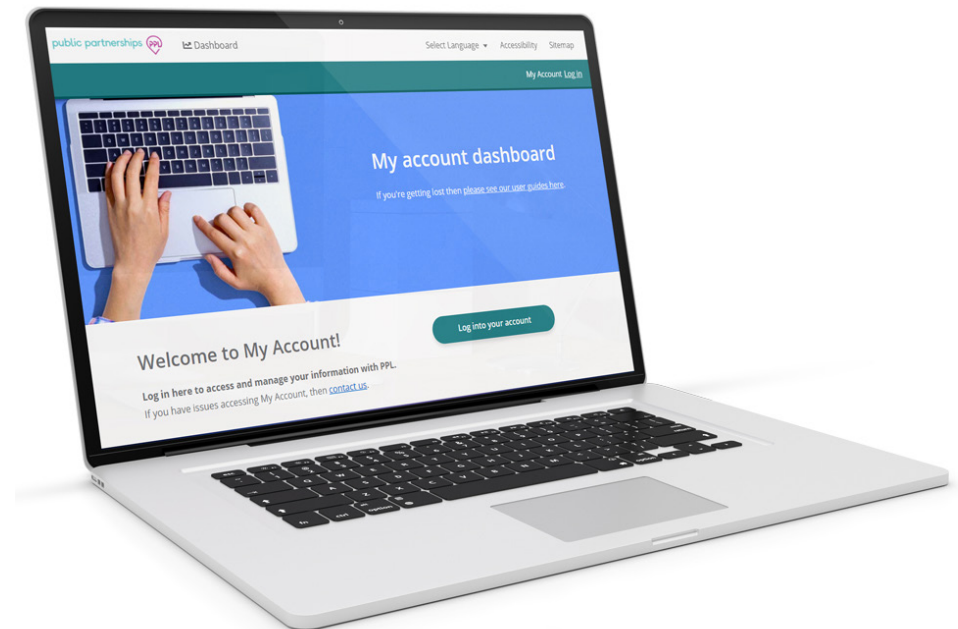public partnerships PPL

Your #1 choice for self-directed care ™
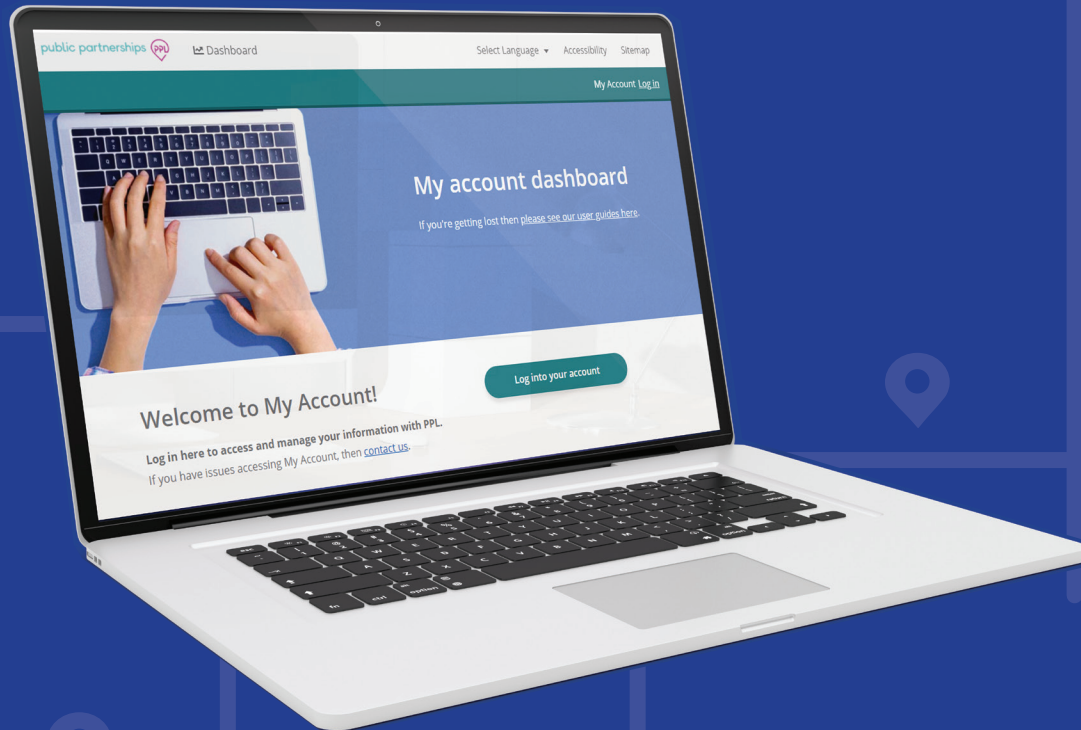
USER GUIDE
at a glance

WELCOME

This document is about changes to the MyAccount system for Participants. These changes include:

- Improved Employer enrollment.
- Viewing and updating Employer details.
- Changing the Employer to a new person.
- An ability to disassociate or re-hire providers.
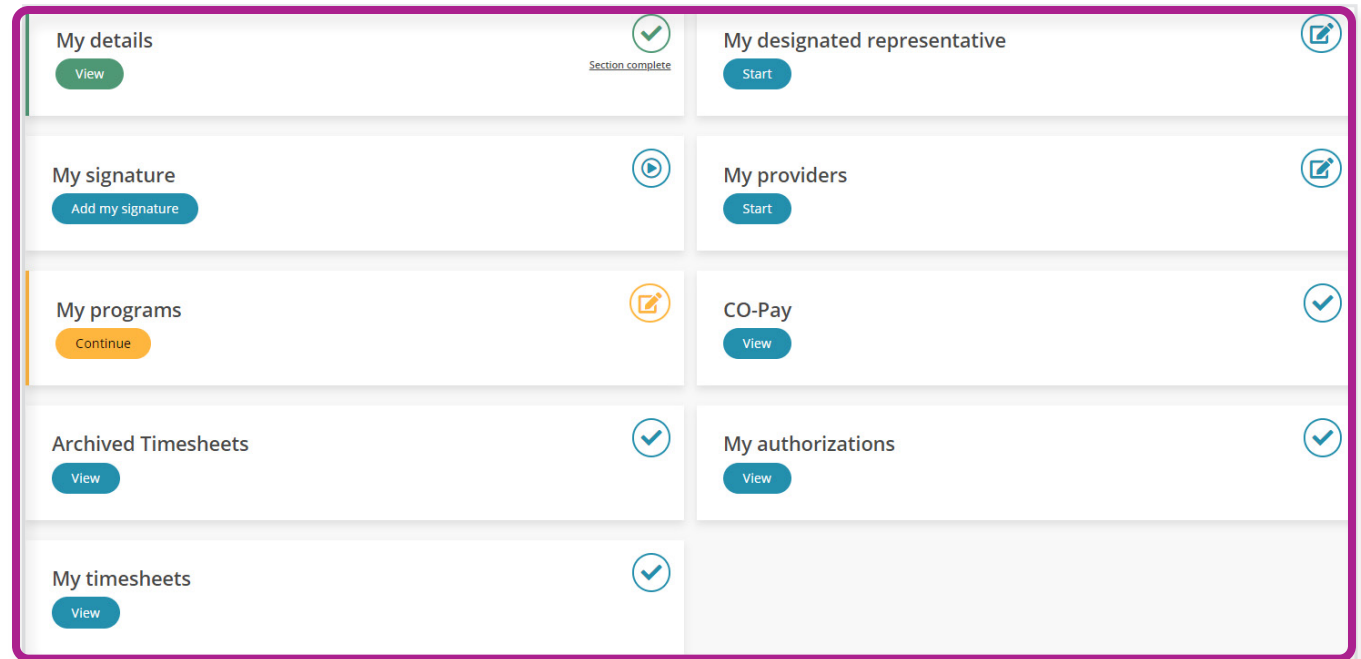
PARTICIPANT/EMPLOYER ENROLLMENT

First, the Participant referral will be approved. Then, a registration email will be sent to the Participant's email. The link in the email takes you to the online Employer enrollment forms. Complete these forms with the Employer's information.

DASHBOARD

When you login, you will see your Participant dashboard page first.

Here you can:

- Edit your details
- Create and edit your digital signature
- Complete and update your enrollment forms
- Enroll or change your Designated Representative
- Hire a Worker (Provider)
- View your Worker's Timesheets
- View your Authorizations
- View your Co-Pay details

MY PROGRAMS

As a Participant / Employer, you need details and documents for your programs. You can view this information from the **'My programs'** tile in the MyAccount Dashboard. Here you can complete your enrollment, and view status updates and documents..

1. Select the '**My programs'** in MyAccount to start your program enrollment.
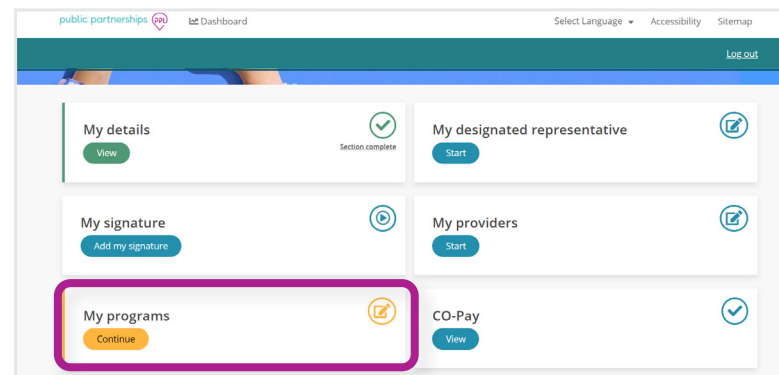
PARTICIPANT/EMPLOYER ENROLLMENT

2. In the **'My Programs'** section, the Participant tile shows your:

- Name
- Enrollment status
- Date of enrollment
- Program name
- PPL ID

3. Select the '**Enrollment**' button to view the Employer enrollment forms.

public partnerships PPL   📈 Dashboard

Select Language ▼   Accessibility   Sitemap

Log out

ℹ Completed enrollments will be reviewed and verified by the PPL team to check compliance.

⊗ Close

Test Participant

Status: New application
Date: 04-04-2022
Program: CCC +
PPLID: PA-0016066

Enrollment

|< < **1** of 1 pages > >|

PARTICIPANT/EMPLOYER ENROLLMENT

4. On this page there are Employer details from your referral form. Confirm that this information is correct.

- The Employer can edit:
  - Phone number
  - Address
  - Email
  - Gender
  - Existing Employer Identification Number (EIN) (if applicable)

If the information here is not correct and you can't edit it, please reach out to your Service Facilitator or PPL. Information you can't edit is the First Name, Last Name or SSN.

5. If If you confirmed the information, select **'Next'** to accept the Terms and Conditions.

✏ Terms and Conditions

EMPLOYER INFORMATION

The Employer of Record(EOR) is the actual owner of the Self-Directed Supports business and will have a Federal Employer Identification Number (EIN) established in their name. The EOR also manages the providers and approves their time. An Authorized Representative is **not** the EOR.

Who is responsible for employment tasks?*

[Other Relative]

☑ Add New EOR

Employer Legal First Name*
Employer

Employer Legal Last Name*
Enrollment

Employer Social Security Number*
012-12-1234

Employer Phone Number*
[555-555-5555]

Employer Address*
[NO PO BOX] (Search) (Add)

Your selected address:
✖ 40 Broad St , Boston, MA, 02109-4313, US

Employer Email
[   ]

Employer Gender
○ Male
● Female
○ Prefer Not to Disclose

Does the Employer have an existing Employer Identification Number (EIN)?*
○ Yes
● No

(Save) (Next)

PARTICIPANT/EMPLOYER ENROLLMENT

6. Next, select **'Finish'** to make the enrollment documents. Review the documents, then select **'Sign and submit.'**

The system will apply the digital signature to each form automatically. The Employer does not need to do this.

7. Now their enrollment status will be "Awaiting Approval".

8. The Employer's enrollment will now be Reviewed and Approved by PPL. The Participant will receive an email when this is done.

public partnerships (PPL)   📊 Dashboard

Select Language ▾   Accessibility   Sitemap

Log out

❌ Close

The following documents have been generated

Sign and submit

Enrollment documents

☐ 📄 VA CCC+ Form 2678

☐ 📄 VA CCC+ Form SS4

☐ 📄 VA CCC Employer Agreement

CHANGE OF EMPLOYER ENROLLMENT

This chart defines the statuses for employer enrollments.

INITIAL EMPLOYER ENROLLMENT	
STATUS	**DEFINITION**
New Application	The Employer enrollment has been created but hasn't started the enrollment process yet.
In Progress	The Employer has started the enrollment process. Or an update has been made to the enrollment details. The details can only be updated by the Case Manager, Service Facilitator, or a PPL Admin user.
Signing	The Employer has accepted the Terms and Conditions but has not signed their enrollment.
Awaiting Approval	The Employer has signed and submitted their enrollment. PPL is processing it for Approval.
Pending EIN	PPL approved the Employer's enrollment. PPL is still obtaining an Employer Identification Number (EIN) for the Employer.
Returned	The enrollment documents need to be corrected by the Employer.
Completed	The Employer's enrollment has been approved and an EIN has been obtained.

CHANGE OF EMPLOYER ENROLLMENT	
STATUS	**DEFINITION**
In Progress	The Change of Employer enrollment has been created.
Signing	The New Employer has accepted the Terms and Conditions but has not signed their enrollment.
Awaiting Approval	The New Employer has signed and submitted their enrollment. PPL is processing it for Approval.
Pending EIN	PPL approved the New Employer's enrollment. PPL is still obtaining an Employer Identification Number (EIN) for the New Employer.
Pending Effective Date	PPL has: • Approved the Change of Employer's enrollment • Obtained an EIN • Set the Effective Date in the future. On the Effective date, the New Employer's enrollment will be moved to Completed status.
Returned	The enrollment documents need to be corrected by the New Employer.
Denied	PPL denied the New Employer's enrollment. Another Employer needs to be chosen.
Completed	The New Employer's enrollment has been approved and an EIN has been obtained.
Archived	The initial Employer is no longer the employer. The New Employer's enrollment is now in a Completed status. The initial Employer's status is now in Archived status.

PARTICIPANT/EMPLOYER ENROLLMENT

UPDATING EMPLOYER DETAILS

If the Employer's enrollment status is "Completed," select '**View EOR Details**' to review the Employer Details. If any information is incorrect, you can edit it here.

After the enrollment is in "Completed" status, the Participant / Employer can update their:

- *Phone Number*
- *Email*
- *Address*

.Please contact PPL if you need to change:
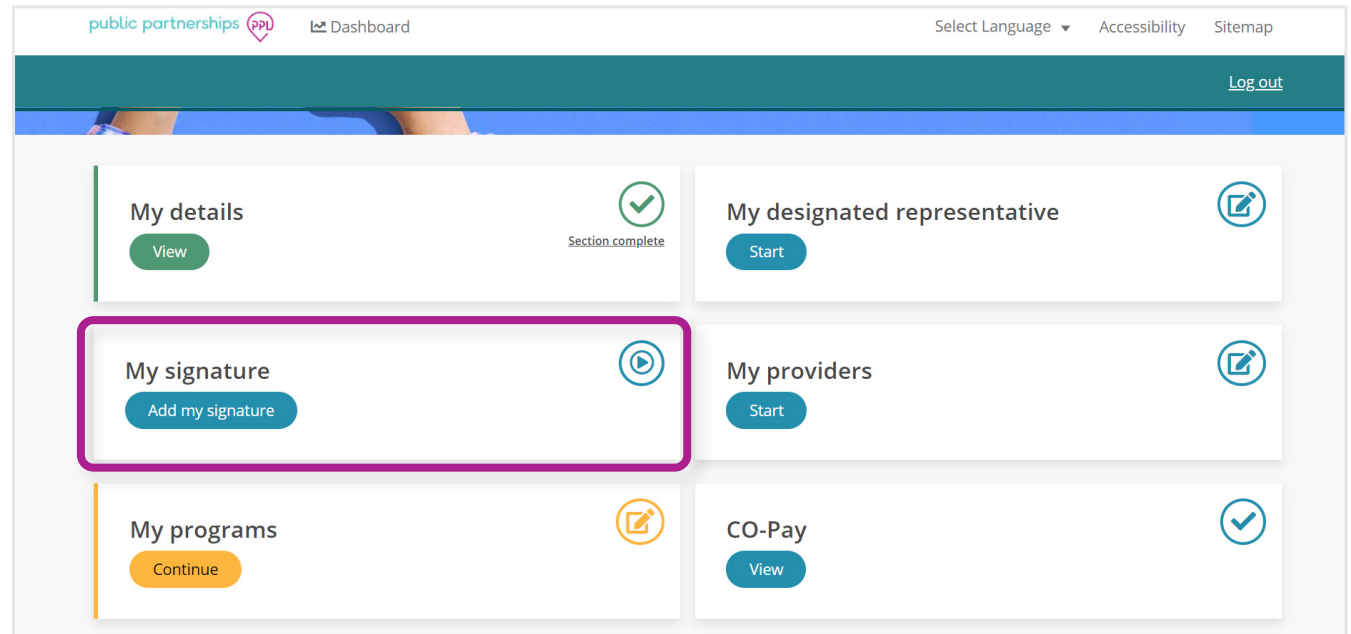
- *Name*
- *Social Security Number (SSN).*

public partnerships (PPL)   📊 Dashboard

My programs

To learn about the self-directed home care prog
state, click on the state name to show our availa

For details and documentation on each program, cl
information, such as: eligibility requirements, progr
information, and more.

ℹ Completed enrollments will be reviewed and verified by

Employer Of Record details   ⊗

First name:*	TEST
Last name:*	Employer
Social Security No:*	012-55-0000
EIN:	12-3456999
Phone number:*	555-555-5555
Email:*	testemployer@test.com
Address line 1:	40 Broad St
City:	Boston
State:	MA
Zip code:	02109

Search address   Find   Add

Test Participant

Status: Completed
Date: 04-04-2022
Program: CCC +
PPLID: PA-0016064

Enrollment   **View EOR Details**

CHANGE OF EMPLOYER ENROLLMENT

Ask your Service Facilitator to start the Change of Employer process. Then, an email will be sent to the Participant to notify them that the Change of Employer's enrollment has been created. From here, follow the steps below.

MY SIGNATURE

1. Select '**My Signature**' on your MyAccount Dashboard. The New Employer should create and save a digital signature.

2. Go back to your MyAccount Dashboard and select '**My Programs**.'
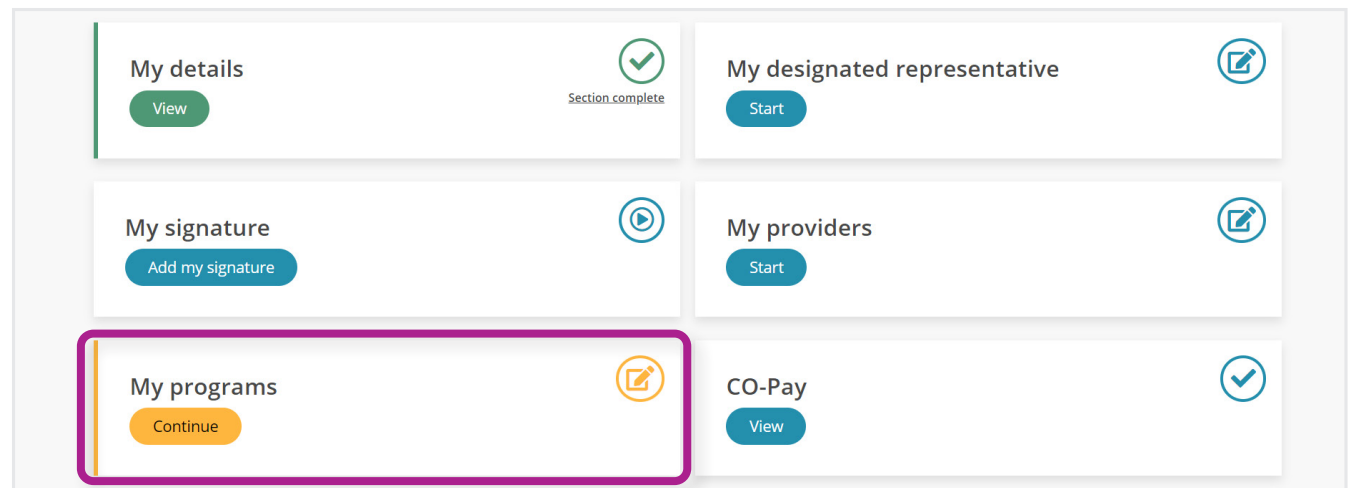
CHANGE OF EMPLOYER ENROLLMENT

3. Here you will see enrollment tiles. These tiles show the Participant's name, enrollment status, date of enrollment, the program, and PPL ID.

- The New Employer's enrollment will be in an "In Progress" status.

4. To open the New Employer's Enrollment, select '**Enrollment access validation.**'

5. The New Employer can't access the current/previous Employer's enrollment documents. The New Employer will need to verify their First Name, Last Name, and SSN to continue.

6. The information displayed now is from the Change of Employer form submitted by the Service Facilitator. Review this information and make any needed edits.

The Employer can edit:

- Phone Number
- Address
- Email
- Gender
- Existing Employer Identification Number (EIN) (if applicable)

IMPORTANT

The Employer has 3 attempts to enter the correct information. If they fail all 3 attempts, they will have to wait one hour before tryin g again. If the Employer = Self (Participant) the Enrollment Access Validation will not be enabled, and you will just see an Enrollment button.

Test Participant

Status: In progress
Date: 04-04-2022
Program: CCC +
PPLID: PA-0016064

Enrollment access validation

CHANGE OF EMPLOYER ENROLLMENT

7. Select '**Next**' to accept the Terms and Conditions.

8. Select '**Finish**' to generate the enrollment documents, then review them. If correct, select '**Sign and Submit**.'

IMPORTANT

The system will apply the digital signature to each form automatically. The employer does not need to do this.

If the information here is not correct and you can't edit it, please reach out to your Service Facilitator or PPL. Information you can't edit is the First Name, Last Name or SSN.

9. Once the Employer Signs and Submits, their enrollment status will update to Awaiting Approval.

10. When the Employer's enrollment has been approved, an email will be sent to the Participant's email address.

public partnerships (PPL)   📈 Dashboard

Select Language ▾   Accessibility   Sitemap

Log out

❌ Close

The following documents have been generated

Sign and submit

Enrollment documents

☐ 📄 VA CCC+ Form 2678

☐ 📄 VA CCC+ Form SS4

☐ 📄 VA CCC Employer Agreement

DISASSOCIATING & RE-HIRING A PROVIDER

DISASSOCIATE

Program Participants / Employers can now manage the dismissal of any hired workers (providers).

To start:

1. Go to **'My providers'** on the MyAccount Dashboard
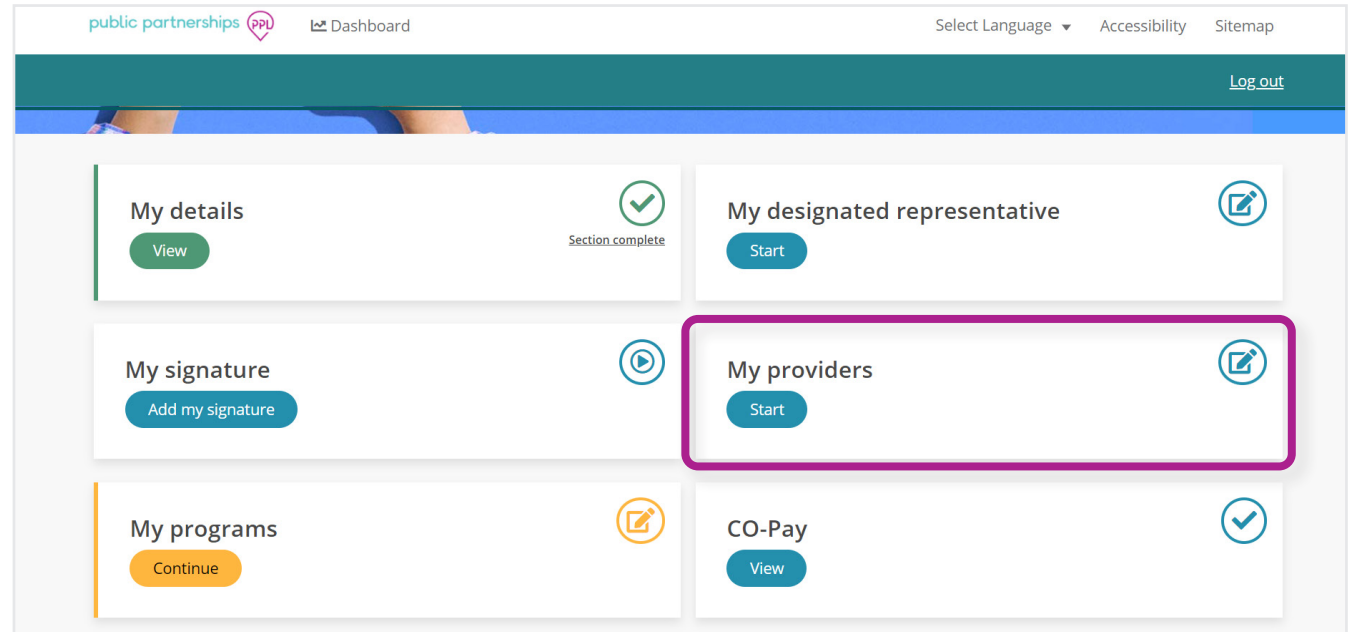
2. Select **'Disassociate provider'** under the name of the worker who will no longer work with you.

Wendy Worker

Status: Awaiting Approval

Date sent: 03-30-2022

Program: CCC +

PPLID: PA-0015833

Review

Disassociate provider

DISASSOCIATING & RE-HIRING A PROVIDER

3. Enter a Disassociation Date and a Disassociation Reason and select **'Finish'** at the bottom of the screen.

PROVIDER DISASSOCIATION

This provider will not be able to submit dates of service worked after the disassociation date you have selected below.
- If this provider is in a pending disassociation status, the provider has up to 30 days after the disassociation date to submit any remaining timesheets for payment.
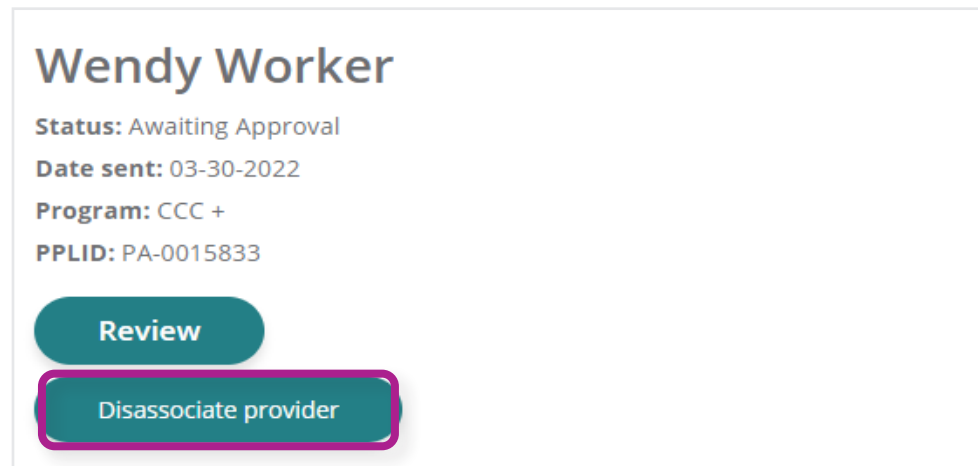- If this provider is in a disassociation status, the provider is now disassociated and your employment relationship is no longer active

Disassociation Date
*

04/06/2022

Disassociation Reason*
- ○ 1 - Provider quit due to dissatisfaction with VA CCC+ Program
- ○ 2 - Provider quit due to dissatisfaction with pay
- ○ 3 - Provider quit due to scheduling reasons
- ○ 4 - Provider quit for unknown reasons
- ○ 5 - Provider was let go due to performance issues
- ○ 6 - Provider was let go due to participant dissatisfaction
- ○ 7 - Provider was let go due to scheduling issues
- ● 20 - Other

Finish

4. Review the confirmation page.

- If the date and reason for dismissal is correct, select **'Confirm'.**
- If changes are needed, select the **'Edit'** button.

VA Disassociation
VA Disassociation

You have initiated your provider's disassociation. Please ask that they submit any unsubmitted time entries for payment.

Your answers

Edit

Disassociation Date
4/6/2022

Edit

Disassociation Reason
20 - Other

Edit   Confirm

5. After selecting '**Confirm**' a confirmation message will appear. The page may take a minute, but it will then reload and return you to your dashboard.

6. The worker tile will stay in your account. PPL cannot delete information per requirements. The dismissed worker can't submit time on or after your selected date.

IMPORTANT

A worker might be in Pending status, and you might see "Provider is Pending Disassociation" for two reasons:

1. Your chosen disassociation date is in the future.

2. You did the disassociation process today. The system takes one day to process, and the status will say "Disassociated" the day after.

DISASSOCIATING & RE-HIRING A PROVIDER

RESTORE

After dismissing a worker, Participants / Employers can also re-hire them for work again. If the worker was dismissed recently (less than 6 months), you can simply "Restore" them.
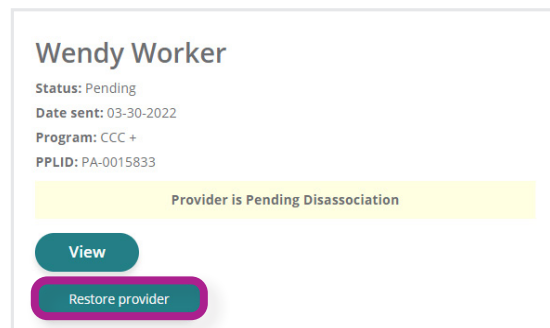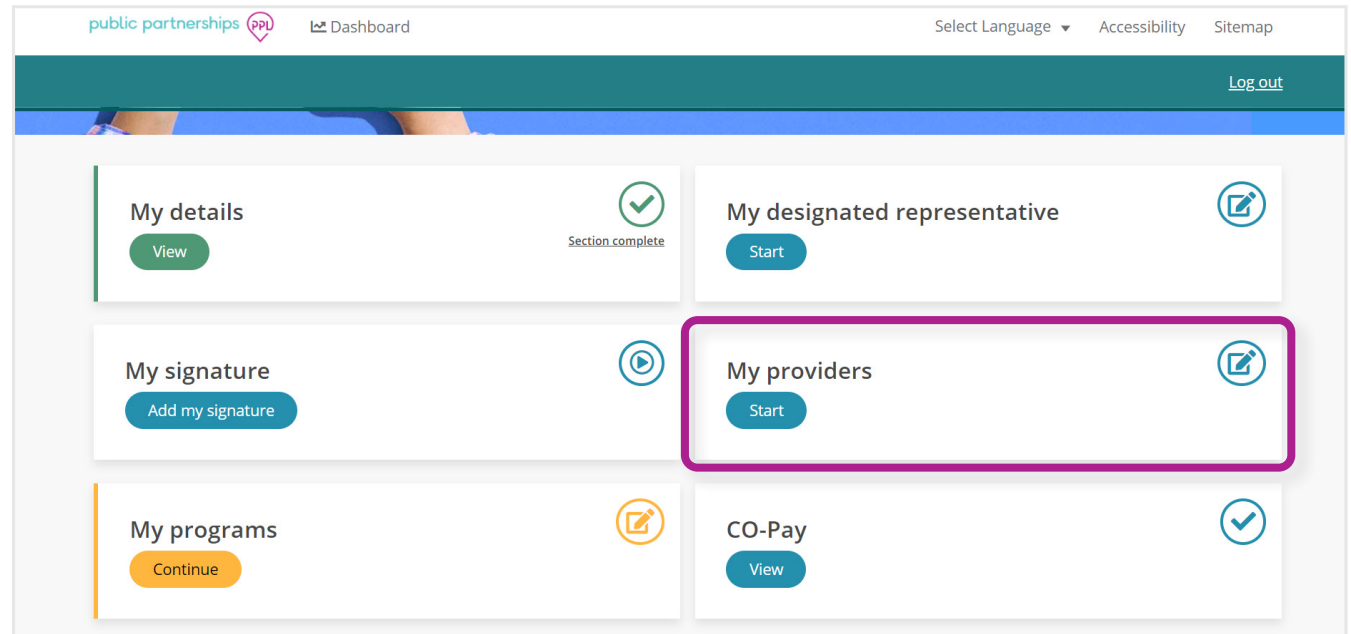
If more than 6 months has passed since dismissal, you will need to rehire them. Re-hiring instructions are in the "How-to Re-Hire a Provider" section of this document. Re-hiring involves workers submitting and signing their paperwork again.

1. Go to your '**My providers**' in the MyAccount Dashboard.

2. Select '**Restore provider**' under the name of the worker you want to work with again.

You can do this if you both want to work together again, or the worker was mistakenly dismissed.

public partnerships **PPL**   📈 Dashboard

Select Language ▾   Accessibility   Sitemap

Log out

My details
View
Section complete ✓

My designated representative
Start

My signature
Add my signature

My providers
Start

My programs
Continue

CO-Pay
View

Wendy Worker
Status: Pending
Date sent: 03-30-2022
Program: CCC +
PPLID: PA-0015833

Provider is Pending Disassociation

View

Restore provider

DISASSOCIATING & RE-HIRING A PROVIDER

3. Once you select **'Restore provider,'** the worker's enrollment status will change to "Awaiting Approval" status.

4. The Participant / Employer should select **'Review.'** The worker does not need to make any changes or re-sign any documentation

5. After selecting **'Review,'** you will see this confirmation screen.

Wendy Worker
Status: Awaiting Approval
Date sent: 03-30-2022
Program: CCC +
PPLID: PA-0015833

Review

Disassociate provider

Provider Enrollment complete

You have successfully completed your enrollment. Your signature will be added to the relevant documents and sent to your Employer for approval.

Review the information below and select Edit if you want to go back to change anything.

DISASSOCIATING & RE-HIRING A PROVIDER

6. At the bottom of the screen, select **'Sign and Submit'** to approve the worker's enrollment.

7. The enrollment will then move into a "Completed" status.

8. If the worker needs to make changes to their documentation, choose to **'Return.'** Once the worker makes any corrections, review and sign their enrollment.

9. If you do not want to work with them again, select **'Deny.'** The worker will remain dismissed.

Certification: I attest, under penalty of perjury, that

1. I have examined the document(s) presented by the employee,
2. the documents appear to be genuine and relate to the employee named, and
3. to the best of my knowledge the employee is authorized to work in the United States.

Employment start date

mm/dd/yyyy

Sign and submit

Reject enrollment

Please give a reason why you want to reject this registration

Deny   Return

DISASSOCIATING & RE-HIRING A PROVIDER

RE-HIRE

After dismissing a worker, Participants / Employers can also re-hire them for work again. If the worker was dismissed more than 6 months ago, you can 'Rehire' them. You do not need to enter any information for them. They will be able to update this themselves.

You may not see their tile under MyProviders if they have not worked for you for quite some time or if they never enrolled in MyAccount.

1. Go to '**My Providers**' in the MyAccount Dashboard.

2. Select '**Re-Hire Provider'** button under the worker's name.

3. After selecting the '**Re-Hire Provider'** button, you will see the worker tile change to "New Application."

4. The worker can now complete their enrollment online. They will also see their status change to "New Application."

The instructions on how to complete Worker enrollment is in the Provider user guide.