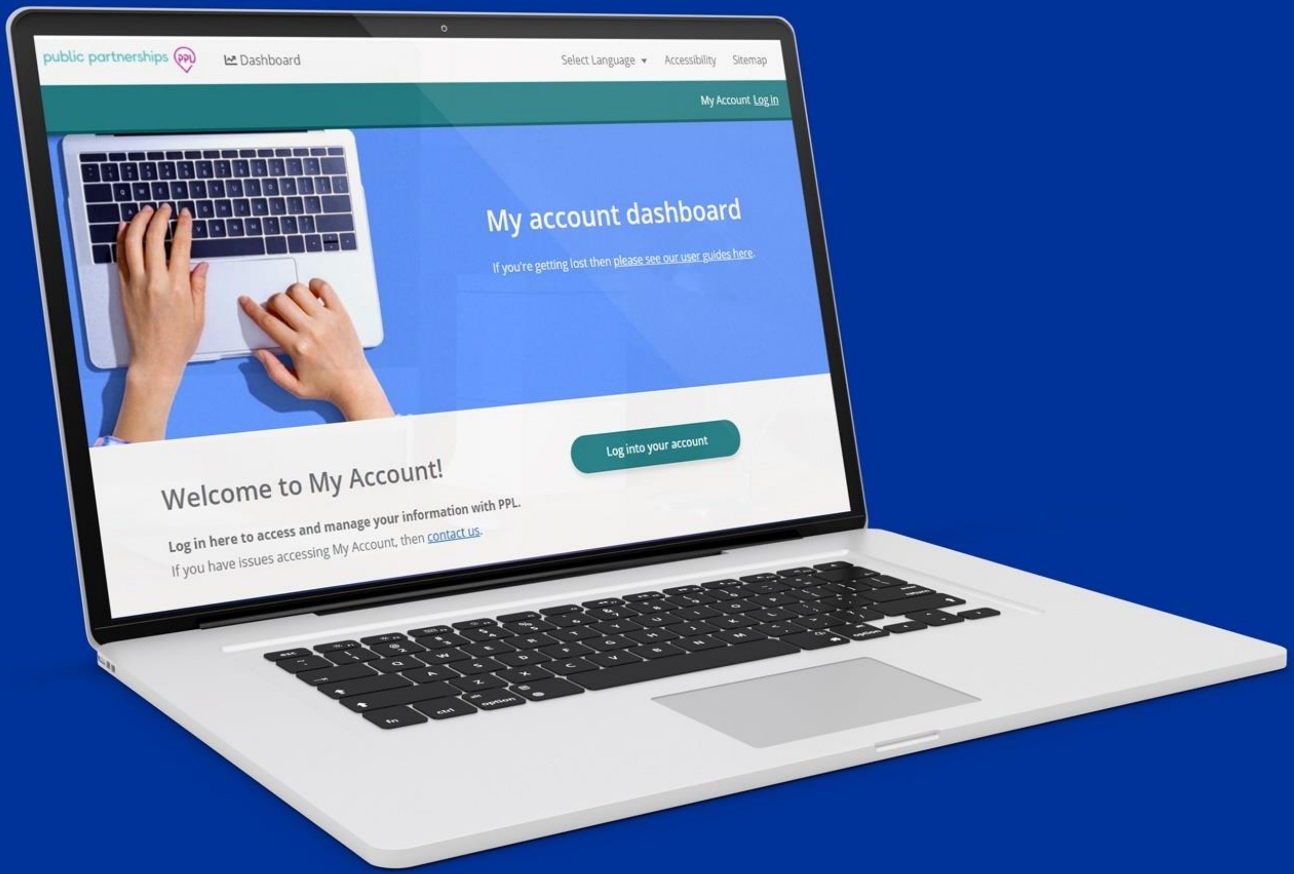
public partnerships PPL

Your #1 choice for self-directed care™



MyAccount

FOR SERVICE FACILITATORS AND MANAGED CARE ORGANIZATIONS

April 2021

Agenda

WELCOME

MyAccount for
Service Facilitators and MCO

OVERVIEW

Your Care, Centralized

We know one of the most important things in taking control of your own healthcare is keeping things easy. That’s why we created MyAccount.

MyAccount is an intuitive online platform that puts the power of PPL at your fingertips. Getting registered, submitting time sheets, and communicating with your service representatives just got a whole lot, yeah, easier.

PPL

Transform more lives by making self-directed home care easier for all.

OVERVIEW

What is MyAccount?

- Within a self-directed program, there is information and documentation that you and your attendant(s) need to provide or monitor
- In 2016, Public Partnerships | PPL created a web portal to give you more control over your care
- MyAccount is a brand-new platform that replaces BetterOnline to give users easier access to forms, personal information, and provider care.

Who Uses MyAccount in Virginia?

OVERVIEW

Consumers/Employer

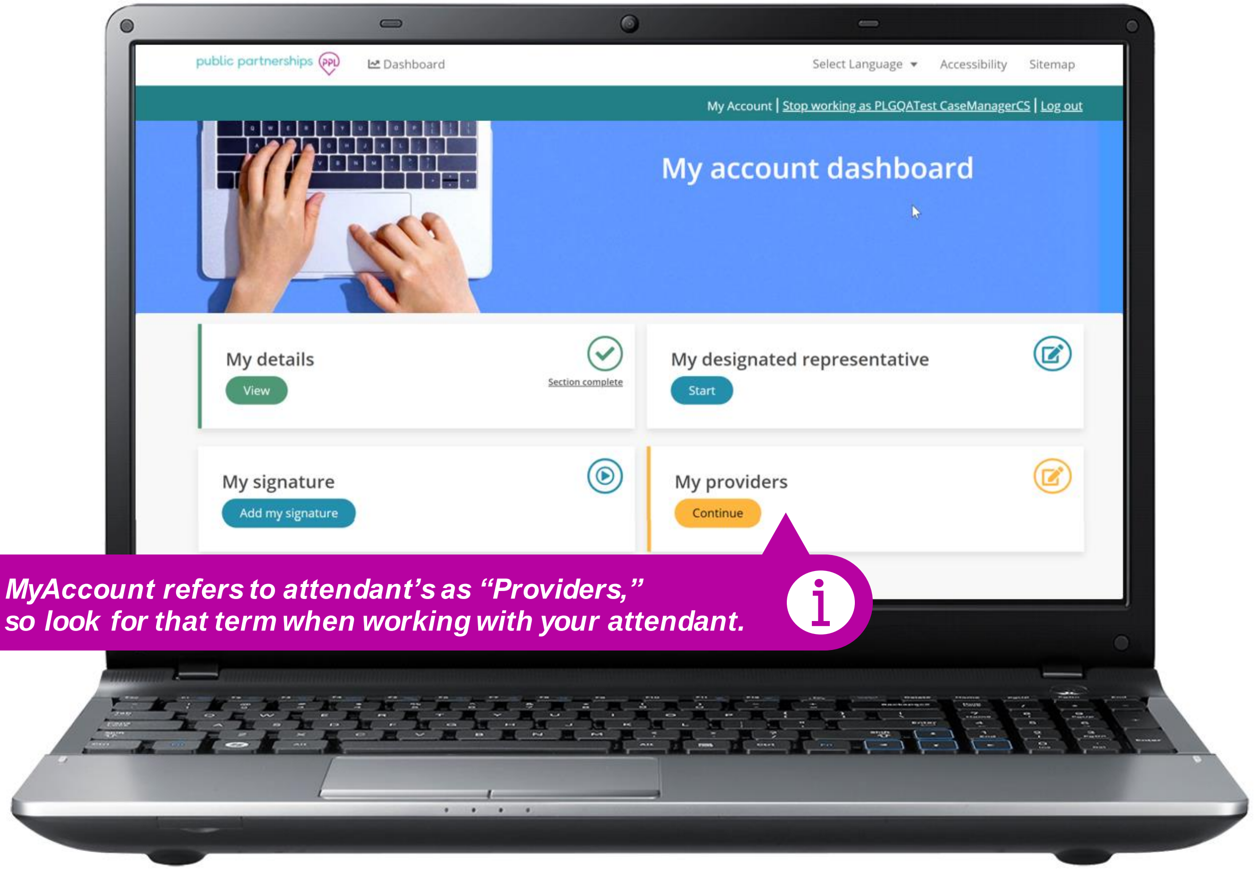
- Enroll in a state specific program
- Hire an Attendant
- Review and approve timesheets

Attendants

- Enroll with a consumer
- View timesheets

MCO/Service Facilitators

- View caseload
- Submit referrals



MyAccount refers to attendant's as "Providers," so look for that term when working with your attendant.

Why change the web portal from BetterOnline™?

- Making self-direction home care easier includes rethinking our tools and updating our capabilities to support the needs of our populations. Current design limitations of our current BetterOnline™ web portal made creating a new platform, MyAccount, more practical.
- MyAccount improves the user experience.
- Supporting the user journey.
  - **Users will have more insight into where they are in the enrollment process.**
  - Access to proactive communication and support.

MyAccount versus BetterOnline

OVERVIEW

	Fully Integrated User Registration During Enrollment	Electronic forms/signatures	Barcoding on paper forms for required wet signatures	FMS Self-Directed standards for Participant Enrollment	Self-Service	Enhanced Tracking/workflow reporting	Standardized Readability
MyAccount	✓	✓	✓	✓	✓	✓	✓
BetterOnline	✗	✗	✗	✗	✗	✗	✗

Enrollment + MyAccount

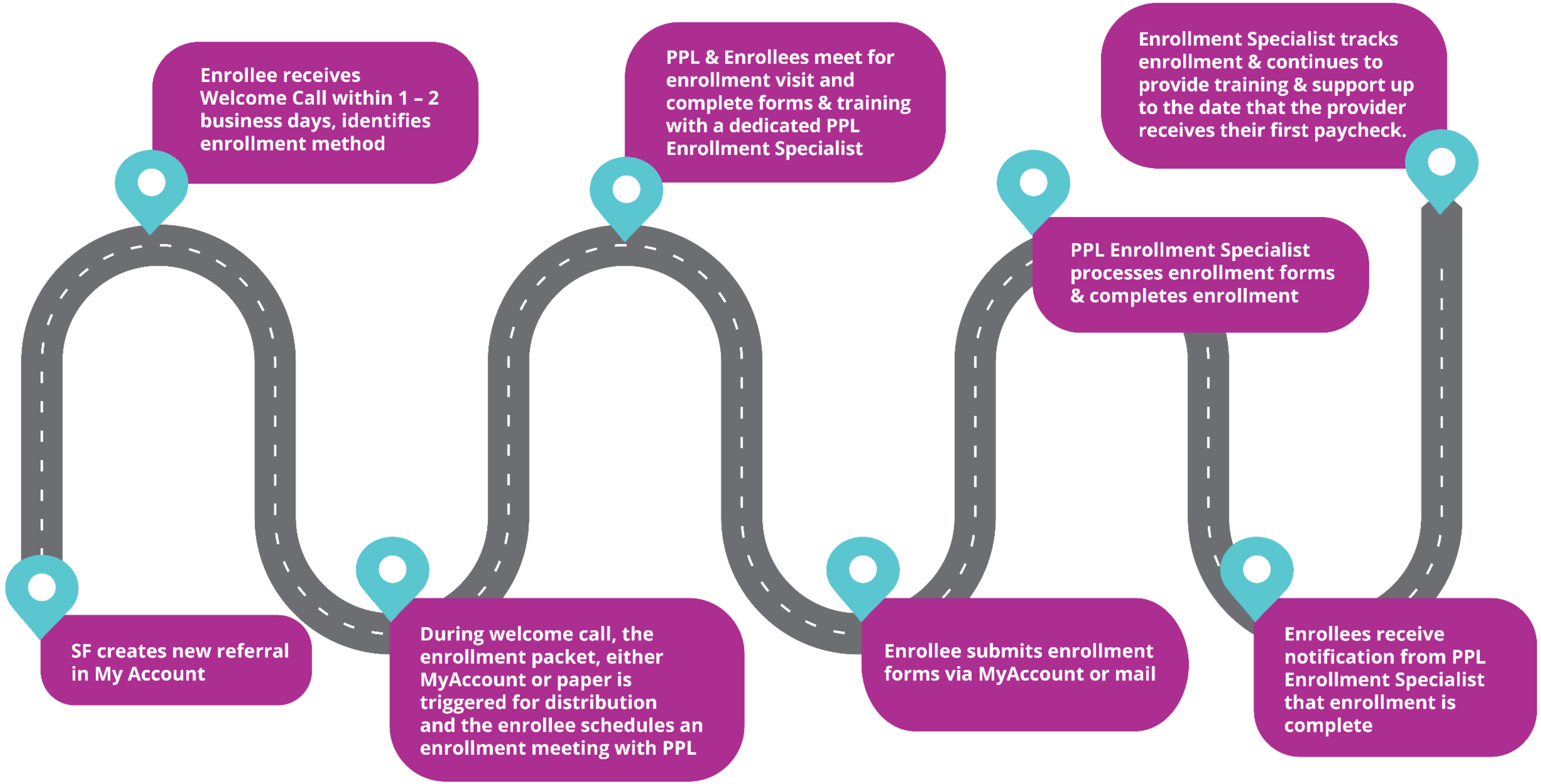
OVERVIEW

Making self-directed enrollment easier:

- **Dedicated enrollment support** for all enrollments
- Dynamic methods to complete enrollment; targets:
  - 80% MyAccount
  - 20% Traditional (mail)
    - ✓Leveraging bar-coding
- **Fully integrated**; enhanced capabilities to manage processes and requirements end-to-end electronically
- **Built in dashboard and progress management** capabilities for key roles
- Increased communications and tracking throughout the enrollment experience
- Condensed enrollment timeline(s), target **under 15 days** within first year
- Increased data validations to verify accuracy, reducing corrections
- **New and expanded self-service** options for both participants and direct care workers
  - Obtaining UID
  - Requalification

Enrollment Process

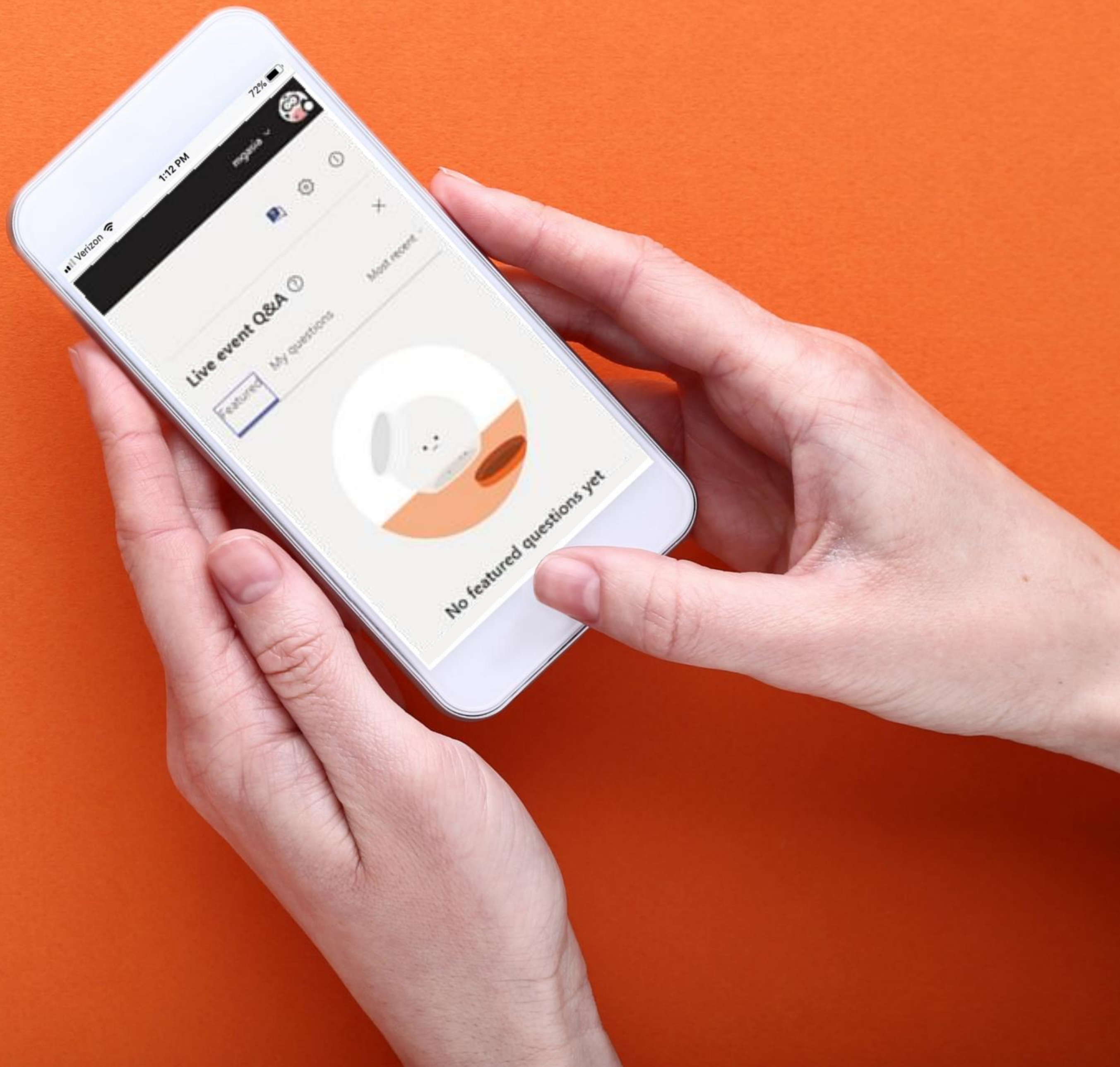
OVERVIEW



LIVE EVENT

Q&A

We'll be pausing after each topic section to give you a chance to ask questions in the chat. Feel free to give feedback, raise concerns, or add comments to the chat at any time during the presentation! We'll spend a few minutes answering them (or adding them to our FAQ) when you see this slide.



ACCOUNT ACTIVATION

ACCOUNT ACTIVATION

Objective:

Activate your account as a user for MyAccount

Upon completion of this task, you will be able to:

- Set a new password so that you can begin using My Account.

For MCO or Service Facilitators, once you have activated your account you will be able to use My Account to:

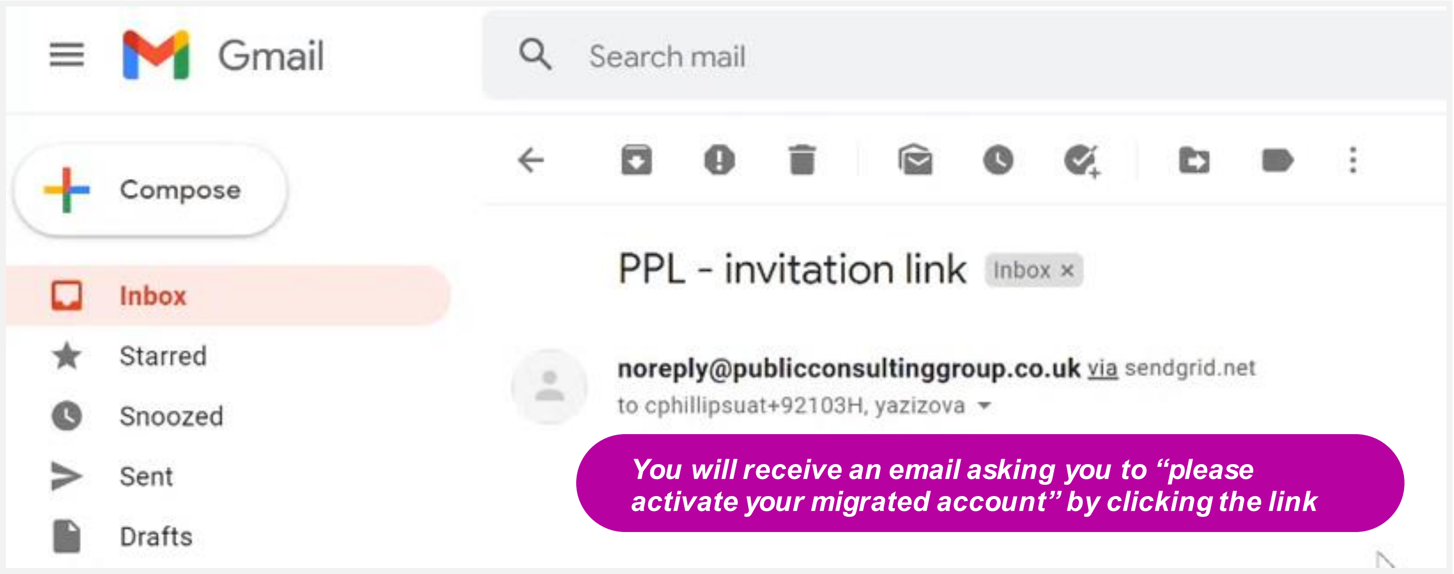
- View your cases
- Work in MyAccount as a consumer or attendant to assist them
- View timesheets
- View authorizations
- Change demographic information

ACCOUNT ACTIVATION

1

The first step of your account activation comes in the form of an email. These emails are sent from PPL so be on the look out for this message.

For MCO and Service Facilitators, the message will ask you to click a link to activate your migrated account with MyAccount.

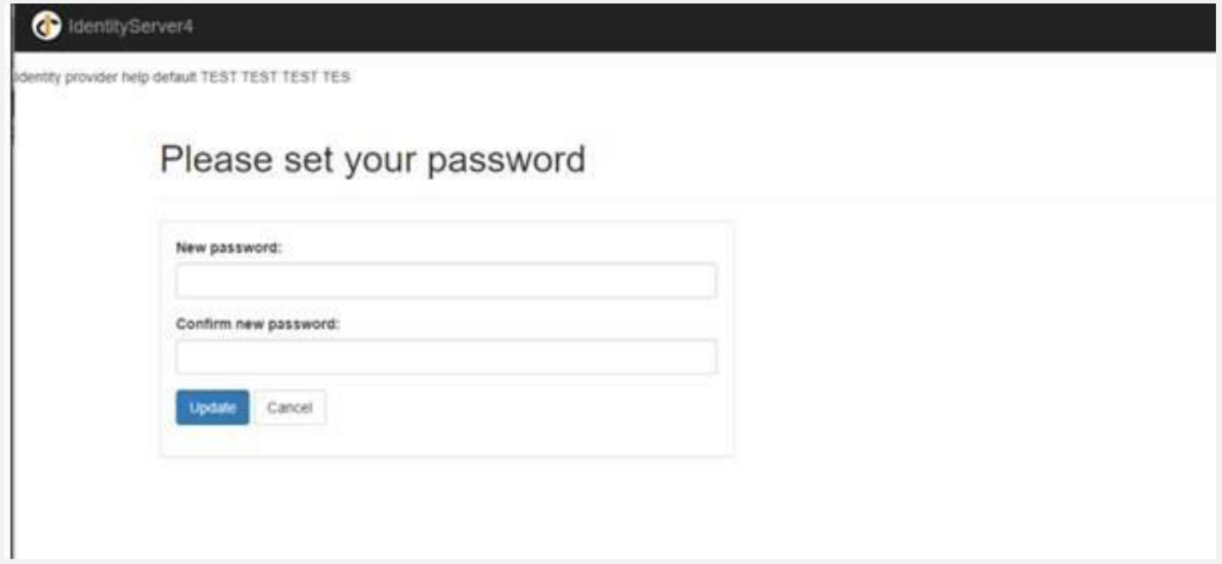


ACCOUNT ACTIVATION

2

When you click the link in your email, it will bring you to this Set Password page.

You will need to set your new password to finalize the account activation. Once this is complete, you are ready to start using your new MyAccount!



CREATE A NEW REFERRAL

CREATE A NEW REFERRAL

Objective:
Create a new referral for a consumer in MyAccount

Upon completion of this task, you will be able to:

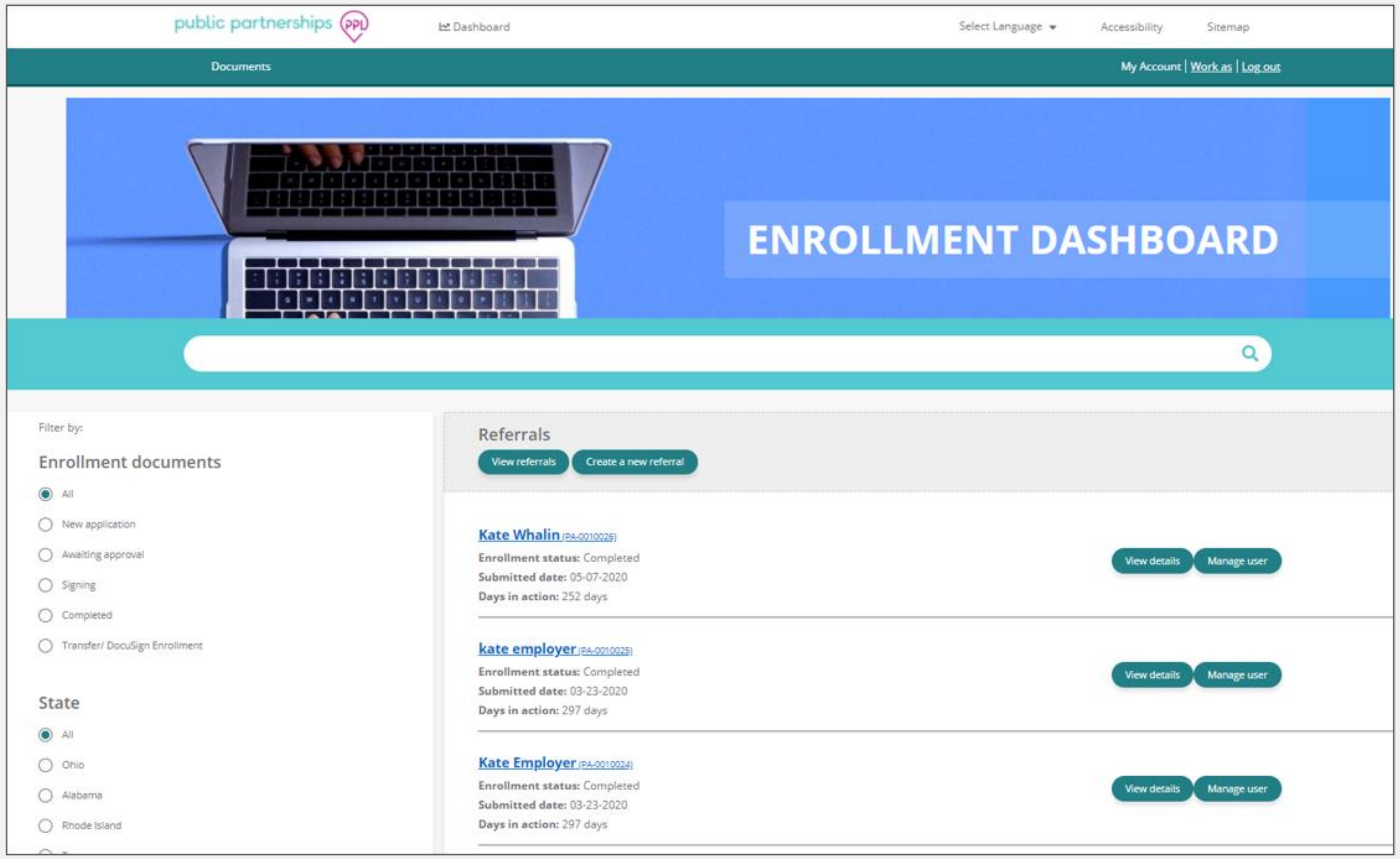
- Create a new referral for a consumer in MyAccount

CREATE A NEW REFERRAL

1

The dashboard shows the most recent referrals that are being worked on or have been completed.

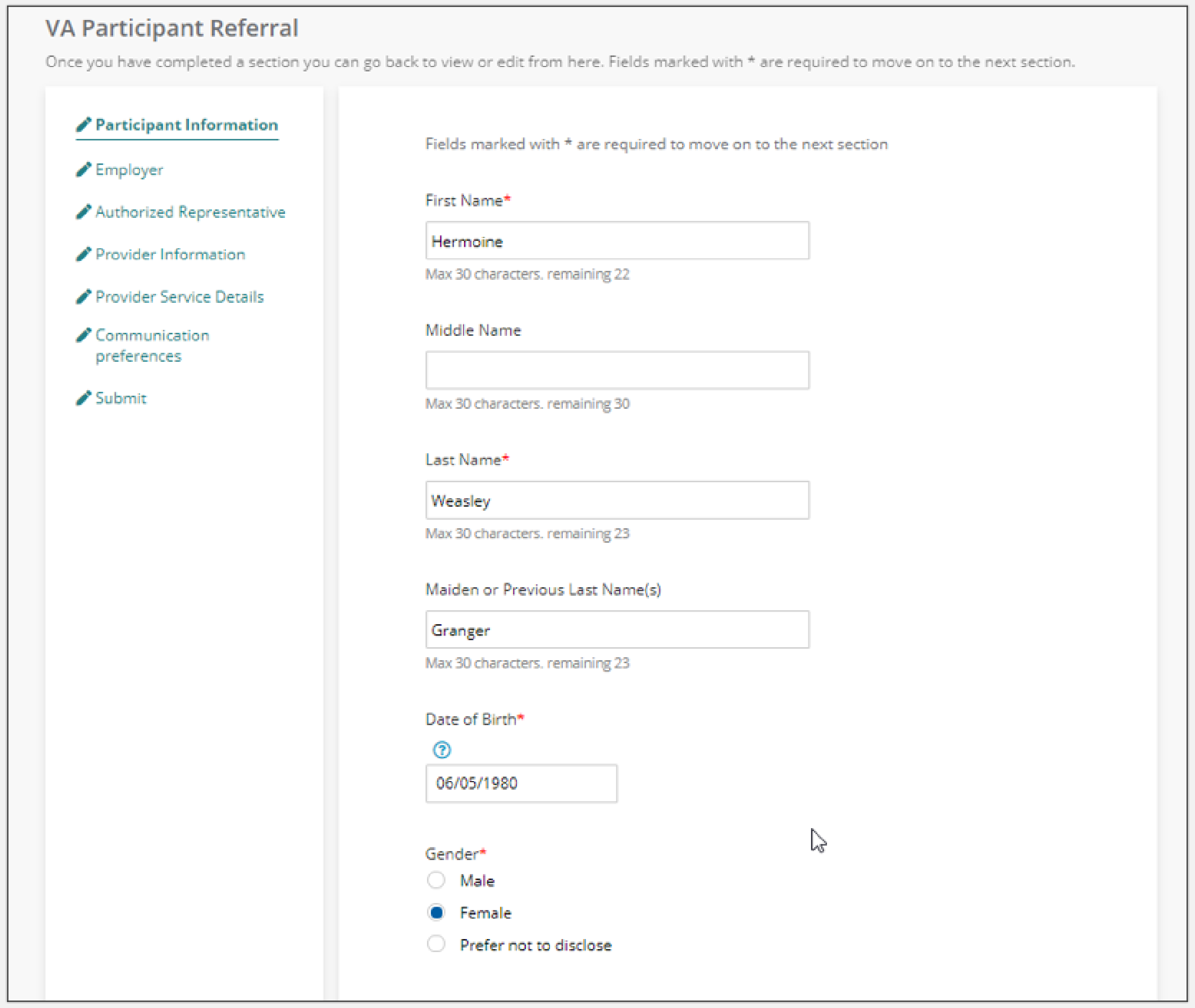
Click “Create a new referral.”



CREATE A NEW REFERRAL

2

Enter each referral's information to start the enrollment process for MyAccount. Any field with an asterisk is required.



VA Participant Referral

Once you have completed a section you can go back to view or edit from here. Fields marked with * are required to move on to the next section.

- Participant Information
- Employer
- Authorized Representative
- Provider Information
- Provider Service Details
- Communication preferences
- Submit

Fields marked with * are required to move on to the next section

First Name*

Hermoine

Max 30 characters. remaining 22

Middle Name

Max 30 characters. remaining 30

Last Name*

Weasley

Max 30 characters. remaining 23

Maiden or Previous Last Name(s)

Granger

Max 30 characters. remaining 23

Date of Birth*

06/05/1980

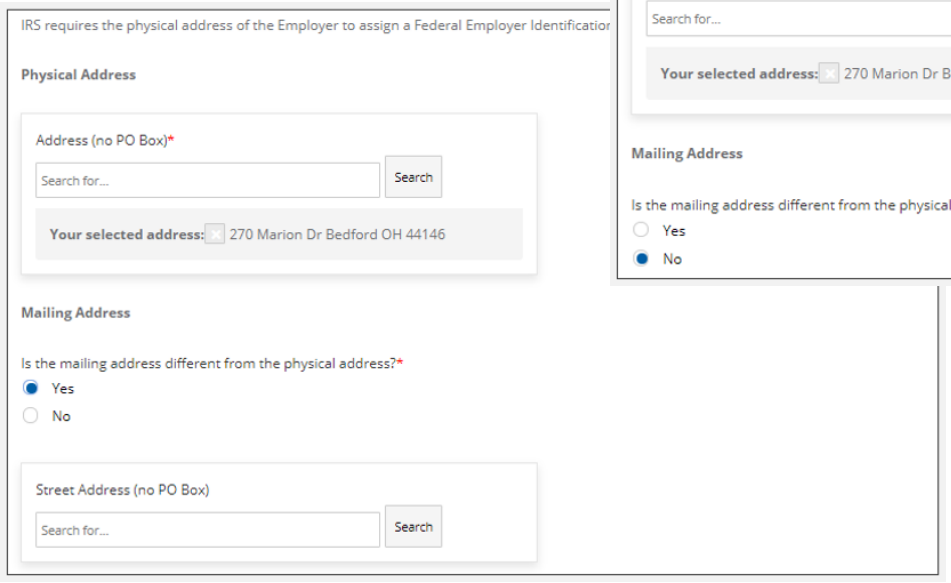
Gender*

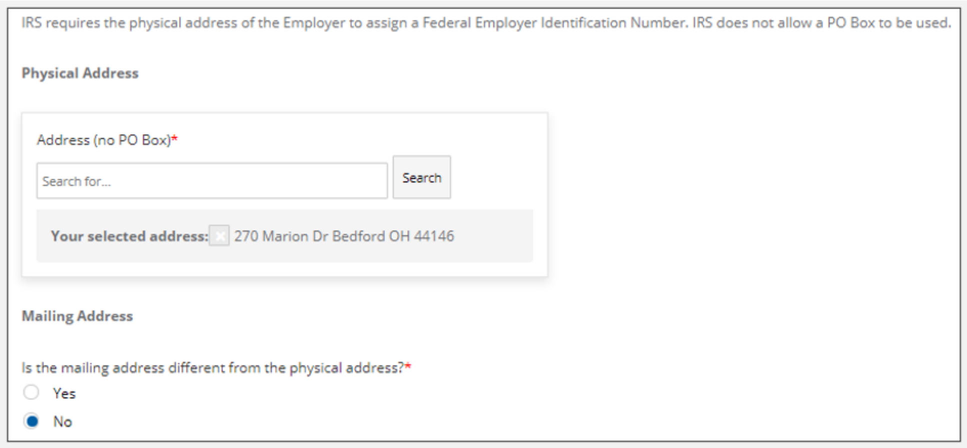
- Male
- Female
- Prefer not to disclose

CREATE A NEW REFERRAL

3

In the address field you will search for the appropriate address. This is verifying the address against the USPS database. When the USPS "version" of the address comes up, you select it.

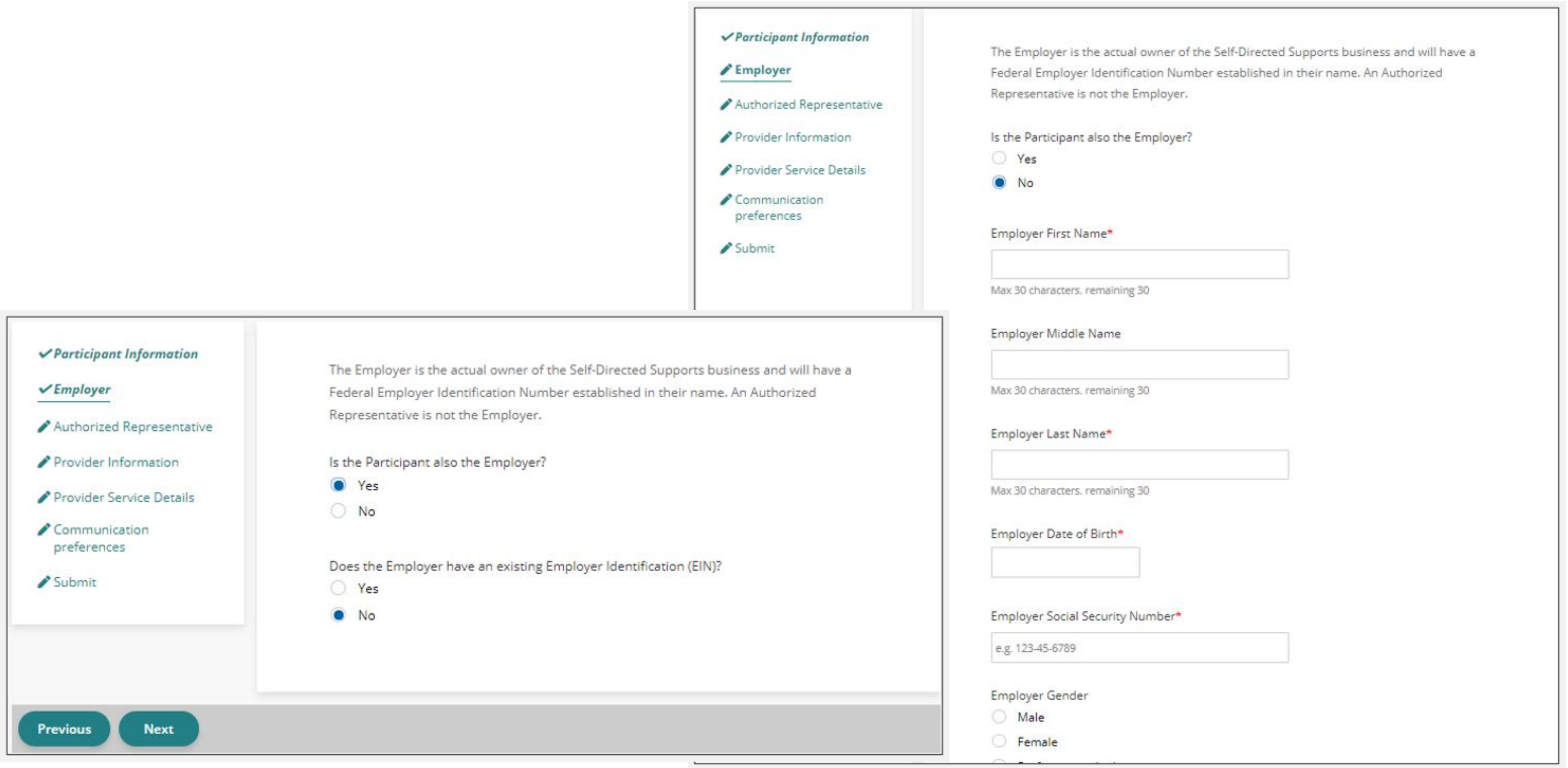




CREATE A NEW REFERRAL

4

Complete the rest of the participant information. Notice as you complete the sections, the icon by the section name turns into a checkmark instead of a pencil.

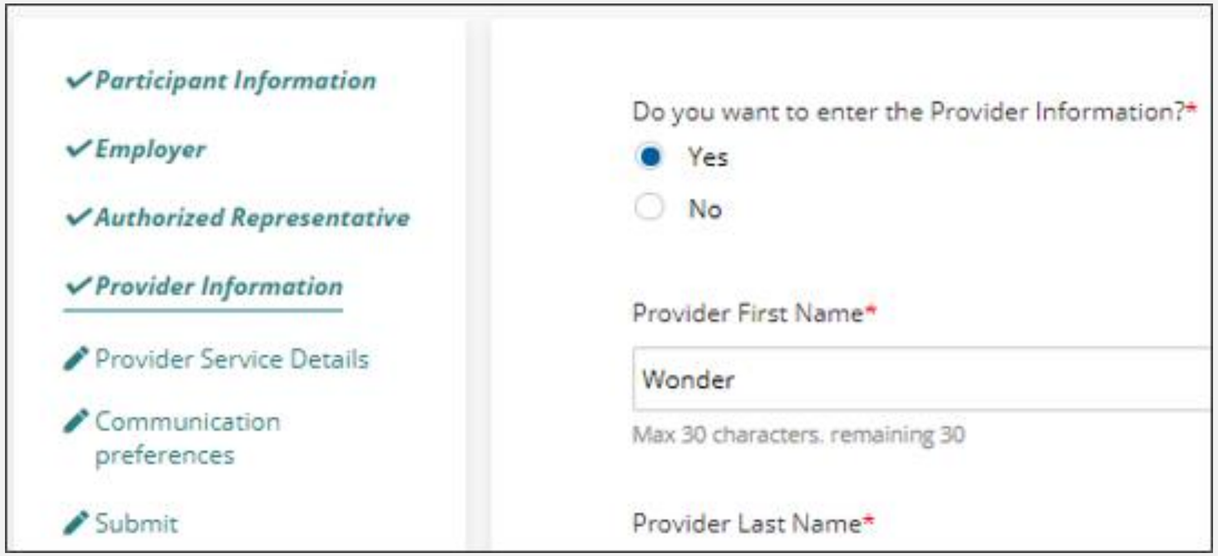


If the participant is also the employer, no additional information is needed. As soon as “No” is selected, additional fields for related information appear.

CREATE A NEW REFERRAL

5

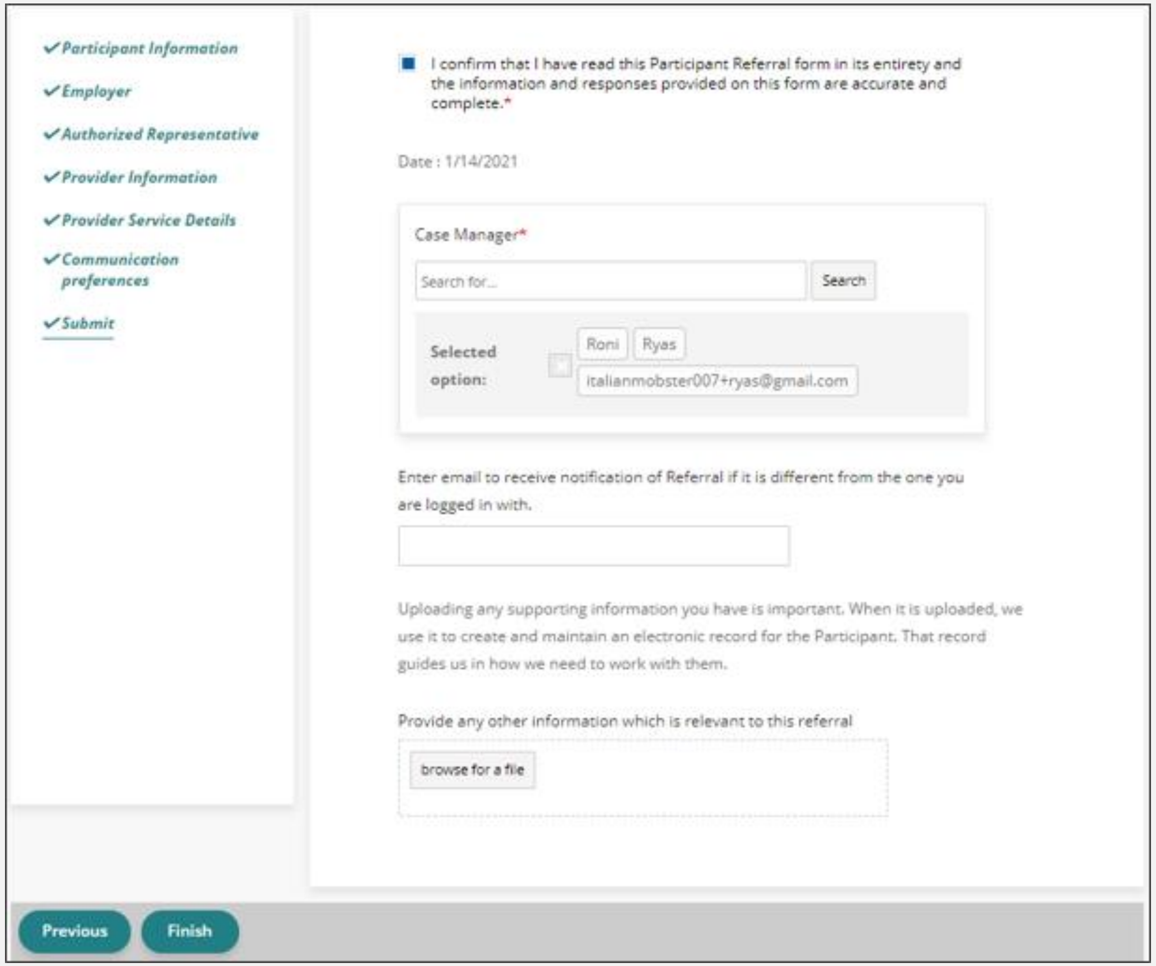
You can opt to not include Provider Information right away. Selecting “No” here will hide the Provider data fields and when that information is available, they can add it using their dashboard.



CREATE A NEW REFERRAL

6

When you've completed the required fields, click "Finish" to send the referral to PPL for approval. Once approved, an email is sent to the consumer inviting them to register.



LIVE EVENT

Q&A

Add your comments or questions to the chat and we'll do our best to answer them during the live event.

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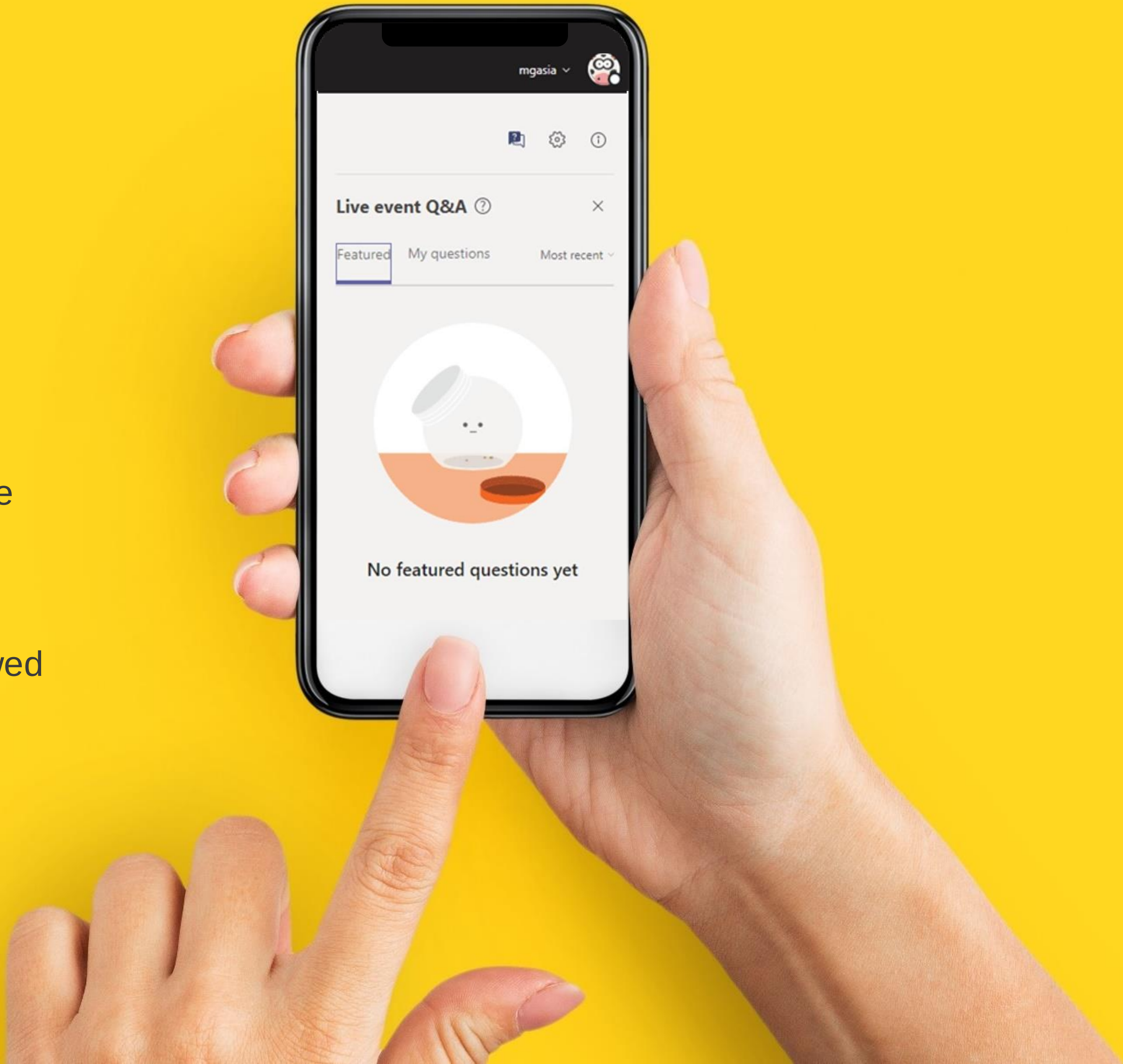


FINDING A REFERRAL

FINDING A REFERRAL

Objective:

Find a referral in MyAccount

Upon completion of this task, you will be able to

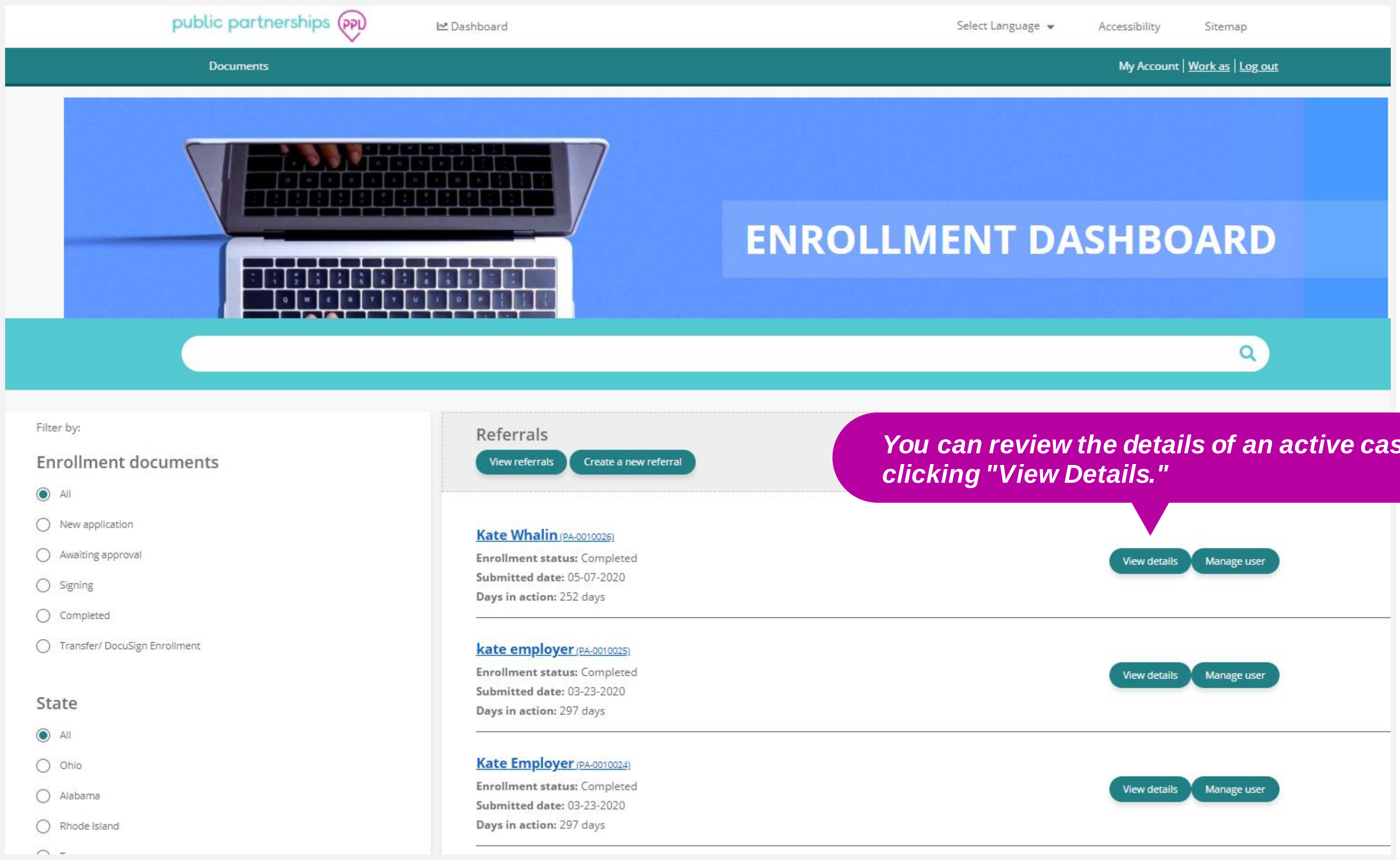
- Find a referral
- View completed referrals
- Edit information for referral’s still awaiting approval

MCO/Service Facilitator Consumers Attendants

FINDING A REFERRAL

1

Active referrals are listed on the homepage of the Dashboard.



You can review the details of an active case by clicking "View Details."

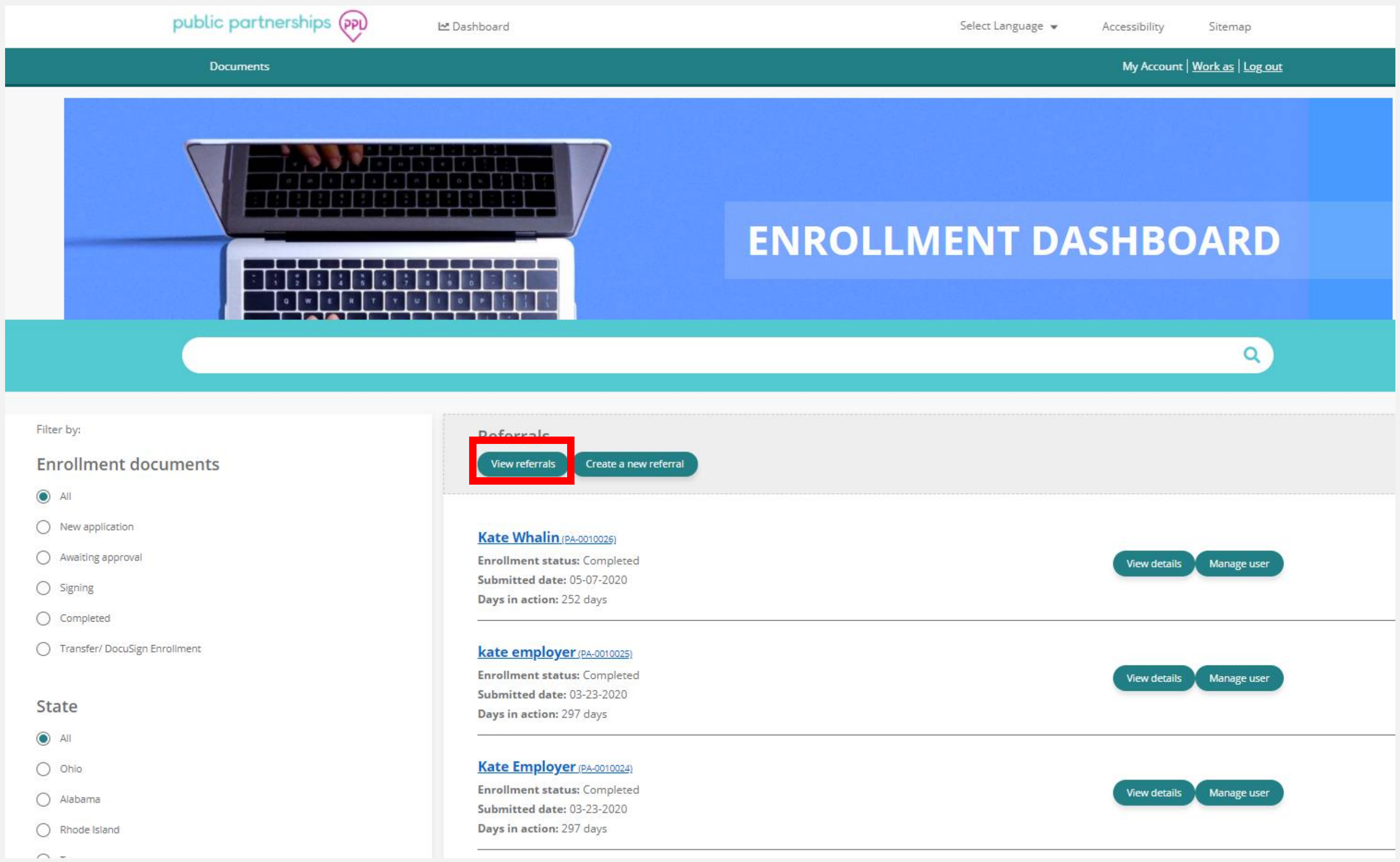
MCO/Service Facilitator Consumers Attendants

FINDING A REFERRAL

2

Filtering criteria is found on the left-hand side and can be used to search via relevant criteria.

To conduct more detailed searches or locate new referrals that don't show on your dashboard, click "View Referrals" at the top of the listings.

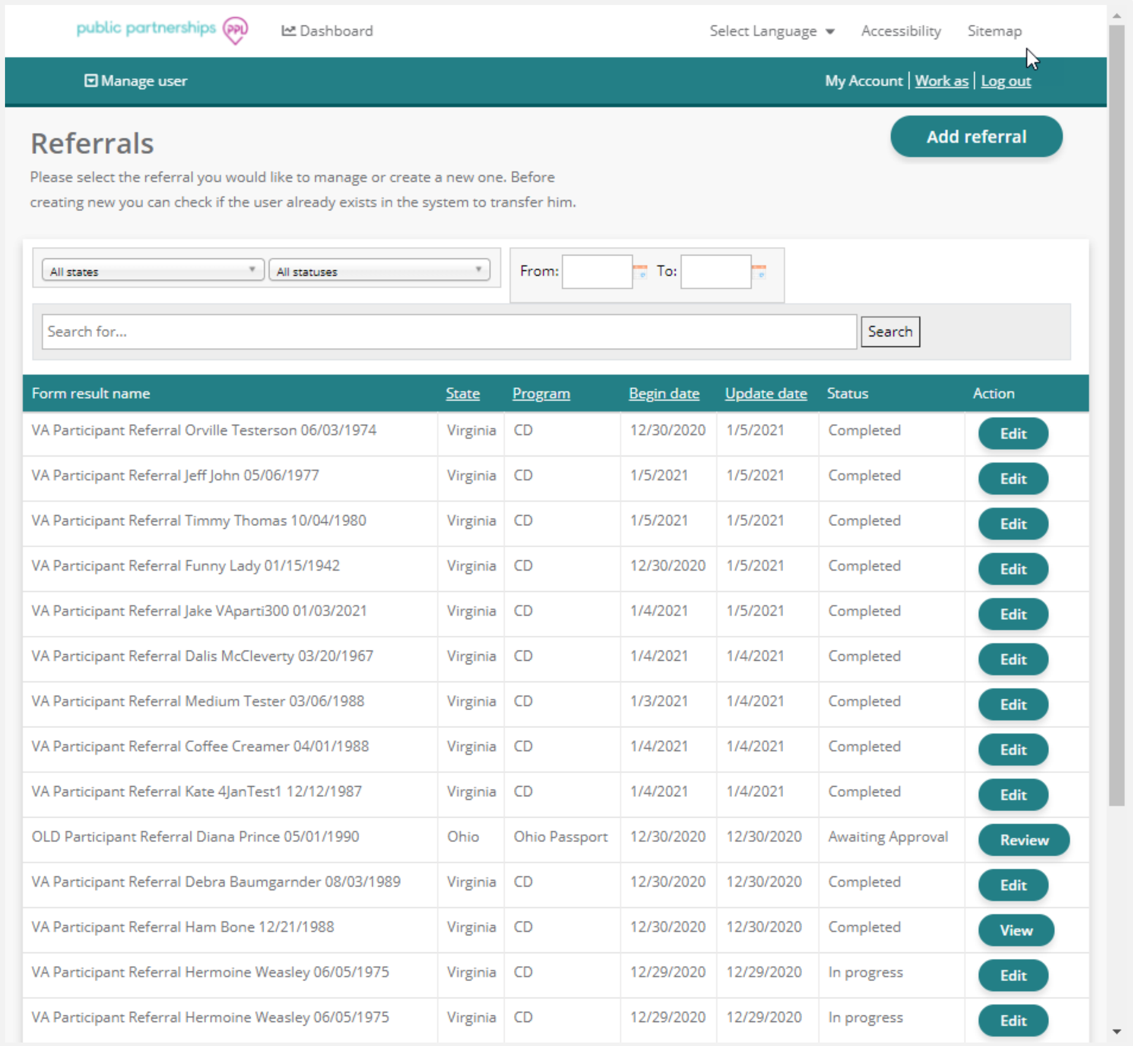


FINDING A REFERRAL

3

Search for referrals by state, status, ones that fall within a certain timeframe or even search by name.

- The “Review” or “Edit” action is contingent on the referral status.
- If it is awaiting approval, you can Review it but you cannot edit it.
- If the referral is In progress, you can continue to edit it before submission (in progress referrals have not been submitted to PPL).

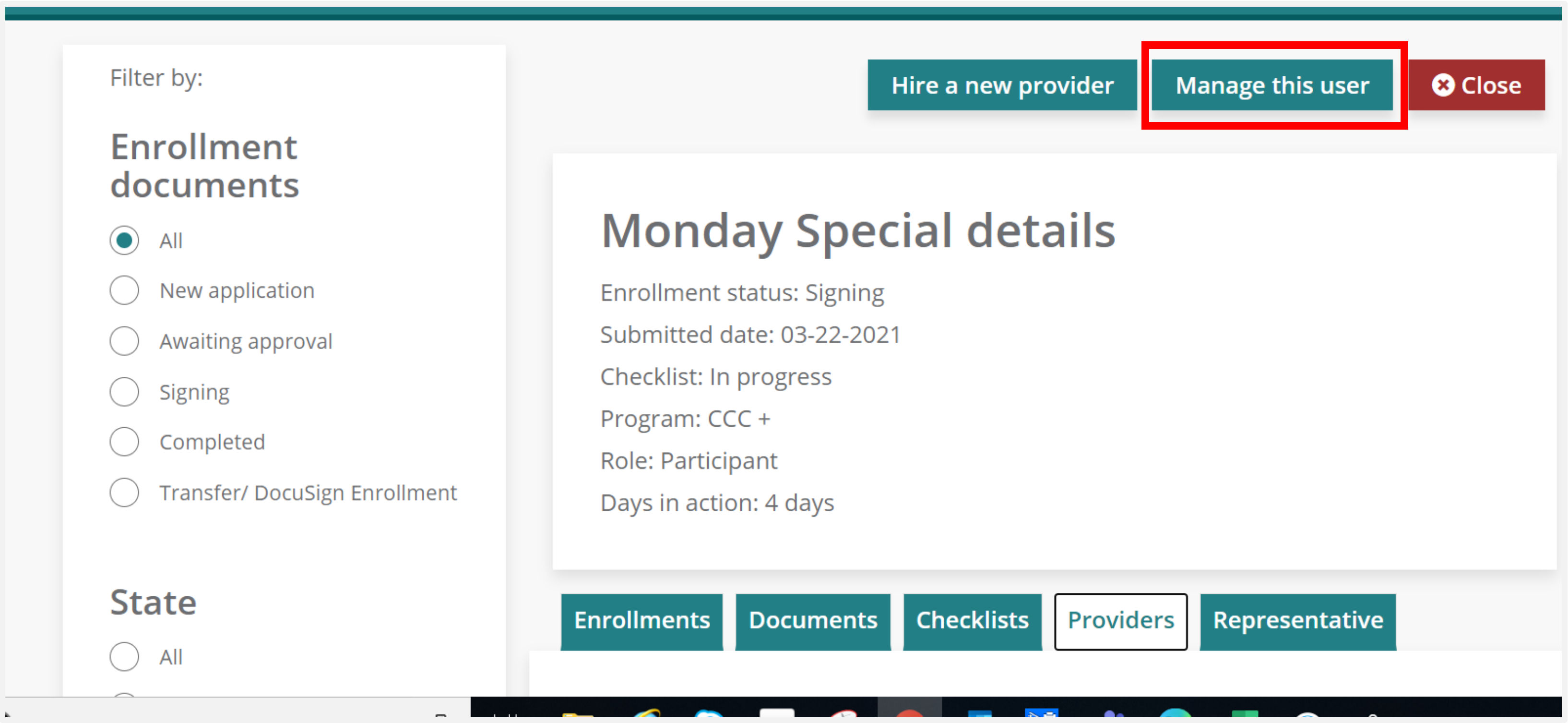


Form result name	State	Program	Begin date	Update date	Status	Action
VA Participant Referral Orville Testerson 06/03/1974	Virginia	CD	12/30/2020	1/5/2021	Completed	Edit
VA Participant Referral Jeff John 05/06/1977	Virginia	CD	1/5/2021	1/5/2021	Completed	Edit
VA Participant Referral Timmy Thomas 10/04/1980	Virginia	CD	1/5/2021	1/5/2021	Completed	Edit
VA Participant Referral Funny Lady 01/15/1942	Virginia	CD	12/30/2020	1/5/2021	Completed	Edit
VA Participant Referral Jake VAparti300 01/03/2021	Virginia	CD	1/4/2021	1/5/2021	Completed	Edit
VA Participant Referral Dalis McCleverty 03/20/1967	Virginia	CD	1/4/2021	1/4/2021	Completed	Edit
VA Participant Referral Medium Tester 03/06/1988	Virginia	CD	1/3/2021	1/4/2021	Completed	Edit
VA Participant Referral Coffee Creamer 04/01/1988	Virginia	CD	1/4/2021	1/4/2021	Completed	Edit
VA Participant Referral Kate 4JanTest1 12/12/1987	Virginia	CD	1/4/2021	1/4/2021	Completed	Edit
OLD Participant Referral Diana Prince 05/01/1990	Ohio	Ohio Passport	12/30/2020	12/30/2020	Awaiting Approval	Review
VA Participant Referral Debra Baumgarnder 08/03/1989	Virginia	CD	12/30/2020	12/30/2020	Completed	Edit
VA Participant Referral Ham Bone 12/21/1988	Virginia	CD	12/30/2020	12/30/2020	Completed	View
VA Participant Referral Hermoine Weasley 06/05/1975	Virginia	CD	12/29/2020	12/29/2020	In progress	Edit
VA Participant Referral Hermoine Weasley 06/05/1975	Virginia	CD	12/29/2020	12/29/2020	In progress	Edit

FINDING A REFERRAL

4

Service Facilitators can view a consumer's dashboard and make edits on their behalf by clicking "Manage this user."



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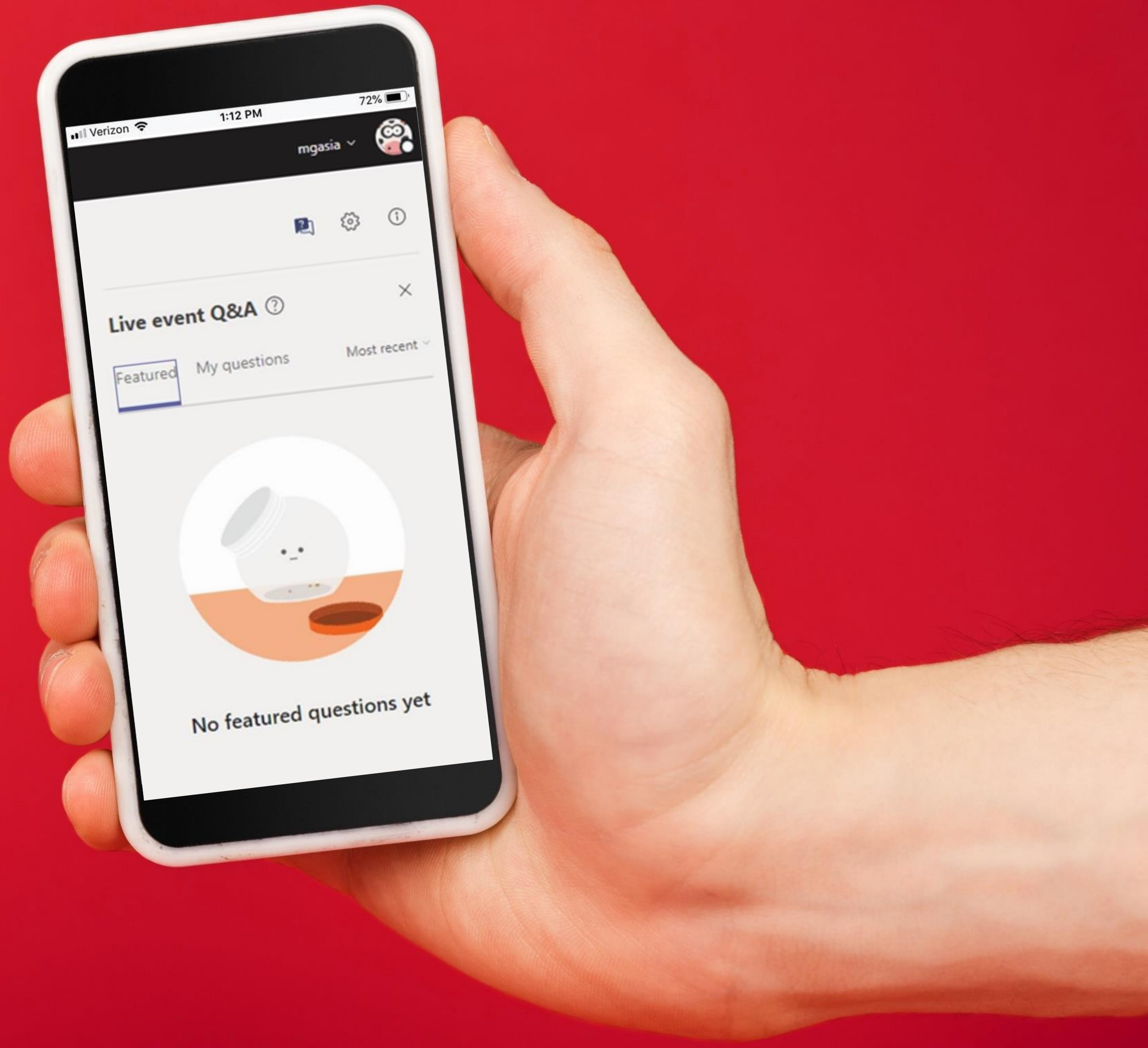


VIEWING AN AUTHORIZATION

VIEWING AN AUTHORIZATION

Objective:
View an Authorization in MyAccount

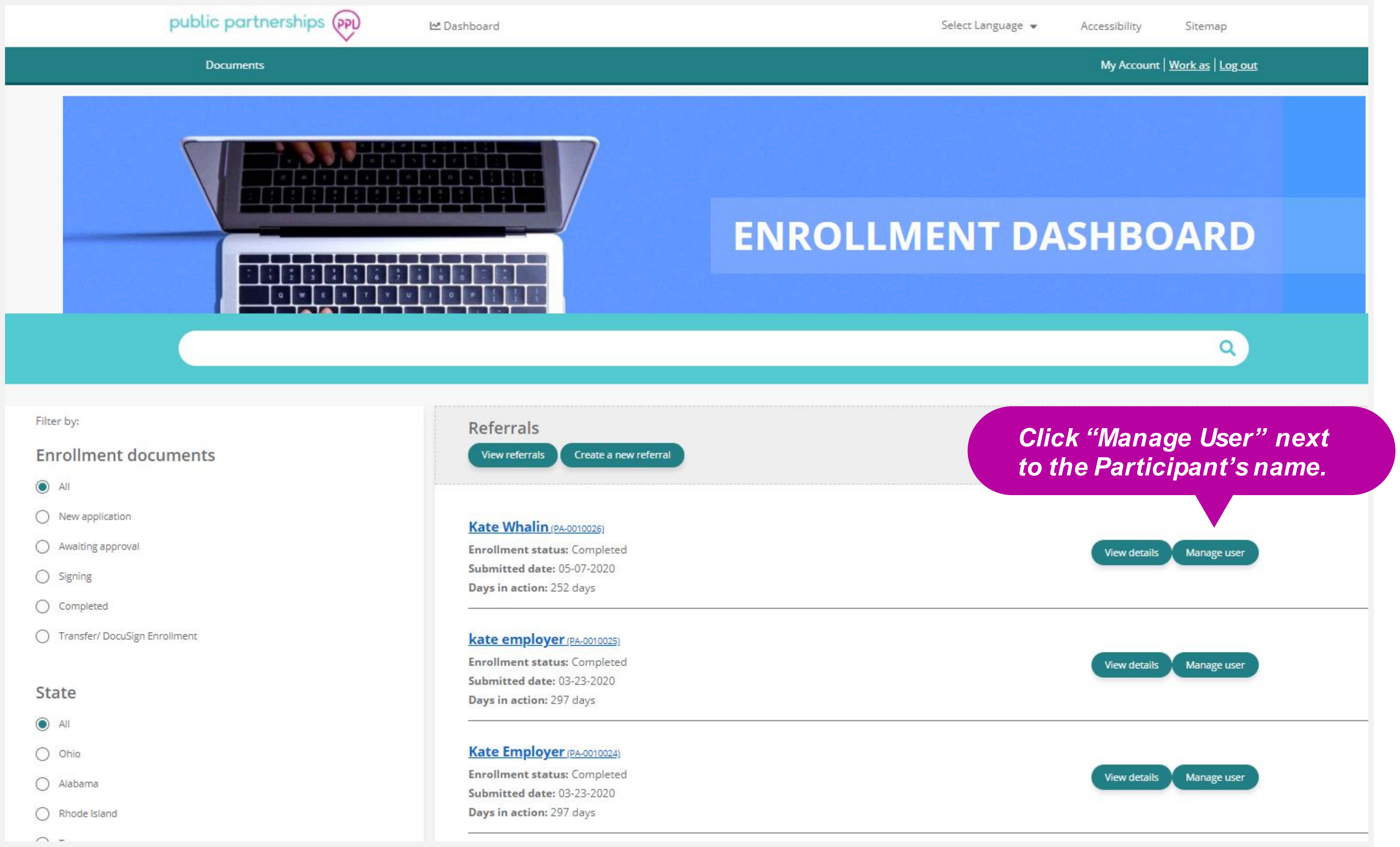
Upon completion of this task, you will be able to
- View the Authorization budget of a specific Participant

VIEWING AN AUTHORIZATION

1

On the Enrollment Dashboard, you will see Participants assigned to you and, using the 'manager user' feature of MyAccount, can easily switch user profiles to one of your participants.

Click the 'Manage User' button listed next to the Participants name you wish to view.



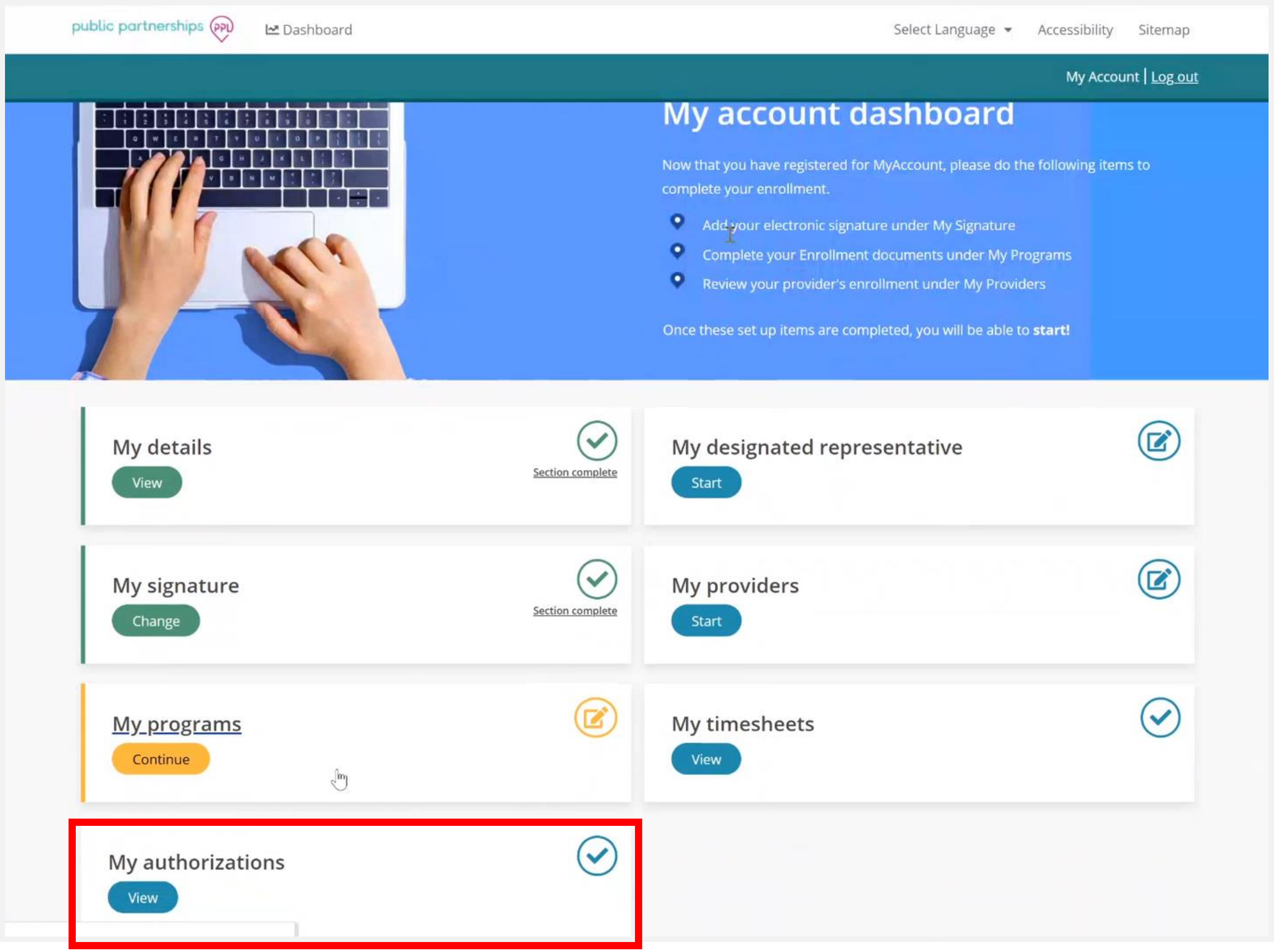
Click "Manage User" next to the Participant's name.

VIEWING AN AUTHORIZATION

2

Your view switches to the participant dashboard and what the Participant sees when they log in.

Click the “View” button under My Authorizations to access their budget.

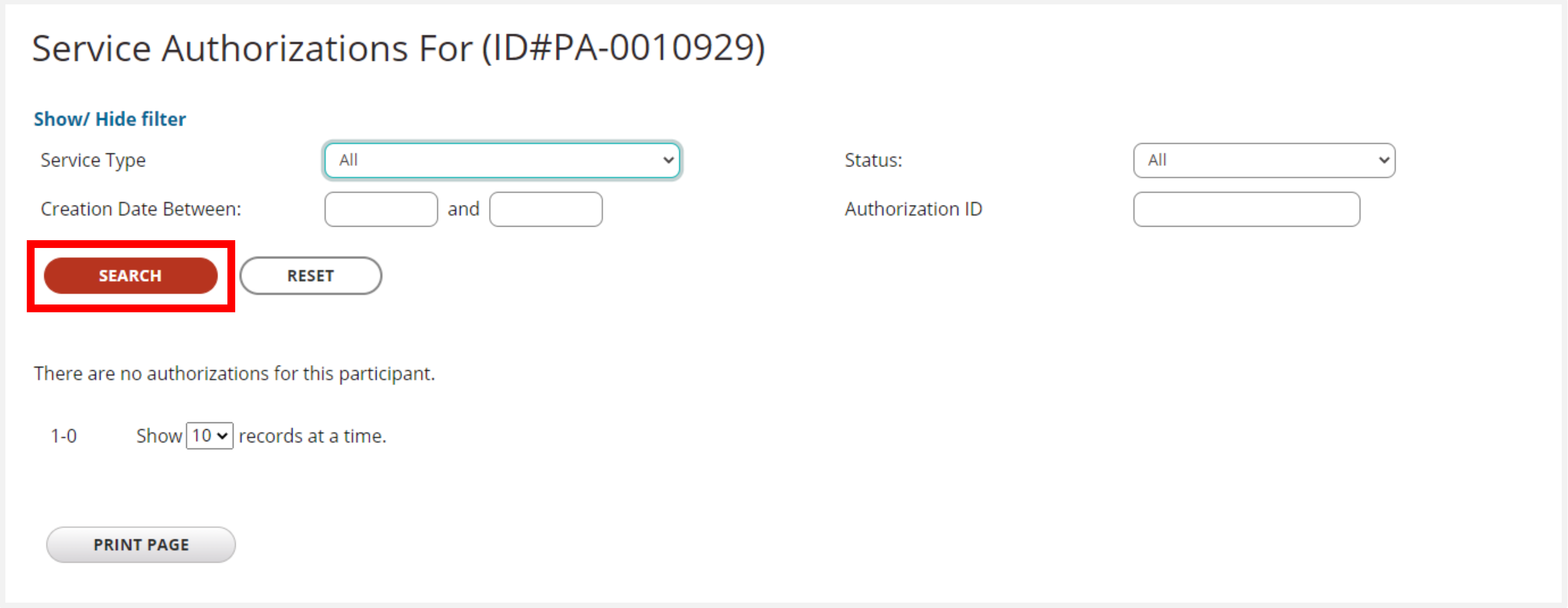


VIEWING AN AUTHORIZATION

3

On the Participant's authorization page, you can search for "Service Type", "Status", "Creation Date", or "Authorization ID."

Once you have filled in your criteria, click 'Search' to bring up all the related authorizations.



VIEWING A PROVIDER CHECKLIST

VIEWING A CHECKLIST

Objective:
View a Provider Checklist

Upon completion of this task, you will be able to

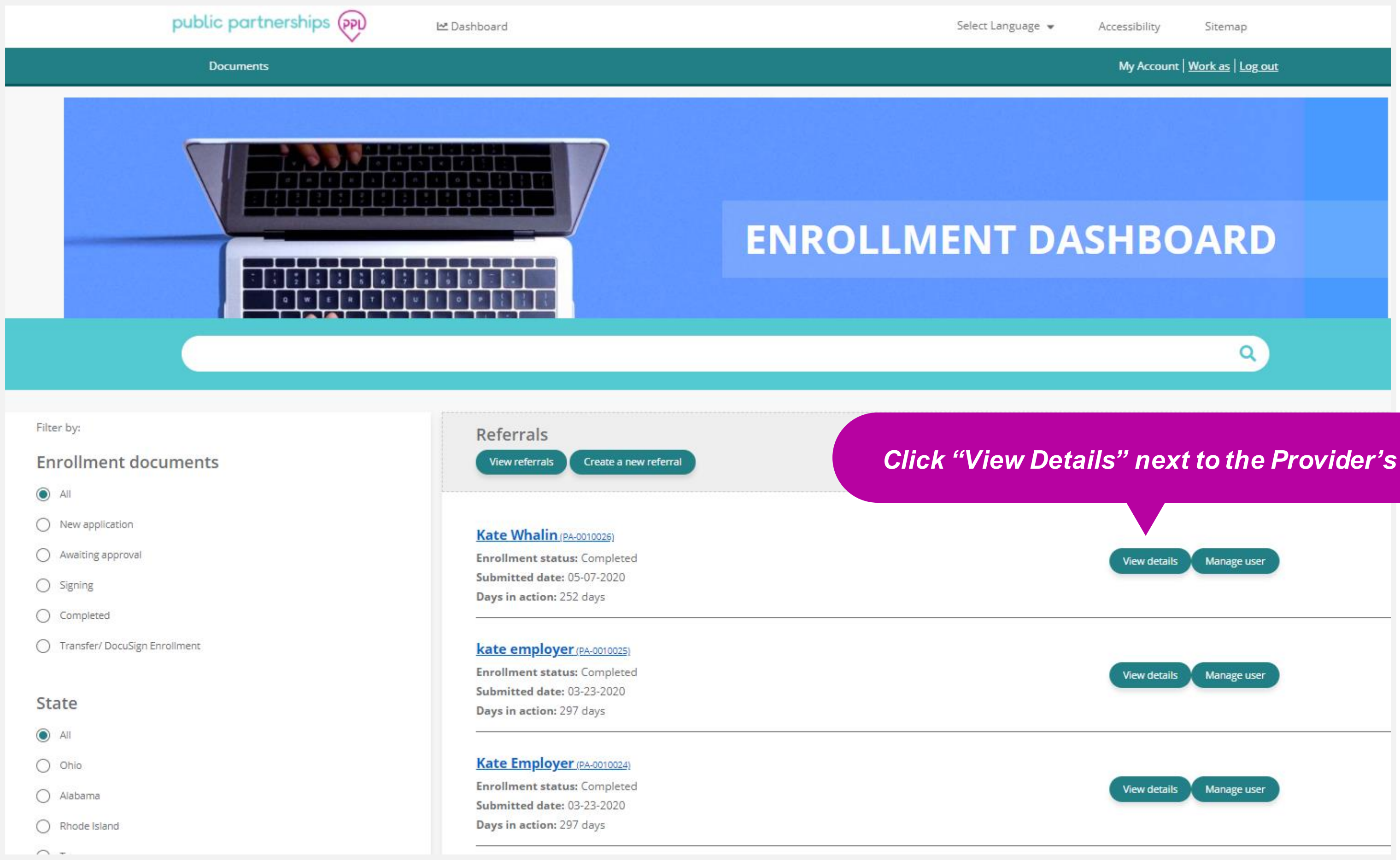
- View the enrollment progress of a specific Provider

VIEWING A CHECKLIST

1

On the Enrollment Dashboard, you can also view the details of Participants assigned to you.

Click the ‘View Details’ button listed next to the Providers name you wish to view.



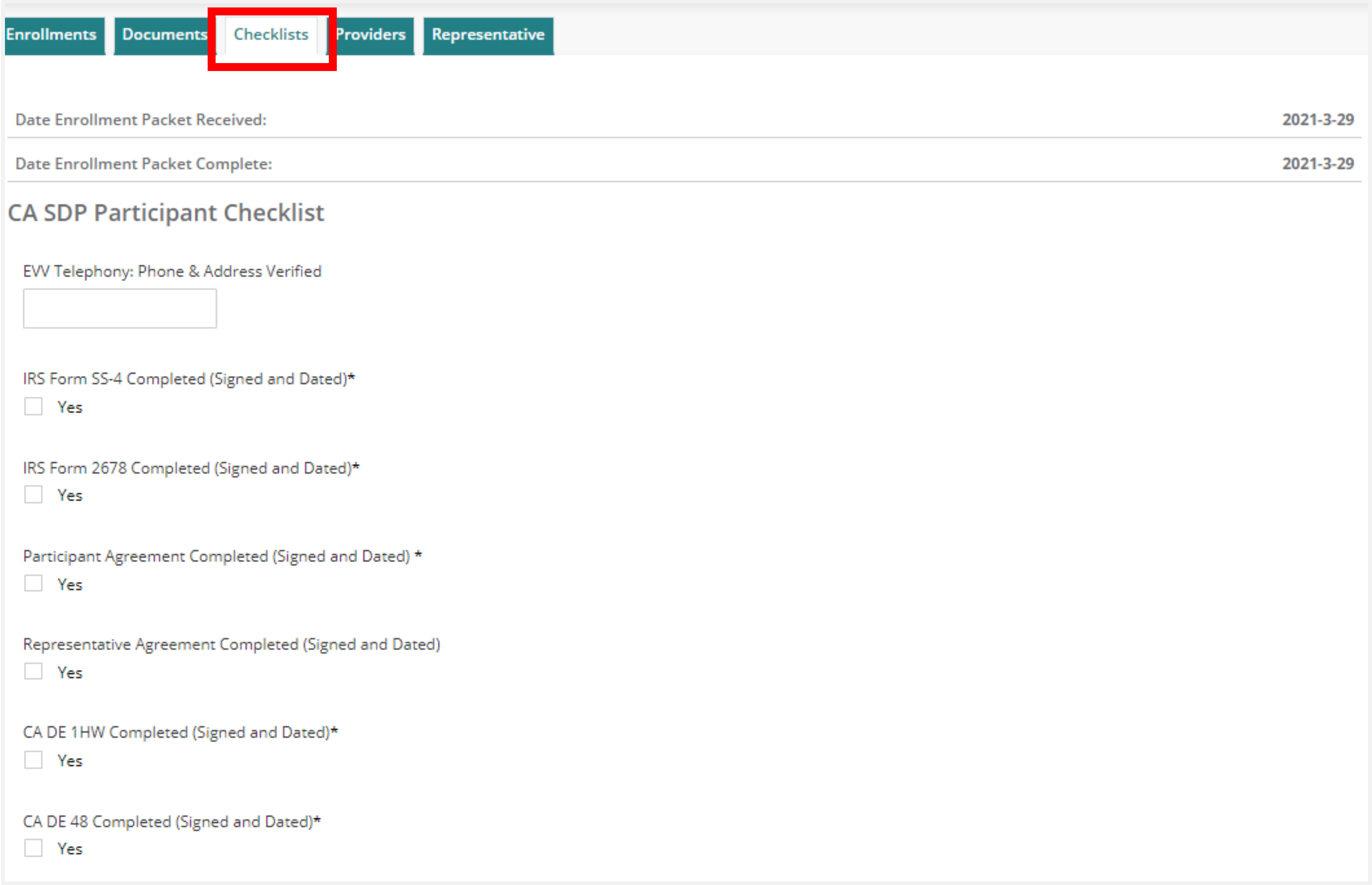
Click “View Details” next to the Provider’s name.

VIEWING A CHECKLIST

2

The Checklists tab displays any enrollment documents the Provider has completed (a check box will be marked “Yes”).

Checklists are read only and can’t be edited.


Enrollments | Documents | Checklists | Providers | Representative

Date Enrollment Packet Received: 2021-3-29

Date Enrollment Packet Complete: 2021-3-29

CA SDP Participant Checklist

EVV Telephony: Phone & Address Verified

IRS Form SS-4 Completed (Signed and Dated)*
Yes

IRS Form 2678 Completed (Signed and Dated)*
Yes

Participant Agreement Completed (Signed and Dated) *
Yes

Representative Agreement Completed (Signed and Dated)
Yes

CA DE 1HW Completed (Signed and Dated)*
Yes

CA DE 48 Completed (Signed and Dated)*
Yes

LIVE EVENT

Q&A

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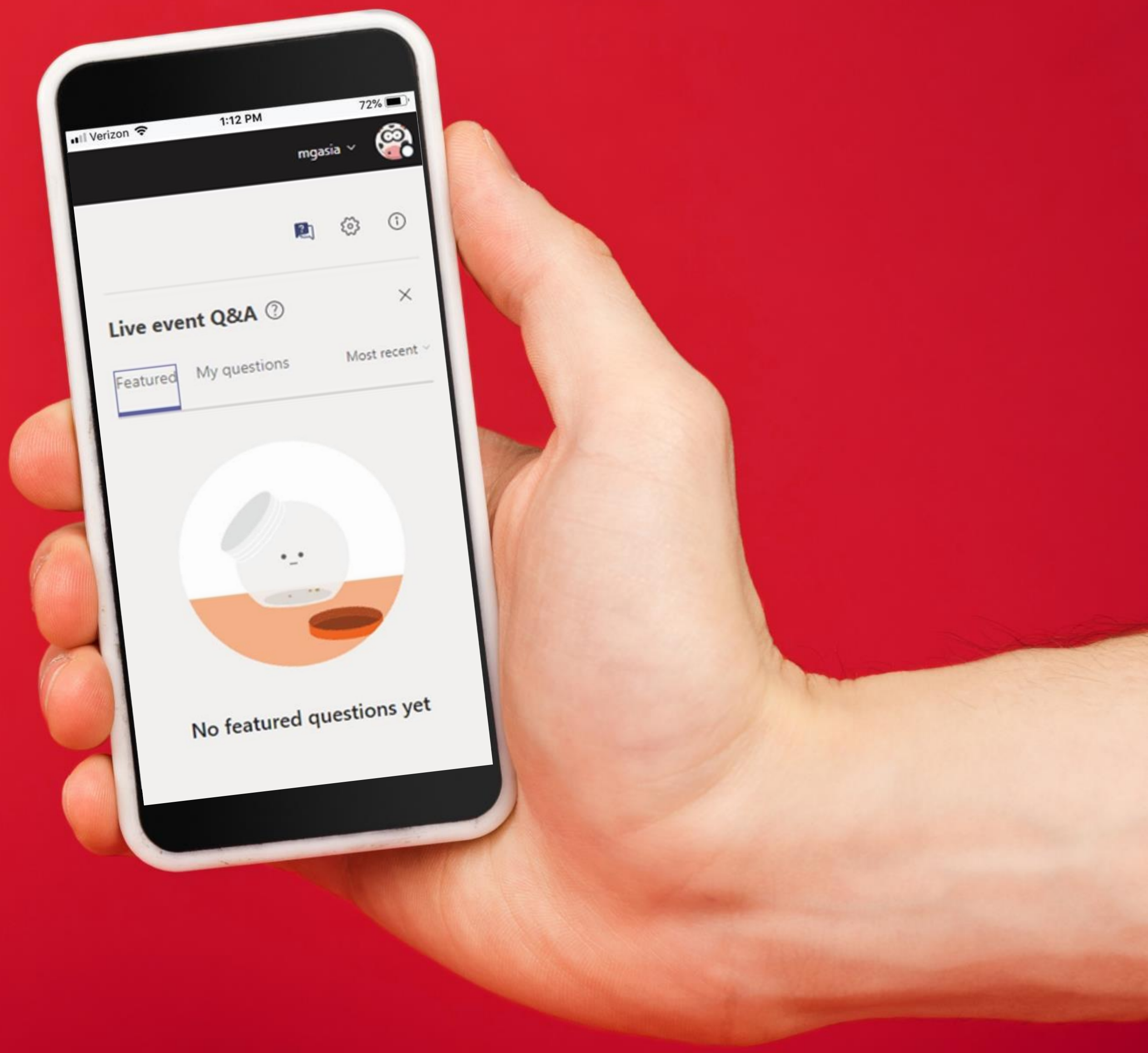
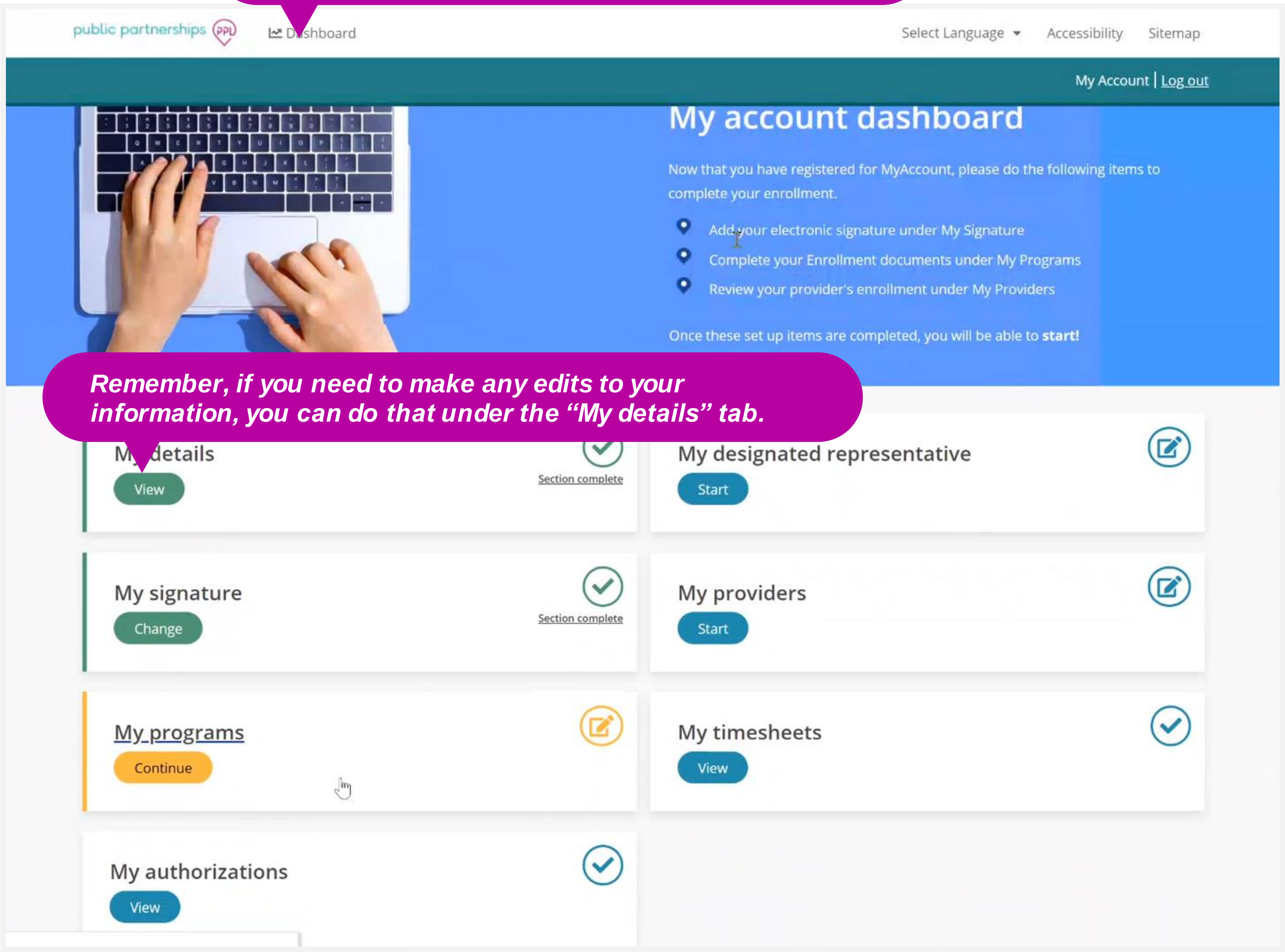
Anything we can't answer will be followed up on with the experts who can!



DASHBOARD EXPLORE

DASHBOARD EXPLORE

If you need to return to the dashboard at any time, use the Dashboard button in the header.

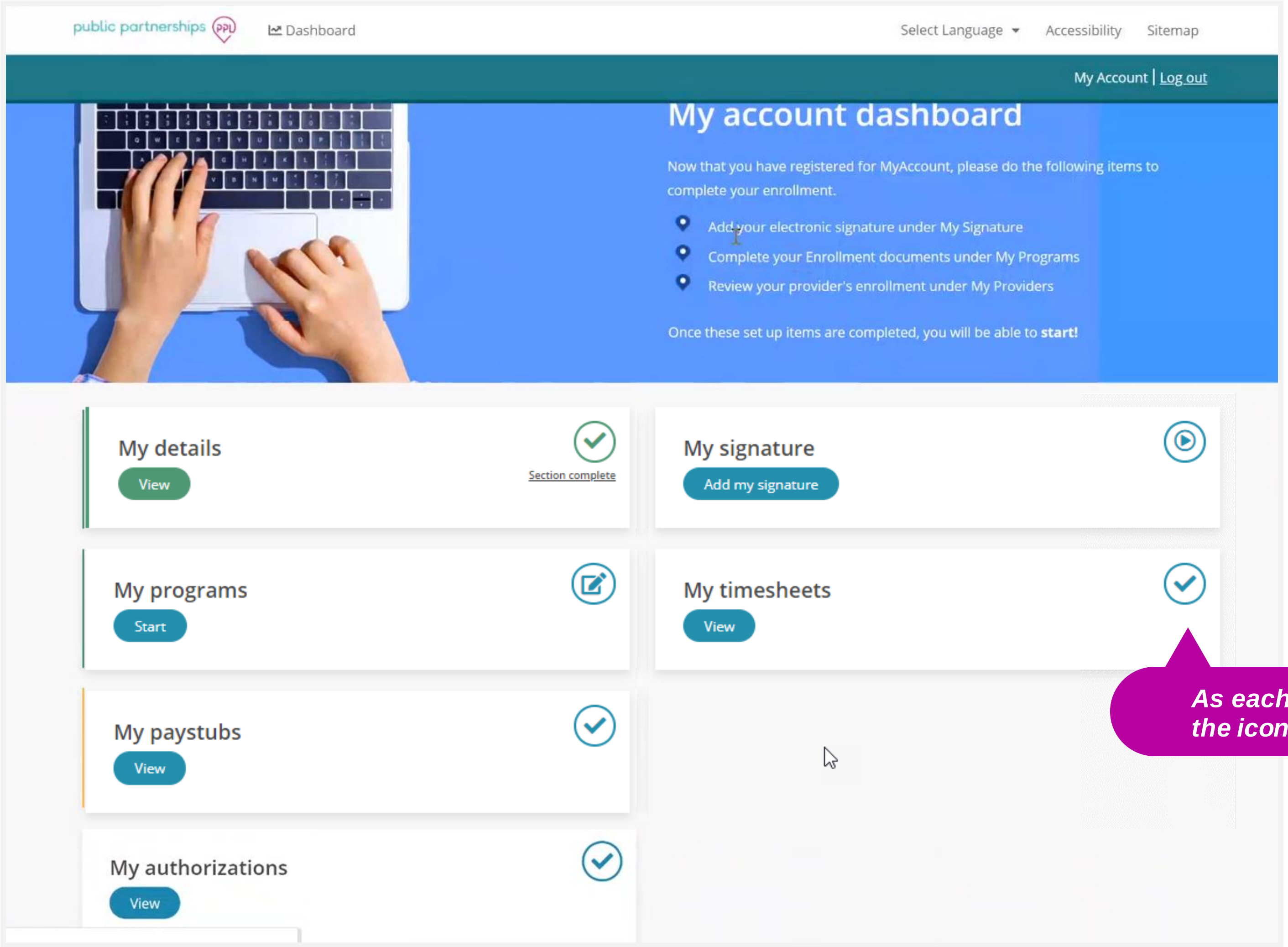


Remember, if you need to make any edits to your information, you can do that under the "My details" tab.

This is the dashboard in MyAccount.

As each section on the dashboard is completed, the icon changes to a checkmark.

DASHBOARD EXPLORE



This is the dashboard in MyAccount.

On the right-hand side of the header, the tasks that must be completed are listed.

As each section on the dashboard is completed, the icon changes to a checkmark.

MY SIGNATURE

Consumer and Attendant

MY SIGNATURE

Objective:
My Signature, My Programs, My Providers, My Time Sheets

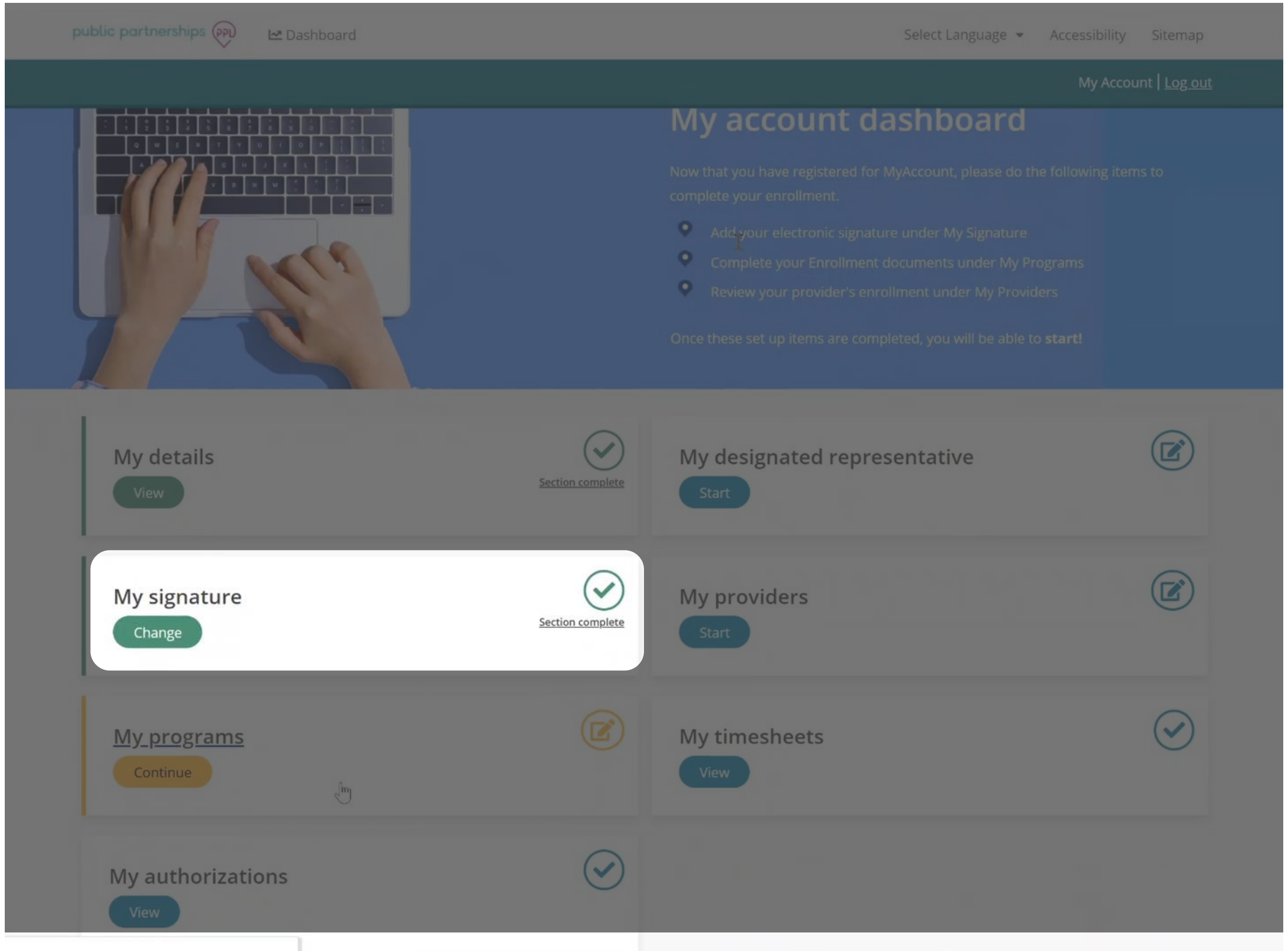
Upon completion of this task, you will be able to:

- Add your electronic signature as part of the MyAccount enrollment process

MY SIGNATURE

1

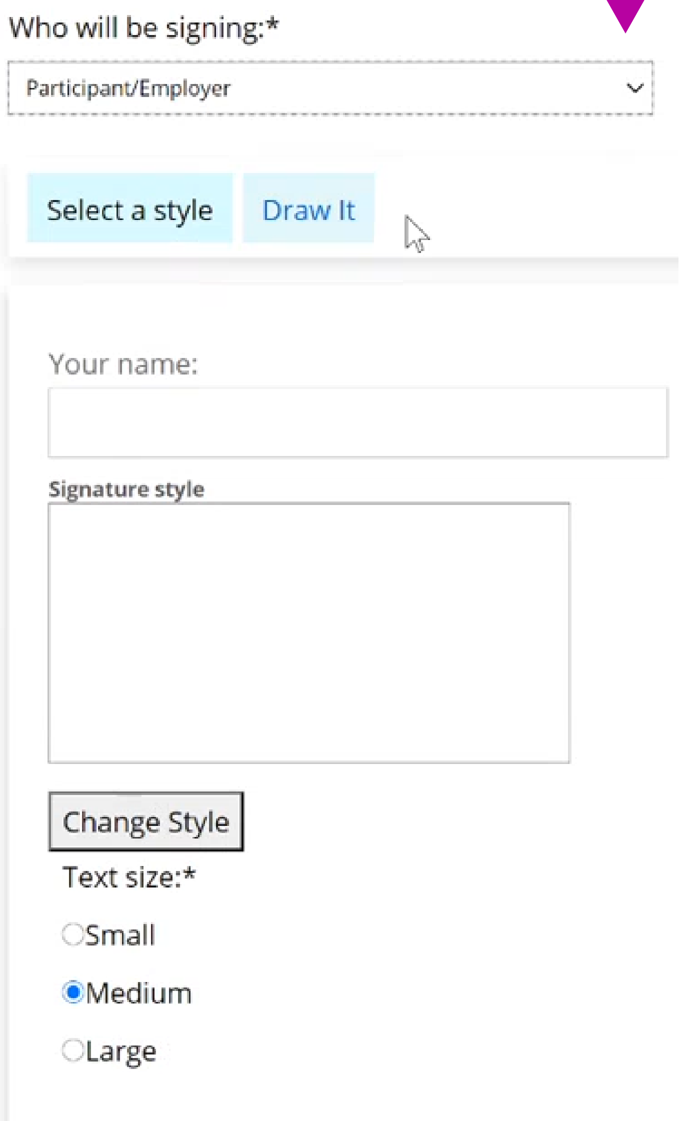
In this example, the signature needs to be added. Let's walk through that process.



MY SIGNATURE

2

You must select who will be signing.

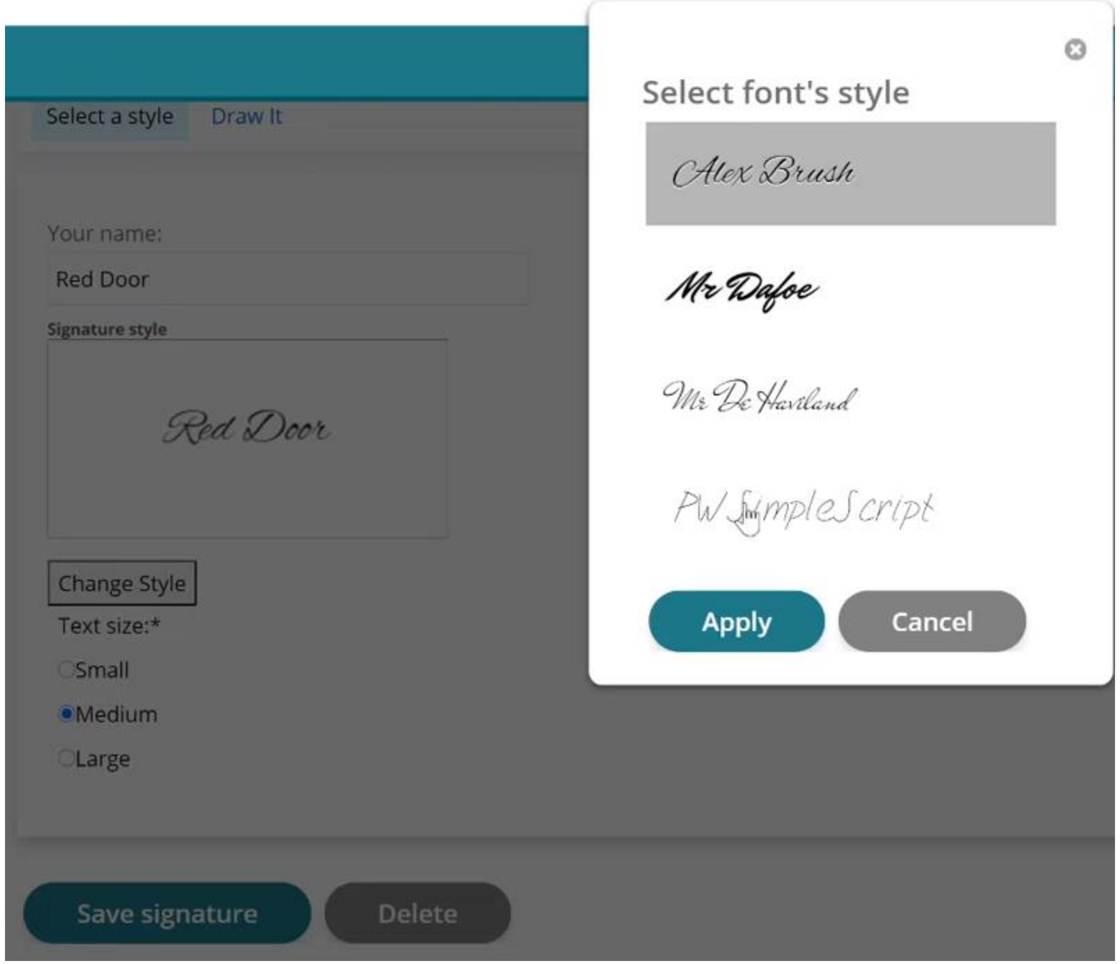


Electronic signatures are required in MyAccount. You can select a font and style and use that as a signature, or you can draw your signature. For touch screen users, drawing a signature works well.

MY SIGNATURE

3

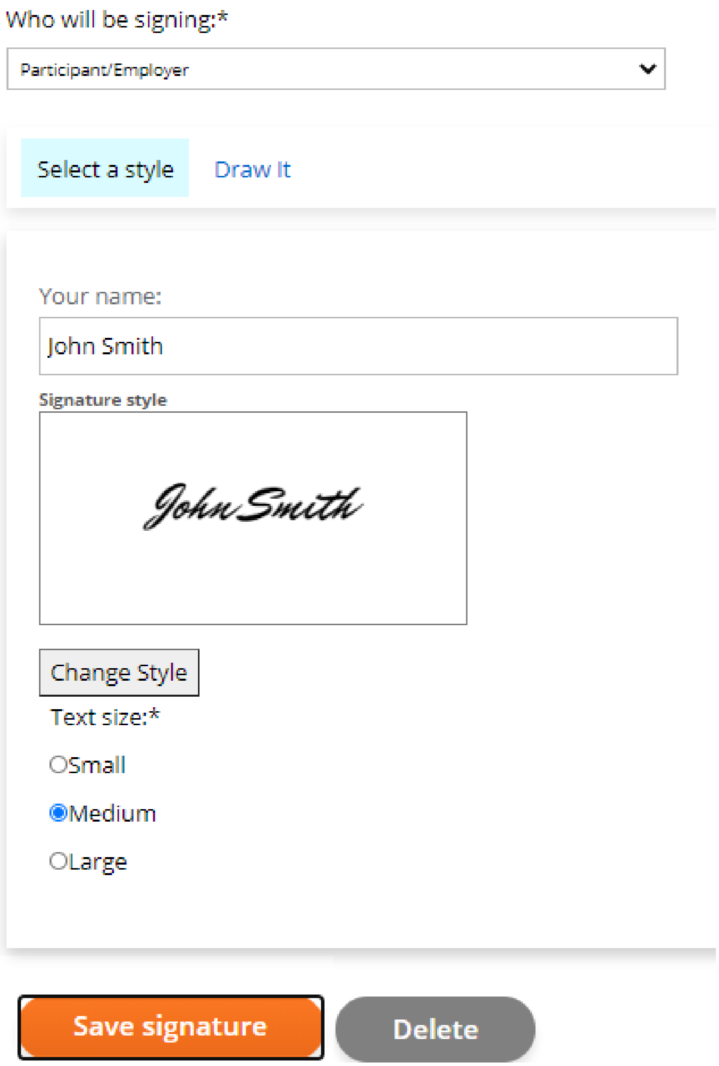
In this example for “Select a Style”, a font style is chosen to represent the signature.



MY SIGNATURE

4

Once a signature has been completed, click “Save signature” and then “Close.”



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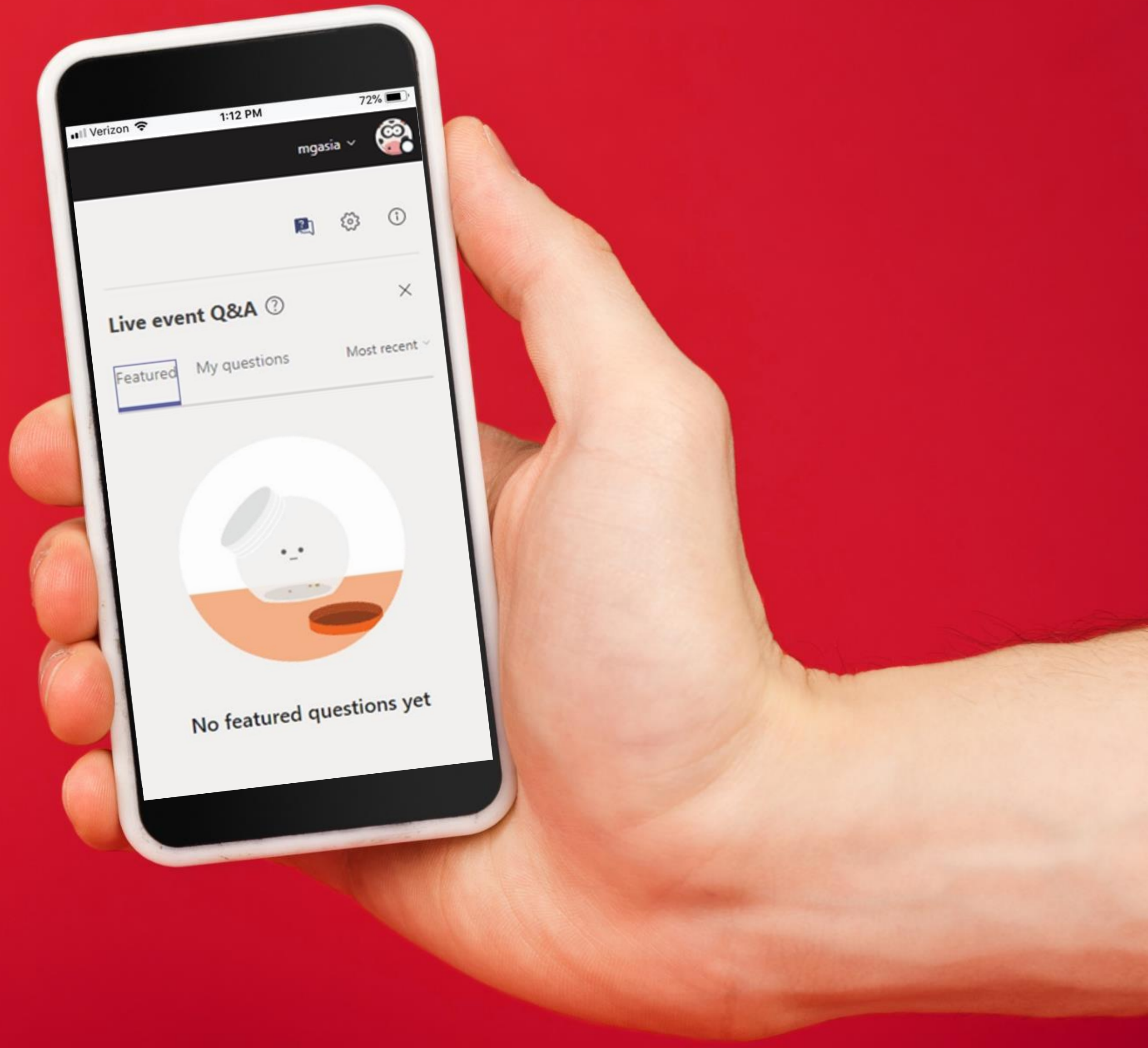


MY PROGRAMS

MY PROGRAMS

Objective: **My Signature, My Programs, My Providers, My Time Sheets**

On the My Program tab, you will be able to:

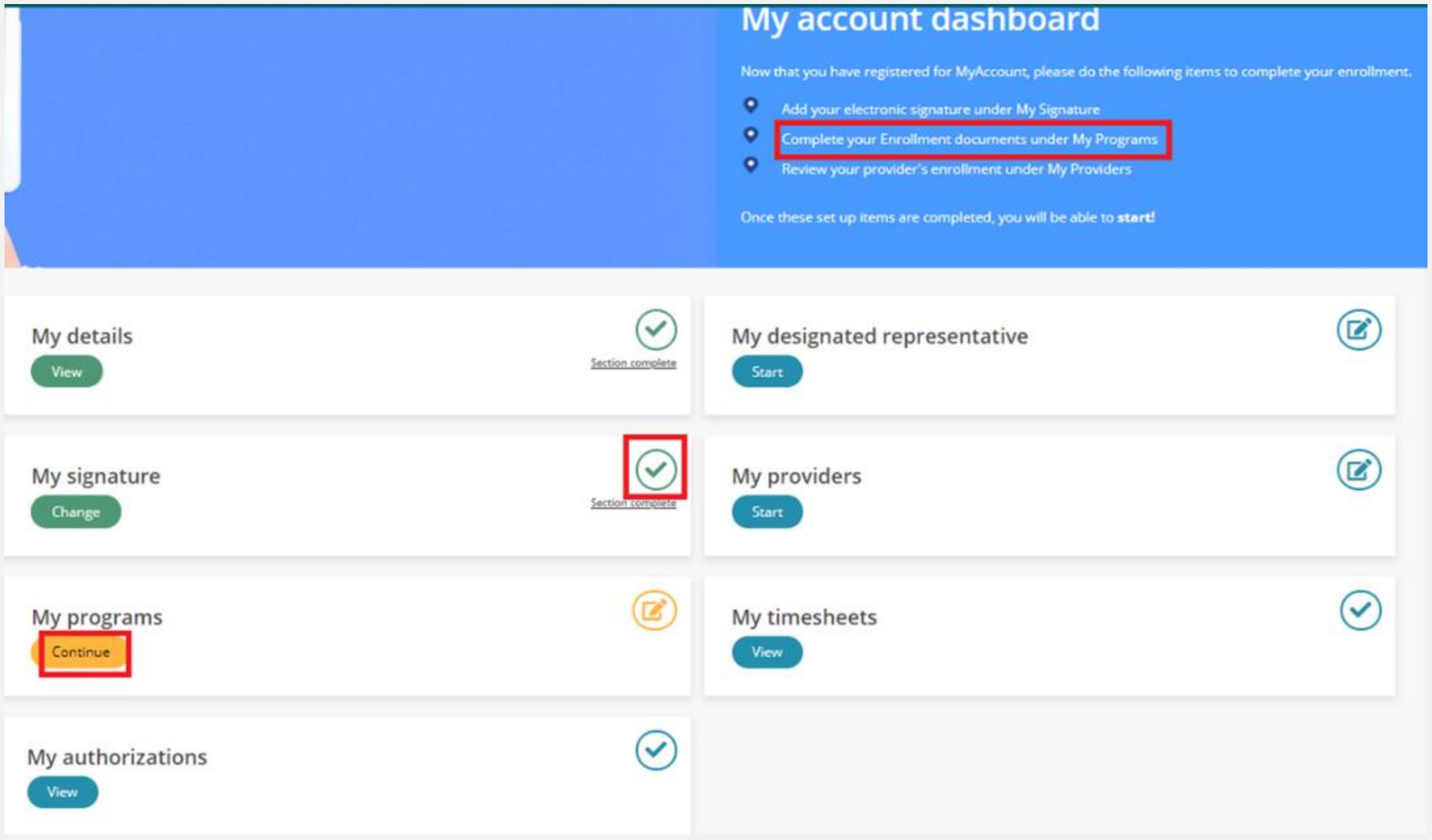
- Update your information (address, phone number

MY PROGRAMS

1

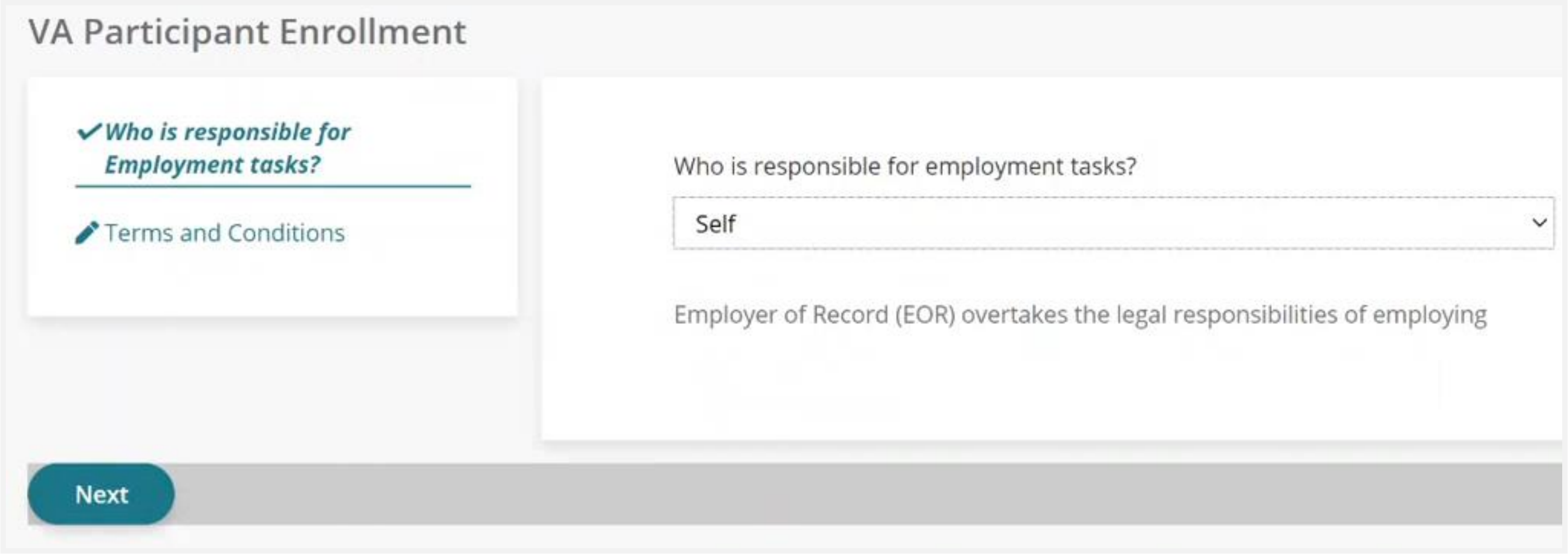
The dashboard now reflects the completed signature section.

To view the Consumer's personal information and make any updates, click on “Continue” under the “My programs” tab.



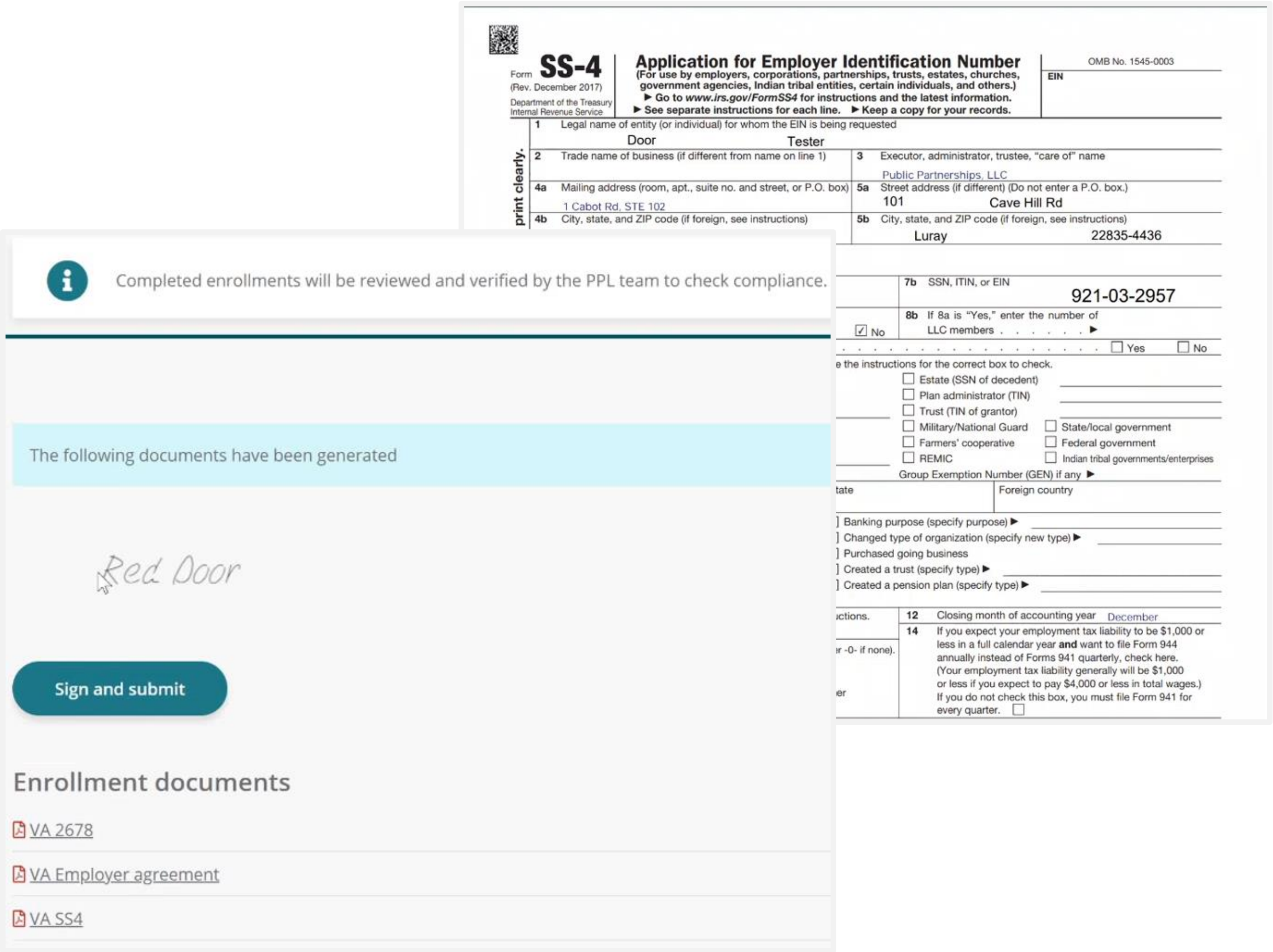
2

If anyone other than “Self” for Employment Tasks is selected, there will be additional fields to complete.



3

Once the Employment Tasks and Terms and Conditions are completed, each document should be reviewed before clicking “Sign and submit.”



HIRING A PROVIDER

HIRING A NEW PROVIDER

Objective:
Hire a new provider using MyAccount

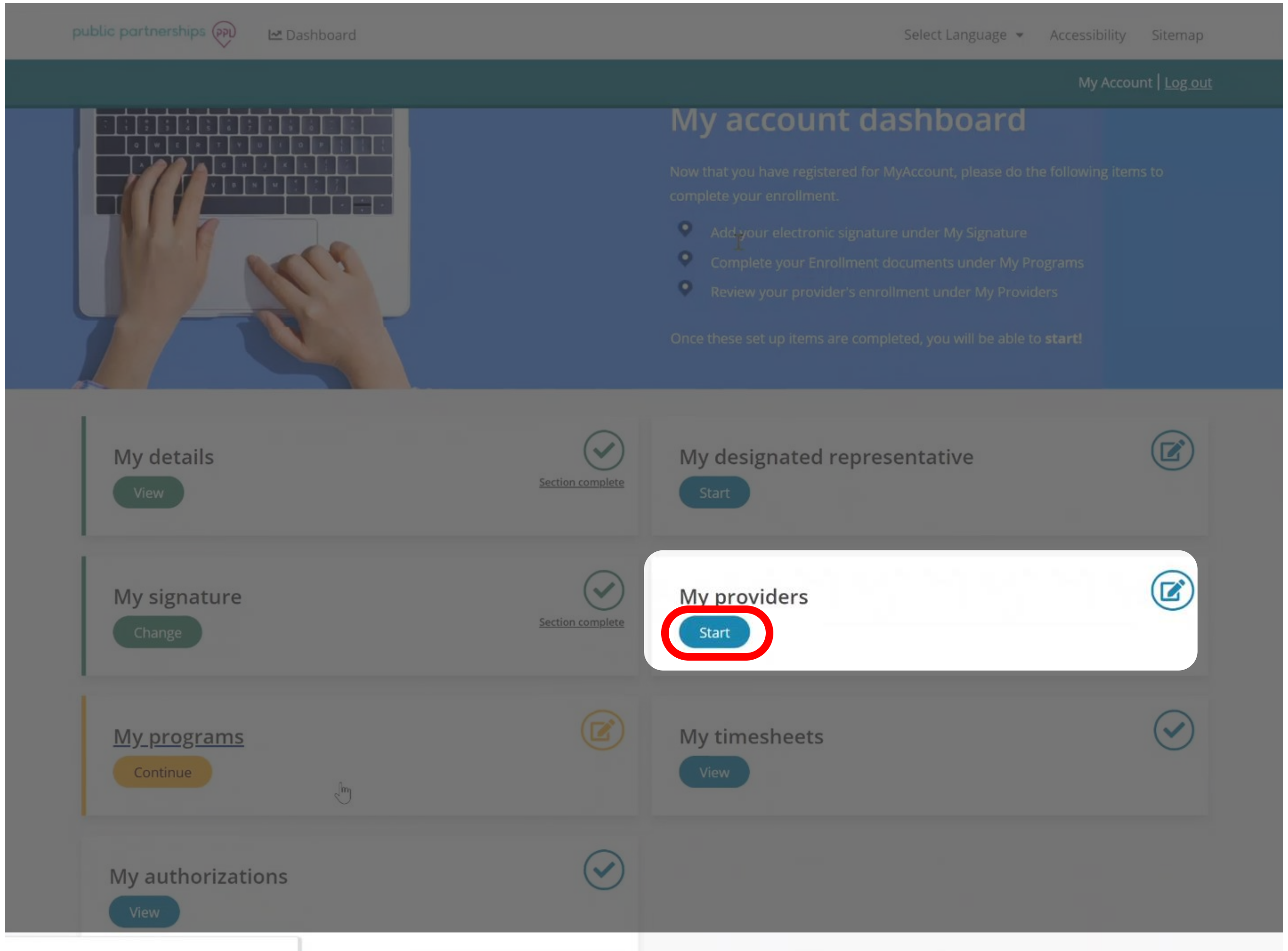
Upon completion of this task, a Consumer will be able to:

- Hire a new provider
- Sign any necessary forms for their enrollment

HIRING A NEW PROVIDER

1

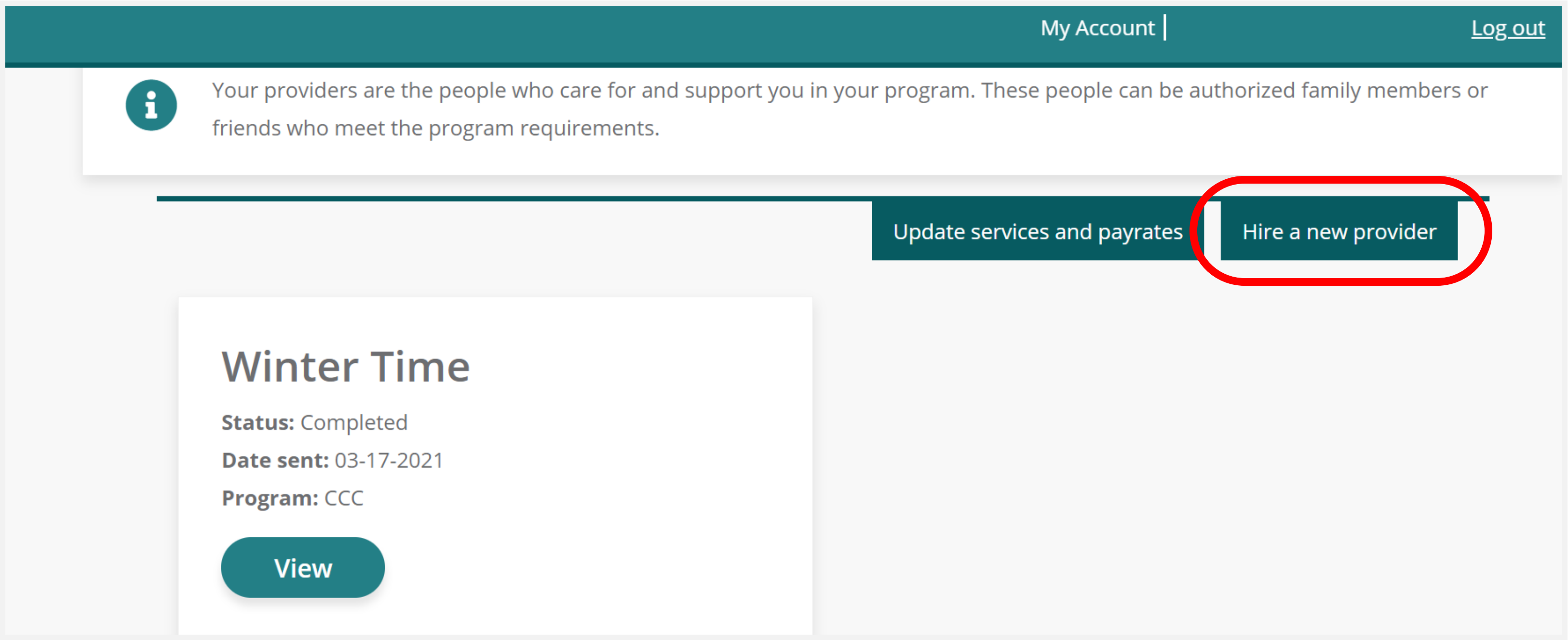
To begin hiring a new provider, click on “Start” under “My providers.”



HIRING A NEW PROVIDER

2

Their current attendants will be listed. To add a new provider, click on “Hire a new provider.”

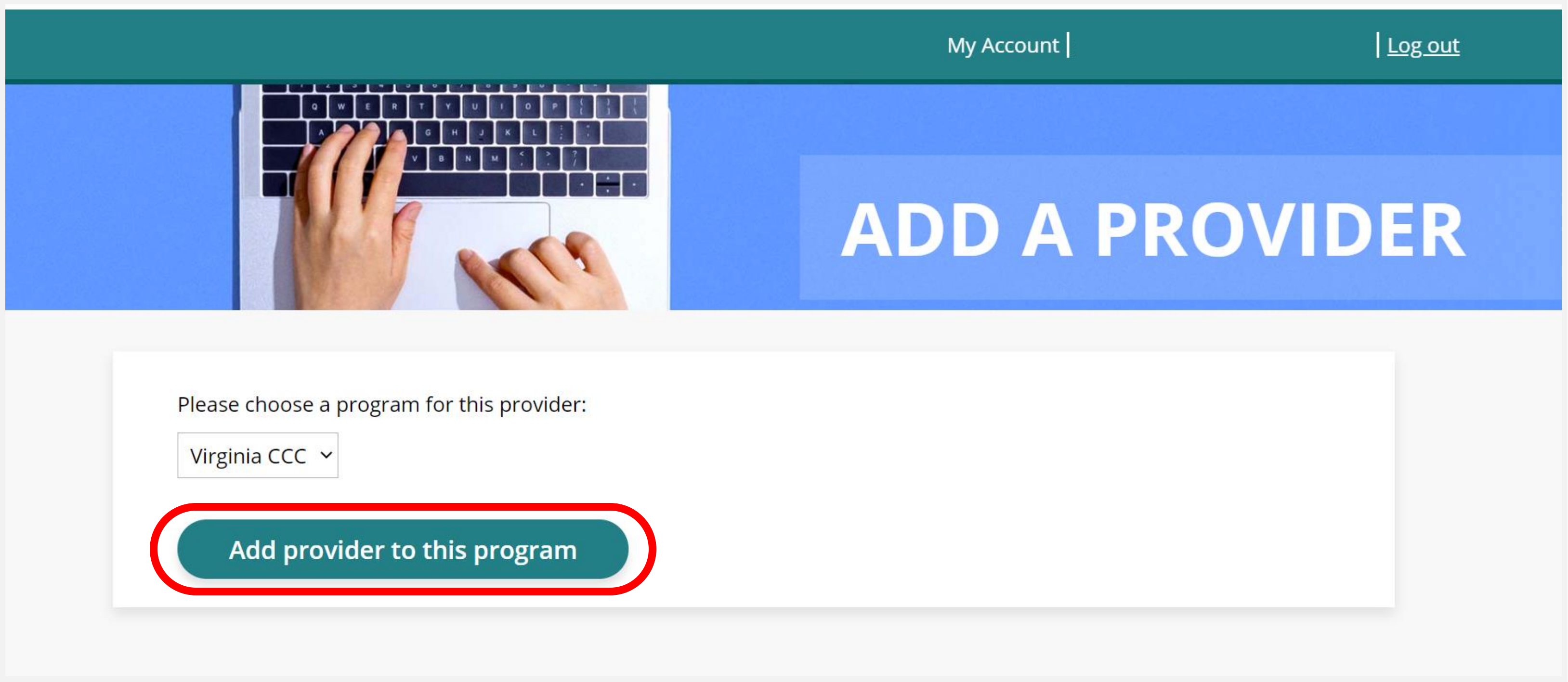


HIRING A NEW PROVIDER

3

Choose the provider's program from the drop-down menu if it is not already selected.

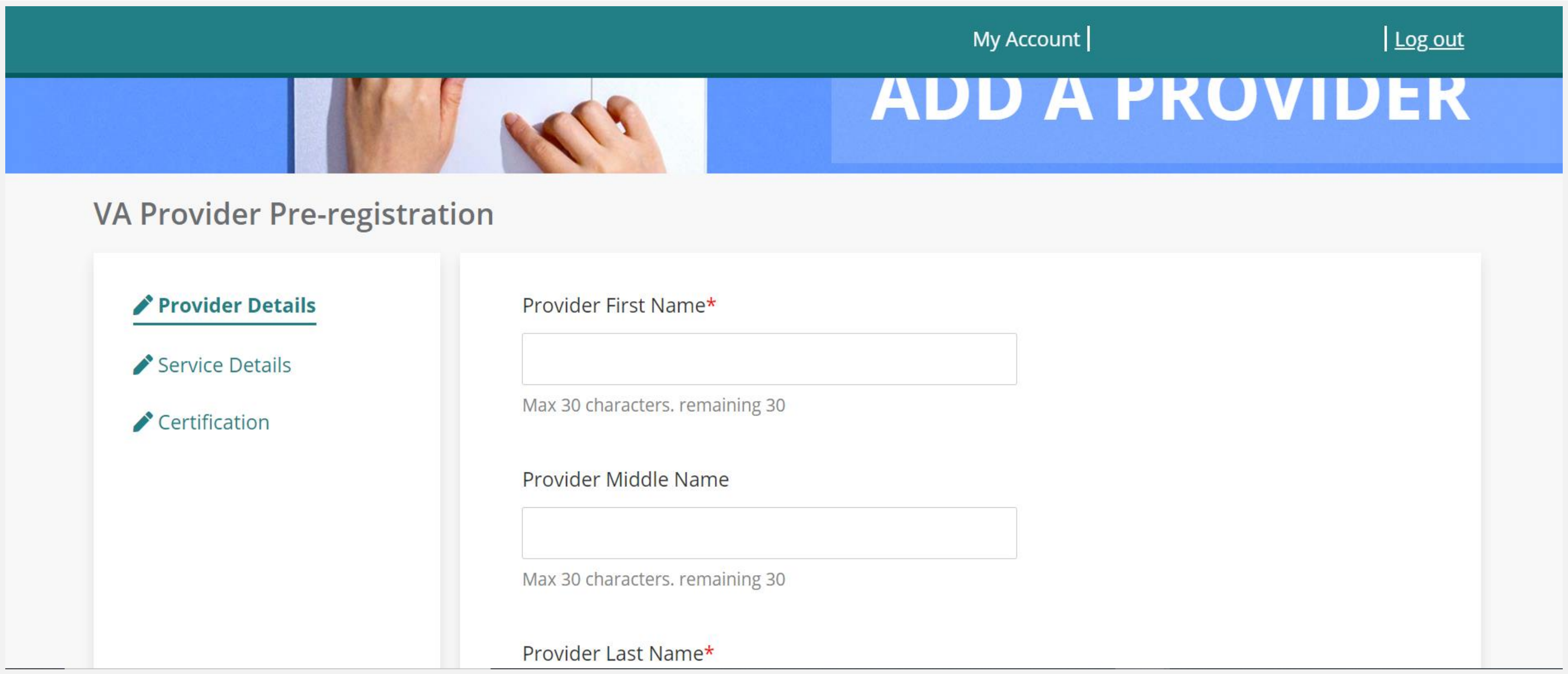
Click “Add provider to this program.”



HIRING A NEW PROVIDER

4

Complete the Provider Details, Service Details and Certification.

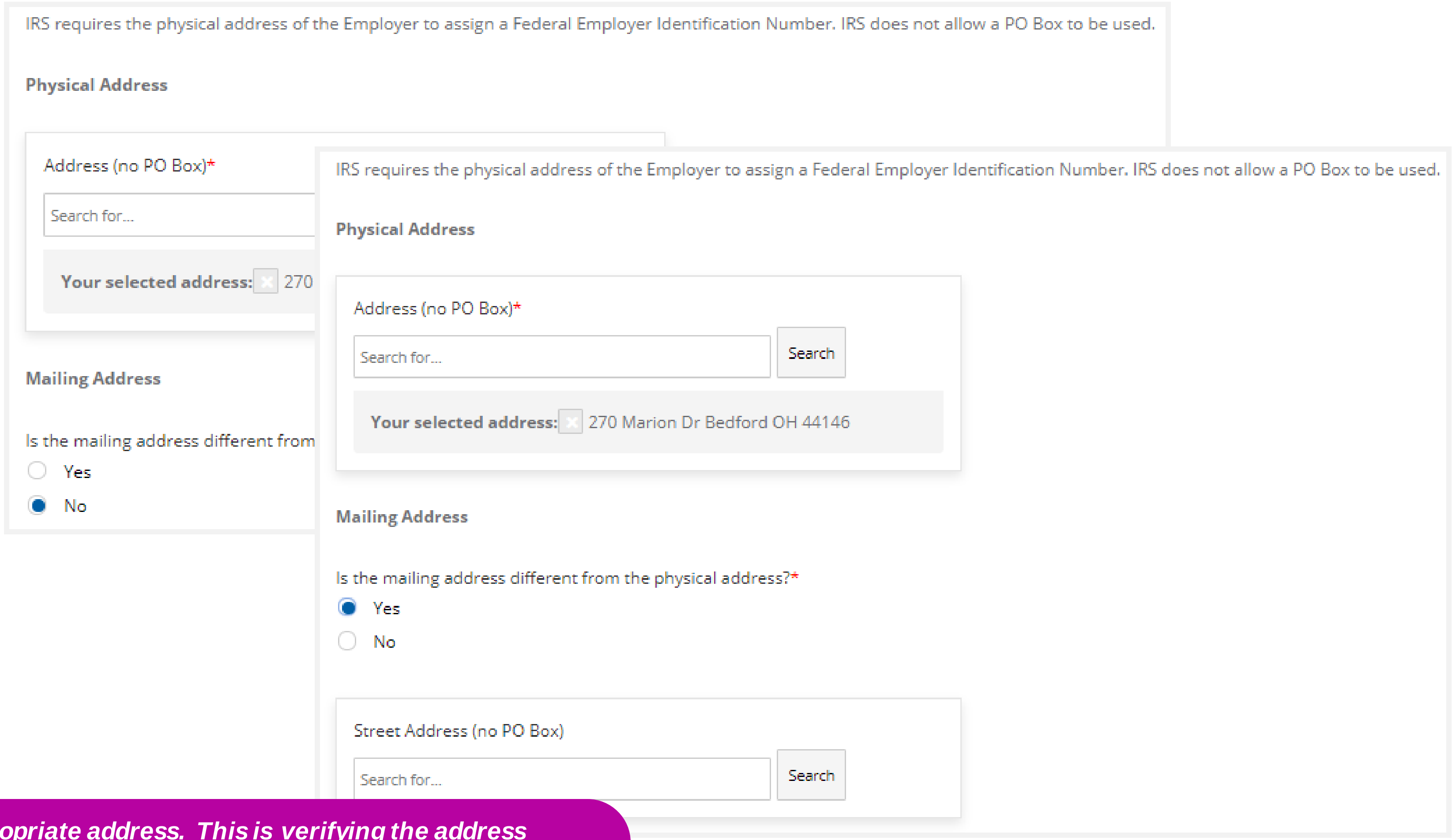


All asterisk fields need to be completed before you proceed.

HIRING A NEW PROVIDER

5

Complete the Provider Details, Service Details and Certification.

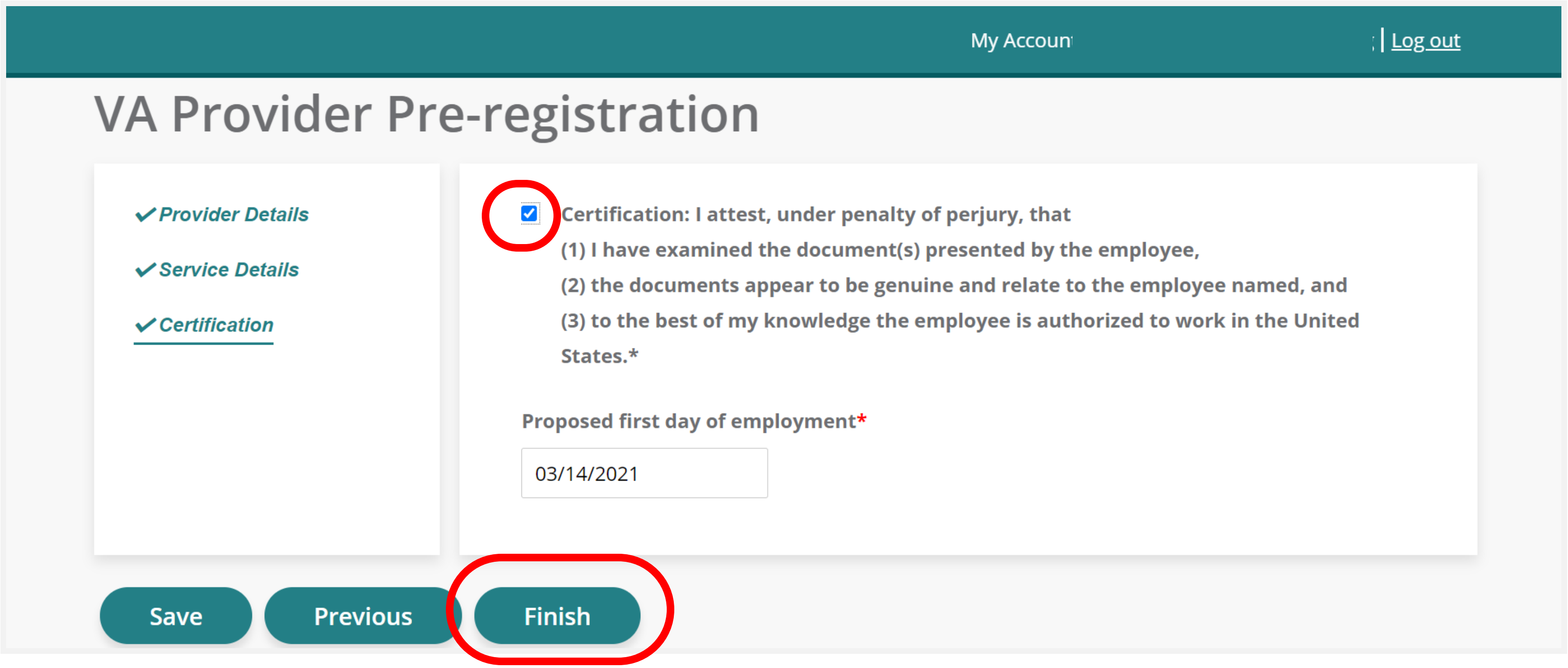


In the address field you will search for the appropriate address. This is verifying the address against the USPS database. When the USPS "version" of the address comes up, you select it.

HIRING A NEW PROVIDER

6

Read the certification statement regarding the provider's USCIS Form I-9, and when ready, check the certification box and click "Finish."



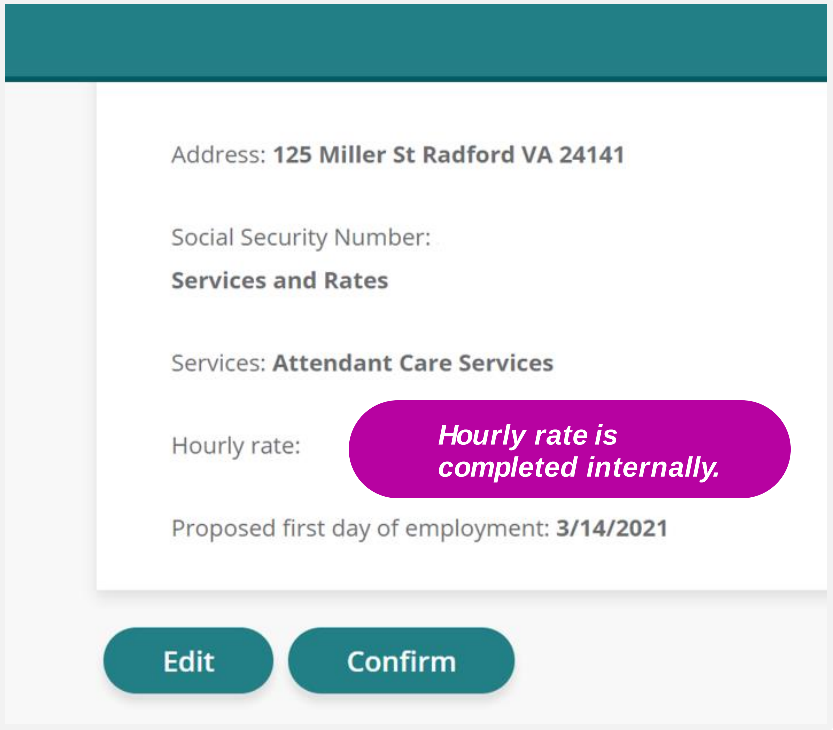
Proposed first day of employment IS NOT the actual start date. We will notify you when services can start.

HIRING A NEW PROVIDER

7

A summary page displays. Review the information and if everything is correct, click "Confirm."

Your attendant will receive an email inviting them to register in MyAccount.



LIVE EVENT

Q&A

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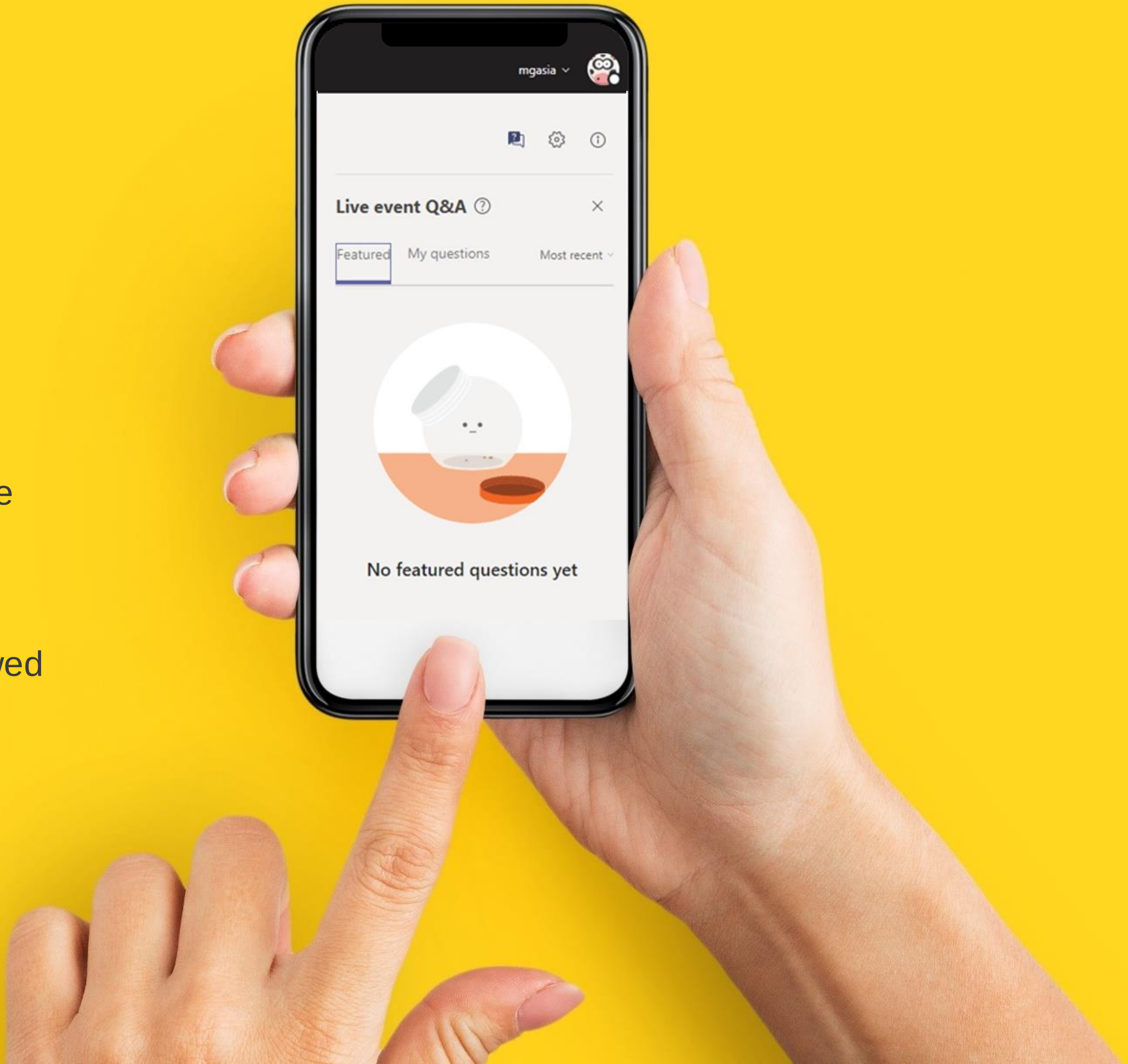


PROVIDER ENROLLMENT

PROVIDER ENROLLMENT

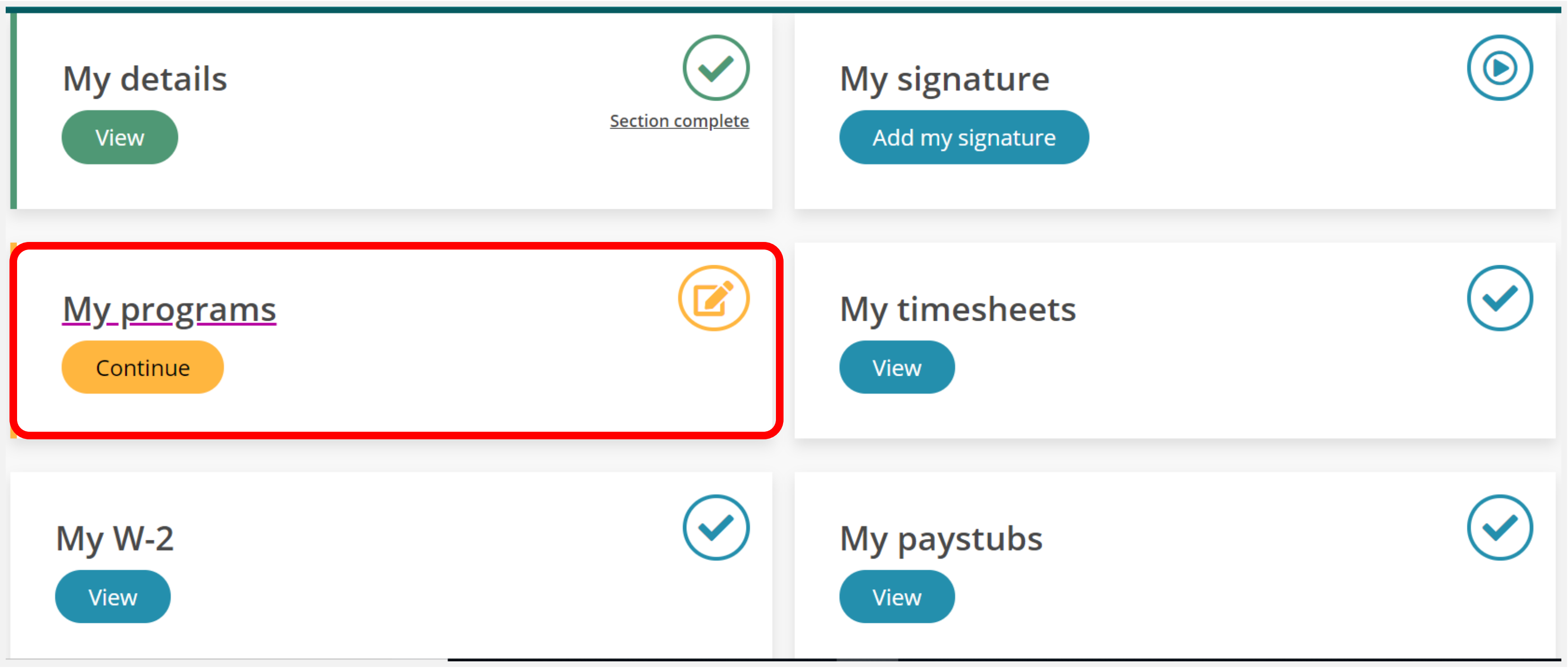
Objective:
Enroll a new provider using MyAccount

Upon completion of this task, you will be able to:
- Enroll a new provider
- Sign any necessary forms for their enrollment

PROVIDER ENROLLMENT

1

To begin the enrollment process in MyAccount, click on “Continue” under “My programs.”

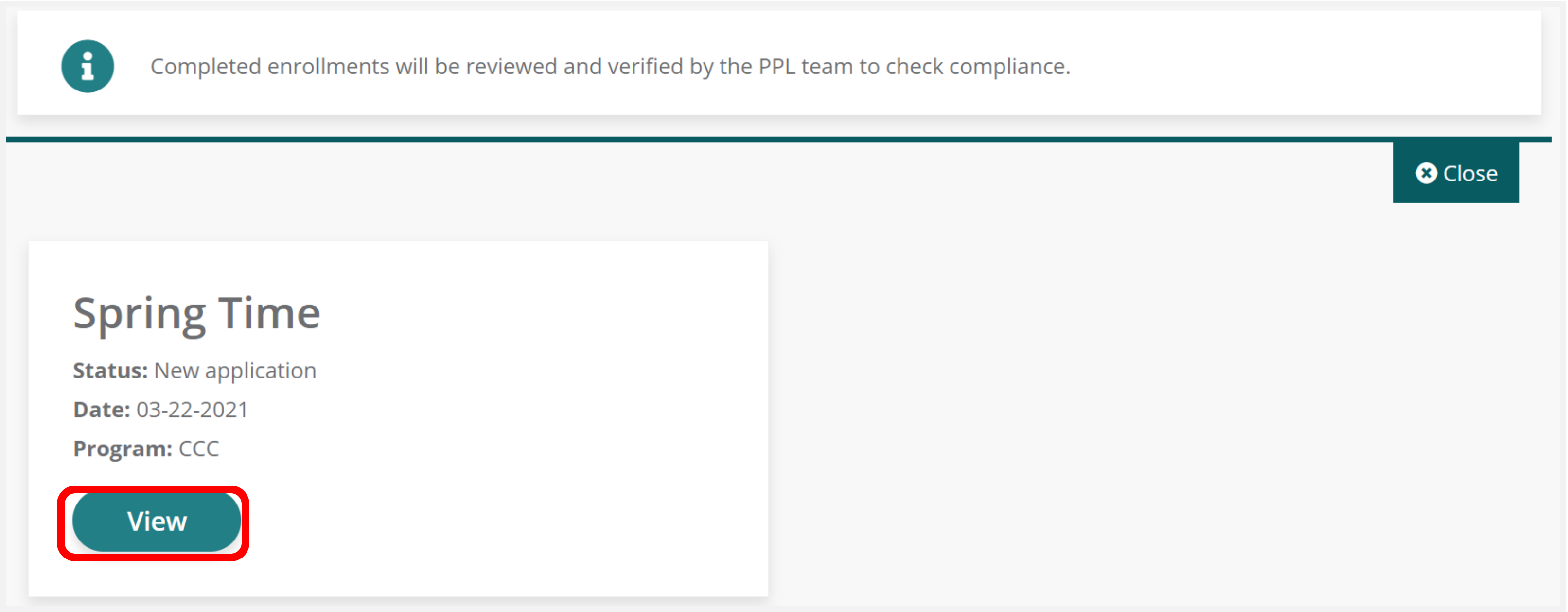


PROVIDER ENROLLMENT

2

Spring Time is listed as the consumer for this attendant in the Virginia Cardinal Care program.

Click “View” to complete the enrollment.

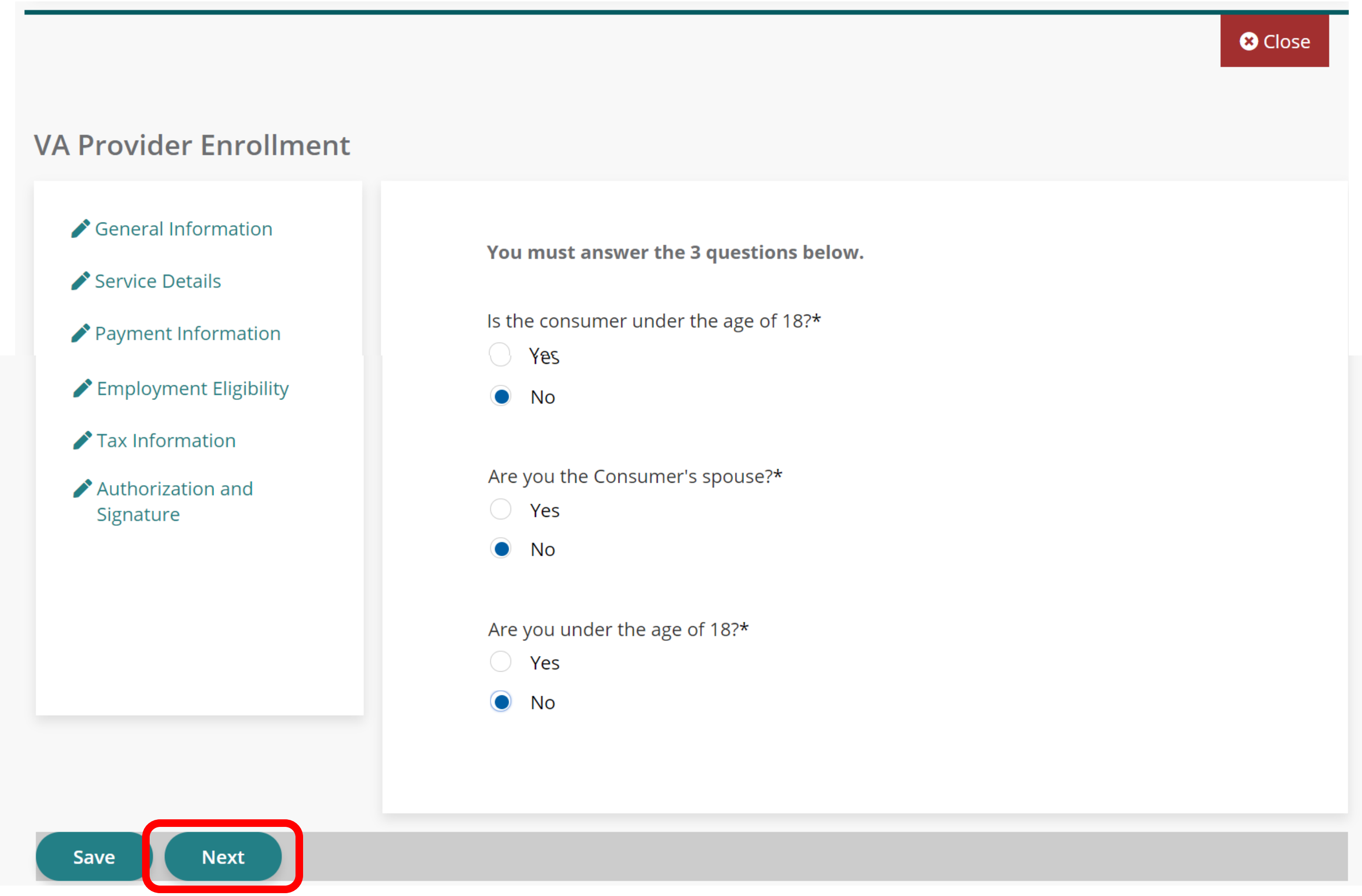


PROVIDER ENROLLMENT

3

The Provider Enrollment section of MyAccount walks through six screens of information.

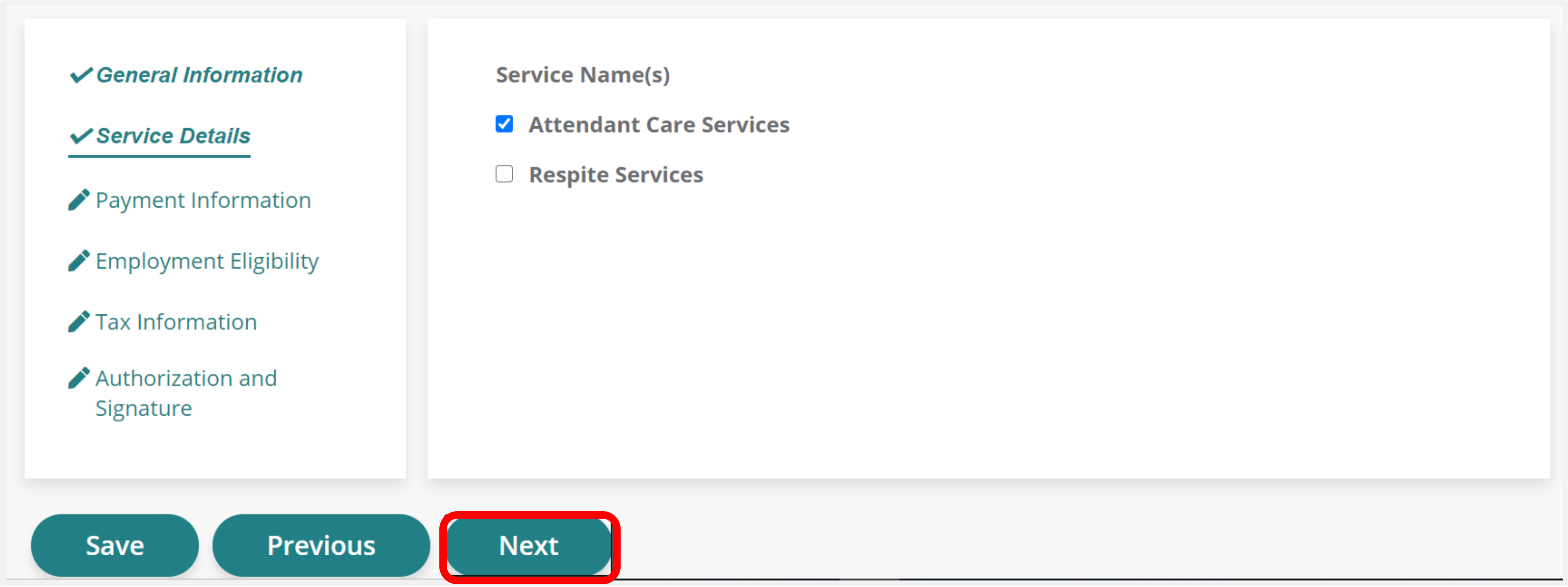
After answering each required question (marked with an asterisk), click ‘Next” to continue or “Save” to save your progress.



PROVIDER ENROLLMENT

4

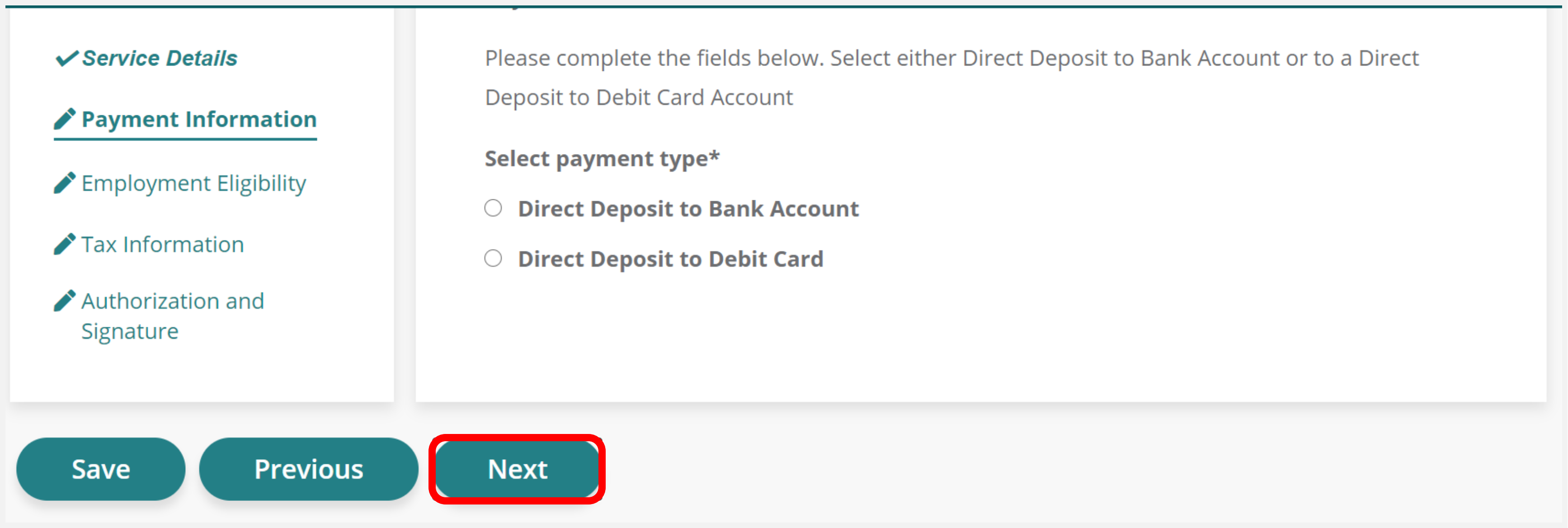
Complete the Service Details information and click “Next” to continue.



PROVIDER ENROLLMENT

5

Complete the Payment Information (how the provider will be compensated) and click “Next” to continue.

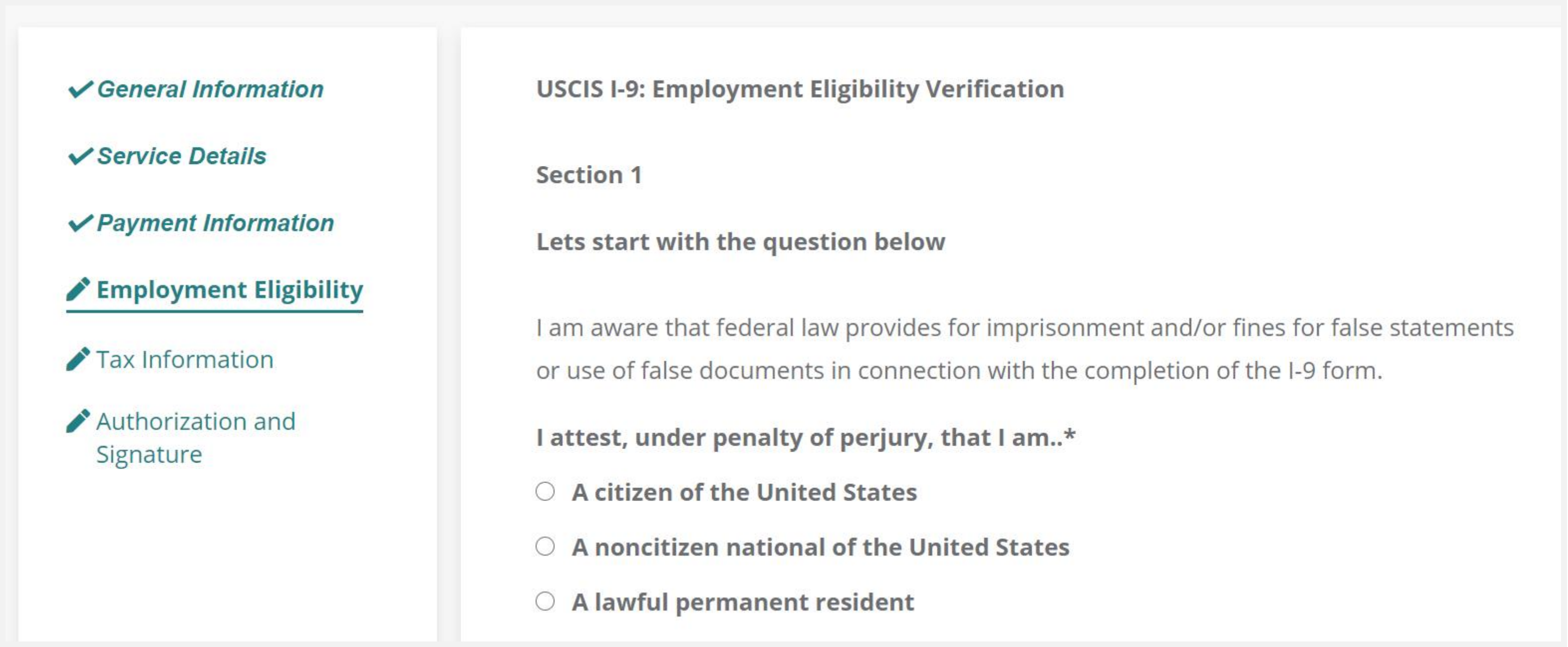


PROVIDER ENROLLMENT

6

The Employment Eligibility section of the enrollment process is important and should be reviewed carefully.

Completion of the USCIS I-9 Employment Eligibility Verification involves several steps.



- ✓ *General Information*
- ✓ *Service Details*
- ✓ *Payment Information*
- **Employment Eligibility**
- Tax Information
- Authorization and Signature

USCIS I-9: Employment Eligibility Verification

Section 1

Lets start with the question below

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of the I-9 form.

I attest, under penalty of perjury, that I am..*

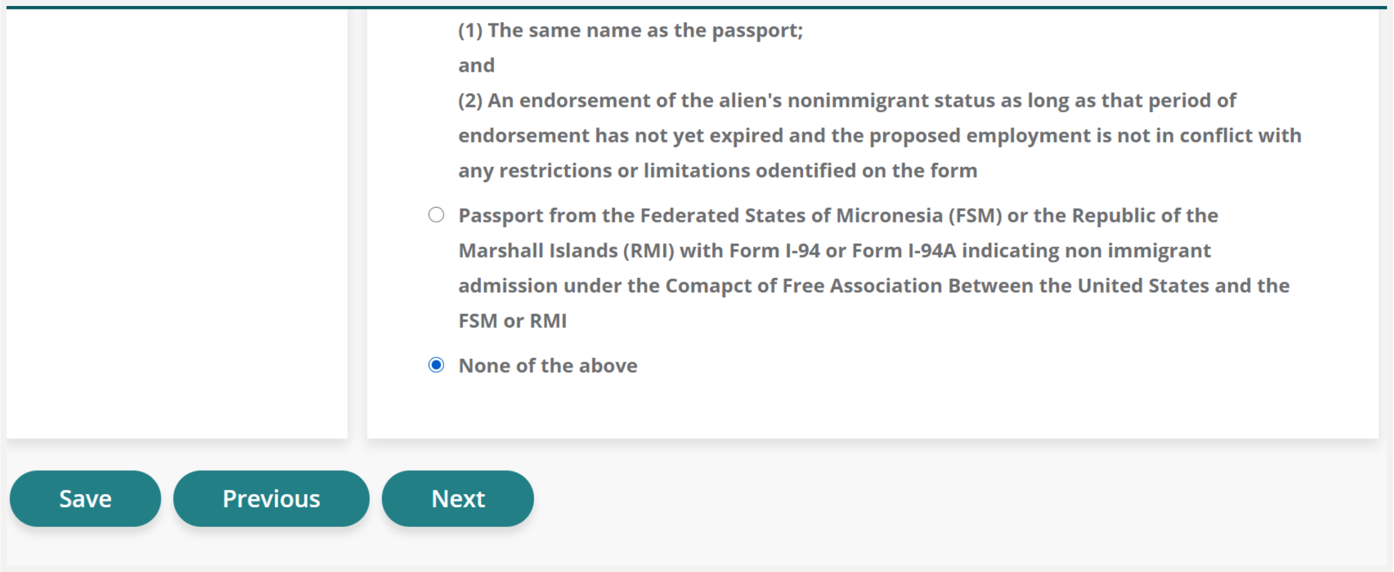
- ○ **A citizen of the United States**
- ○ **A noncitizen national of the United States**
- ○ **A lawful permanent resident**

Providers must choose which documents they will use to establish their identity.

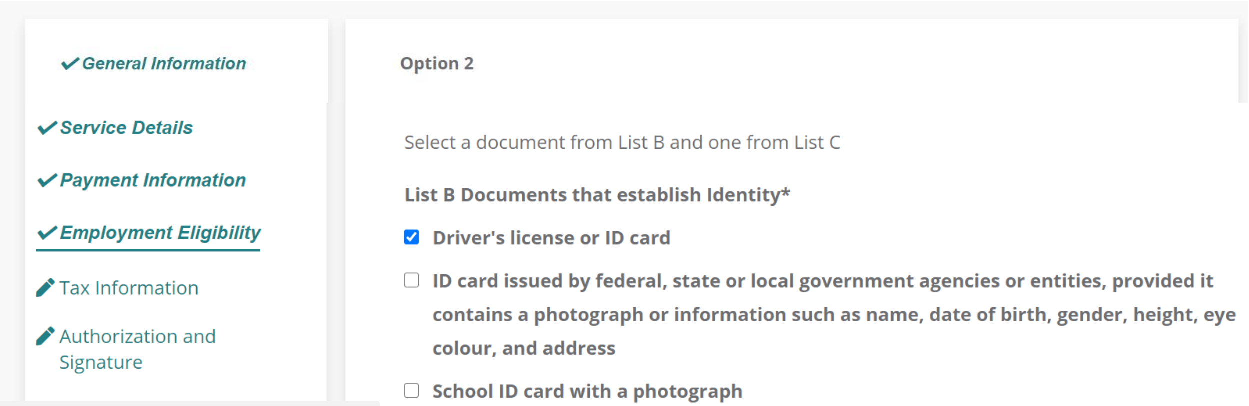
List A items are less common, like a passport.

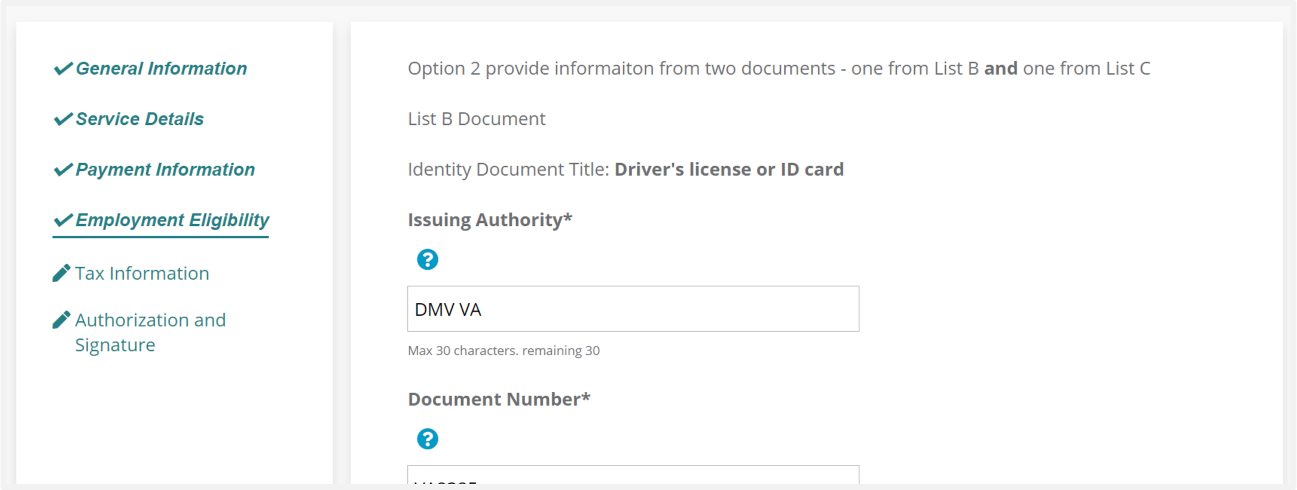
Lists B and C includes more common IDs like a driver’s license and a social security card.

Providers would select “None of the above” for the List A items to choose from the List B and C items.



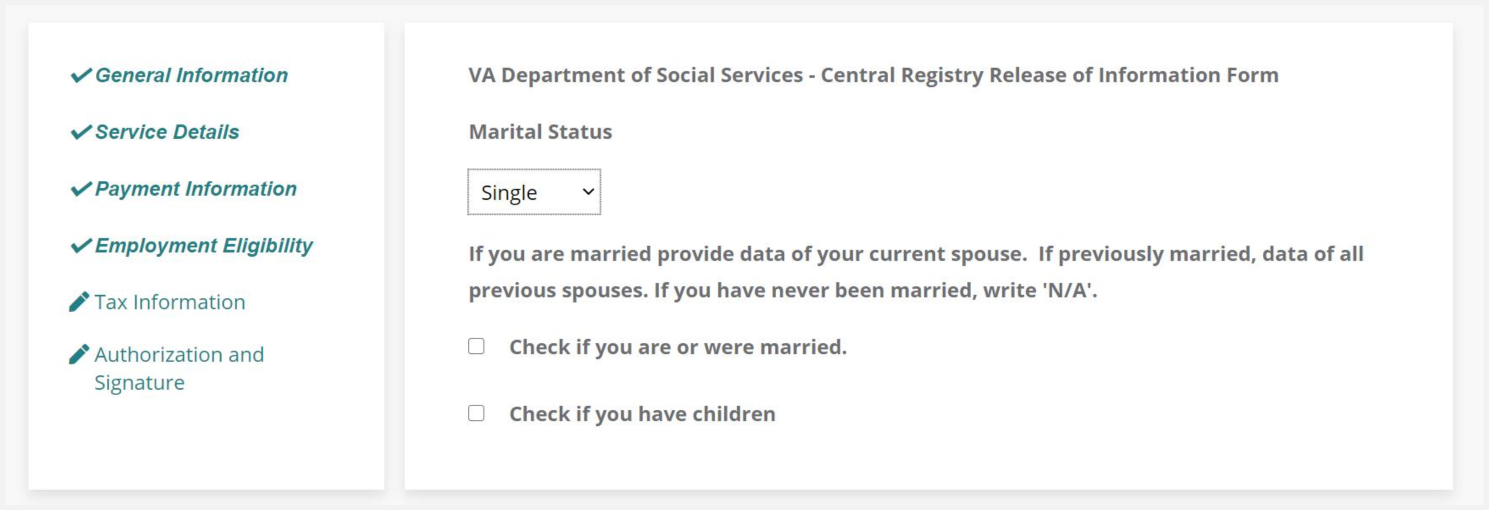
Option 2 of the identification documents means choosing one document from List B and one from List C.



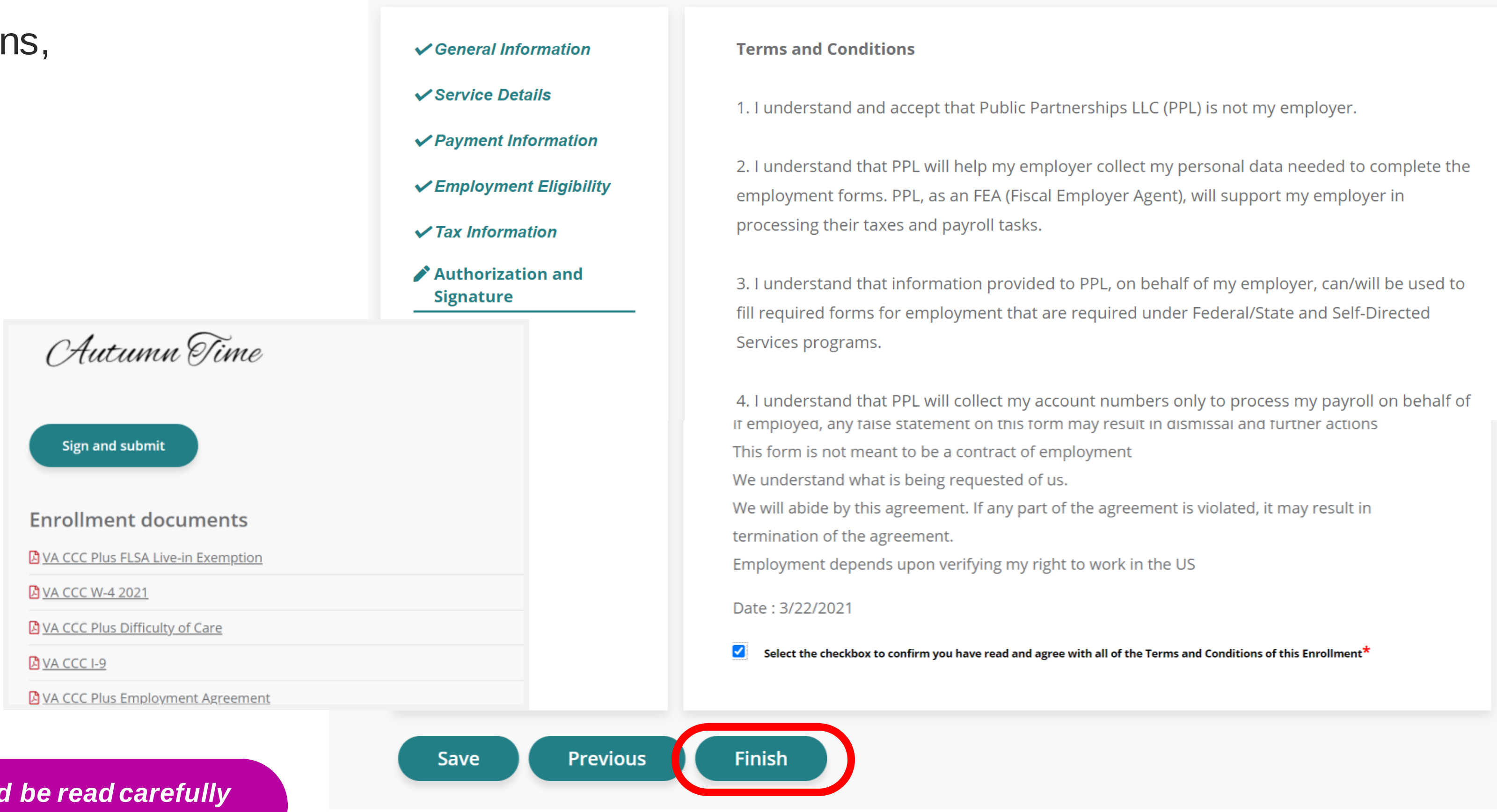


PROVIDER ENROLLMENT

The Tax Information section of the Provider Enrollment process includes completing your W-4 forms for both state and federal, the difficulty of care, and any live-in exemptions.



Read the terms and conditions, check the box at the bottom and click “Finish.”



Each enrollment documents should be read carefully before clicking “Sign and Submit.”

LIVE EVENT

Q&A

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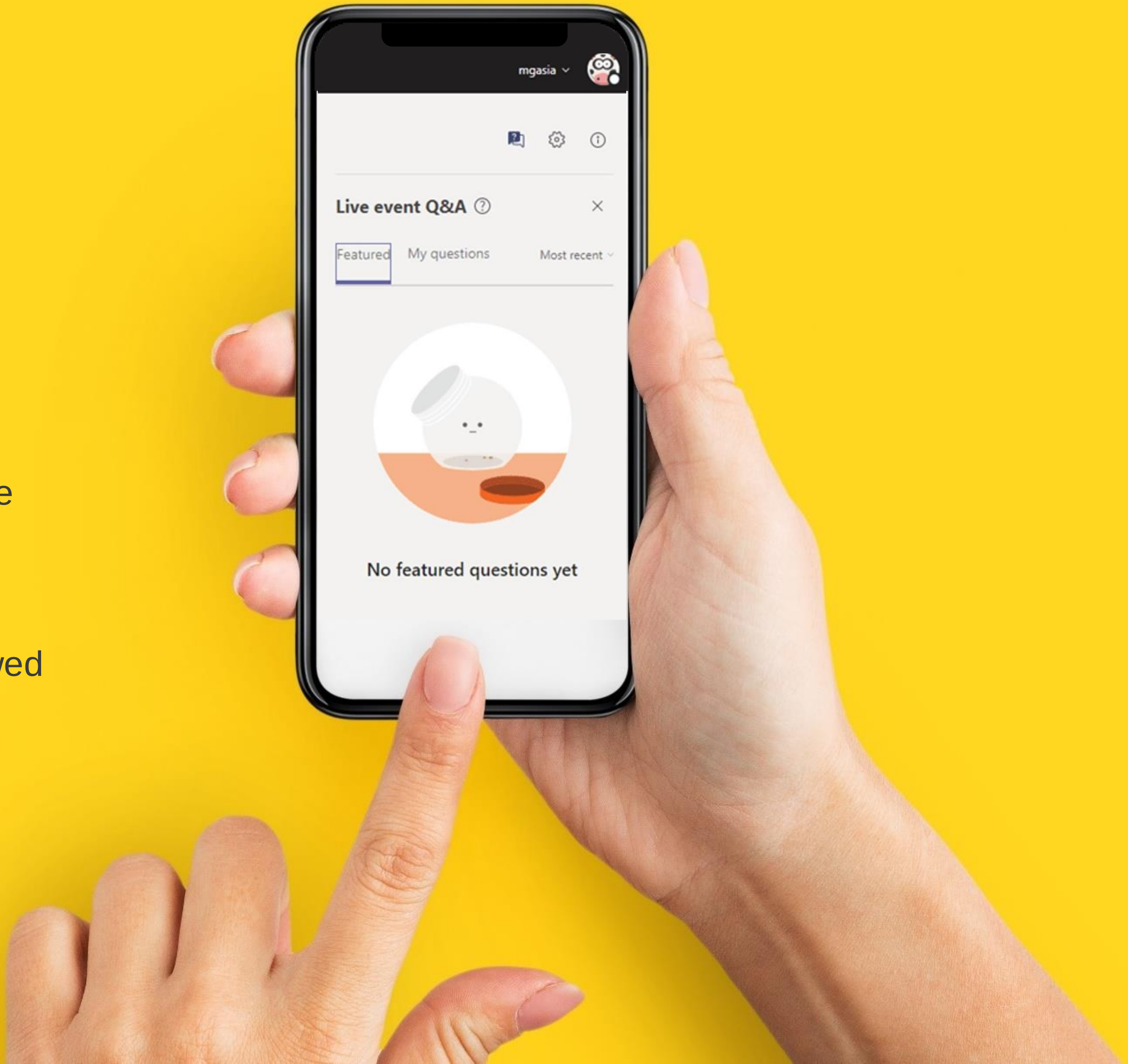


MY TIMESHEETS

TIMESHEETS

Objective:
Review the My Timesheets tab of MyAccount

Upon completion of this task, you will be able to:

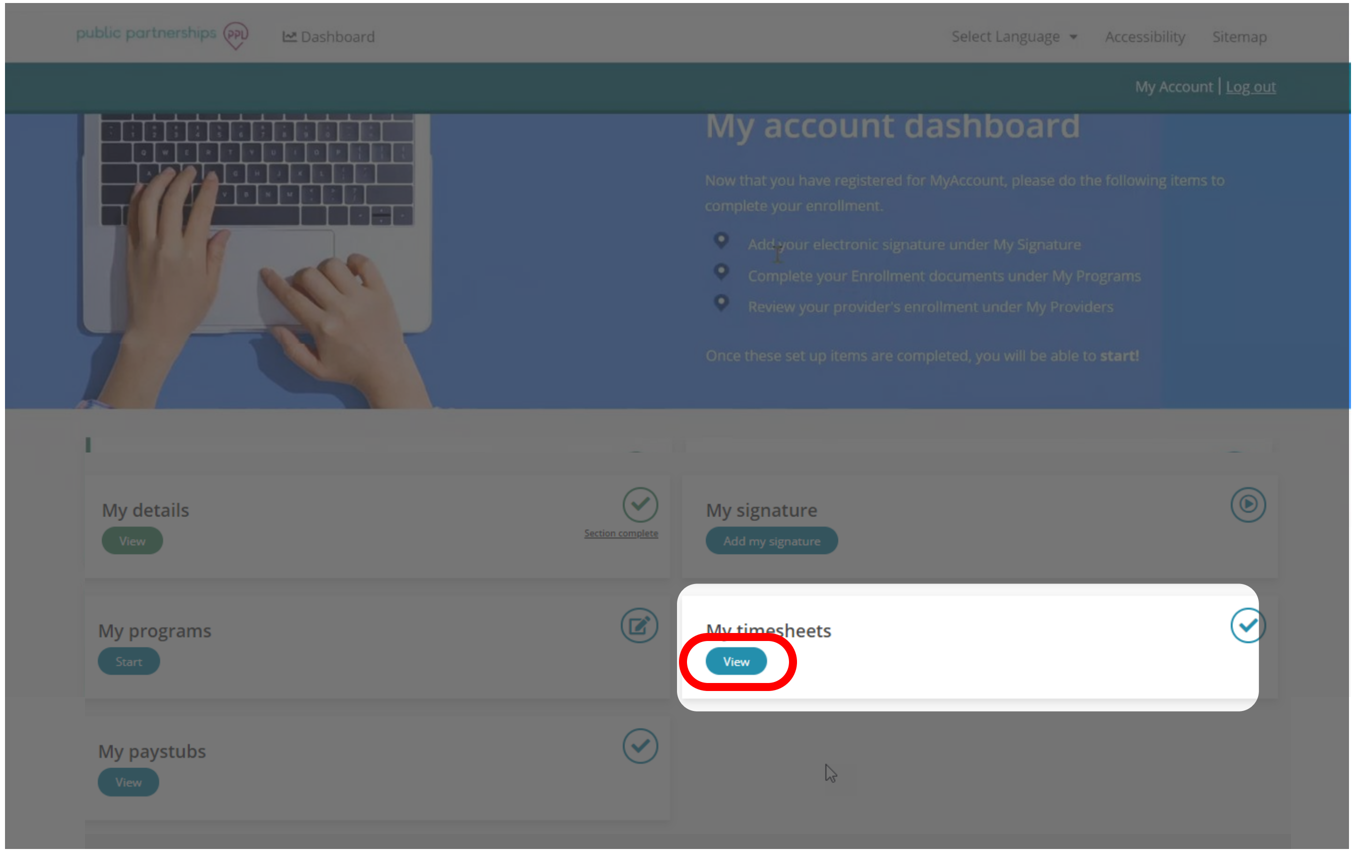
- Create new timesheets;
- Approve and Reject electronically submitted timesheets;
- Monitor the payment progress for each of your employee's time entries;

You will continue to use the Time4Care app (with MyAccount credentials) to submit your timesheets.

TIMESHEETS

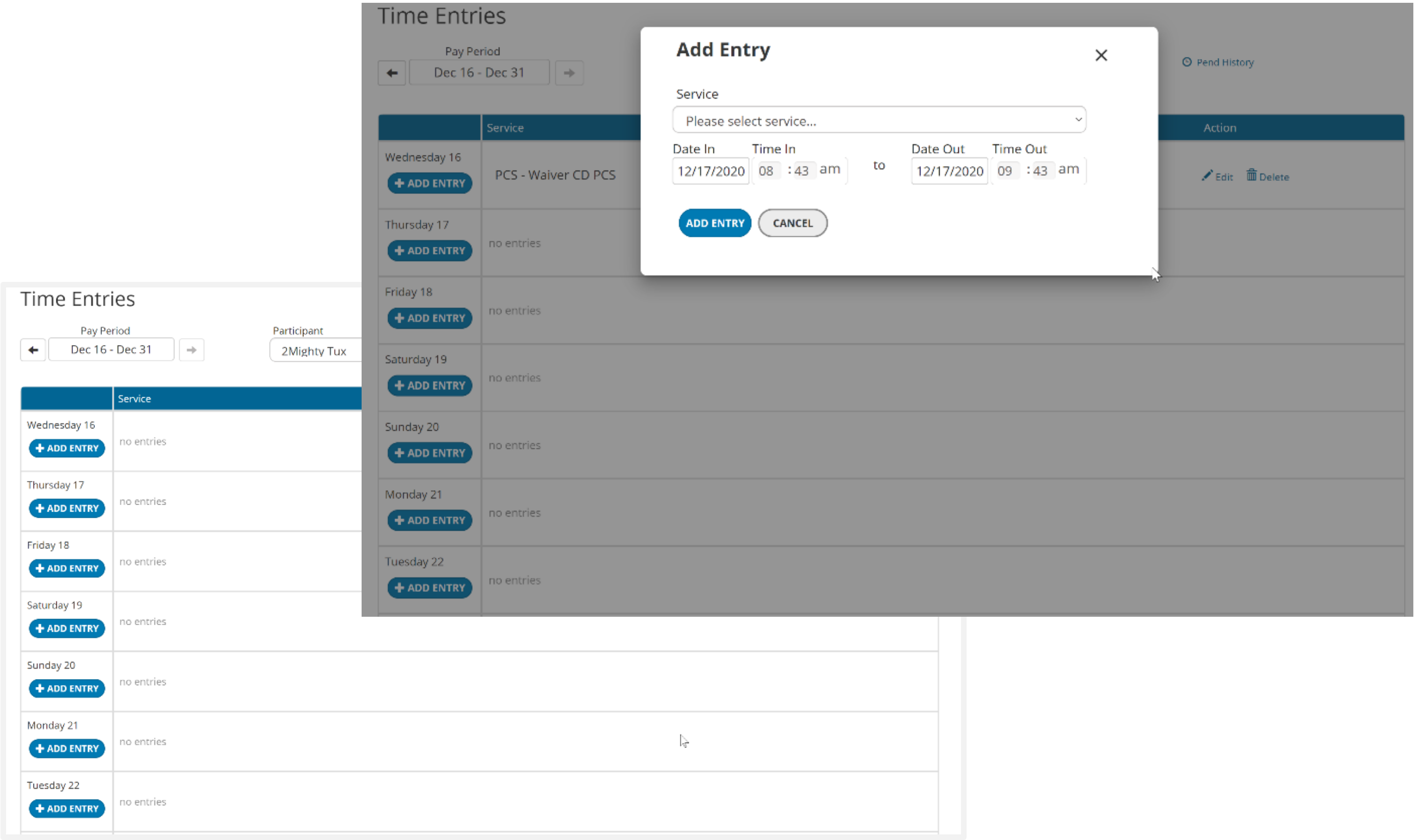
1

To access timesheets, click the “View” button on the “My Timesheets” tab.



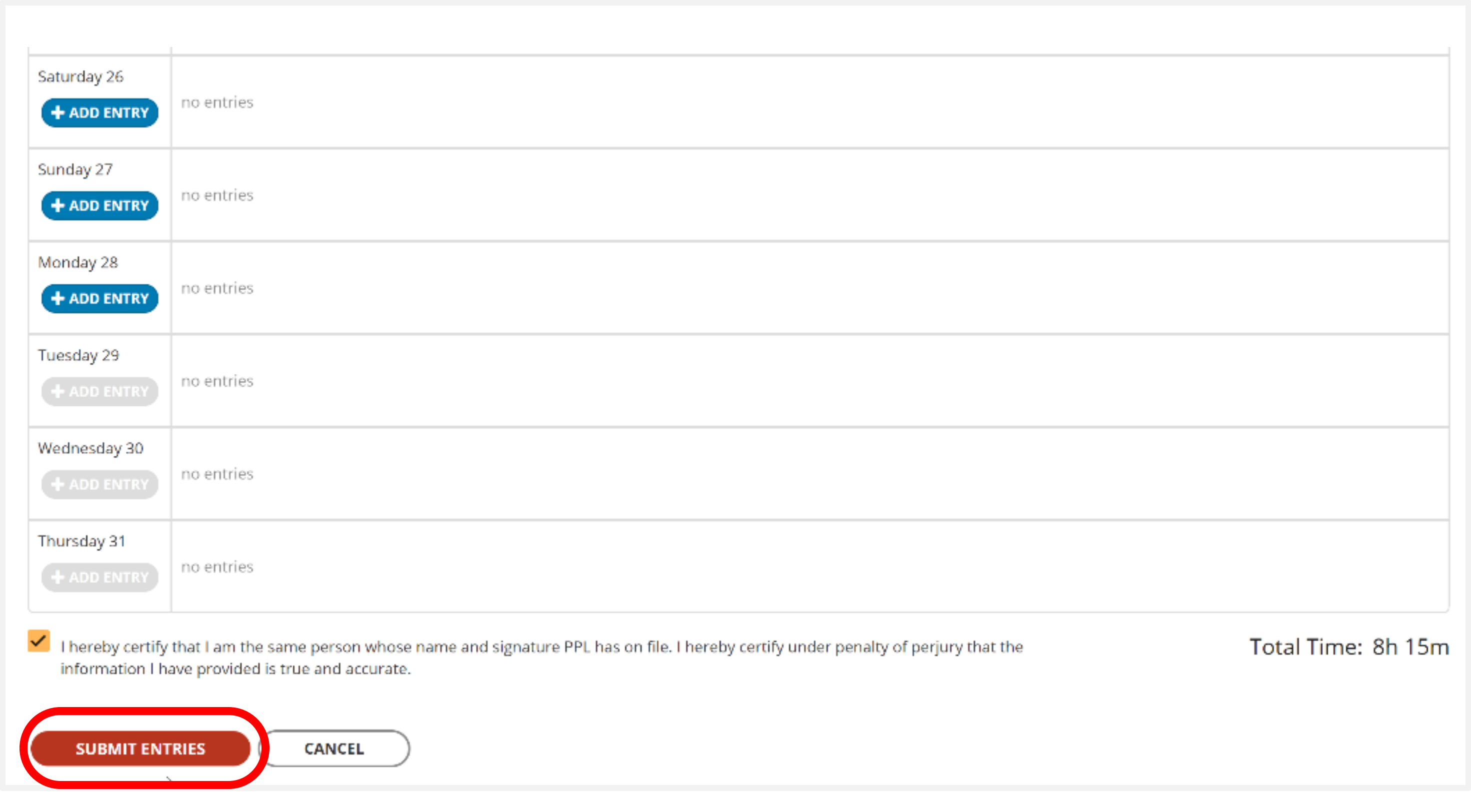
Adding Time Entries

The main Time Entries screen gives Providers a chance to click +Add Entry, put in the shift information, and select the service associated with those hours.



3

Adding Time Entries
When the hours for the week have been added by the attendant, click “Submit Entries.”



The consumer can approve or reject a submitted electronic timesheet on the "Time Entries" page.

The Ready for Approval column will show any time entries that need approval.

Time Entries

Date Range
May 1, 2020 - Jun 17, 2020

Pay Period	Provider Name	PPL Provider ID	Hours	Ready For Approval	Gross Amount	Check Amount	Action
6/16/2020 - 6/30/2020	Provider	PODM0000990	2h 0m	2 entries			View Entries
5/16/2020 - 5/31/2020	Provider	PODM0000989	2h 0m	2 entries			View Entries
5/16/2020 - 5/31/2020	Provider	PODM0000989	2h 0m		$ 20.00	$ 17.72	View Entries

Click the "View Entries" link under the Action column in the appropriate Pay Period row.

The time entries submitted by the attendant for that Pay Period will display in greater detail.

Time Entries

Date Range
May 1, 2020 - Jun 17, 2020

Pay Period	Provider Name	PPL Provider ID	Hours	Ready For Approval	Gross Amount	Check Amount	Action
6/16/2020 - 6/30/2020	Provider	PODM0000990	2h 0m	2 entries			View Entries
5/16/2020 - 5/31/2020	Provider	PODM0000989	2h 0m	2 entries			View Entries
5/16/2020 - 5/31/2020	Provider	PODM0000989	2h 0m		$ 20.00	$ 17.72	View Entries

If any entries are in SUBMITTED status, they will need approval before PPL can process them.

SUBMITTED entries can be approved or rejected by selecting the time entry checkbox in the first column and then clicking either "Approve" or "Reject."

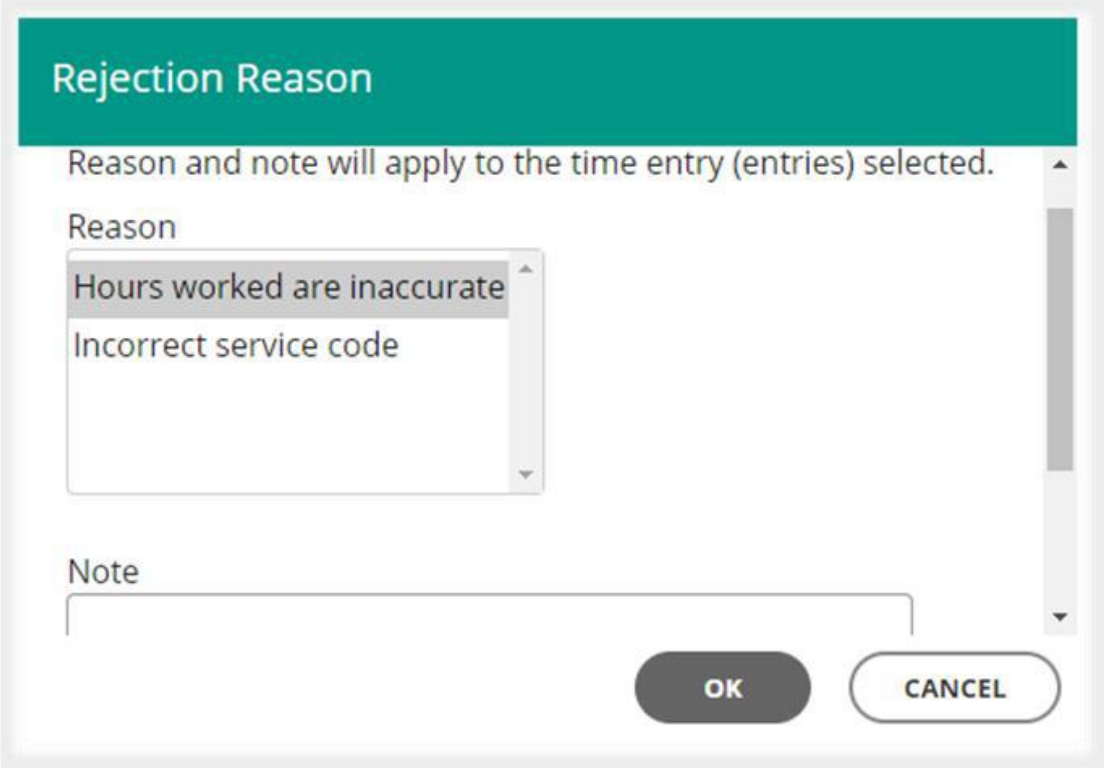
SELECT ALL APPROVE SELECTED REJECT SELECTED

	Date	Service	Time In	Time Out	Hours	Status
☐	06/03/2020 Wednesday	PCS - Waiver CD PCS	6:00 AM	7:00 AM	1h 0m	Good to be paid
☐	06/04/2020 Thursday	CHCAS - Waiver Choices HCAS	6:00 AM	7:00 AM	1h 0m	Good to be paid
☐	06/05/2020 Friday	CHCAS - Waiver Choices HCAS	11:10 AM	12:10 PM	1h 0m	Paid
☐	06/06/2020 Saturday	PCS - Waiver CD PCS	1:00 AM	2:00 AM	1h 0m	Paid

REJECT SELECTED, which will return the timesheet to your attendant for correction. You can enter a reason so that your employee knows what they need to correct.

APPROVE SELECTED, which will move the timesheet forward for payment processing

A rejected timesheet will not be paid by PPL until it has been corrected and resubmitted by the attendant and approved.



Questions?

We want to make these materials as helpful as possible. So let us know if you have any feedback, questions, or concerns!

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