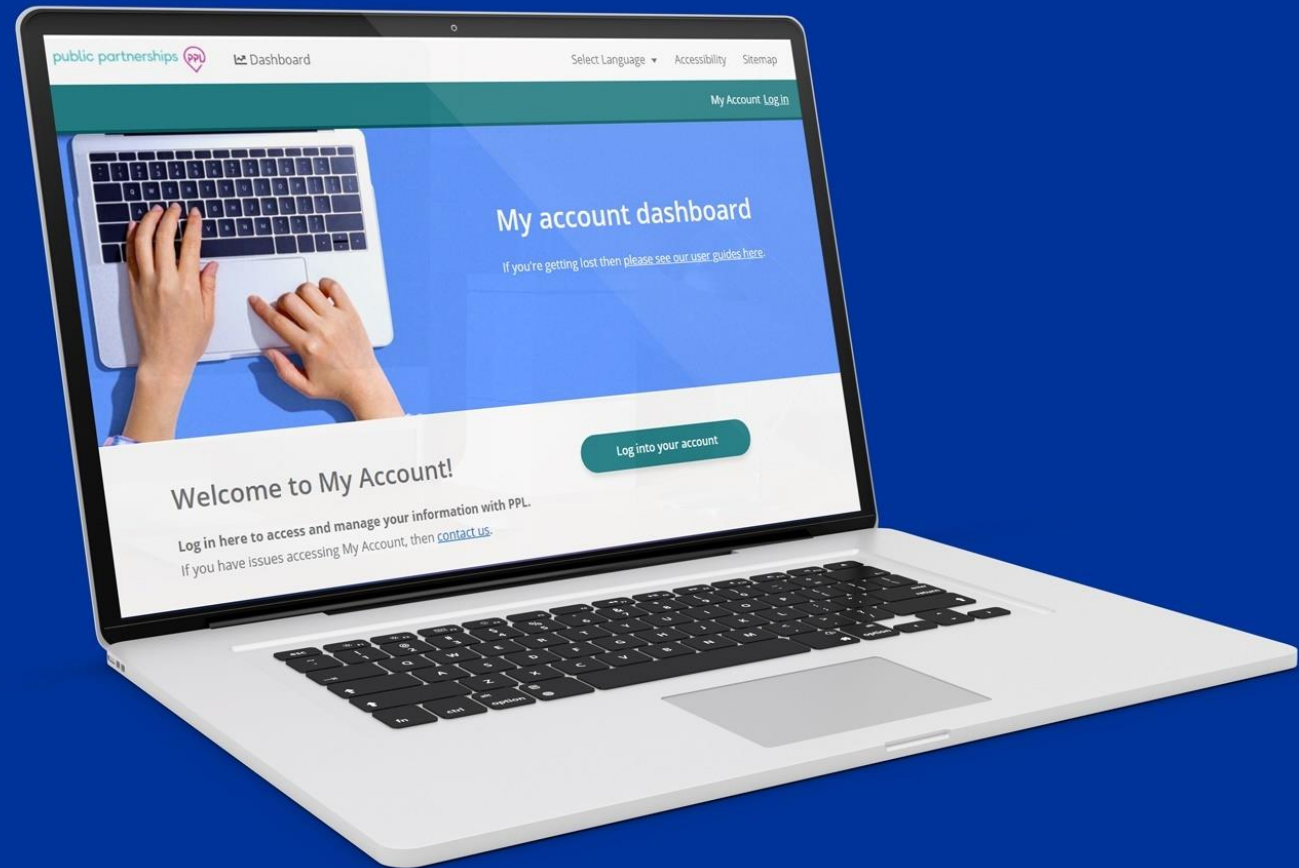




MyAccount

FOR SERVICE FACILITATORS AND
MANAGED CARE ORGANIZATIONS

April 2021



Agenda

Introduction	03
Activated Account	12
Create a New Referral	16
Finding a Referral	25
View an Authorization	32
View a Checklist	37
Dashboard Explore	42
My Signature	45
My Programs	52
Hiring a Provider	57
Provider Enrollment	67
My Timesheets	80





WELCOME

MyAccount for
Service Facilitators and MCO



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.



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





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?



Consumers/Employer

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



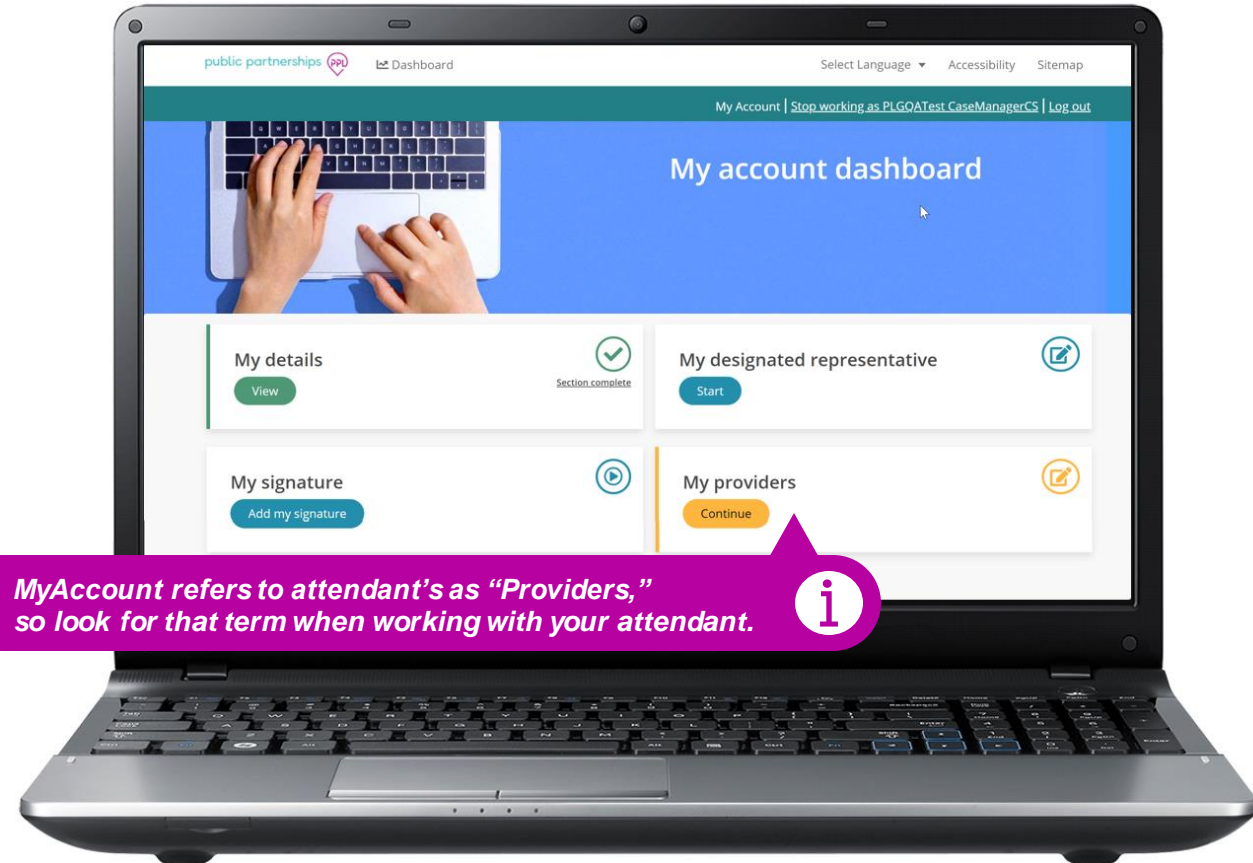
Attendants

- 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

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

Enrollment + MyAccount



Making self-directed enrollment easier:

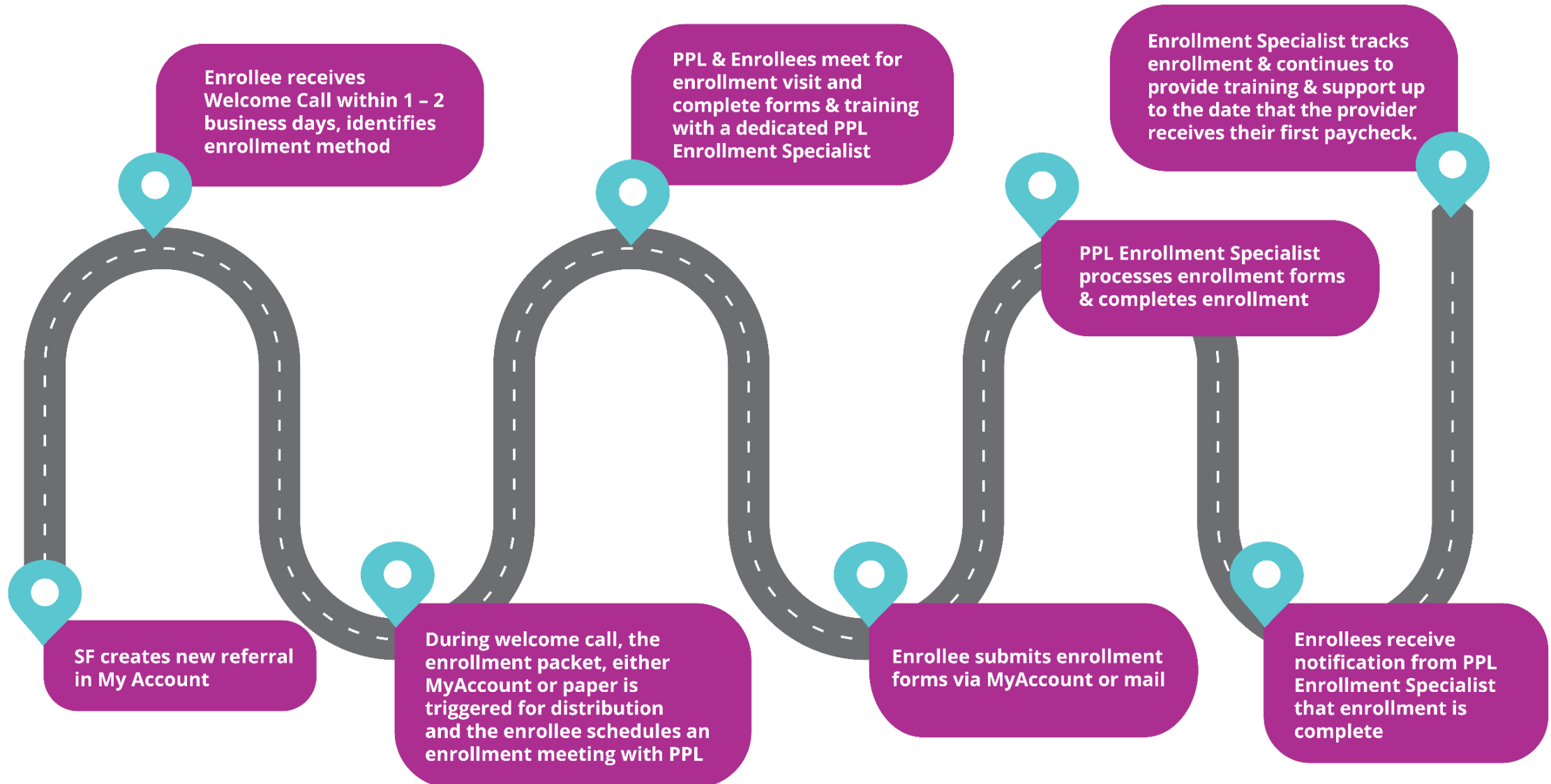
- **Dedicated enrollment support** for all enrollments
 - Dynamic methods to complete enrollment; targets:
 - 80% MyAccount
 - 20% Traditional (mail)
 - ✓ Leveraging bar-coding
 - **Fully integrated**; enhanced capabilities to manage processes and requirements end-to-end electronically
 - **Built in 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



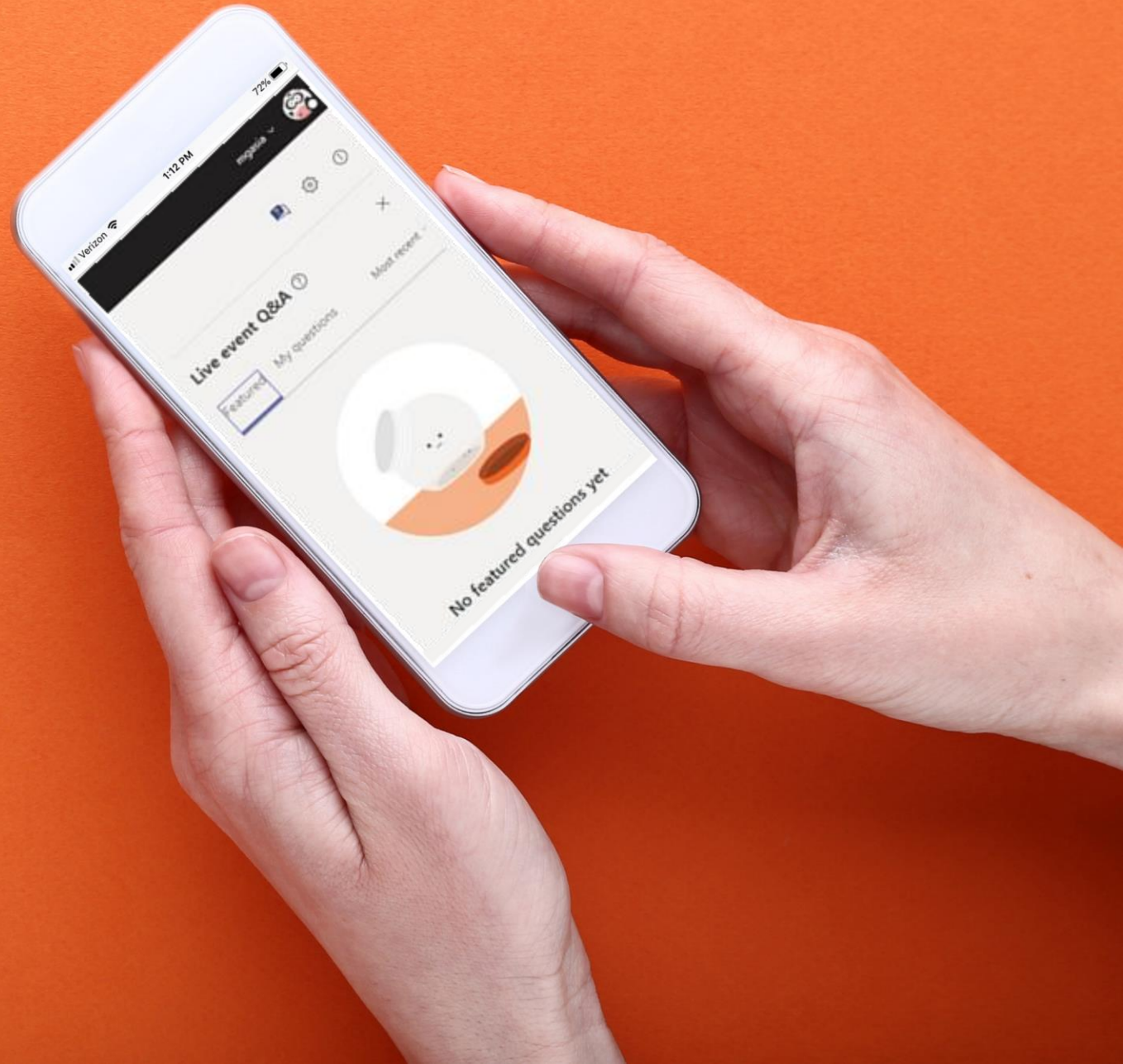
OVERVIEW



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:

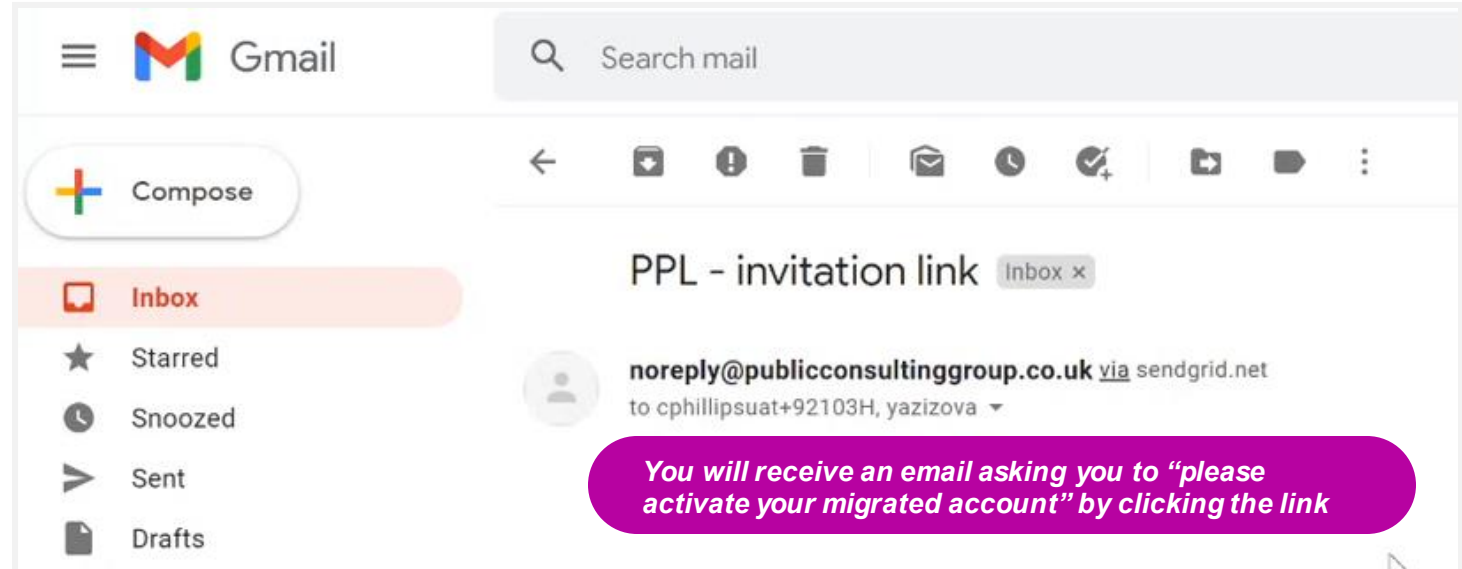
- View your cases
- Work in MyAccount as a consumer or attendant to assist them
- View timesheets
- View authorizations
- Change demographic information

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!

IdentityServer4
Identity provider help default TEST TEST TEST YES

Please set your password

New password:

Confirm new password:



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.”

The screenshot displays the 'Enrollment Dashboard' for Public Partnerships (PPL). The page features a header with the PPL logo, 'Dashboard', and navigation links for 'Select Language', 'Accessibility', and 'Sitemap'. Below the header, there are links for 'Documents', 'My Account', 'Work as', and 'Log out'. The main content area includes a search bar and a 'Referrals' section with buttons for 'View referrals' and 'Create a new referral'. A list of referrals is shown, each with details like name, enrollment status, submitted date, and days in action, along with 'View details' and 'Manage user' buttons. On the left, there are filter sections for 'Enrollment documents' and 'State'.

Filter by:
Enrollment documents
<input checked="" type="radio"/> All
<input type="radio"/> New application
<input type="radio"/> Awaiting approval
<input type="radio"/> Signing
<input type="radio"/> Completed
<input type="radio"/> Transfer/ DocuSign Enrollment

State
<input checked="" type="radio"/> All
<input type="radio"/> Ohio
<input type="radio"/> Alabama
<input type="radio"/> Rhode Island

Referrals
View referrals Create a new referral
Kate Whalin (PA-0010026) Enrollment status: Completed Submitted date: 05-07-2020 Days in action: 252 days View details Manage user
kate employer (PA-0010025) Enrollment status: Completed Submitted date: 03-23-2020 Days in action: 297 days View details Manage user
Kate Employer (PA-0010024) Enrollment status: Completed Submitted date: 03-23-2020 Days in action: 297 days View details Manage user

 **CREATE A NEW REFERRAL**

-
-
-
-
-
-

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*

Max 30 characters. remaining 22

Middle Name

Max 30 characters. remaining 30

Last Name*

Max 30 characters. remaining 23

Maiden or Previous Last Name(s)

Max 30 characters. remaining 23

Date of Birth*

Gender*
 Male
 Female
 Prefer not to disclose

 **CREATE A NEW REFERRAL**









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.

The screenshot displays a form with the following sections:

- Physical Address:** Includes a search box labeled "Address (no PO Box)*" with a "Search" button. Below it, a highlighted box shows "Your selected address: 270 Marion Dr Bedford OH 44146".
- Mailing Address:** Includes a question "Is the mailing address different from the physical address?*" with radio buttons for "Yes" and "No". The "No" option is selected.
- Street Address (no PO Box):** Includes a search box with a "Search" button.

At the top of the form, a note states: "IRS requires the physical address of the Employer to assign a Federal Employer Identification Number. IRS does not allow a PO Box to be used."

 **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.

Participant Information (Completed)

Employer (Active)

Authorized Representative

Provider Information

Provider Service Details

Communication preferences

Submit

The Employer is the actual owner of the Self-Directed Supports business and will have a Federal Employer Identification Number established in their name. An Authorized Representative is not the Employer.

Is the Participant also the Employer?

Yes

No

Employer First Name*

Max 30 characters, remaining 30

Employer Middle Name

Max 30 characters, remaining 30

Employer Last Name*

Max 30 characters, remaining 30

Employer Date of Birth*

Employer Social Security Number*


e.g. 123-45-6789

Employer Gender

Male

Female

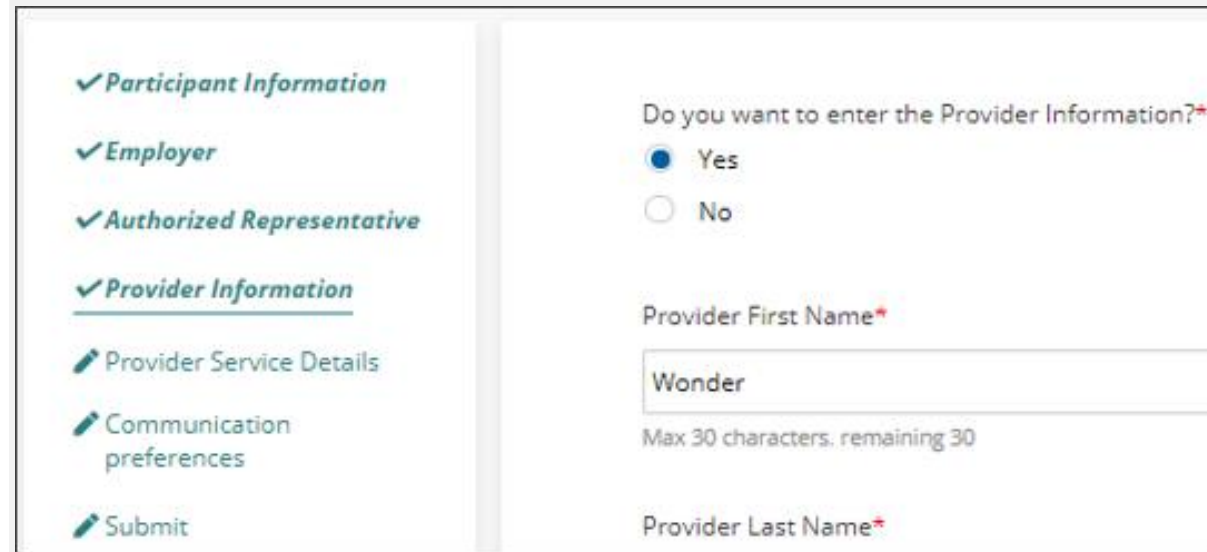
Previous Next

 **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.



✓ Participant Information

✓ Employer

✓ Authorized Representative

✓ Provider Information

✎ Provider Service Details

✎ Communication preferences

✎ Submit

Do you want to enter the Provider Information?*

Yes

No

Provider First Name*

Wonder

Max 30 characters, remaining 30

Provider Last Name*

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.

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

I confirm that I have read this Participant Referral form in its entirety and the information and responses provided on this form are accurate and complete.*

Date: 1/14/2021

Case Manager*

Search for... Search

Selected option: Roni Ryas
italianmobster007+ryas@gmail.com

Enter email to receive notification of Referral if it is different from the one you are logged in with.

Uploading any supporting information you have is important. When it is uploaded, we use it to create and maintain an electronic record for the Participant. That record guides us in how we need to work with them.

Provide any other information which is relevant to this referral

browse for a file

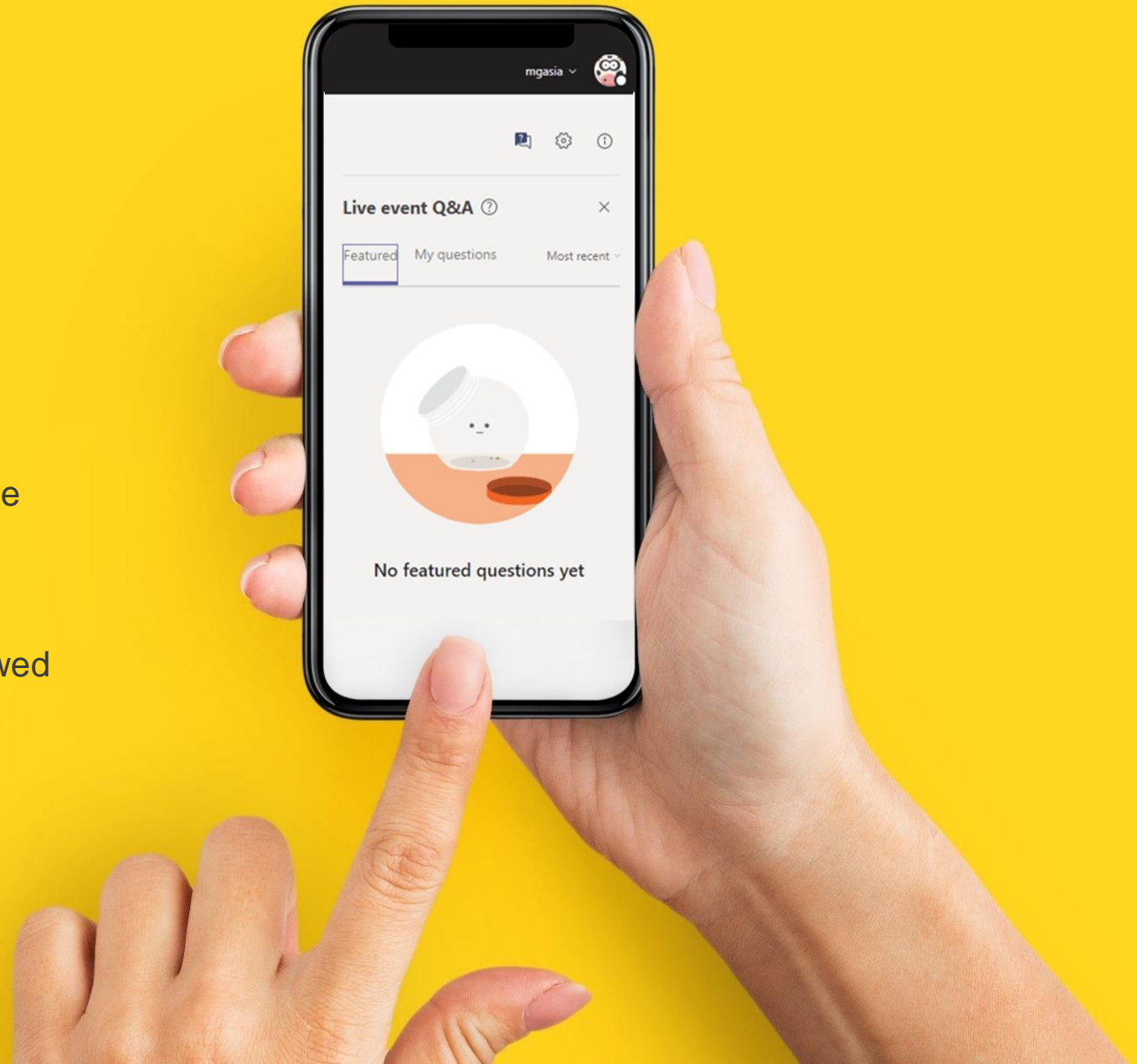
Previous Finish

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.

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





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



FINDING A REFERRAL

- 1
-
-
-

Active referrals are listed on the homepage of the Dashboard.

The screenshot shows the 'ENROLLMENT DASHBOARD' for 'public partnerships PPL'. The dashboard includes a search bar, filter options for 'Enrollment documents' and 'State', and a 'Referrals' section. The 'Referrals' section lists three entries, each with 'View details' and 'Manage user' buttons. A callout bubble points to the 'View details' button for the first entry.

Referral Name	Enrollment status	Submitted date	Days in action	Actions
Kate Whalin (PA-0010026)	Completed	05-07-2020	252 days	View details Manage user
kate employer (PA-0010025)	Completed	03-23-2020	297 days	View details Manage user
Kate Employer (PA-0010024)	Completed	03-23-2020	297 days	View details Manage user

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

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.

The screenshot shows the 'ENROLLMENT DASHBOARD' for 'public partnerships PPL'. The dashboard includes a search bar, a 'Filter by:' section on the left, and a 'Referrals' section on the right. The 'Referrals' section contains a table of referrals with columns for name, status, submitted date, and days in action. A red box highlights the 'View referrals' button at the top of the referrals list.

Referrals	View details	Manage user
Kate Whalin (PA-0010026) Enrollment status: Completed Submitted date: 05-07-2020 Days in action: 252 days	View details	Manage user
kate employer (PA-0010025) Enrollment status: Completed Submitted date: 03-23-2020 Days in action: 297 days	View details	Manage user
Kate Employer (PA-0010024) Enrollment status: Completed Submitted date: 03-23-2020 Days in action: 297 days	View details	Manage user

FINDING A REFERRAL



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).

public partnerships Dashboard Select Language Accessibility Sitemap

[Manage user](#) My Account [Work as](#) [Log out](#)

Referrals Add referral

Please select the referral you would like to manage or create a new one. Before creating new you can check if the user already exists in the system to transfer him.

From: To:

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 VAparsi300 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."

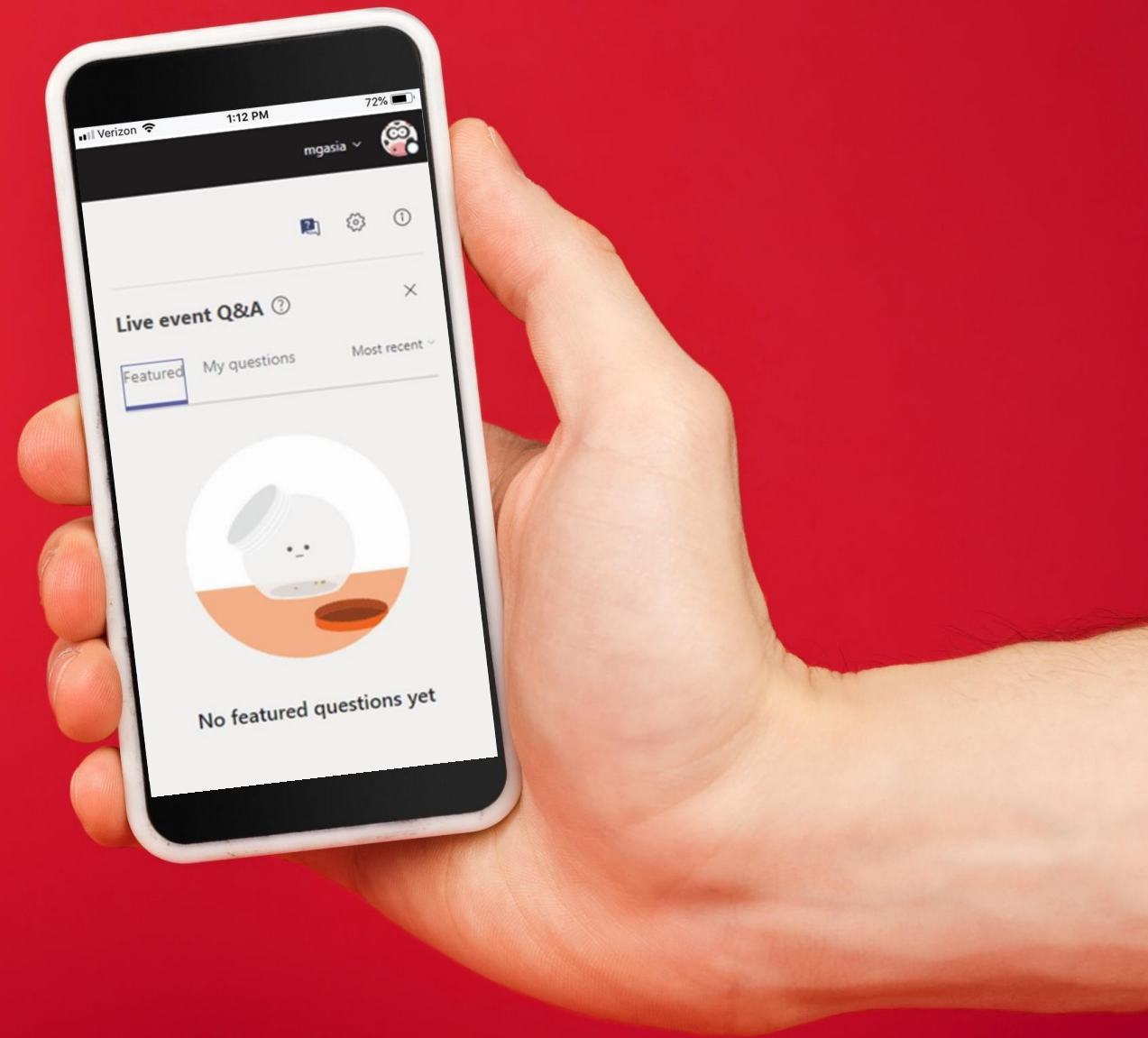
The screenshot displays a user management interface. On the left, there is a 'Filter by:' section with 'Enrollment documents' and 'State' categories. Under 'Enrollment documents', there are radio buttons for 'All' (selected), 'New application', 'Awaiting approval', 'Signing', 'Completed', and 'Transfer/ DocuSign Enrollment'. Under 'State', there is a radio button for 'All'. On the right, there are three buttons: 'Hire a new provider', 'Manage this user' (highlighted with a red border), and 'Close'. Below these buttons is a 'Monday Special details' card with the following information: Enrollment status: Signing, Submitted date: 03-22-2021, Checklist: In progress, Program: CCC +, Role: Participant, and Days in action: 4 days. At the bottom of the card, there are five tabs: 'Enrollments', 'Documents', 'Checklists', 'Providers', and 'Representative'.

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.

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





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.

The screenshot shows the 'ENROLLMENT DASHBOARD' with a search bar and filter options. The 'Referrals' section lists three entries:

Participant Name	Enrollment status	Submitted date	Days in action	Actions
Kate Whalin (PA-0010026)	Completed	05-07-2020	252 days	View details Manage user
kate employer (PA-0010026)	Completed	03-23-2020	297 days	View details Manage user
Kate Employer (PA-0010024)	Completed	03-23-2020	297 days	View details Manage user

A callout bubble points to the 'Manage user' button for 'Kate Whalin' with the text: "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.

The screenshot shows the 'My account dashboard' for 'public partnerships PPL'. The dashboard includes a navigation bar with 'Dashboard', 'Select Language', 'Accessibility', and 'Sitemap'. Below the navigation bar, there's a 'My Account | Log out' link. The main content area is titled 'My account dashboard' and contains a list of items to complete enrollment: 'Add your electronic signature under My Signature', 'Complete your Enrollment documents under My Programs', and 'Review your provider's enrollment under My Providers'. Below this, there are several sections with 'View' or 'Start' buttons: 'My details' (View), 'My designated representative' (Start), 'My signature' (Change), 'My providers' (Start), 'My programs' (Continue), and 'My timesheets' (View). The 'My authorizations' section at the bottom is highlighted with a red box and has a 'View' button.



VIEWING AN AUTHORIZATION



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.

Service Authorizations For (ID#PA-0010929)

Show/ Hide filter

Service Type

Creation Date Between: and

Status:

Authorization ID

SEARCH

There are no authorizations for this participant.

1-0 Show records at a time.



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.

The screenshot shows the 'ENROLLMENT DASHBOARD' for 'public partnerships PPL'. The dashboard includes a search bar and filter options. Under 'Enrollment documents', there are radio buttons for 'All', 'New application', 'Awaiting approval', 'Signing', 'Completed', and 'Transfer/ DocuSign Enrollment'. Under 'State', there are radio buttons for 'All', 'Ohio', 'Alabama', and 'Rhode Island'. The 'Referrals' section contains a table with three entries:

Referral Name	Enrollment status	Submitted date	Days in action	View details	Manage user
Kate Whalin (PA-0010026)	Completed	05-07-2020	252 days	View details	Manage user
kate employer (PA-0010026)	Completed	03-23-2020	297 days	View details	Manage user
Kate Employer (PA-0010024)	Completed	03-23-2020	297 days	View details	Manage user


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.**

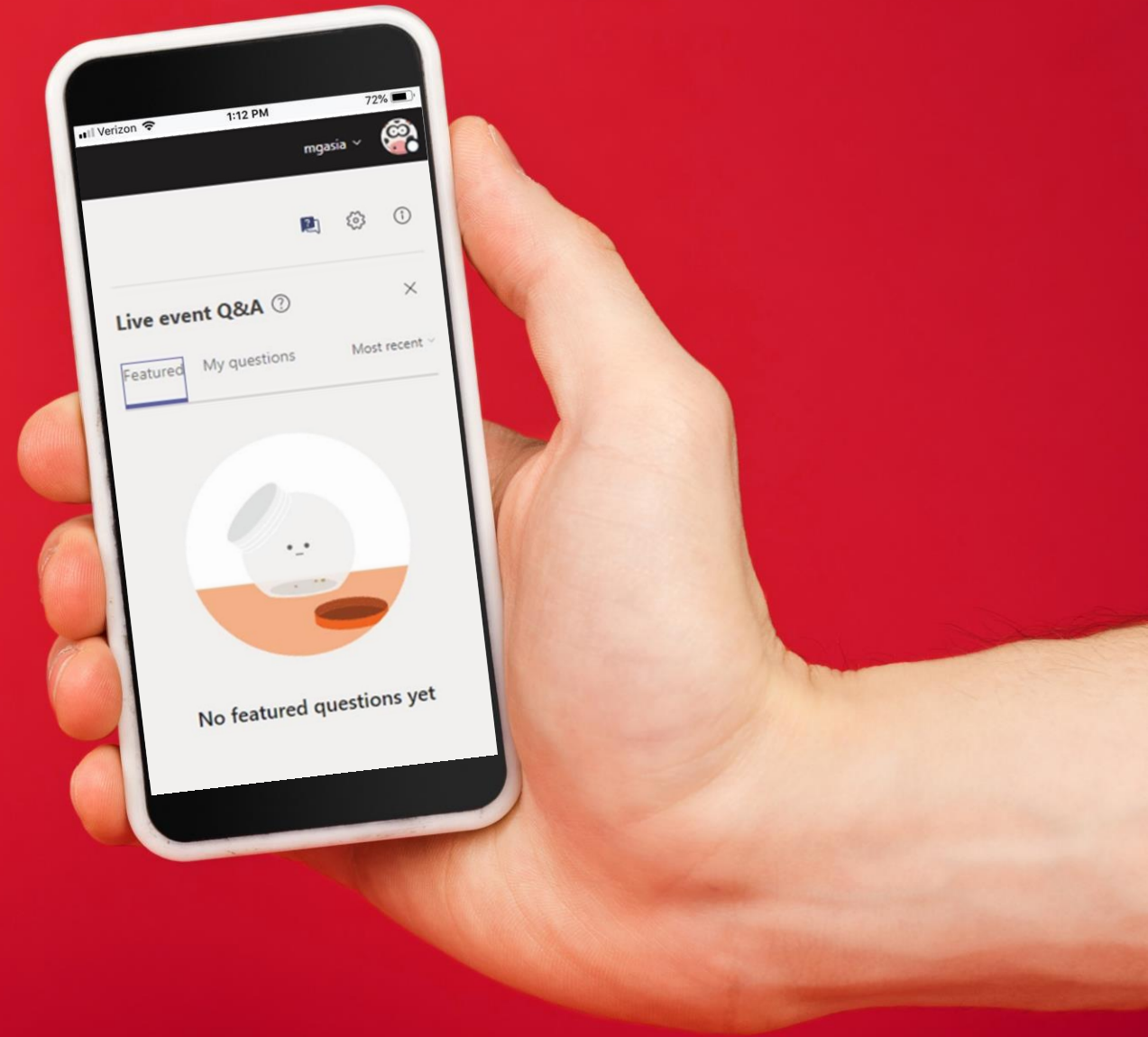
Enrollments	Documents	Checklists	Providers	Representative
Date Enrollment Packet Received:		2021-3-29		
Date Enrollment Packet Complete:		2021-3-29		
CA SDP Participant Checklist				
EW Telephony: Phone & Address Verified				
<input type="text"/>				
IRS Form 55-4 Completed (Signed and Dated)*				
<input type="checkbox"/> Yes				
IRS Form 2678 Completed (Signed and Dated)*				
<input type="checkbox"/> Yes				
Participant Agreement Completed (Signed and Dated) *				
<input type="checkbox"/> Yes				
Representative Agreement Completed (Signed and Dated)				
<input type="checkbox"/> Yes				
CA DE 1HW Completed (Signed and Dated)*				
<input type="checkbox"/> Yes				
CA DE 48 Completed (Signed and Dated)*				
<input type="checkbox"/> Yes				

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.

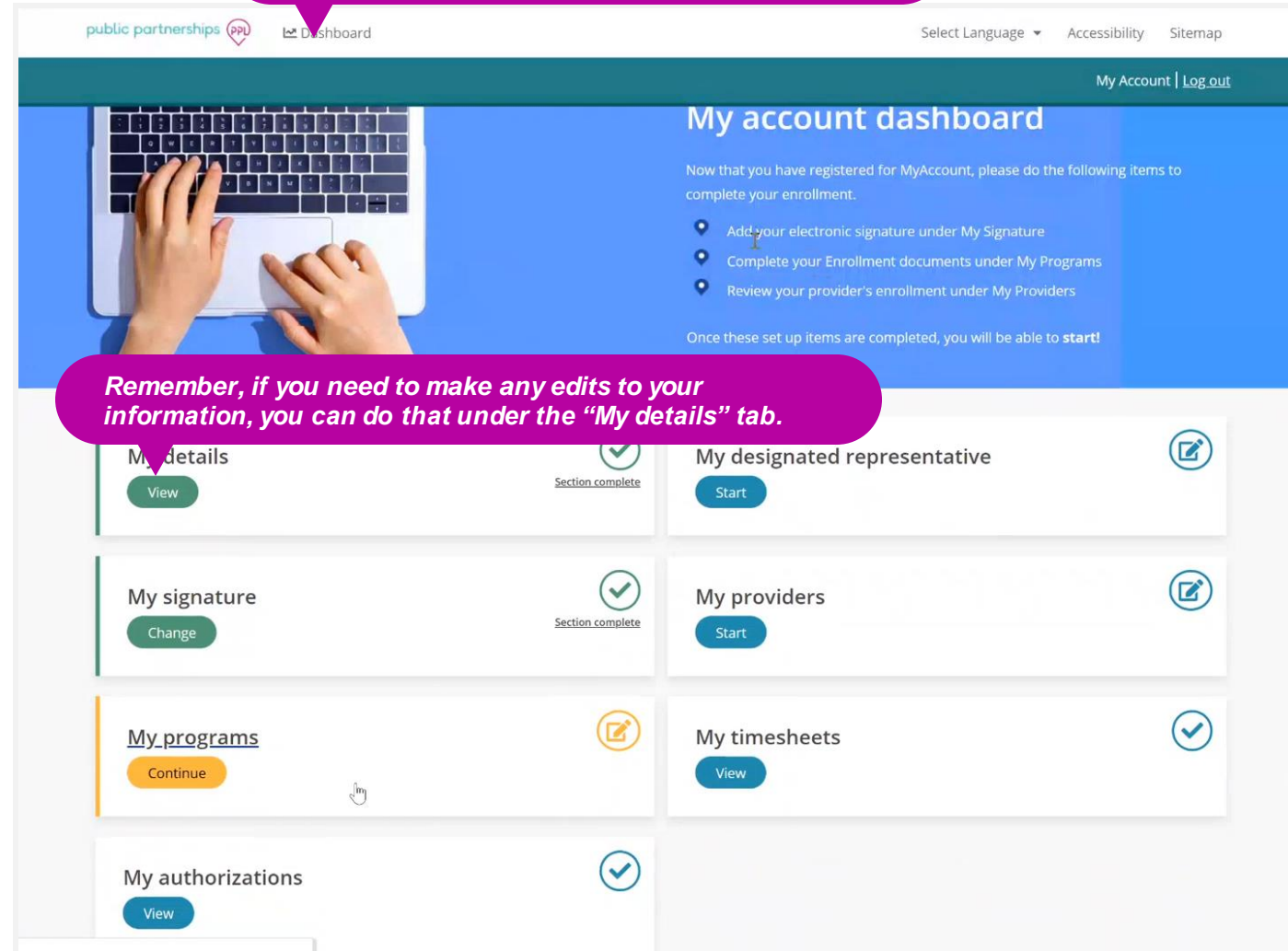
Anything we can't answer will be followed up on with the experts who can!





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.

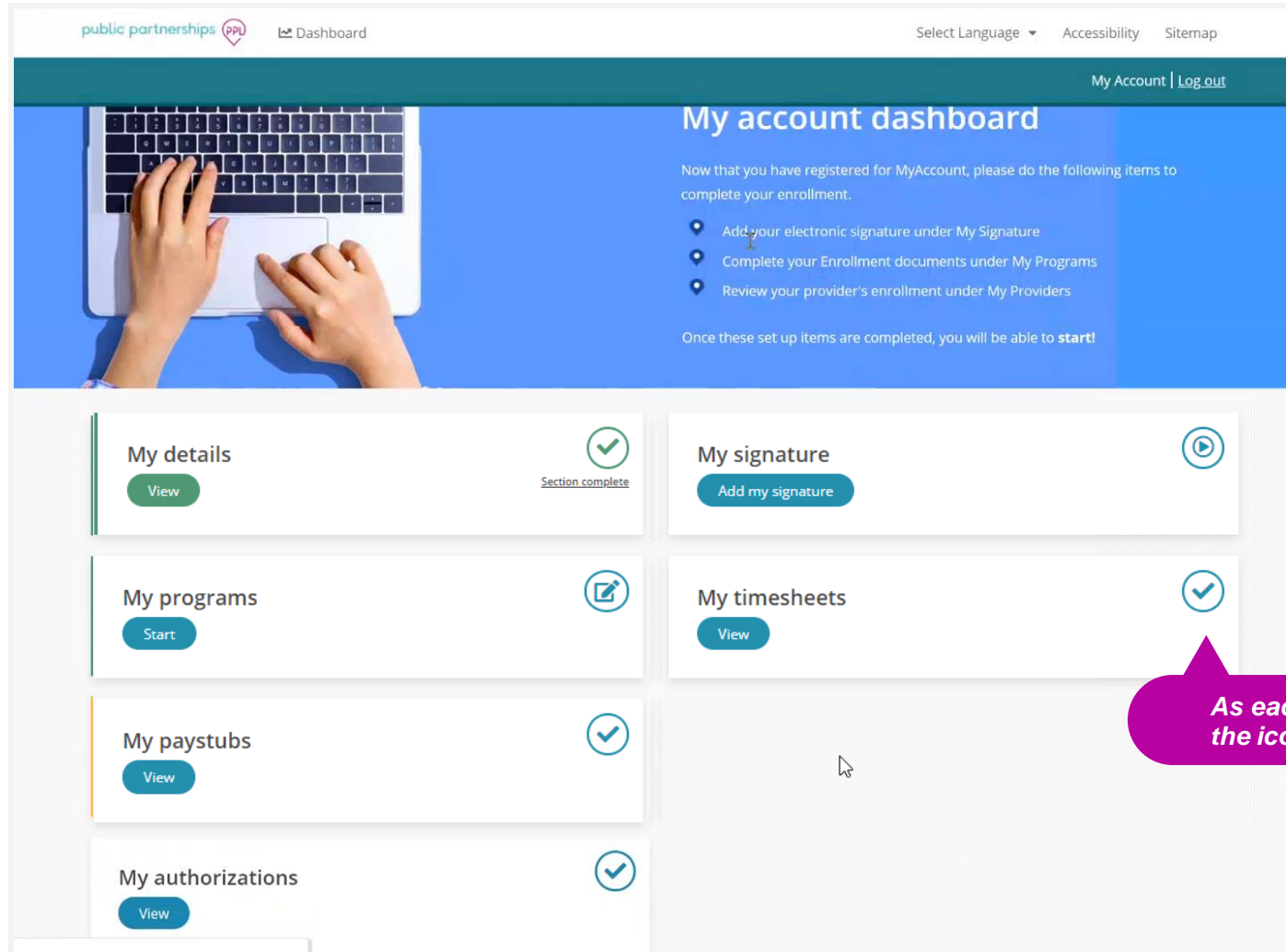
DASHBOARD EXPLORE

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:

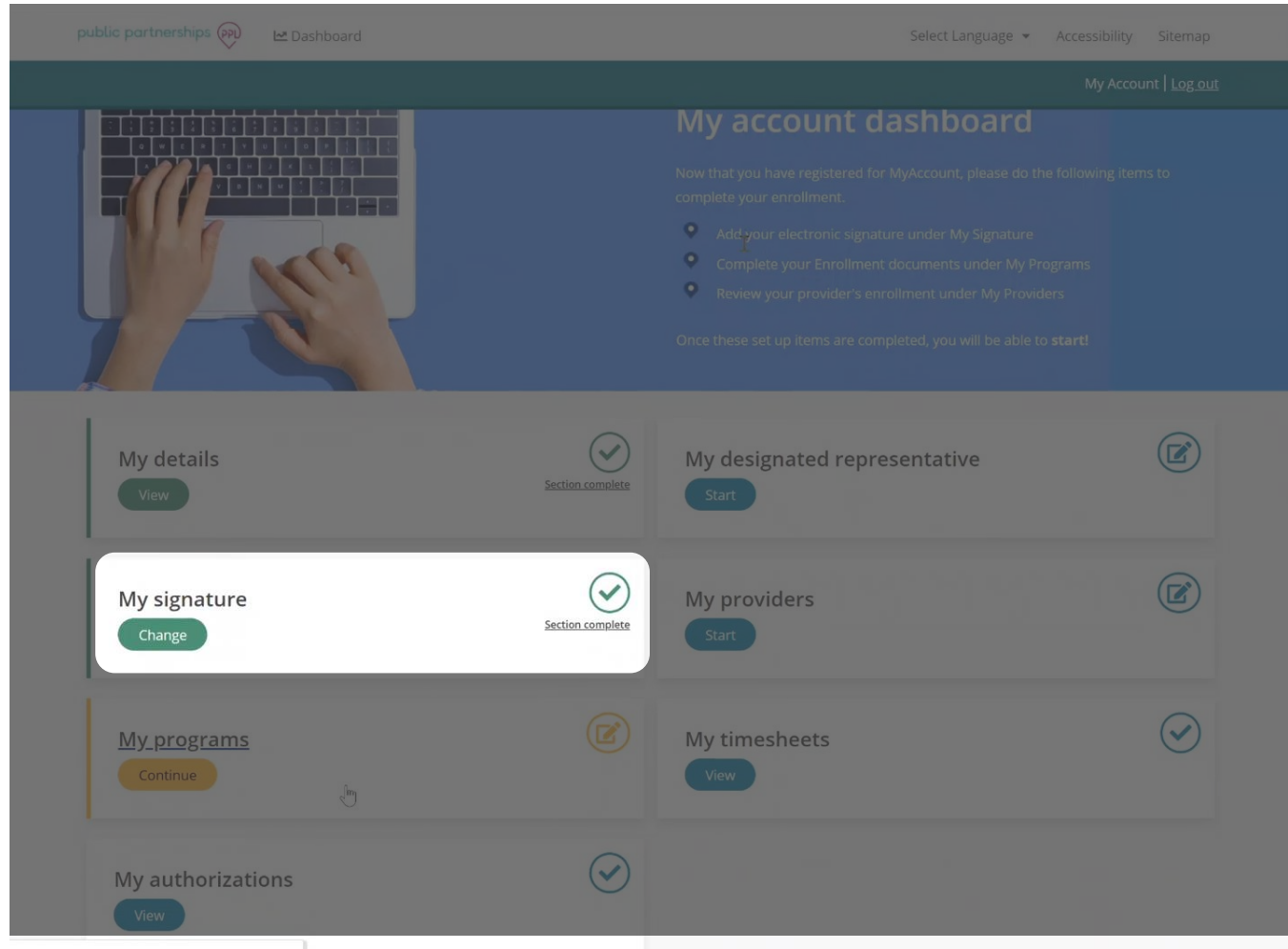
- Add your electronic signature as part of the MyAccount enrollment process



MY SIGNATURE

- 1
-
-
-

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





You must select who will be signing.

Who will be signing:*

Participant/Employer

Select a style

Draw It

Your name:

[Empty text input field]

Signature style

[Large empty drawing area]

Change Style

Text size:*

Small

Medium

Large

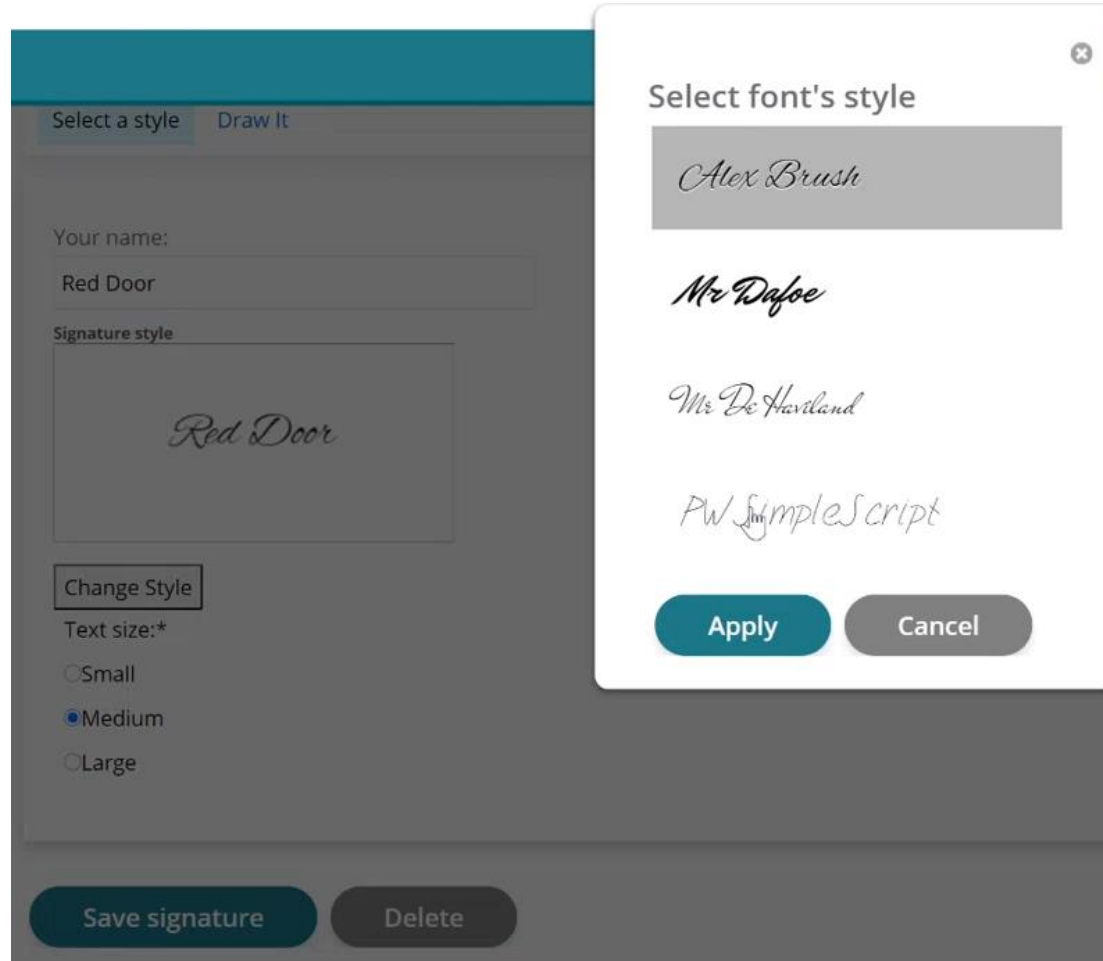
MY SIGNATURE

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

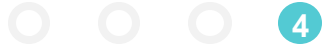
-
-
-
-

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



The screenshot shows a web interface for selecting a signature style. At the top, there are two tabs: "Select a style" (active) and "Draw It". Below the tabs, there is a text input field labeled "Your name:" containing the text "Red Door". Underneath is a "Signature style" preview area showing the text "Red Door" in a cursive font. Below the preview is a "Change Style" button. Further down, there is a "Text size:*" section with three radio button options: "Small", "Medium" (selected), and "Large". At the bottom of the main interface are two buttons: "Save signature" and "Delete".

A modal dialog box titled "Select font's style" is open in the foreground. It contains a list of four font styles, each with a preview of the text "Mr De Havilland" in that style: "Alex Brush", "Mr Dajoe", "Mr De Havilland", and "PW Simple Script". At the bottom of the dialog are two buttons: "Apply" and "Cancel".



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

Who will be signing:*


Participant/Employer

Select a style Draw it

Your name:

John Smith

Signature style



Change Style

Text size:*

Small

Medium

Large

Save signature Delete

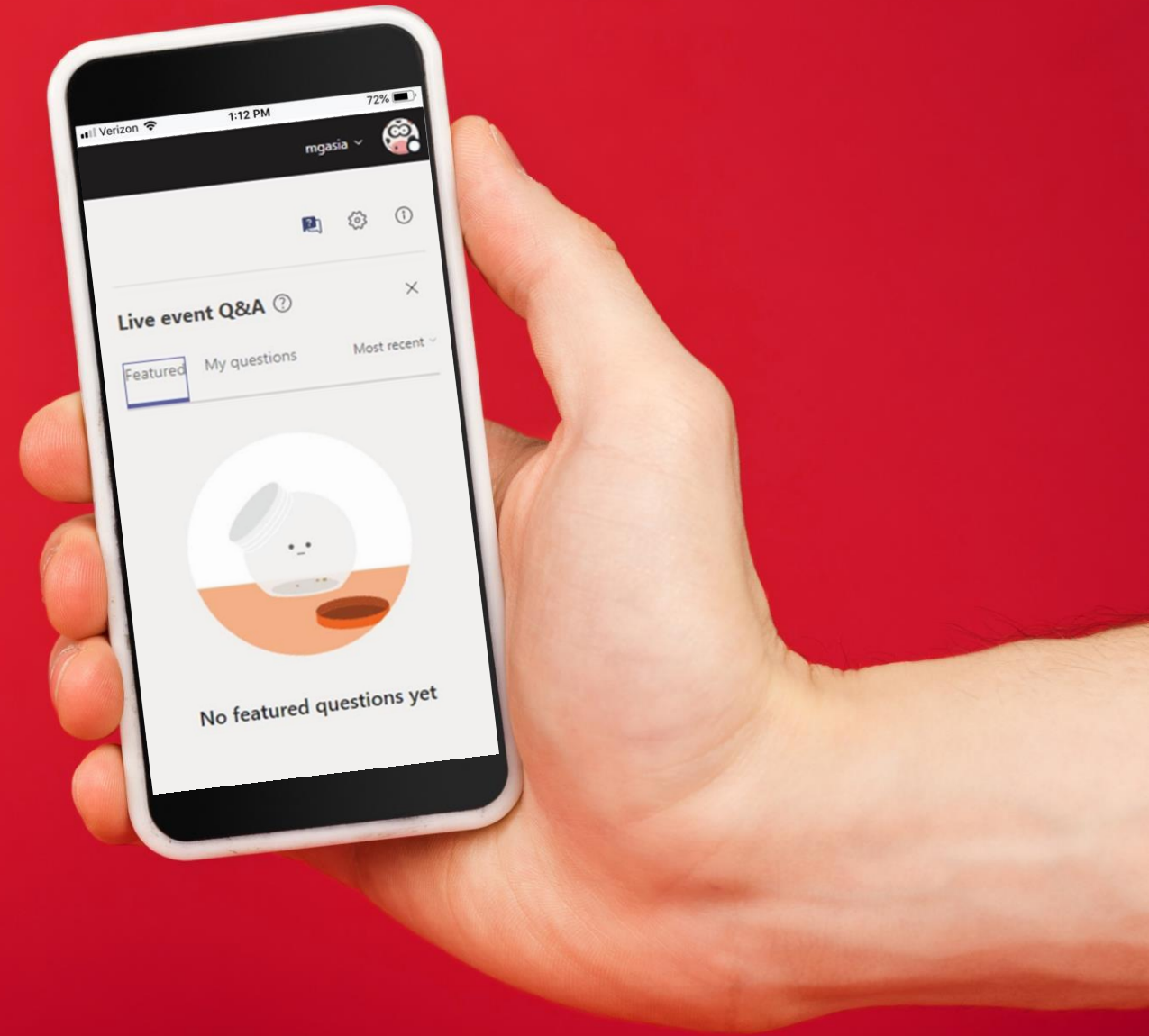
MY SIGNATURE

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.

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





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)

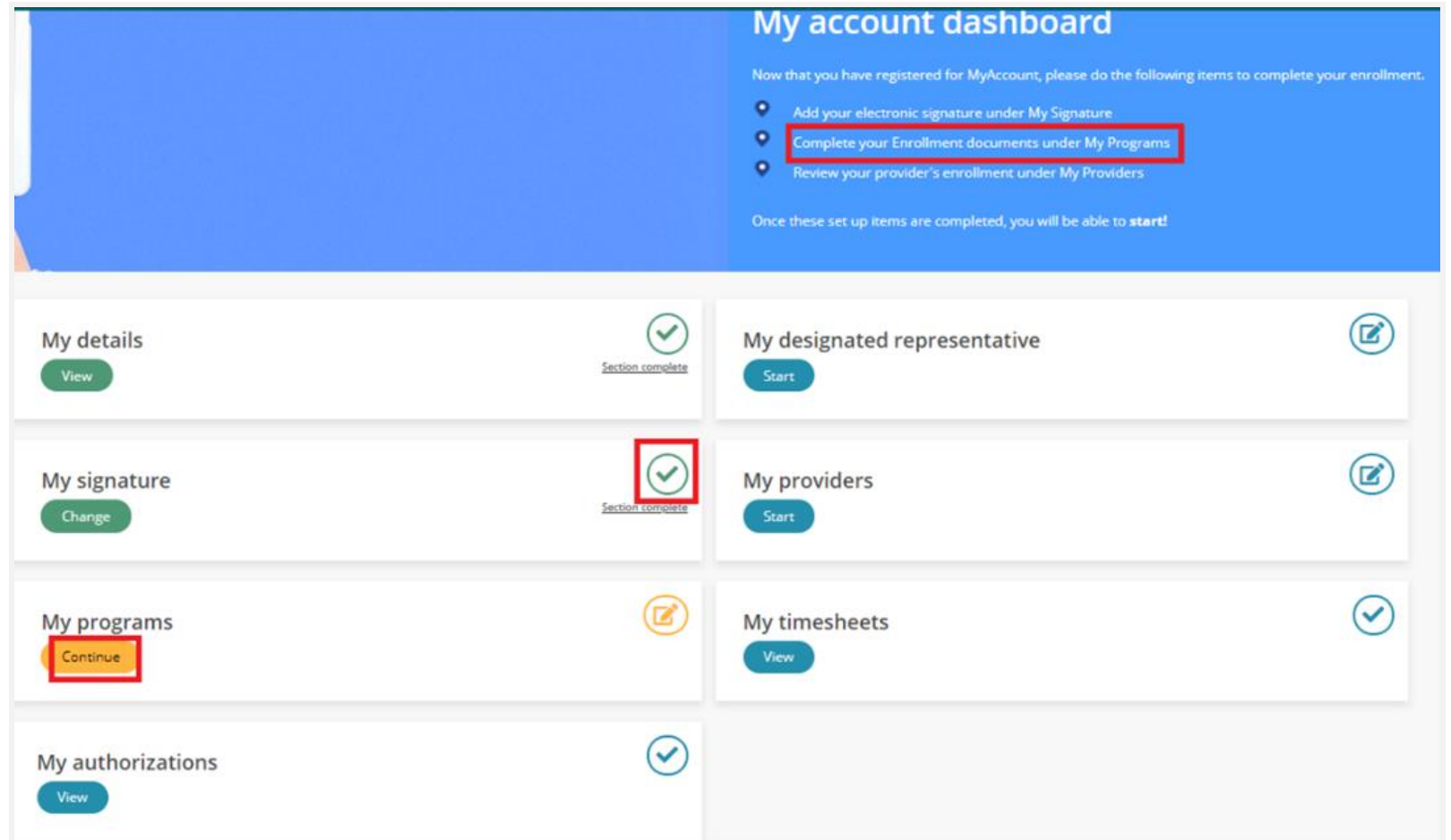


 **MY PROGRAMS**

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.










My account dashboard

Now that you have registered for MyAccount, please do the following items to complete your enrollment.

- Add your electronic signature under My Signature
- **Complete your Enrollment documents under My Programs**
- Review your provider's enrollment under My Providers

Once these set up items are completed, you will be able to **start!**

My details View  <small>Section complete</small>	My designated representative Start 
My signature Change  <small>Section complete</small>	My providers Start 
My programs Continue 	My timesheets View 
My authorizations View 	

MY PROGRAMS



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

VA Participant Enrollment

✓ Who is responsible for Employment tasks?

✎ Terms and Conditions

Who is responsible for employment tasks?

Self

Employer of Record (EOR) overtakes the legal responsibilities of employing

Next

MY PROGRAMS



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

SS-4 Application for Employer Identification Number
 (For use by employers, corporations, partnerships, trusts, estates, churches, government agencies, Indian tribal entities, certain individuals, and others.)
 ▶ Go to www.irs.gov/FormSS4 for instructions and the latest information.
 ▶ See separate instructions for each line. ▶ Keep a copy for your records.

OMB No. 1545-0003

1 Legal name of entity (or individual) for whom the EIN is being requested
 Door Tester

2 Trade name of business (if different from name on line 1)

3 Executor, administrator, trustee, "care of" name
 Public Partnerships, LLC

4a Mailing address (room, apt., suite no. and street, or P.O. box)
 1 Cabot Rd, STE 102

5a Street address (if different) (Do not enter a P.O. box)
 101 Cave Hill Rd

4b City, state, and ZIP code (if foreign, see instructions)

5b City, state, and ZIP code (if foreign, see instructions)
 Luray 22835-4436

7b SSN, ITIN, or EIN
 921-03-2957

8b If 8a is "Yes," enter the number of LLC members Yes No

9 Check the instructions for the correct box to check.
 Estate (SSN of decedent)
 Plan administrator (TIN)
 Trust (TIN of grantor)
 Military/National Guard State/local government
 Farmers' cooperative Federal government
 REMIC Indian tribal governments/enterprises

Group Exemption Number (GEN) if any ▶

10 State Foreign country

11 Banking purpose (specify purpose) ▶
 Changed type of organization (specify new type) ▶
 Purchased going business
 Created a trust (specify type) ▶
 Created a pension plan (specify type) ▶

12 Closing month of accounting year December

14 If you expect your employment tax liability to be \$1,000 or less in a full calendar year and want to file Form 944 annually instead of Forms 941 quarterly, check here. (Your employment tax liability generally will be \$1,000 or less if you expect to pay \$4,000 or less in total wages.) If you do not check this box, you must file Form 941 for every quarter.

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

The following documents have been generated

Red Door

Sign and submit

Enrollment documents

- [VA 2678](#)
- [VA Employer agreement](#)
- [VA SS4](#)





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:

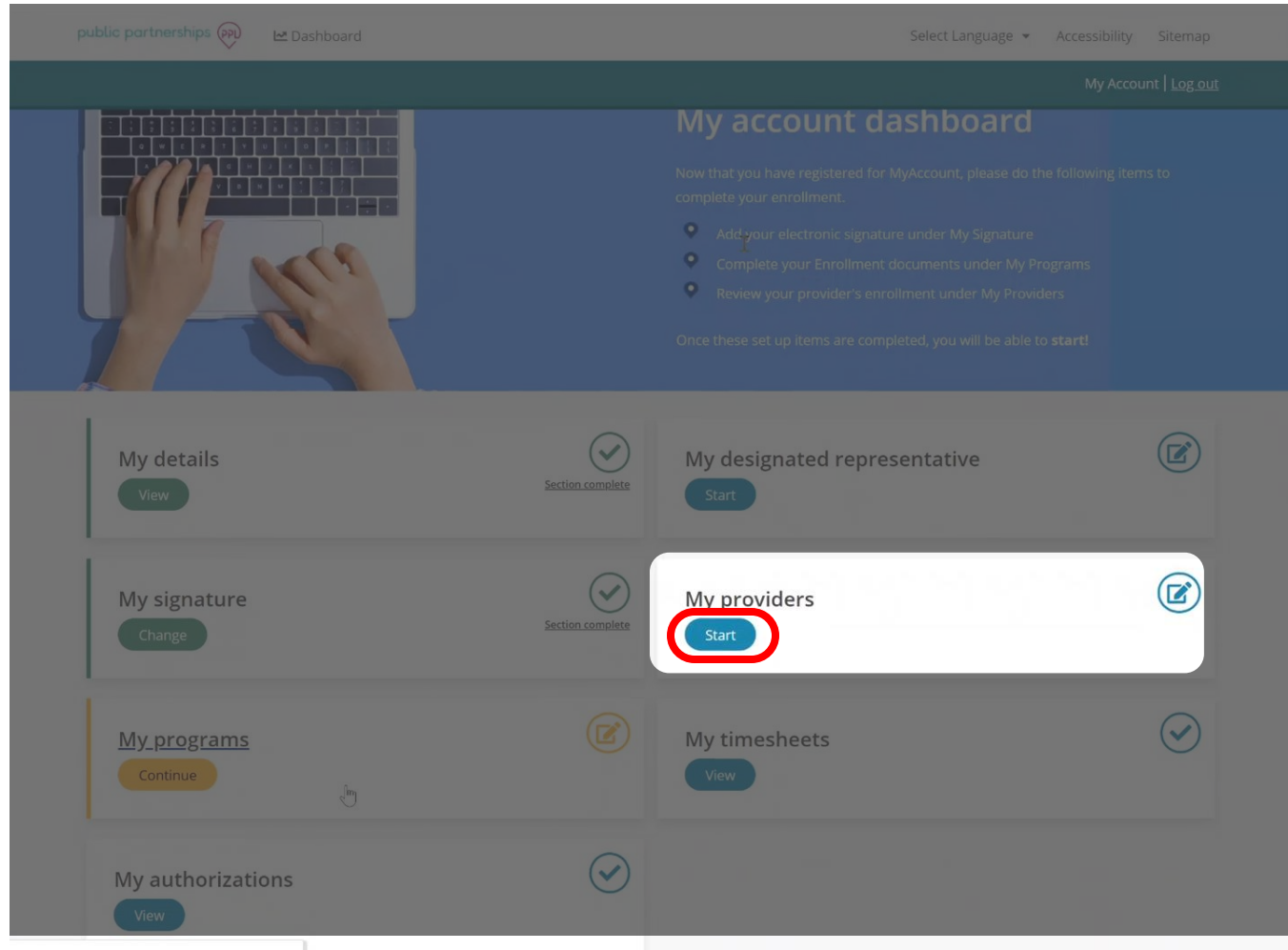
- Hire a new provider
- Sign any necessary forms for their enrollment



HIRING A NEW PROVIDER

- 1 ○ ○ ○ ○ ○ ○ ○

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



HIRING A NEW PROVIDER



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

My Account | [Log out](#)

i Your providers are the people who care for and support you in your program. These people can be authorized family members or friends who meet the program requirements.

Update services and payrates **Hire a new provider**

Winter Time

Status: Completed
Date sent: 03-17-2021
Program: CCC

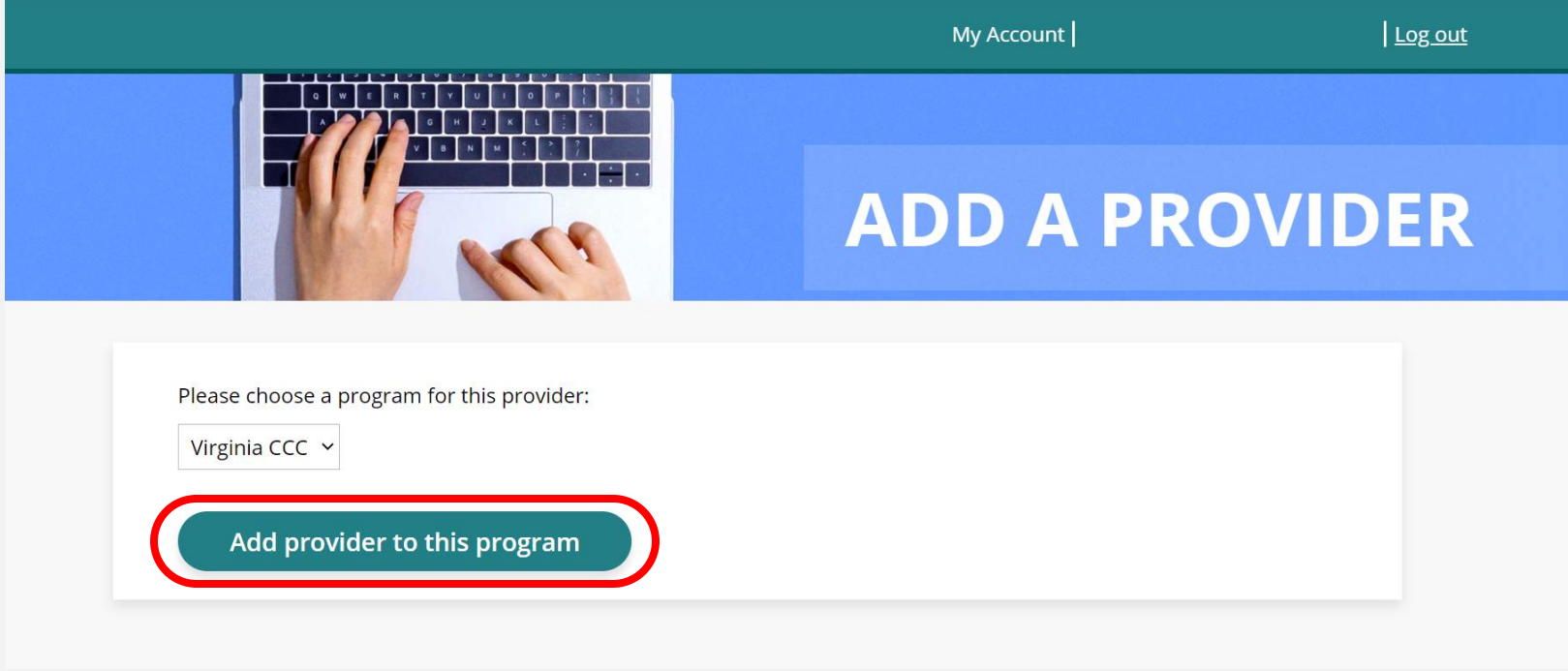
[View](#)

 **HIRING A NEW PROVIDER**

- 
- 
- **
- 
- 
- 
- 

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

Click “Add provider to this program.”



My Account | [Log out](#)

ADD A PROVIDER

Please choose a program for this provider:

Virginia CCC ▾

Add provider to this program

 **HIRING A NEW PROVIDER**




- 
- 
- 
- **
- 
- 
- 

Complete the Provider Details, Service Details and Certification.

My Account | [Log out](#)

ADD A PROVIDER

VA Provider Pre-registration

-  Provider Details**
-  Service Details
-  Certification


Provider First Name*

Max 30 characters. remaining 30

Provider Middle Name

Max 30 characters. remaining 30

Provider Last Name*

 **All asterisk fields need to be completed before you proceed.**

HIRING A NEW PROVIDER



Complete the Provider Details, Service Details and Certification.

IRS requires the physical address of the Employer to assign a Federal Employer Identification Number. IRS does not allow a PO Box to be used.

Physical Address

Address (no PO Box)*

Search for...

Your selected address: 270

Mailing Address

Is the mailing address different from

Yes

No

IRS requires the physical address of the Employer to assign a Federal Employer Identification Number. IRS does not allow a PO Box to be used.

Physical Address

Address (no PO Box)*

Search for... Search

Your selected address: 270 Marion Dr Bedford OH 44146

Mailing Address

Is the mailing address different from the physical address?*

Yes

No

Street Address (no PO Box)

Search for... Search

i 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**



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

My Account | [Log out](#)

VA Provider Pre-registration

- ✓ [Provider Details](#)
- ✓ [Service Details](#)
- ✓ [Certification](#)


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.*

Proposed first day of employment*


03/14/2021


[Save](#) [Previous](#) [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.

Address: **125 Miller St Radford VA 24141**

Social Security Number: _____

Services and Rates

Services: **Attendant Care Services**

Hourly rate: **Hourly rate is completed internally.**

Proposed first day of employment: **3/14/2021**

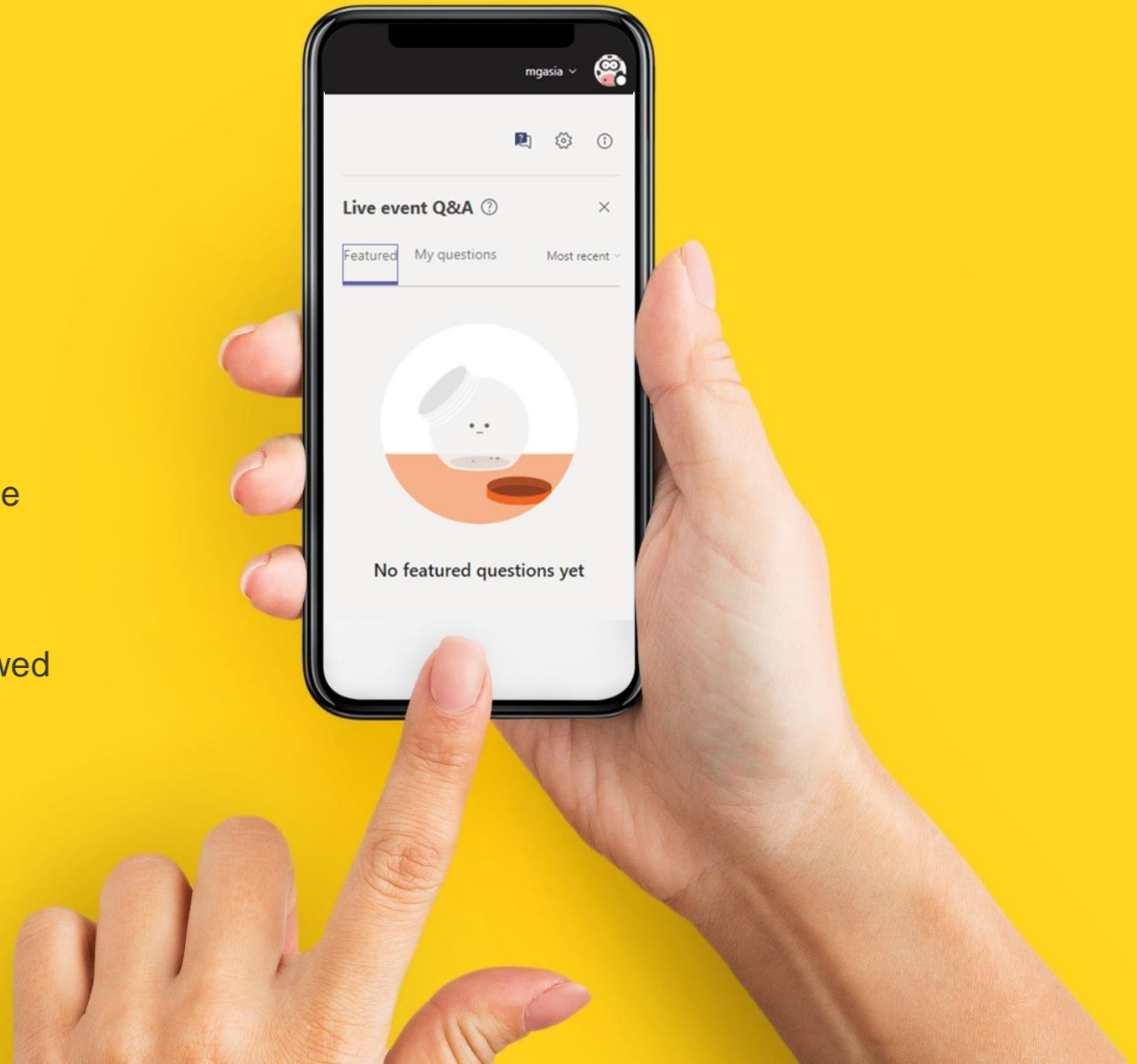
Edit **Confirm**

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.

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





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."


<p>My details</p> <p>View</p> <p>Section complete</p>	<p>My signature</p> <p>Add my signature</p>
<p><u>My programs</u></p> <p>Continue</p>	<p>My timesheets</p> <p>View</p>
<p>My W-2</p> <p>View</p>	<p>My paystubs</p> <p>View</p>


 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.

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

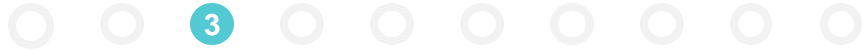
 Close

Spring Time

Status: New application
Date: 03-22-2021
Program: CCC

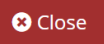
[View](#)

 PROVIDER ENROLLMENT









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.

 Close

VA Provider Enrollment

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

You must answer the 3 questions below.

Is the consumer under the age of 18?*

Yes

No

Are you the Consumer's spouse?*

Yes

No

Are you under the age of 18?*








Yes

No

 PROVIDER ENROLLMENT



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

<ul style="list-style-type: none">✓ <i>General Information</i>✓ <u><i>Service Details</i></u> Payment Information Employment Eligibility Tax Information Authorization and Signature	<p>Service Name(s)</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> Attendant Care Services<input type="checkbox"/> Respite Services
<p>  </p>	

 **PROVIDER ENROLLMENT**



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

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

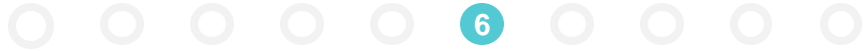
Please complete the fields below. Select either Direct Deposit to Bank Account or to a Direct Deposit to Debit Card Account

Select payment type*

- Direct Deposit to Bank Account**
- Direct Deposit to Debit Card**



Save **Previous** **Next**

 **PROVIDER ENROLLMENT**

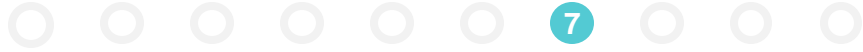


The Employment Eligibility section of the enrollment process is important and should be reviewed carefully.

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

<ul style="list-style-type: none"> <i>General Information</i> <i>Service Details</i> <i>Payment Information</i> <u>Employment Eligibility</u> Tax Information Authorization and Signature	<p>USCIS I-9: Employment Eligibility Verification</p> <p>Section 1</p> <p>Lets start with the question below</p> <p>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.</p> <p>I attest, under penalty of perjury, that I am..*</p> <ul style="list-style-type: none"><input type="radio"/> A citizen of the United States<input type="radio"/> A noncitizen national of the United States<input type="radio"/> A lawful permanent resident
---	---

PROVIDER ENROLLMENT



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.

(1) The same name as the passport;
and

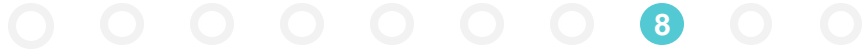
(2) An endorsement of the alien's nonimmigrant status as long as that period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form

Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating non immigrant admission under the Comapct of Free Association Between the United States and the FSM or RMI

None of the above

Save
Previous
Next

PROVIDER ENROLLMENT



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

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

Option 2

Select a document from List B and one from List C

List B Documents that establish Identity*

- Driver's license or ID card
- ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye colour, and address
- School ID card with a photograph
- Voter's registration card
- U.S Military card or draft record
- Military dependent's ID card
- U.S. Coast Guard Merchant Mariner Card
- Native American tribal document

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

Option 2 provide informaiton from two documents - one from List B **and** one from List C

List B Document

Identity Document Title: **Driver's license or ID card**

Issuing Authority*

?

DMV VA

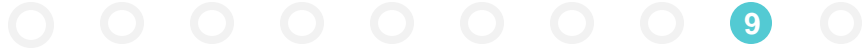
Max 30 characters. remaining 30

Document Number*

?

.....

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.

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

VA Department of Social Services - Central Registry Release of Information Form

Marital Status

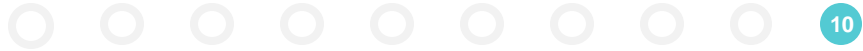
Single ▾

If you are married provide data of your current spouse. If previously married, data of all previous spouses. If you have never been married, write 'N/A'.

Check if you are or were married.

Check if you have children

PROVIDER ENROLLMENT



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

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

Terms and Conditions

- I understand and accept that Public Partnerships LLC (PPL) is not my employer.
- I understand that PPL will help my employer collect my personal data needed to complete the employment forms. PPL, as an FEA (Fiscal Employer Agent), will support my employer in processing their taxes and payroll tasks.
- I understand that information provided to PPL, on behalf of my employer, can/will be used to fill required forms for employment that are required under Federal/State and Self-Directed Services programs.
- I understand that PPL will collect my account numbers only to process my payroll on behalf of ir employed, any raise statement on this form may result in dismissal and turntnr actions
This form is not meant to be a contract of employment
We understand what is being requested of us.
We will abide by this agreement. If any part of the agreement is violated, it may result in termination of the agreement.
Employment depends upon verifying my right to work in the US

Date : 3/22/2021

Select the checkbox to confirm you have read and agree with all of the Terms and Conditions of this Enrollment*

Autumn Time

Sign and submit

Enrollment documents

- [VA CCC Plus FLSA Live-in Exemption](#)
- [VA CCC W-4 2021](#)
- [VA CCC Plus Difficulty of Care](#)
- [VA CCC I-9](#)
- [VA CCC Plus Employment Agreement](#)

Save

Previous

Finish

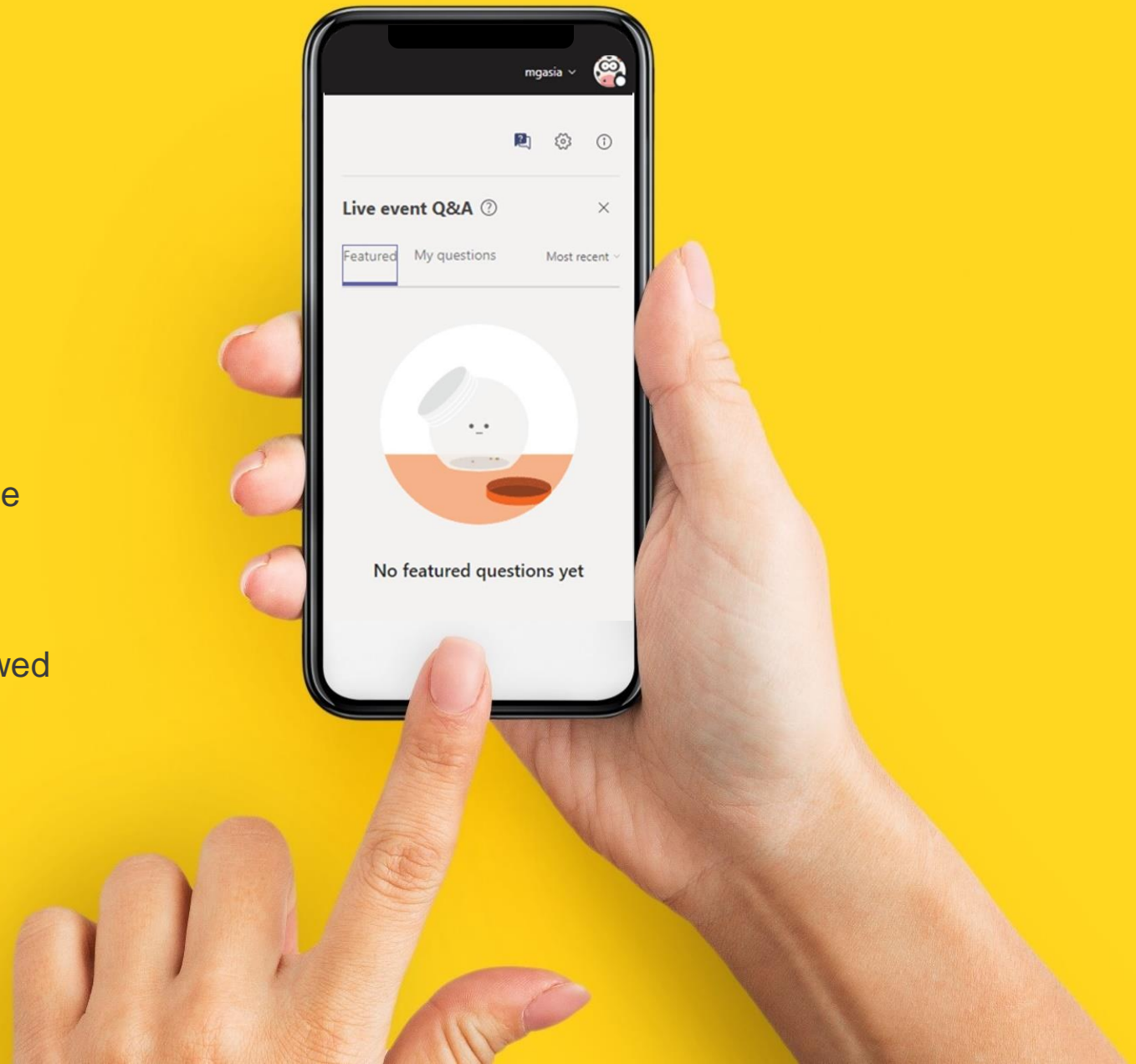
i Each enrollment documents should be read carefully before clicking “Sign and Submit.”

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.

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





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;



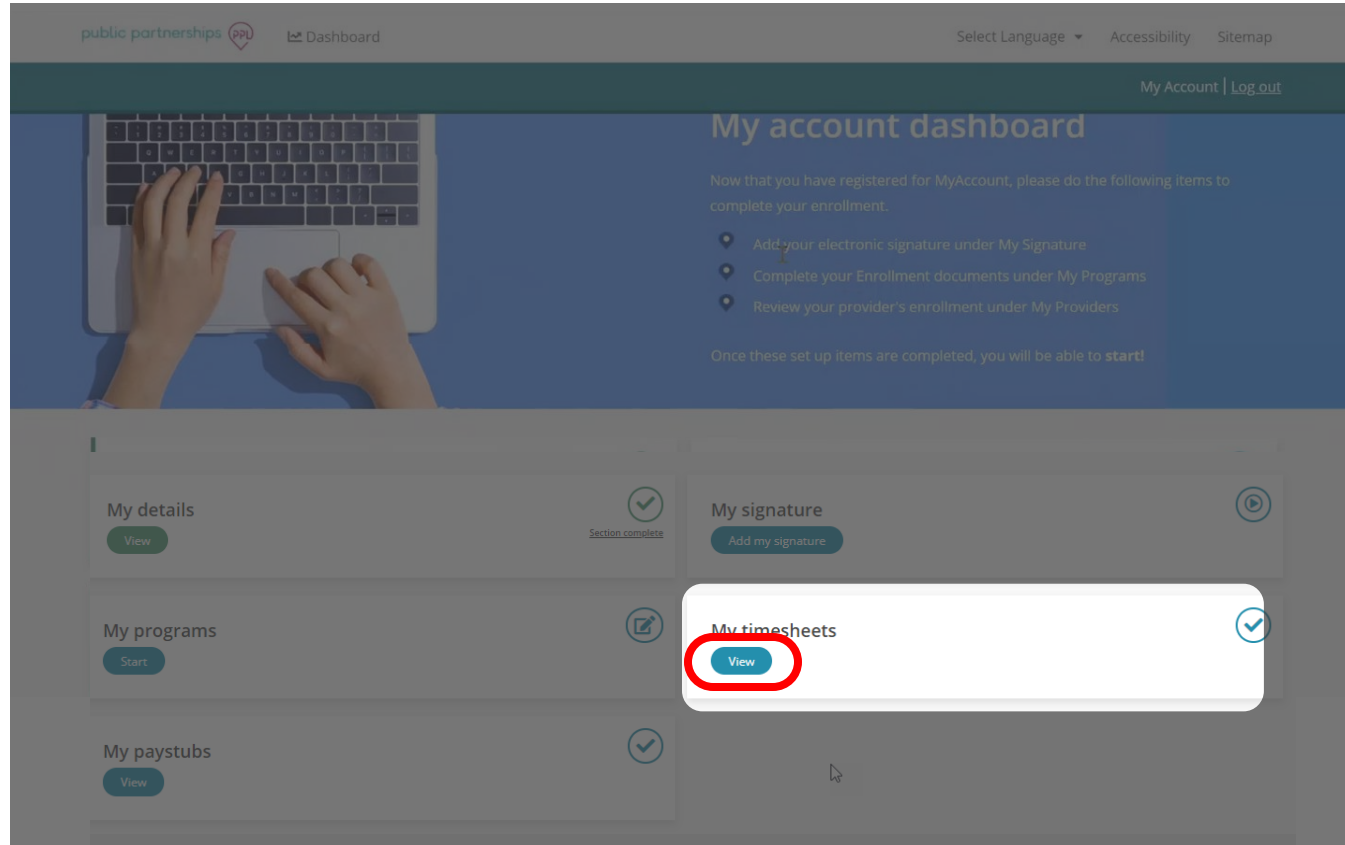
You will continue to use the Time4Care app (with MyAccount credentials) to submit your timesheets.



 **TIMESHEETS**

- 1 ○ ○ ○ ○ ○ ○ ○

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



TIMESHEETS



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.

The screenshot displays the 'Time Entries' interface. At the top, there's a 'Pay Period' selector set to 'Dec 16 - Dec 31' and a 'Participant' dropdown set to '2Mighty Tux'. The main table lists days from Wednesday 16 to Tuesday 22. The entry for Wednesday 16 is expanded, showing a service of 'PCS - Waiver CD PCS' and an '+ ADD ENTRY' button. An 'Add Entry' modal is open, showing a 'Service' dropdown menu with 'Please select service...' selected. Below that, it shows 'Date In' (12/17/2020) and 'Time In' (08 : 43 am) followed by 'to' and 'Date Out' (12/17/2020) and 'Time Out' (09 : 43 am). At the bottom of the modal are 'ADD ENTRY' and 'CANCEL' buttons.

Day	Service	Action
Wednesday 16	PCS - Waiver CD PCS	+ ADD ENTRY
Thursday 17	no entries	+ ADD ENTRY
Friday 18	no entries	+ ADD ENTRY
Saturday 19	no entries	+ ADD ENTRY
Sunday 20	no entries	+ ADD ENTRY
Monday 21	no entries	+ ADD ENTRY
Tuesday 22	no entries	+ ADD ENTRY



Adding Time Entries

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

Saturday 26	no entries
Sunday 27	no entries
Monday 28	no entries
Tuesday 29	no entries
Wednesday 30	no entries
Thursday 31	no entries

I hereby certify that I am the same person whose name and signature PPL has on file. I hereby certify under penalty of perjury that the information I have provided is true and accurate.

Total Time: 8h 15m

SUBMIT ENTRIES CANCEL

 **TIMESHEETS**



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

 **TIMESHEETS**



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

TIMESHEETS



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."

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

SELECT ALL APPROVE SELECTED REJECT SELECTED

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

 **TIMESHEETS**

-
-
-
-
-
-
- 7**

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

Rejection Reason

Reason and note will apply to the time entry (entries) selected.

Reason

- Hours worked are inaccurate
- Incorrect service code

Note

OK **CANCEL**



Questions?

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

public partnerships

Your #1 choice for self-directed care™



www.publicpartnerships.com

The content of this presentation is proprietary and confidential information of Public Partnerships LLC ("PPL"). It is not intended to be distributed to any third party without the written consent of PPL.