

### Participant Directed Option

# PPL Web Portal Instructional Manual



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You can download additional instructions online at <a href="www.publicpartnerships.com">www.publicpartnerships.com</a>.

Go to the Simply-FL PDO program, click on "Program Login" in the upper-right corner, select "Florida" from the drop-down menu, click on the "Simply PDO" link.

## How to Guide for the PPL Web-Portal How to Register Online

#### Welcome to the PPL Web Portal system!

*How do I register online?* This document will outline for you how to set up your Username and Password so that you can begin using the PPL Web Portal. The process for online registration is the same for both Participants & DSWs.

#### As a Participant once you are registered you will be able to use the PPL Web Portal for

- Managing your Authorizations
- ♣ Approving your Direct Service Worker's E-Timesheets

## As a DSW once you are registered you will be able to use the PPL Web Portal to:

- Creating Timesheets
- Reviewing your Timesheet Payment Status
- 1. The first thing you should do is type in the web address provided below into your browser: (we recommend saving this as a *favorite*, so that you don't have to keep typing it in).

#### https://fms.publicpartnerships.com/PPLPortal/login.aspx?

2. A log in screen will appear. You will use this screen to log into the Web Portal after you have registered.



#### How to Guide for the PPL Web-Portal How to Register Online

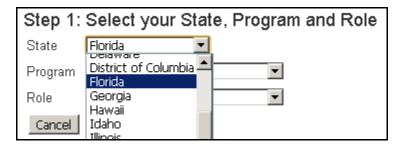
3. Select the **Online User Registration** hyper link below the login button on the Login Screen.

- Online User Registration
- Forgot Username or Password
- Download Adobe Acrobat Reader

4. This will bring you to the **New User Registration** screen. It will ask you to choose your state.



5. You should select **FLORIDA** from the drop down list.

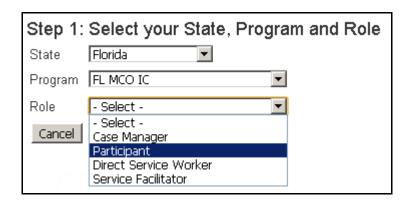


6. After you select your state two new data fields will appear: **Program** and **Role**♣ Select your Program – **Simply FL\_PDO** 



#### How to Guide for the PPL Web-Portal How to Register Online

- ♣ Select your Role (if you choose the incorrect role the system will not be able to verify your information.
- ♣ If you are the Participant or Representative select the PARTICIPANT role.



- 7. After you have selected your role hit the **NEXT** button to continue on to registration.
  - ♣ By choosing the correct role the system now knows which information to look up for your account.
  - **↓** VERY IMPORTANT!! If you do not choose the correct role the system will be unable to find your account in order for you to complete your registration.
- 8. You will be brought to the **STEP 2. Verify Credentials** screen. You are now required to verify who you are by completing the three data fields below:
  - **PPL ID:** This number has been generated by PPL and is unique to each participant in the program. It may also be referred to as your Participant or DSW ID.
  - Last Name: This is the Participant's or DSWs last name
  - **<u> D.O.B:</u>** This is the Participant's or DSWs date of birth, which we have on file in the system already.

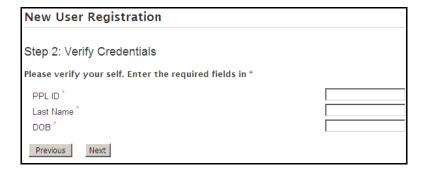
## How to Guide for the PPL Web-Portal How to Register Online

## **♣** Please note IMPORTANT for users registering under the Participant Role ONLY!

Even though you are representing the Participant, you still put the D.O.B of the Participant in the system, not yours.

Please enter the date of birth in the format below:

- $\pm$  **Ex.** Correct = 12/12/1988
- **Ex.** Wrong = 12/12/88



- ♣ If the system is unable to verify your information there are potentially two issues:
  - 1. The Participant's or DSWs information was inaccurately entered at the time of enrollment. In order to resolve this:
    - ♣ You should call Customer service and provide the Participant/DSW ID so that PPL can verify the demographic information we have on file.
  - 2. You will now be brought to **Step 3: User Information** page. This is the page in which you will actually register yourself as a user in the system. You will be asked for the following information:

## How to Guide for the PPL Web-Portal How to Register Online



- **<u>Username</u>** PPL suggests that you use the first letter of your first name and your last name.
  - i. Ex. Mary Poppins = MPoppins
    - 1. Please note, if the user name you selected is already in use you will need to select a different username.
- ♣ <u>Password</u>- Your password must be at least 6 characters long and contain at least 1 numerical character, 1 capitalized character and 1 lower case character. Please be aware that your password will be case sensitive.
- **Confirm Password** Here, you need to retype the password you created.
- **Email Address** Your email address is an optional field. PPL will use this to send information pertaining to your timesheets to your email account. **Please note: If you provide an email address you will receive an email confirmation of your username and password.**
- **<u> Security Questions</u>** You should choose three questions from the drop down menu. Put the answers to these questions in the data field next to it.
  - If you ever needed to change your username or password these questions provide a layer of security to protect your privacy. So that only YOU can change your user registration information.

#### How to Guide for the PPL Web-Portal How to Register Online

3. If you are happy with all of your information hit the **SUBMIT** button.

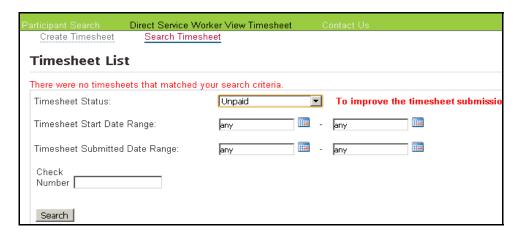
#### **CONGRATULATIONS!**

You are now registered and ready to Log In to the Web Portal!

#### Direct Service Worker (DSW): How to Create and Submit a timesheet

 Log in to the PPL Web Portal using your pre assigned username and password https://fms.publicpartnerships.com/PPLPortal/login.aspx?

2. You will default on the "Timesheets" page.



- 3. Here, you will see two options in the gray header bar.
  - a. Create Timesheet
  - b. Search Timesheet
- 4. Select the option for "Create Timesheet" by clicking on the words. You will see the "Participant Search" page below:



- 5. The participant search page will show all of the participants you work for.
  - a. In the example above you work for "ASSOC CONSUMER" if you would like to submit a timesheet for Mr. CONSUMER the blue hyperlink to the right of the page.



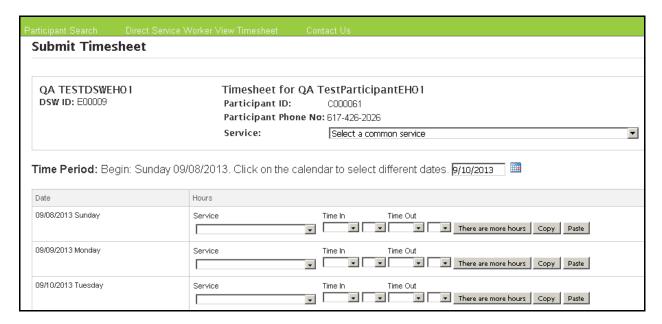
- b. If you are trying to submit a timesheet for a different participant and they do not appear here, you may not be associated with that participant in the system. You should call Customer Service to determine what the next step is.
  - i. This can happen if PPL has not received/or processed your paperwork for this participant yet.
- 6. After selecting the blue hyper link you will see the "Submit Timesheet" page below:
  - a. This is the beginning of the timesheet creation process.



7. In this first screen you should click on the calendar box to select the pay period you are submitting time for.



8. After selecting the correct pay period you will be taken to the screen below:

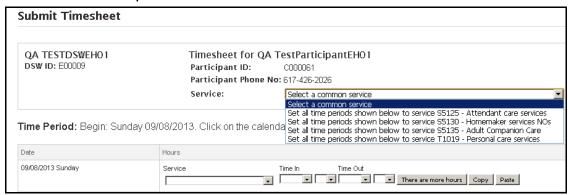


- 9. This page is where you will enter in the time you worked for the pay period.
  - a. If you didn't work on one day, that's ok, just leave it blank.
- 10. At the top of the page you should confirm that you are putting together a timesheet for the right participant.
  - a. You also have the option of selecting a "Common Service".

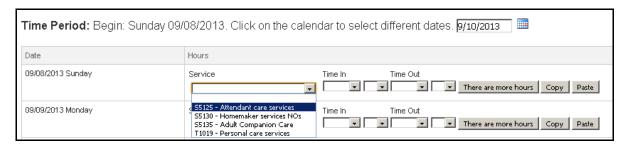


- b. This dropdown feature is used by direct service workers who provide the same service throughout the entire pay period.
- c. The common service drop down lets you populate every line of the timesheet at once instead of filling in each day individually.
- d. The common service drop down is **optional**; you do not have to use this feature.

♣ If you choose to use it you will see something similar to the example below:

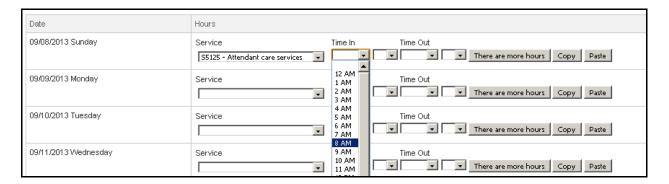


- ♣ If you choose not to use the "Select Common Service" feature.
  You should enter in the service type for each of the days
  worked.
- 11. To enter the service per day click on the "Service" drop down bar on the day you worked.

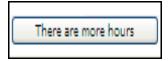


- ♣ Every day you work must have a service selected.
- If you worked a service that does not appear in your drop down menu please contact customer service. This typically means we did not receive a rate or enrollment paperwork required for that service type.
- 12. Next you should select the hours in the day that you worked.

- a. To select the time of day you started click on the "Time In" dropdown:
- b. To select the time of day you ended click on the "Time Out" dropdown:
- c. You can also select minutes if you would like.



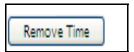
♣If you worked multiple shifts in one day select the "There are more hours" button.



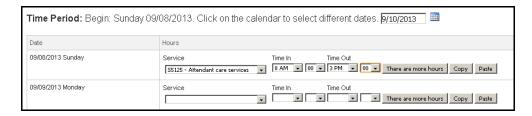
♣ After selecting the "There are more hours" button an additional line will be created for the day worked.



- o You will need to enter in the:
  - service type (which can be different)
  - the hours worked
- You may also remove time if you need to. To remove time select the "Remove Time" button.



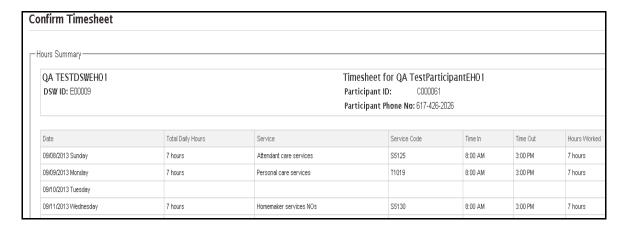
- 13. You also have the option to copy and paste each line individually. To copy a line.
  - a. First click on the "Copy" button of the line you would like to copy. In this case the line on top.



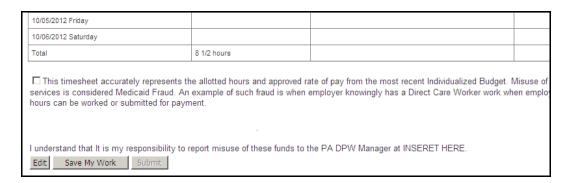
- ♣ Next click on the "Paste" button of the line you would like to put the copied information in. In this case the line at the bottom.
- 14. When you have finished entering in the days worked scroll to the bottom of the page and click on the "Next" button.



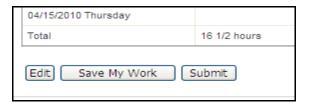
15. You will be taken to the "Confirm Timesheet" page. In this page you should review the timesheet you entered for completeness and accuracy.



- 16. Next scroll to the bottom of the "Confirm Timesheet" page. You will see the following attestation that the hours are accurate:
  - Before you may submit your timesheet you must check the box.



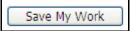
♣ After acknowledging that the timesheet is accurate and truthful, the "SUBMIT" button will become available to select.



17. If the timesheet is incorrect and you would like to edit it. Click on the **"Edit"** button to return to the previous screen.



- 18. If the timesheet is correct but incomplete you can save your work. Click on the "Save My Work" button.
  - a. Some direct care workers like to enter their time every day rather than at the end of the pay period.
  - b. This feature allows you to enter time as you work it without submitting it for approval until the very end.



19. If the timesheet is correct and complete you should submit it to the Participant/Employer/Authorized Representative for approval. Click on the "Submit" button to submit it to the Participant/Employer/Authorized Representative.



20. After you haves selected the Submit button the following page will appear:

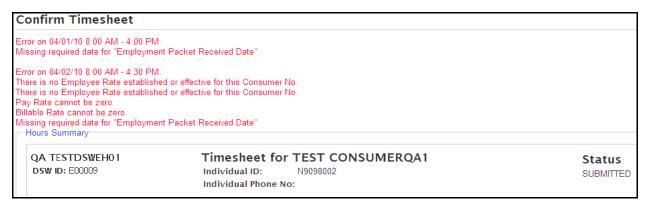


21. If there is a problem with your timesheet that would cause it to not be paid, than the Web Portal will not allow the timesheet to be submitted for approval until the problem is fixed.

#### **Examples:**

- a. Overlapping time
- b. Missing paperwork
- c. Missing DSW Rates
- 22. On the top of your timesheet you will see red alerts that tell you what is wrong with your timesheet. If you do not understand any or even one of the messages, please call customer service.
  - a. As you can see in the example below on 4/1/10 we are missing the Employment packet.
  - b. On 4/2 the employee submitted time for a service type but it appears that we do not have a rate in the system.

- c. If you feel that any of the alert messages in red are incorrect, please call customer service.
- d. If you believe they are correct please submit the missing information to PPL as soon as possible so that PPL staff can enter it into our system. Then resubmit your timesheet for approval.



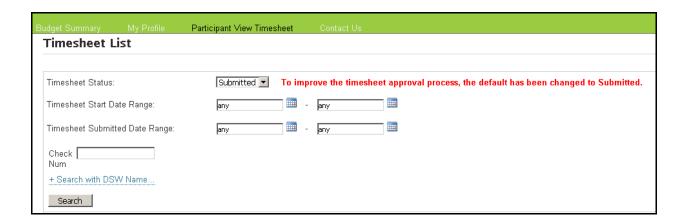
- 23. Once you have successfully submitted your timesheet for approval, it will be up to the Participant, or Representative to approve the timesheet.
- 24. You can monitor the approval status by searching on your timesheets and reviewing the status name.
  - a. As long as the timesheet is in the "Submitted" status it has not been approved.

**Important Note:** Do not assume that if you submitted your timesheet it will be paid. You will want to monitor the status of your timesheet until it has reached "APPROVED" status.

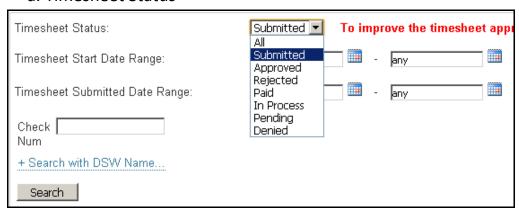
Once the timesheet has an "Approved" status, it has been sent to PPL for payment.

## Participant/Representative: How to approve/reject & submit e-timesheets for payment.

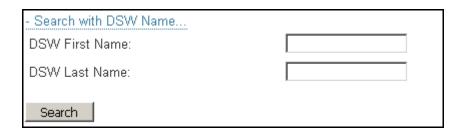
25. You will default on the "Timesheet List" page when you log in.



- 26. In this page you can search for timesheets based on:
  - a. Timesheet Status



- b. Timesheet Start Date
- c. Timesheet Submitted Date
- d. Check Number
- e. Direct Service Worker Name
  - You may want to use this search feature if you have multiple direct care workers and you want to view all of their submitted timesheets.



<u>Note:</u> To search ALL timesheets be sure to select "ALL". If you just want to see the ones which you need to approve select "SUBMITTED".

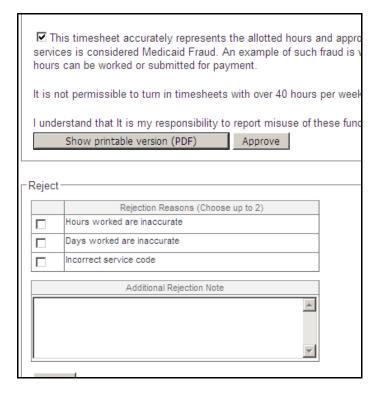
27. Below is an example of the search results screen.



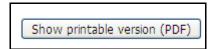
- You will be able to View a timesheet anytime you like. You will notice when a timesheet has been submitted to you for approval, it will have a status of "Submitted" you will need to either approve or reject a timesheet.
- ♣ PPL cannot pay timesheets unless they have been approved by you. By using the Web Portal to approve timesheets, we log an electronic signature based upon your unique username and password.
- 28. Select the "Approve/Reject" button.



29. After selecting the "Approve/Reject" button the screen below will appear.



- ♣ The timesheet will appear so that you can review it while you Approve/Reject. At the bottom of the page you will see three options "Show Printable Version (PDF)", "Approve", "Reject".
- 30. The "Show Printable Version (PDF)" button allows you to print your timesheet so that you can keep a hard copy for your records.



You do NOT need to print your timesheet if you don't want to. Timesheets will always be maintained electronically for your review.

31. After you have reviewed your timesheet and determined that it is accurate you should approve the timesheet for payment.

#### **TIMESHEET APPROVAL**

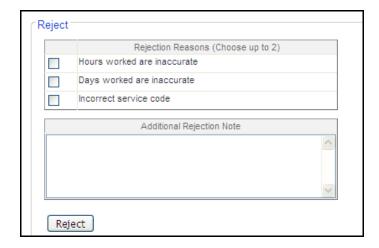
32. To approve the timesheet select the "Approve" button.



- 33. After selecting the "Approve" button you will see the screen below.
  - ♣ You will still have the option to print a paper copy of the timesheets for your records. You can print the approved timesheet by selecting the "Show printable version (PDF)" at the bottom of the screen.
  - ♣ Your timesheet will now be in "Approved" status. PPL will process all "APPROVED" timesheet according to your pay schedule.

#### **TIMESHEET REJECTION**

- 34. If you have reviewed the timesheet and you have determined that it is not correct you can choose to reject the timesheet.
- 35. Scroll to the bottom of the page and select the reason why the timesheet has been rejected. You are also able to add additional notes if you would like to.



- ♣ When a timesheet is rejected it is sent back to the direct care worker for correction and review. Your direct care worker will see the reasons you entered for rejection and will correct the timesheet based upon your reasons.
- 36. After entering your rejection reasons select the "Reject" button.



- 37. Your DSW will need to make the correction and submit their timesheet again for approval. **Remember!** PPL will not pay for timesheets that are not approved.
  - By approving the timesheet, it is automatically entered into PPL payroll system for payment. You can track the progress of the timesheet status any time you want!
  - ♣ When it has been paid the timesheet status will show "PAID". If it has a status of "IN PROGRESS", it means that PPL's payroll team is in the process of cutting the check to your direct care worker.

Congratulations! You now know how to approve or reject your timesheets!

# You can download additional instructions online at <a href="https://www.publicpartnerships.com">www.publicpartnerships.com</a>.

Go to the FL PDO program, click on "Program Login" in the upper-right corner, select "Florida" from the drop-down menu, click on the "Simply- FL PDO" link, enter the following: