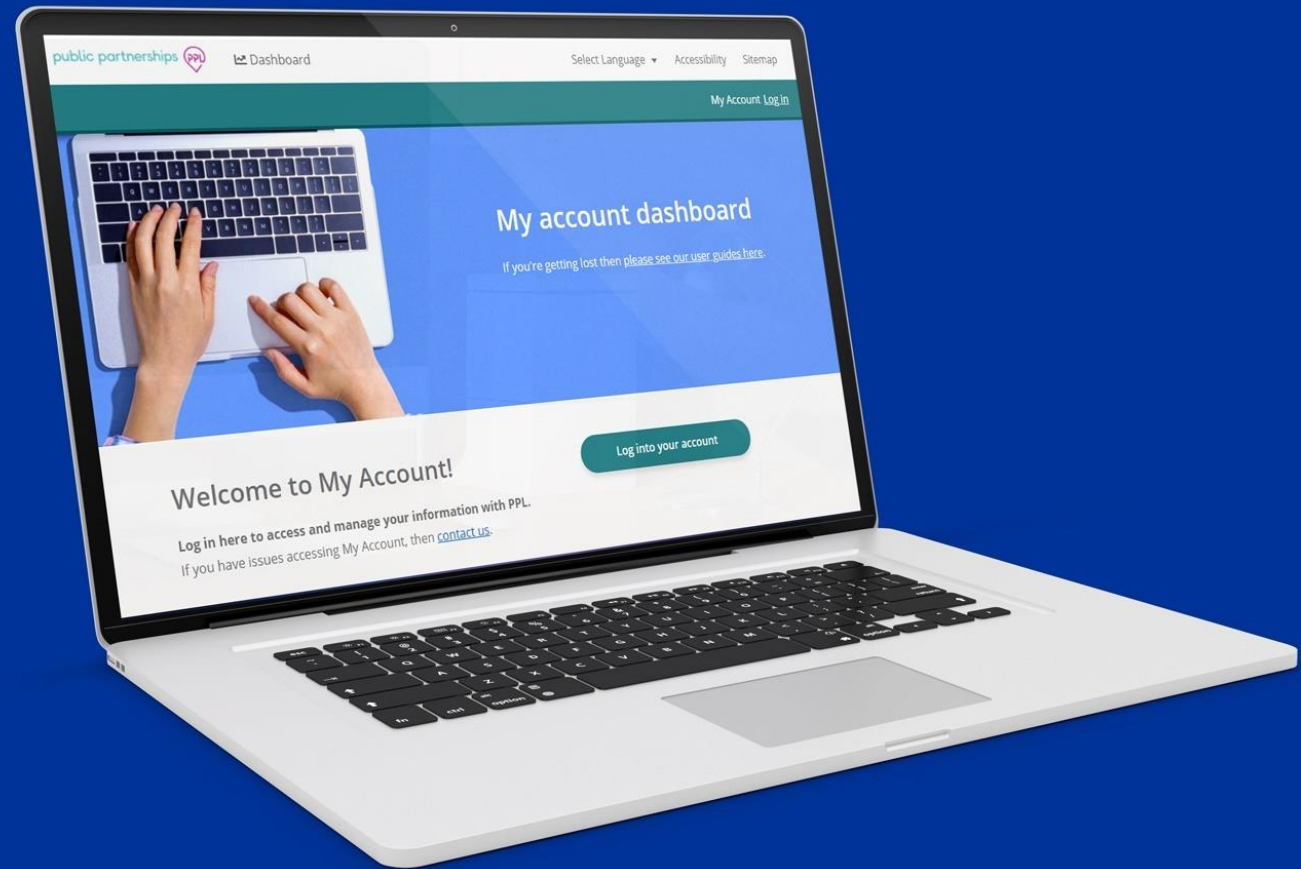




# MyAccount

FOR SERVICE FACILITATORS AND  
MANAGED CARE ORGANIZATIONS

April 2021



# Agenda

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**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



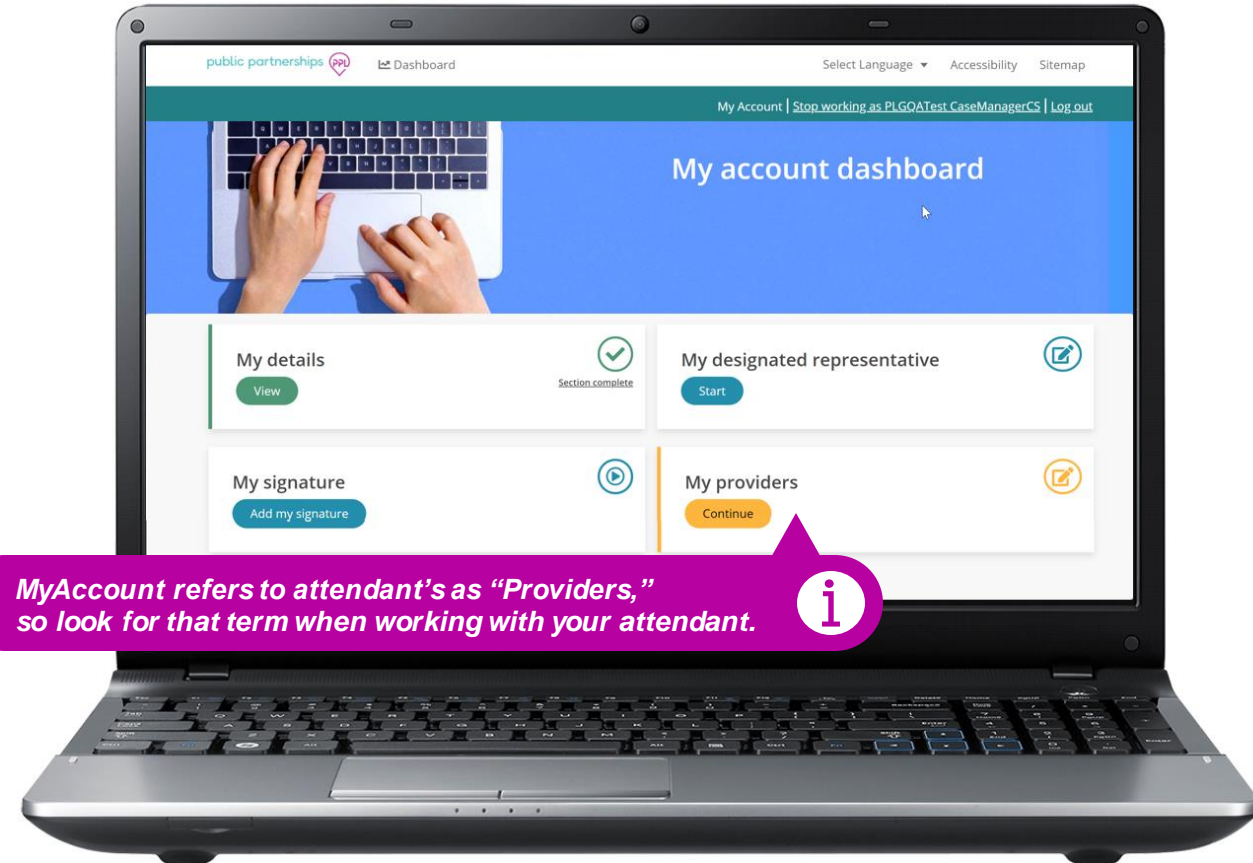
## Attendants

- 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



## OVERVIEW

	<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:

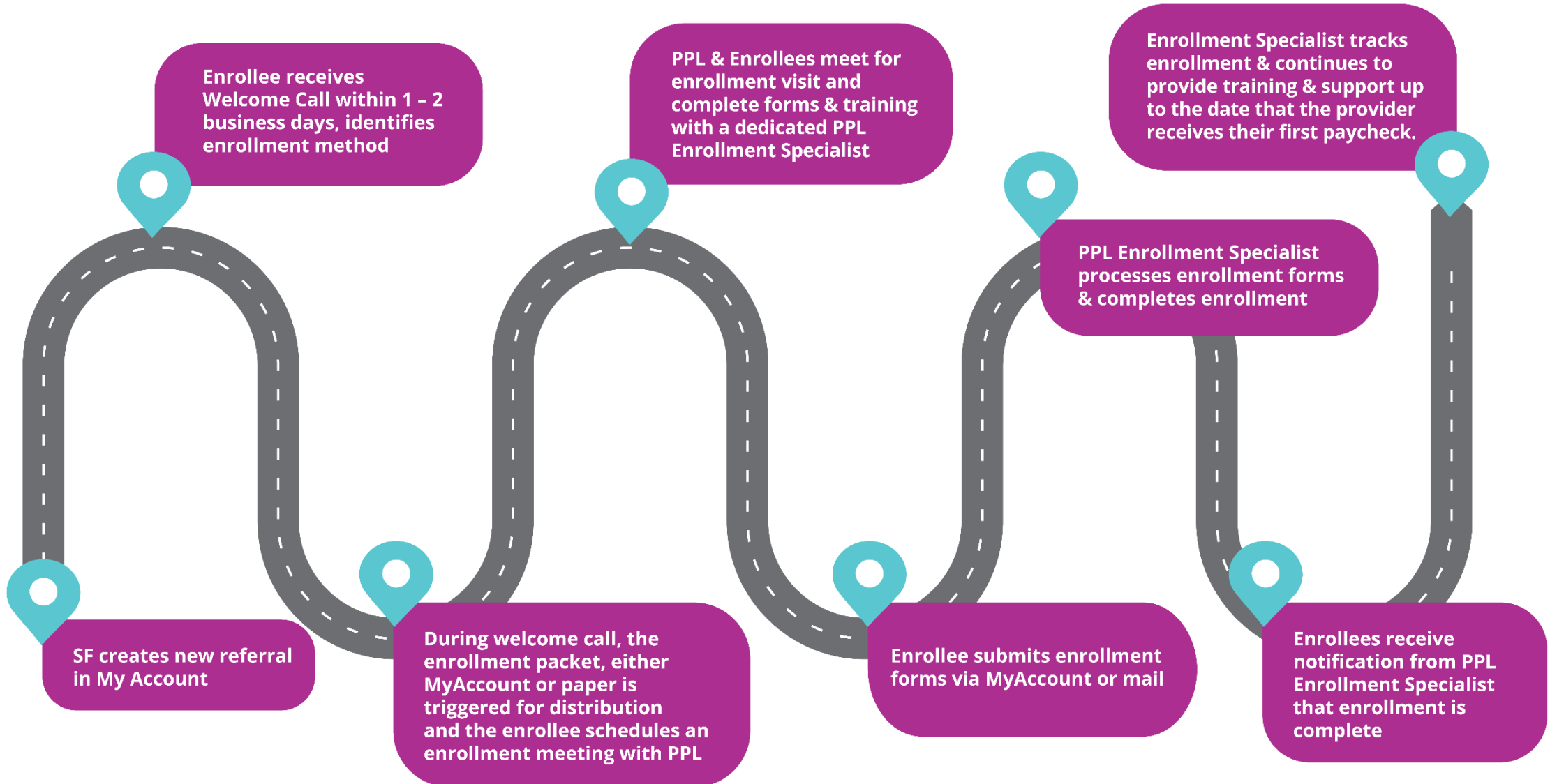
- **Dedicated enrollment support** for all enrollments
  - Dynamic methods to complete enrollment; targets:
    - 80% MyAccount
    - 20% Traditional (mail)
      - ✓ Leveraging bar-coding
  - **Fully integrated**; enhanced capabilities to manage processes and requirements end-to-end electronically
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



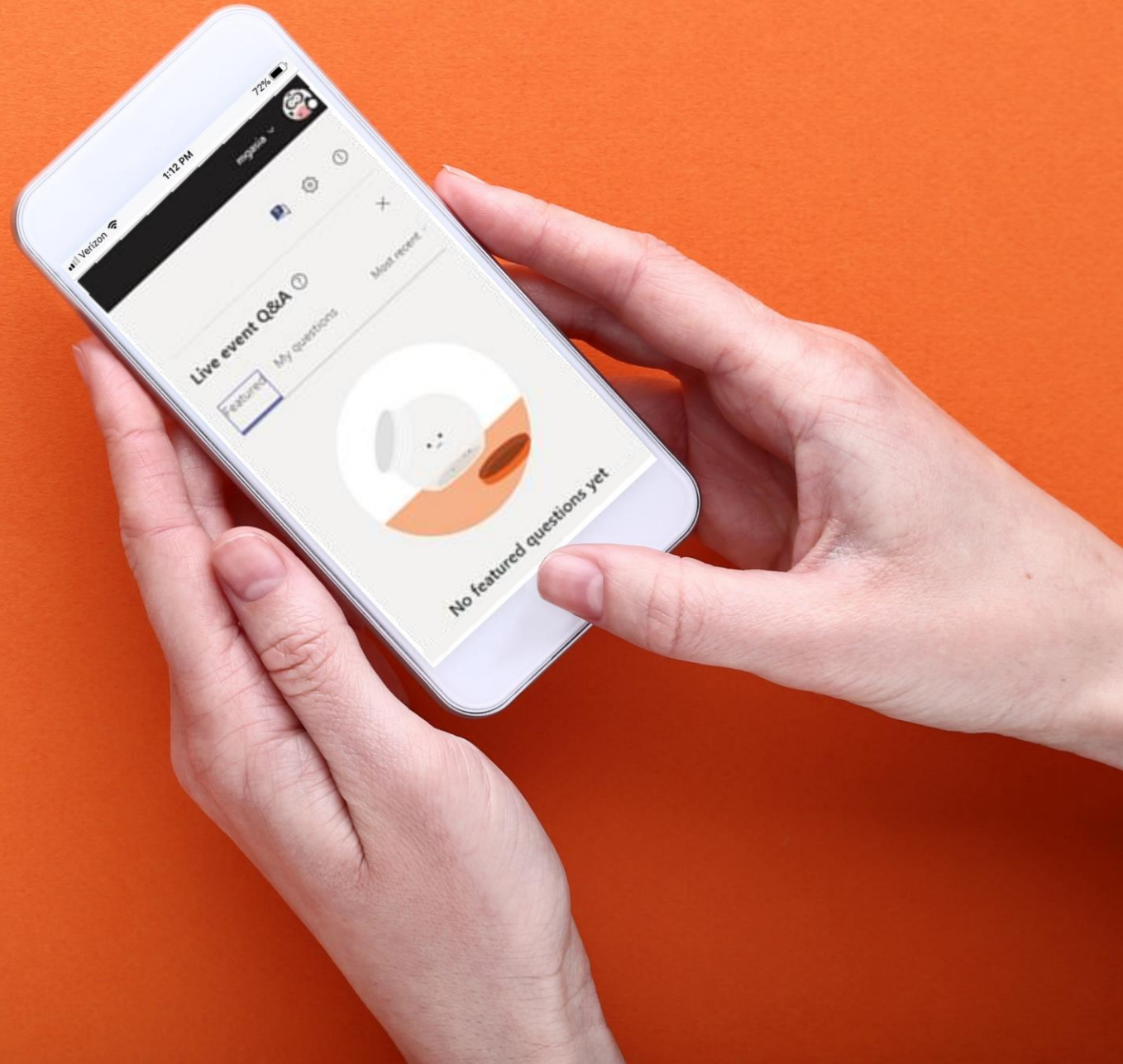
## OVERVIEW



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:

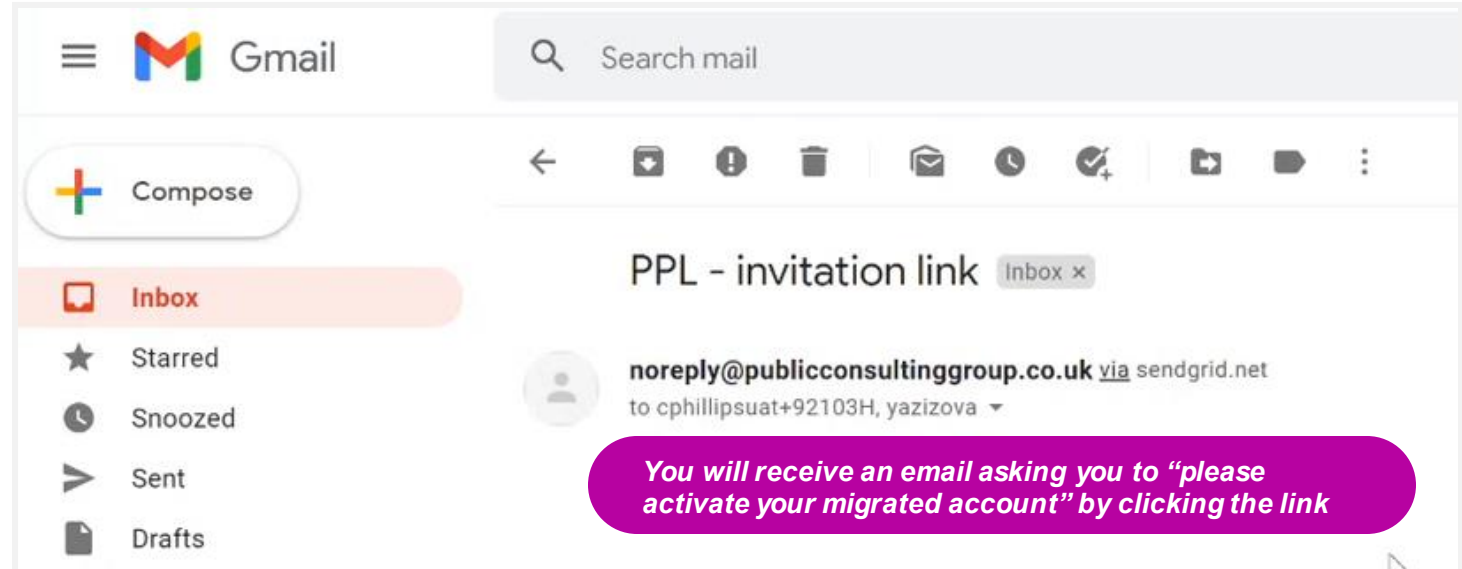
- View your cases
- Work in MyAccount as a consumer or attendant to assist them
- View timesheets
- View authorizations
- Change demographic information

# 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.

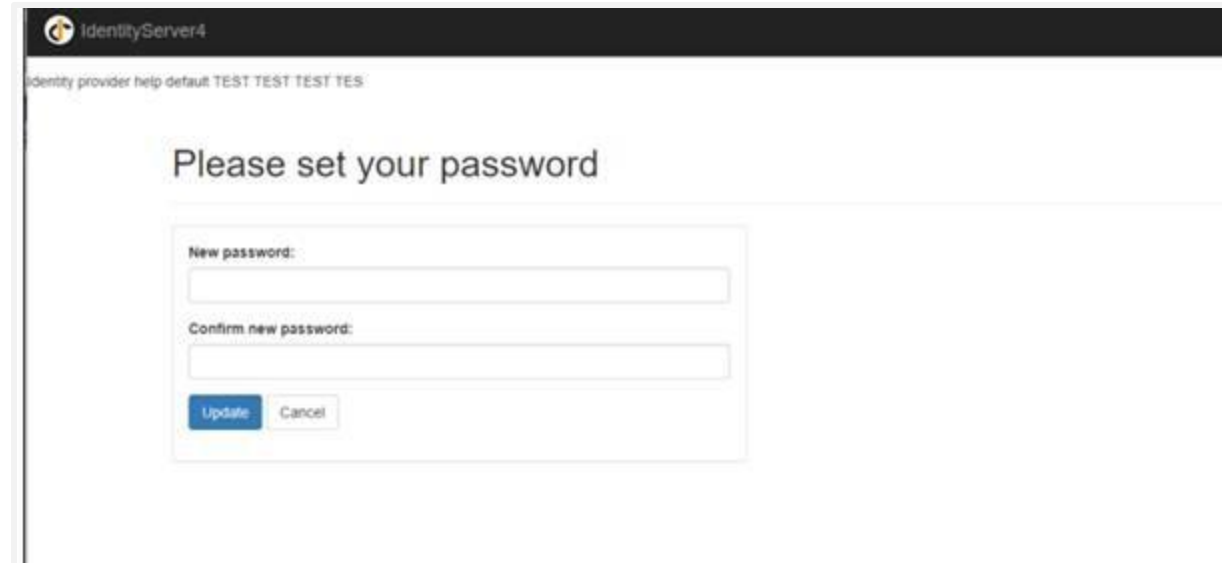


 **ACCOUNT ACTIVATION**

○ 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!





**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

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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 teal header with navigation links for 'Documents', 'My Account', 'Work as', and 'Log out'. A large blue banner at the top contains the text 'ENROLLMENT DASHBOARD' and a search bar. Below the banner, there are two main sections: 'Enrollment documents' on the left and 'Referrals' on the right. The 'Enrollment documents' section includes a 'Filter by:' dropdown and radio buttons for 'All', 'New application', 'Awaiting approval', 'Signing', 'Completed', and 'Transfer/ DocuSign Enrollment'. The 'Referrals' section has a 'View referrals' button and a 'Create a new referral' button. It lists three referrals with details such as 'Enrollment status: Completed', 'Submitted date', and 'Days in action', each with 'View details' and 'Manage user' buttons.

 **CREATE A NEW REFERRAL**

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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.

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

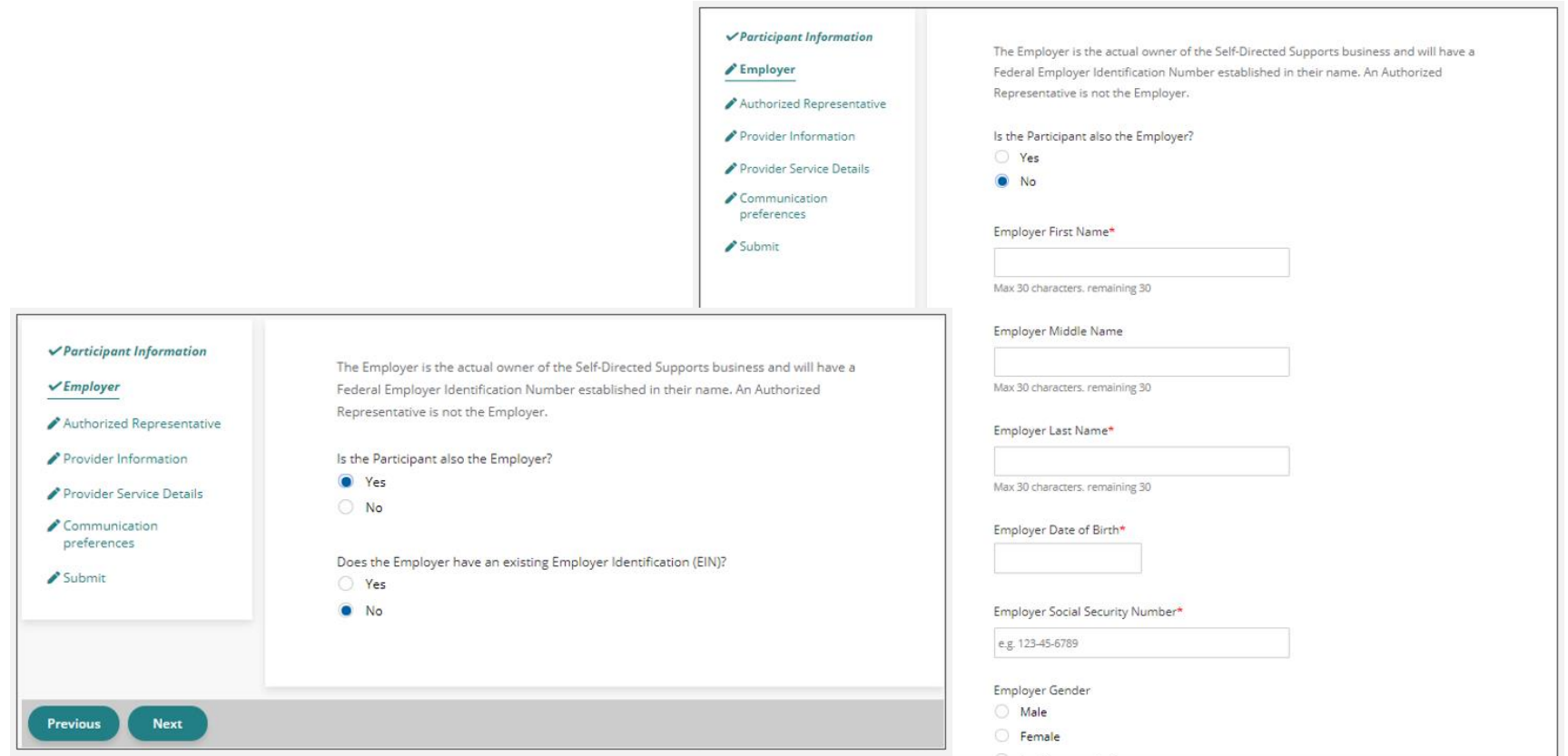
**Street Address (no PO Box)**

Search for... Search

 **CREATE A NEW REFERRAL**

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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** (Completed)

Authorized Representative (Pencil icon)

Provider Information (Pencil icon)

Provider Service Details (Pencil icon)

Communication preferences (Pencil icon)

Submit (Pencil icon)

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

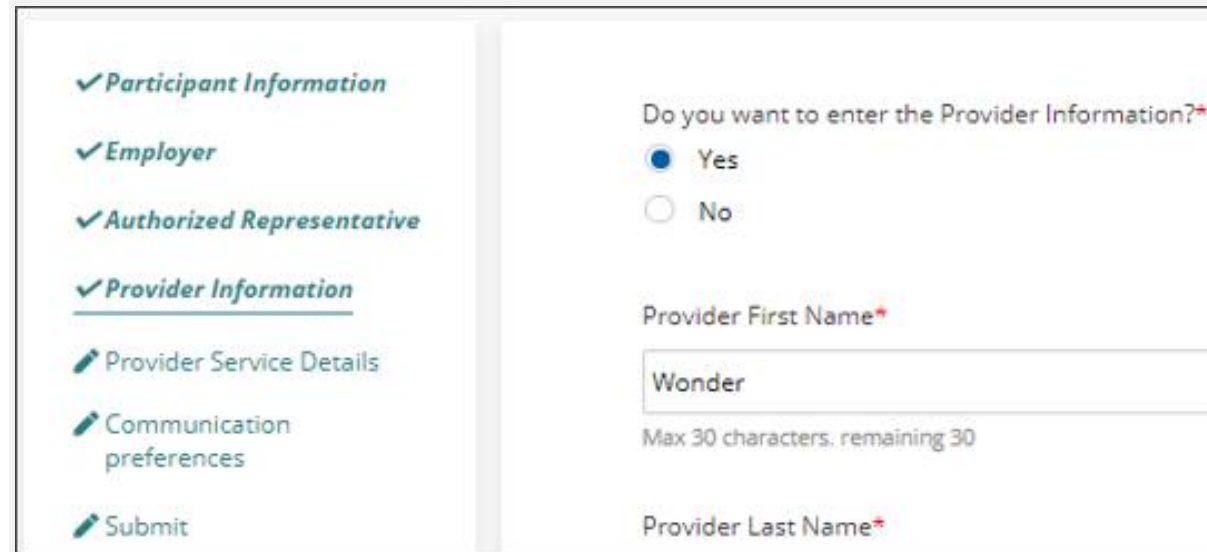
Previous Next

 **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**

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- 5**
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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

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- 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

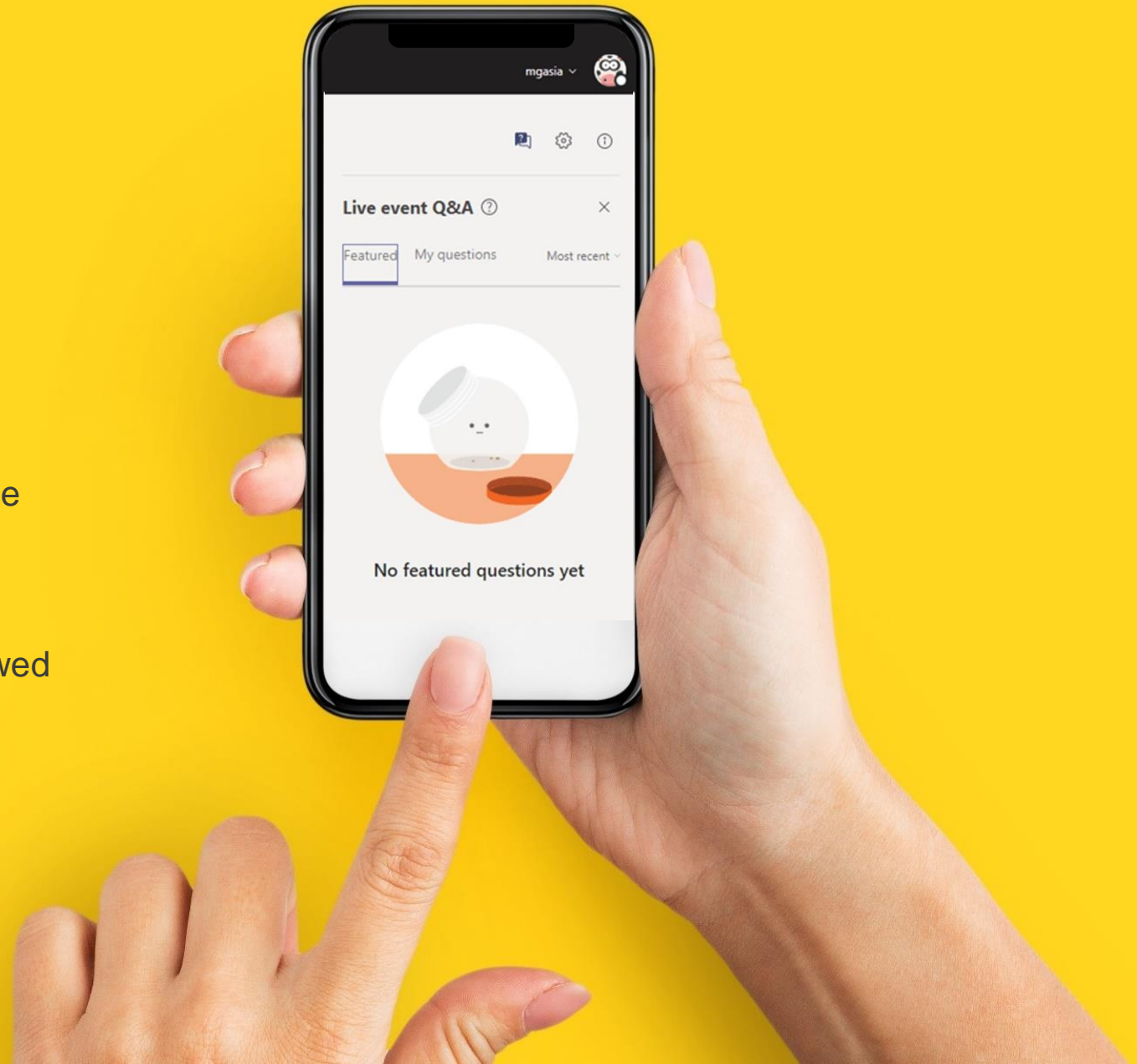
Previous Finish

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

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Active referrals are listed on the homepage of the Dashboard.

The screenshot shows the 'public partnerships PPL' logo and 'Dashboard' in the top left. On the right, there are links for 'Select Language', 'Accessibility', and 'Sitemap'. Below the logo is a 'Documents' section with links for 'My Account', 'Work as', and 'Log out'. The main header features a blue background with a laptop image and the text 'ENROLLMENT DASHBOARD'. A search bar is located below the header. On the left side, there are filter options for 'Enrollment documents' (All, New application, Awaiting approval, Signing, Completed, Transfer/ DocuSign Enrollment) and 'State' (All, Ohio, Alabama, Rhode Island). The main content area is titled 'Referrals' and includes buttons for 'View referrals' and 'Create a new referral'. It lists three referrals, each with 'View details' and 'Manage user' buttons. A purple callout bubble points to the 'View details' button for the first referral, containing the text: 'You can review the details of an active case by clicking "View Details."'

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

# FINDING A REFERRAL



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.

public partnerships PPL Dashboard

Select Language Accessibility Sitemap

Documents My Account Work as Log out

## ENROLLMENT DASHBOARD

Filter by:

**Enrollment documents**

- All
- New application
- Awaiting approval
- Signing
- Completed
- Transfer/ DocuSign Enrollment

**State**

- All
- Ohio
- Alabama
- 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](#)

# 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 PPL 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.

All states All statuses From: To:

Search for... Search

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

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- 4

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

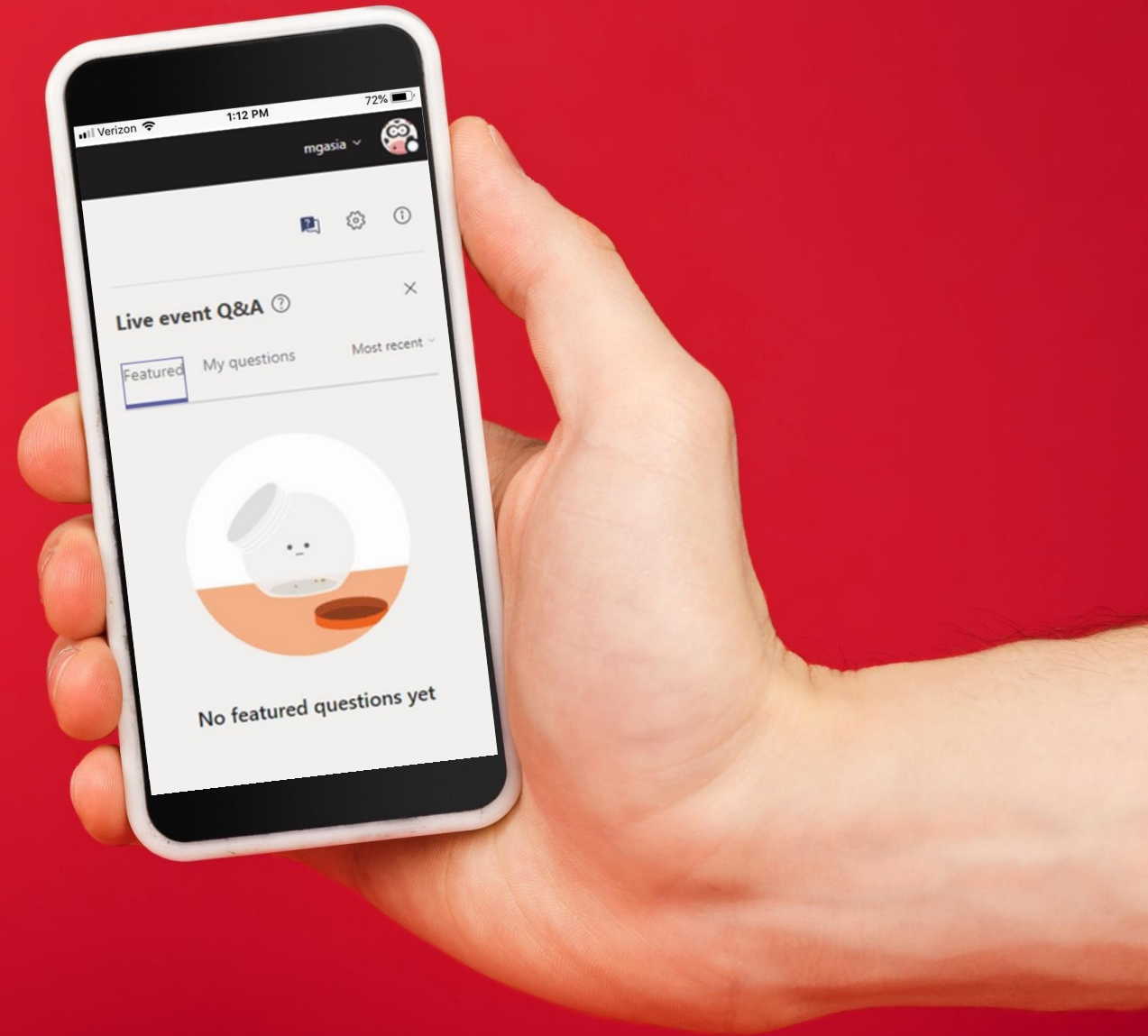
The screenshot shows a user management interface. On the left, there are filter options for 'Enrollment documents' (All, New application, Awaiting approval, Signing, Completed, Transfer/ DocuSign Enrollment) and 'State' (All). On the right, there are three buttons: 'Hire a new provider', 'Manage this user' (highlighted with a red box), and 'Close'. Below these buttons is a card titled 'Monday Special details' with the following information: Enrollment status: Signing, Submitted date: 03-22-2021, Checklist: In progress, Program: CCC +, Role: Participant, 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
<a href="#">Kate Whalin</a> (PA-0010026)	Completed	05-07-2020	252 days	View details   Manage user
<a href="#">kate employer</a> (PA-0010026)	Completed	03-23-2020	297 days	View details   Manage user
<a href="#">Kate Employer</a> (PA-0010024)	Completed	03-23-2020	297 days	View details   Manage user

A callout bubble points to the 'Manage user' button for the first entry, containing 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'. At the top, there are navigation links for 'Dashboard', 'Select Language', 'Accessibility', and 'Sitemap'. On the right, there are links for 'My Account' and 'Log out'. The main content area is titled 'My account dashboard' and includes a list of tasks 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 eight dashboard cards arranged in a 4x2 grid:

- My details**: Includes a 'View' button and a 'Section complete' status.
- My signature**: Includes a 'Change' button and a 'Section complete' status.
- My programs**: Includes a 'Continue' button and a pencil icon.
- My designated representative**: Includes a 'Start' button and a pencil icon.
- My providers**: Includes a 'Start' button and a pencil icon.
- My timesheets**: Includes a 'View' button and a checkmark icon.
- My authorizations**: Includes a 'View' button and a checkmark icon. This card is highlighted with a red border.



## 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.

Service Authorizations For (ID#PA-0010929)

Show/ Hide filter

Service Type

Creation Date Between:  and

Status:

Authorization ID

**SEARCH** **RESET**

There are no authorizations for this participant.

1-0 Show  records at a time.

**PRINT PAGE**



# 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 page has a teal header with navigation links: 'Documents', 'My Account', 'Work as', and 'Log out'. Below the header is a large blue banner with a laptop image and the text 'ENROLLMENT DASHBOARD'. A search bar is located below the banner. The main content area is divided into two columns. The left column has filter options for 'Enrollment documents' (All, New application, Awaiting approval, Signing, Completed, Transfer/ DocuSign Enrollment) and 'State' (All, Ohio, Alabama, Rhode Island). The right column is titled 'Referrals' and contains a table of referral records. Each record includes the provider's name, enrollment status, submitted date, and days in action, along with 'View details' and 'Manage user' buttons. A purple callout bubble points to the 'View details' button for the first provider, 'Kate Whalin'.

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

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	<b>Checklists</b>	Providers	Representative
Date Enrollment Packet Received:		2021-3-29		
Date Enrollment Packet Complete:		2021-3-29		
<b>CA SDP Participant Checklist</b>				
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				

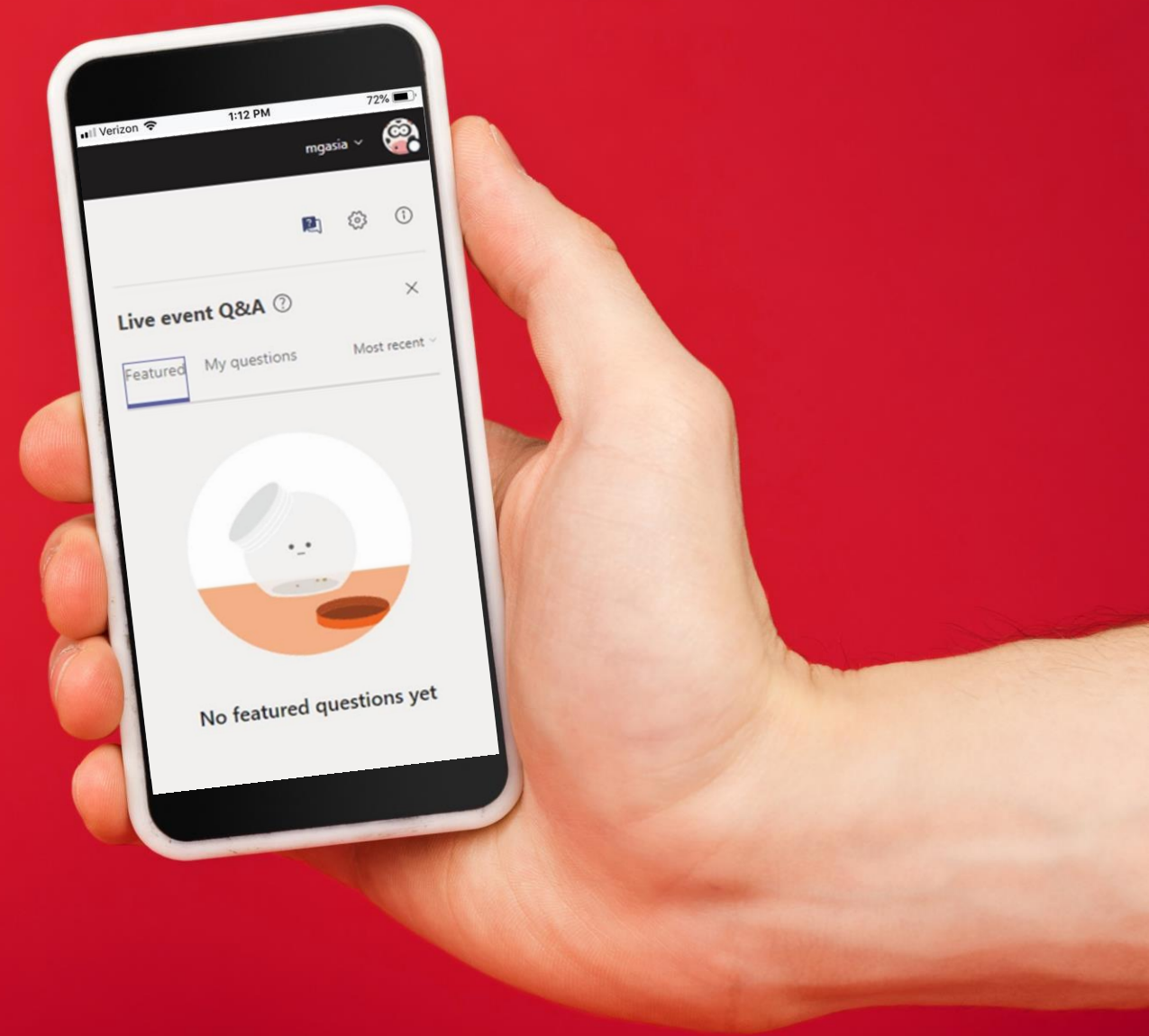


LIVE EVENT

# Q&A

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

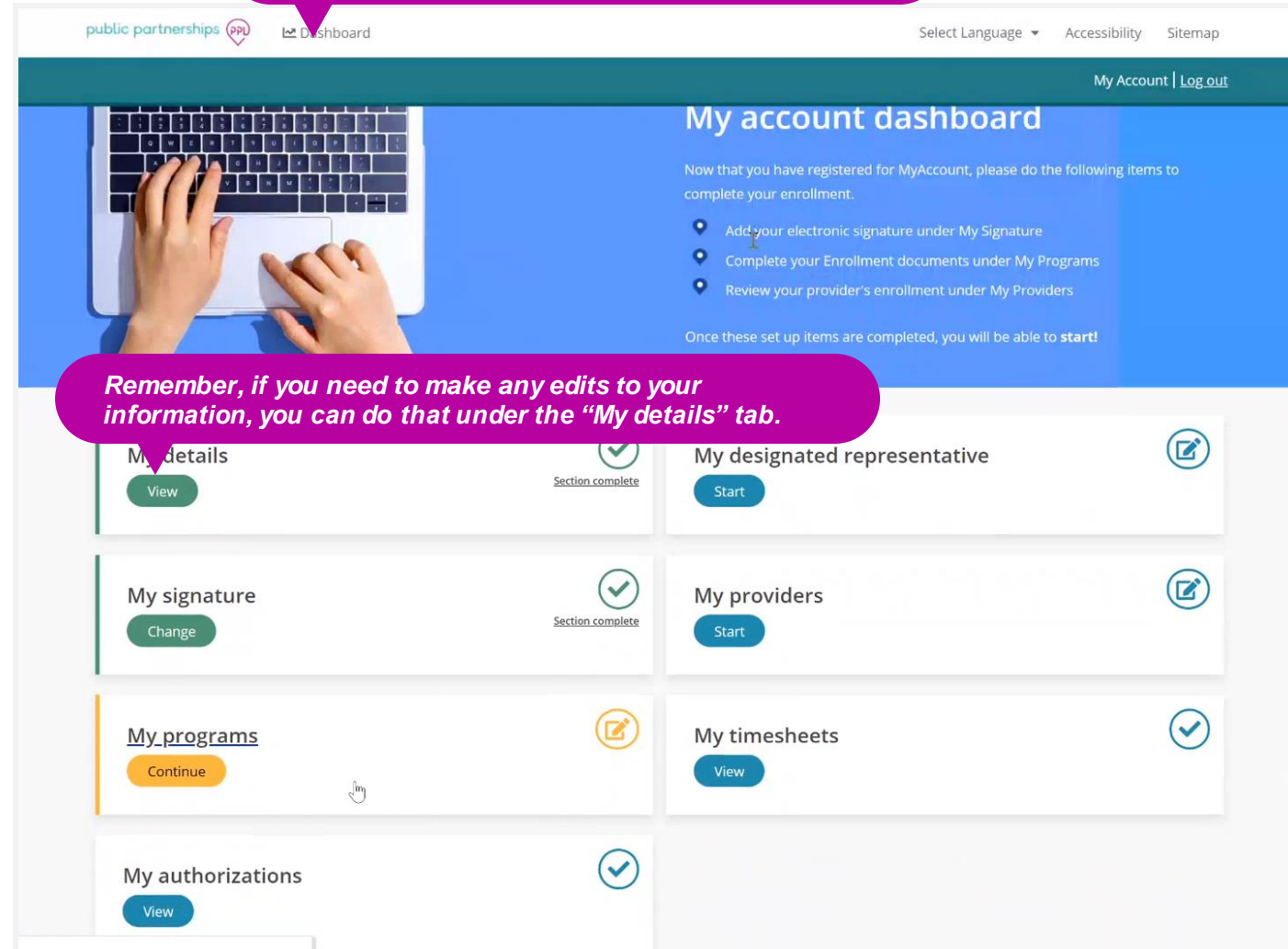
Anything we can't answer will be followed up on with the experts who can!





# 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

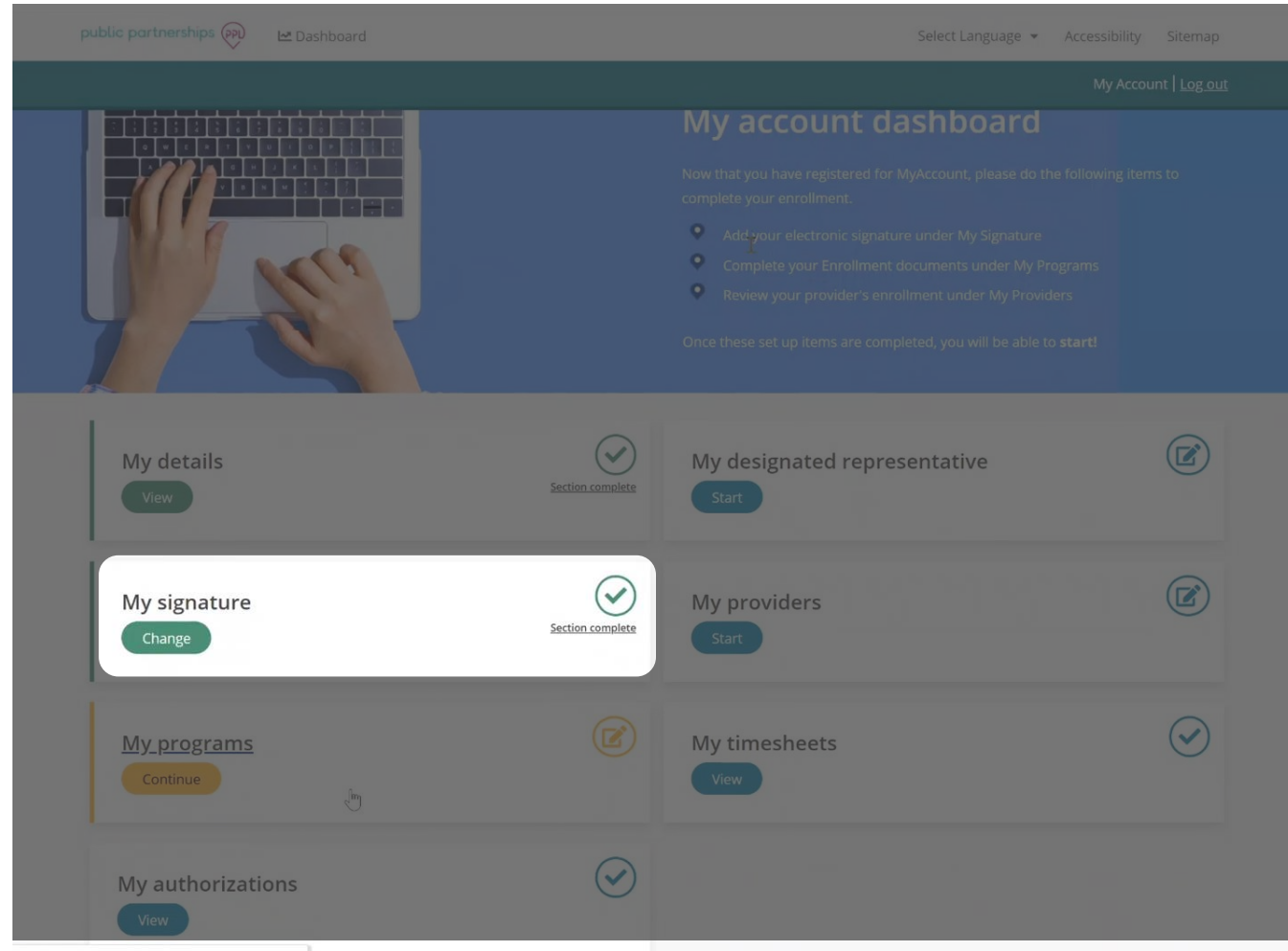




# MY SIGNATURE

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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

[Empty signature drawing area]

Change Style

Text size:\*

Small

Medium

Large

# MY SIGNATURE

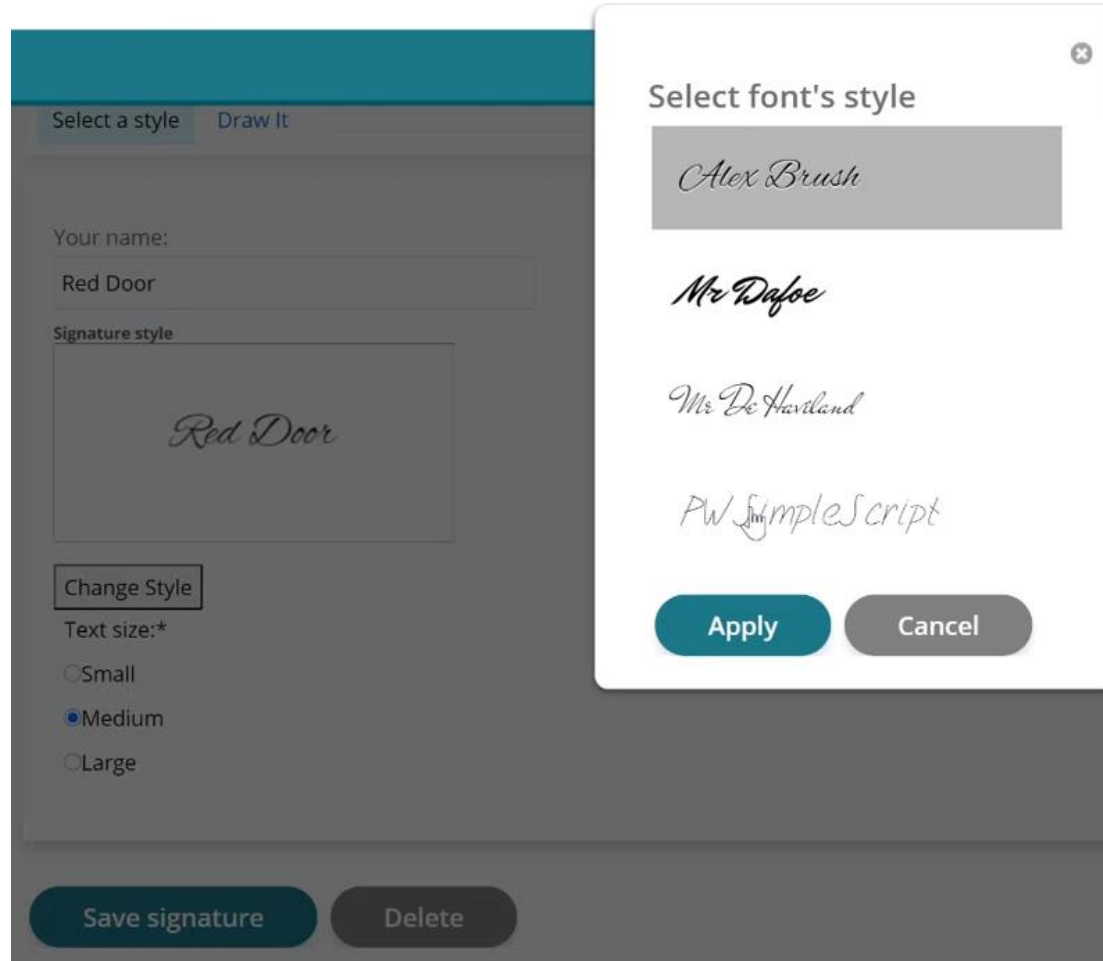
Electronic signatures are required in MyAccount. You can select a font and style and use that as a signature, or you can draw your signature. For touch screen users, drawing a signature works well.



 MY SIGNATURE

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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, there is a "Signature style" section with a preview box showing the text "Red Door" in a cursive font. Below the preview, there is a "Change Style" button and a "Text size:\*" section with three radio button options: "Small", "Medium" (selected), and "Large". At the bottom of the main interface, there are two buttons: "Save signature" and "Delete".

A modal dialog titled "Select font's style" is open in the foreground. It contains a list of four font styles: "Alex Brush", "Mr Dajoe", "Mr De Havilland", and "PW Simple Script". The "PW Simple Script" option is currently selected. At the bottom of the dialog, there are two buttons: "Apply" and "Cancel".

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- 4

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

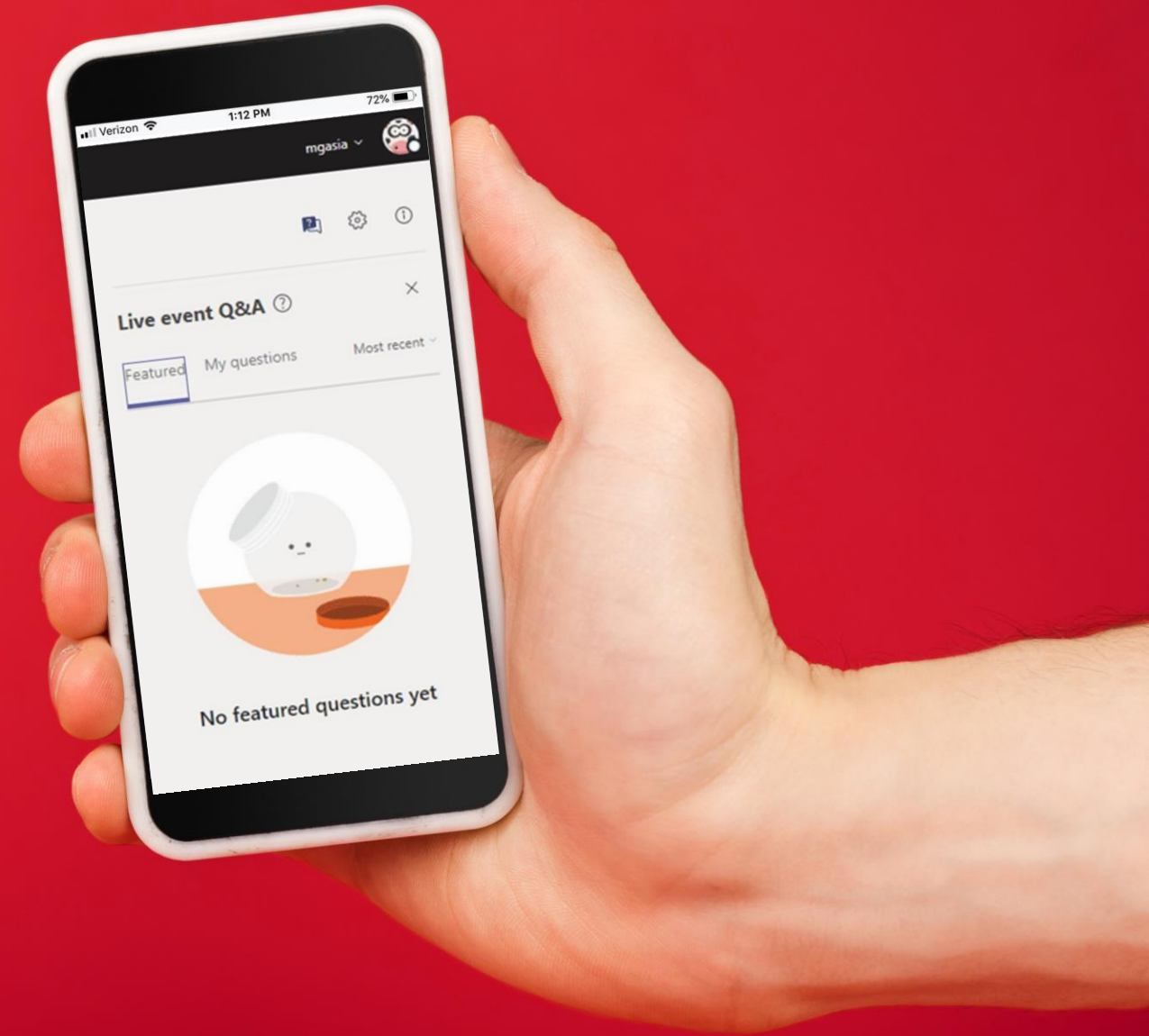
# MY SIGNATURE

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



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!**

<b>My details</b> View <span>Section complete</span>	<b>My designated representative</b> Start
<b>My signature</b> Change <span>Section complete</span>	<b>My providers</b> Start
<b>My programs</b> Continue	<b>My timesheets</b> View
<b>My authorizations</b> 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](http://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 . . . . .  No  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:

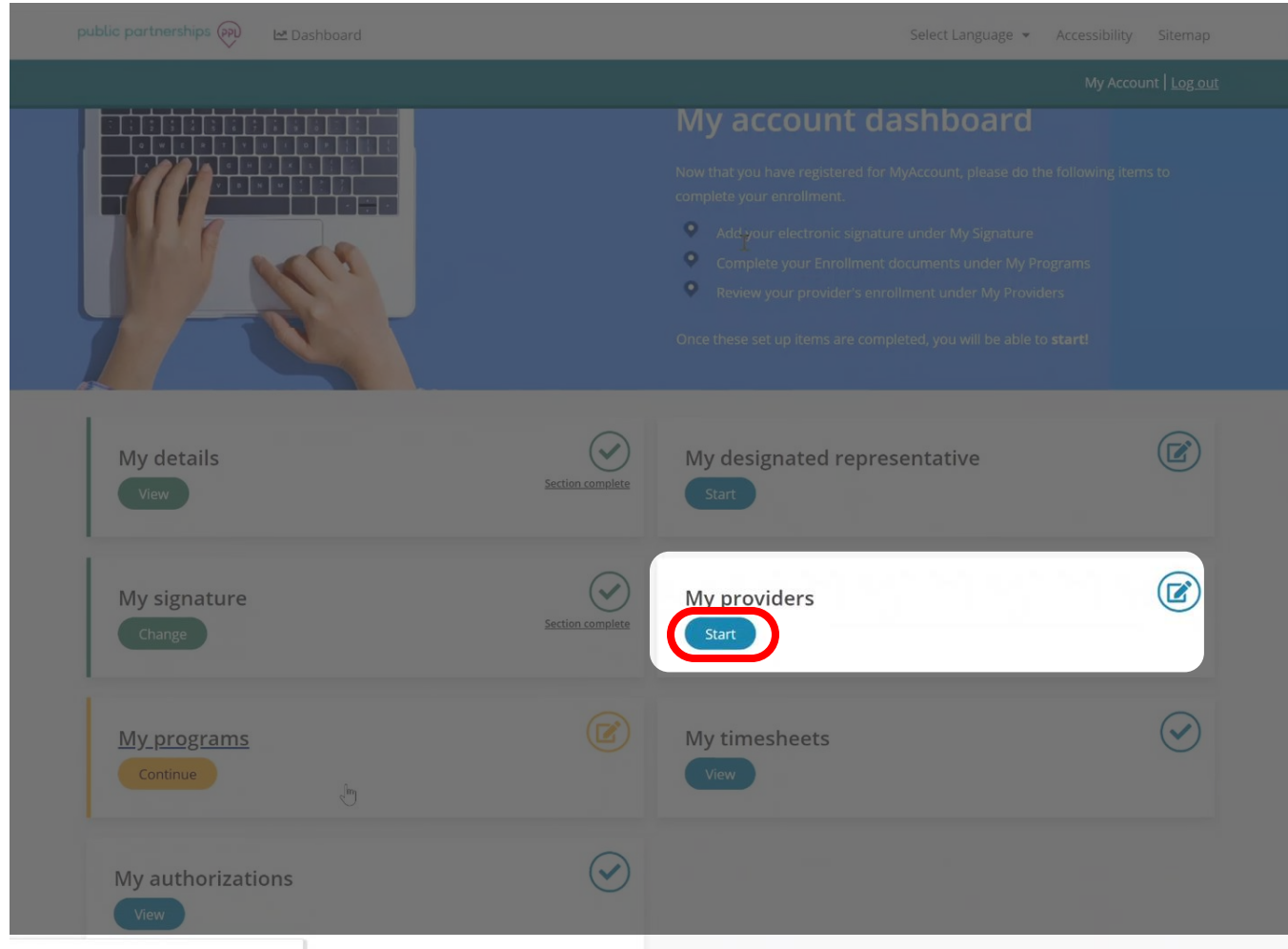
- Hire a new provider
- Sign any necessary forms for their enrollment



# 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](#)

 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

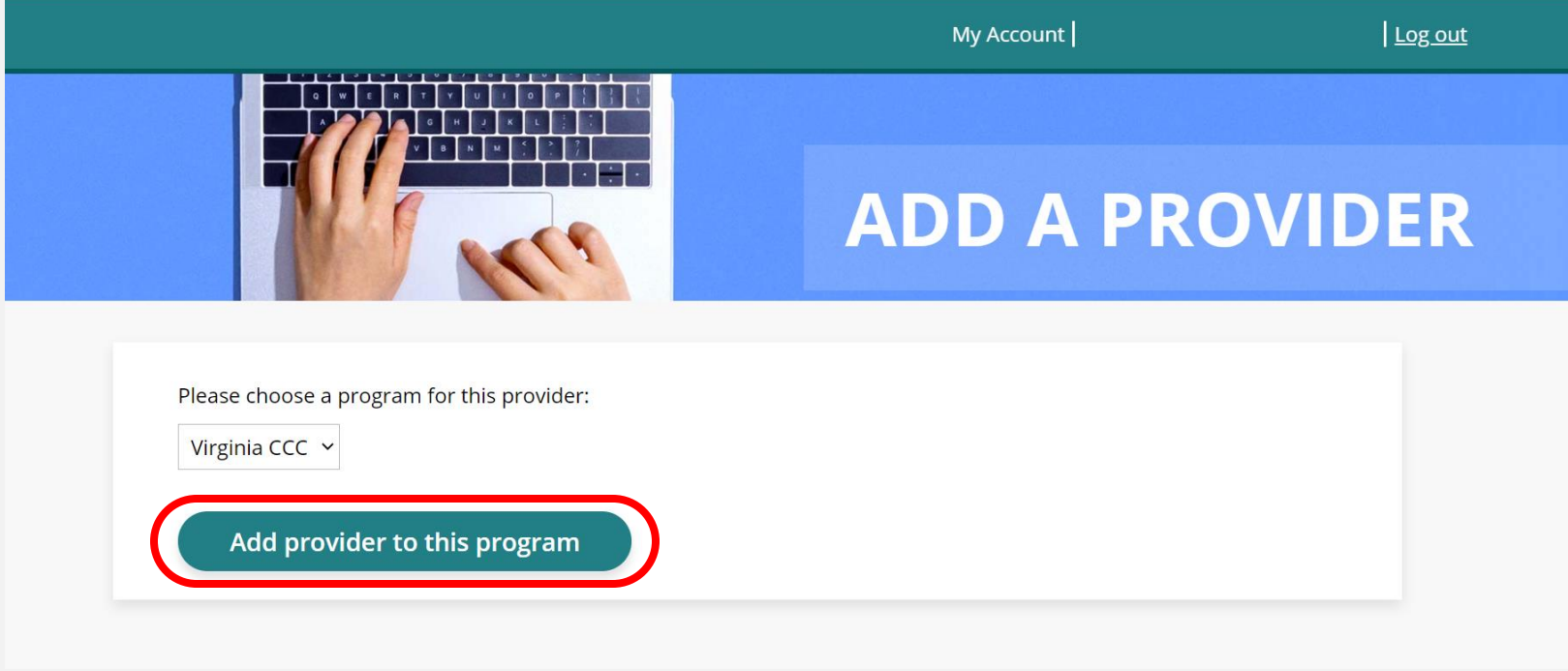
[View](#)

 **HIRING A NEW PROVIDER**

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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**




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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...

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...

**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**

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 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**

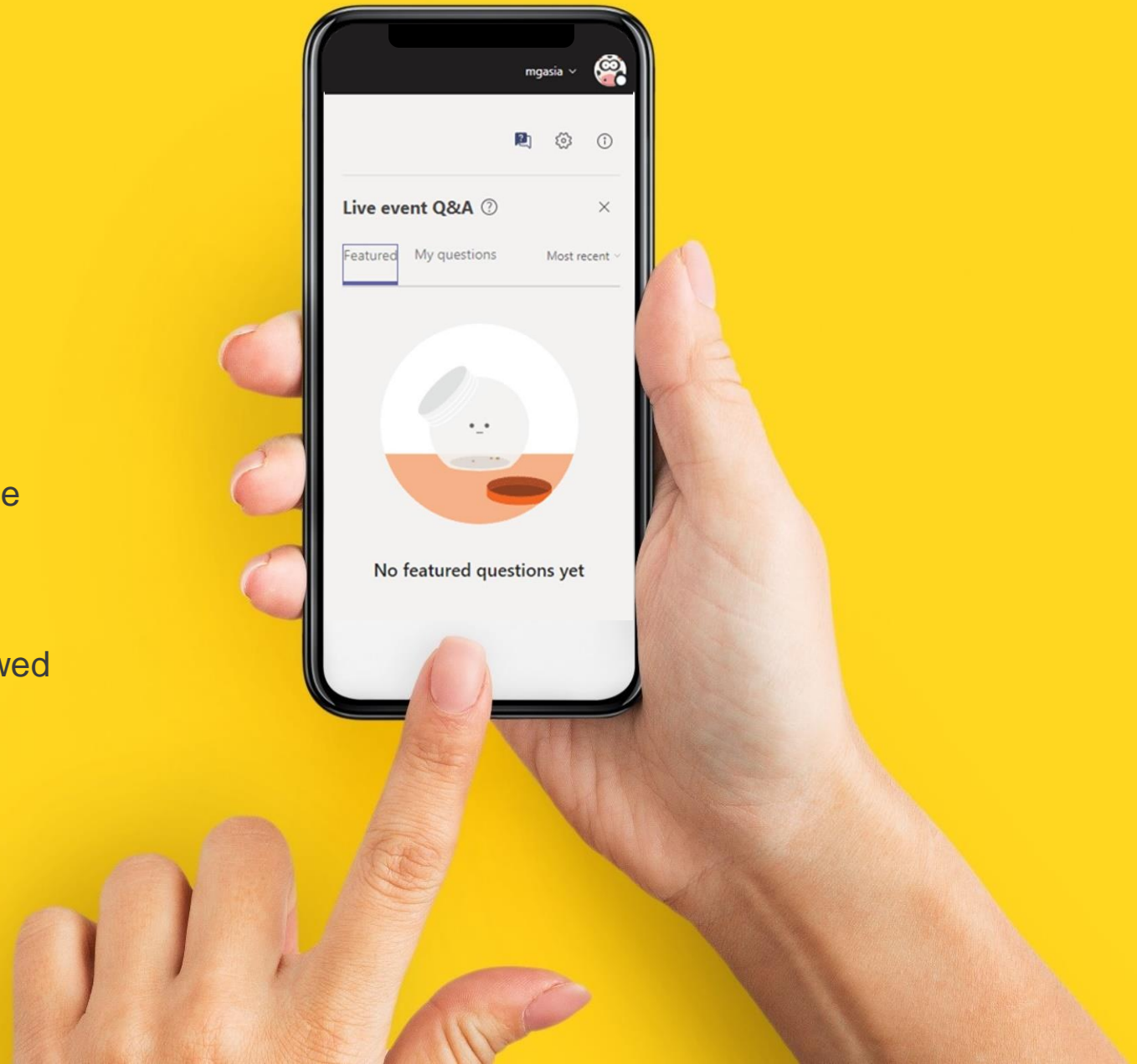
**Edit**   **Confirm**

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

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


<p>My details</p> <p><a href="#">View</a></p> <p> <small>Section complete</small></p>	<p>My signature</p> <p><a href="#">Add my signature</a></p> <p></p>
<p><u>My programs</u></p> <p><a href="#">Continue</a></p> <p></p>	<p>My timesheets</p> <p><a href="#">View</a></p> <p></p>
<p>My W-2</p> <p><a href="#">View</a></p> <p></p>	<p>My paystubs</p> <p><a href="#">View</a></p> <p></p>


 PROVIDER ENROLLMENT

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

Click “View” to complete the enrollment.

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

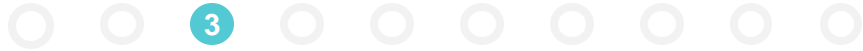
 Close

### 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

Save Next

 PROVIDER ENROLLMENT



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




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

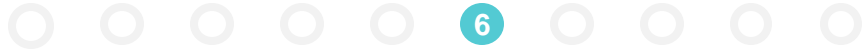
Please complete the fields below. Select either Direct Deposit to Bank Account or to a Direct Deposit to Debit Card Account

**Select payment type\***

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

**Save**   **Previous**   **Next**

# PROVIDER ENROLLMENT

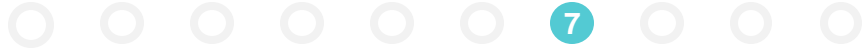


The Employment Eligibility section of the enrollment process is important and should be reviewed carefully.

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

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

# 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 informaition 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

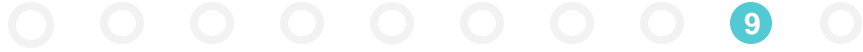
Max 30 characters. remaining 30

**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.

<ul style="list-style-type: none"> <li>✓ <i>General Information</i></li> <li>✓ <i>Service Details</i></li> <li>✓ <i>Payment Information</i></li> <li>✓ <i>Employment Eligibility</i></li> <li>✎ Tax Information</li> <li>✎ Authorization and Signature</li> </ul>	<p>VA Department of Social Services - Central Registry Release of Information Form</p> <p>Marital Status</p> <p>Single ▾</p> <p>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'.</p> <p><input type="checkbox"/> Check if you are or were married.</p> <p><input type="checkbox"/> Check if you have children</p>
---	--

# 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

1. I understand and accept that Public Partnerships LLC (PPL) is not my employer.
2. 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.
3. 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.
4. 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.”

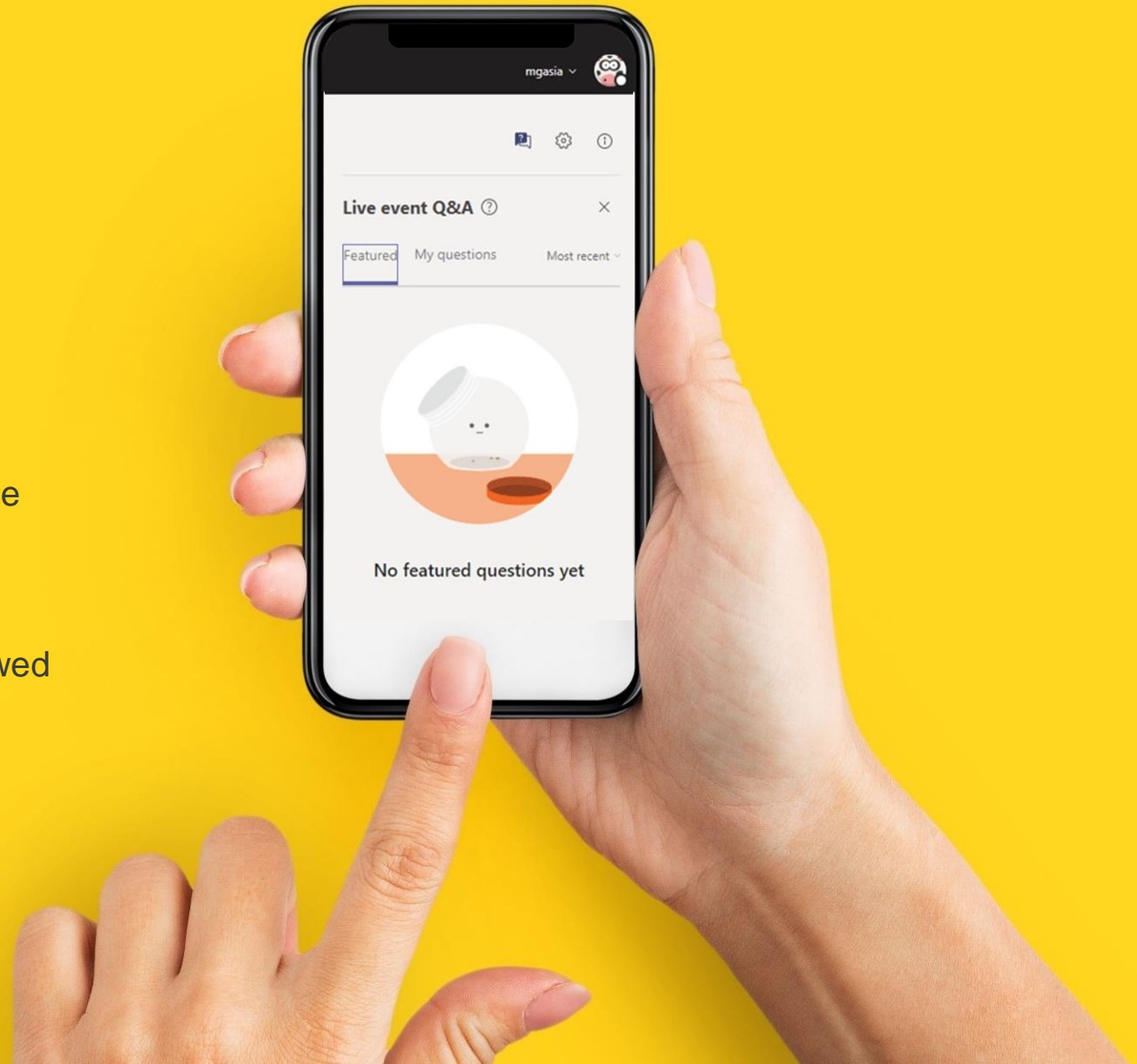


LIVE EVENT

# 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;



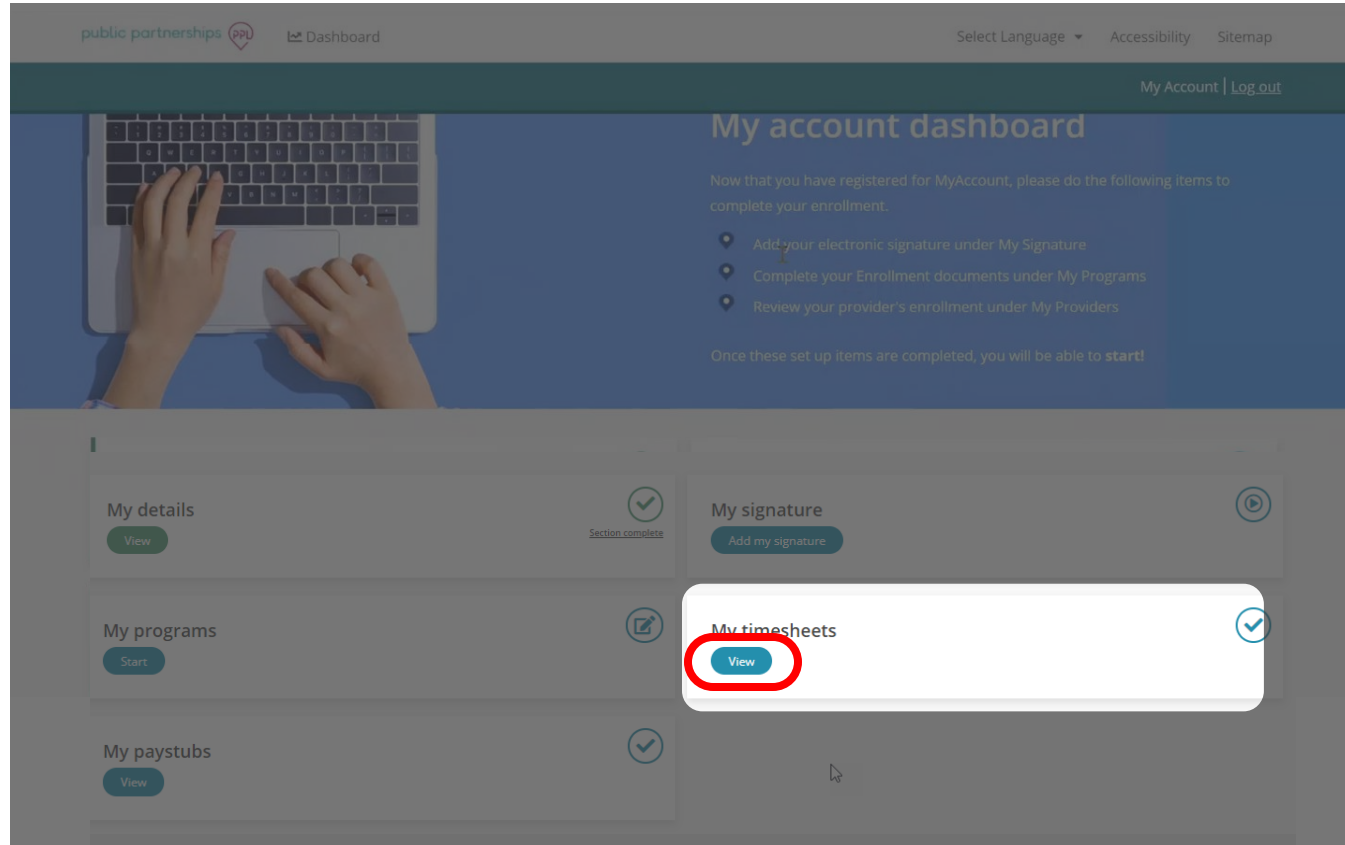
*You will continue to use the Time4Care app (with MyAccount credentials) to submit your timesheets.*



 **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 shows the 'Time Entries' interface. At the top, there's a 'Pay Period' dropdown set to 'Dec 16 - Dec 31' and a 'Participant' dropdown set to '2Mighty Tux'. Below this is a table with columns for date and service. The table shows dates from Wednesday 16 to Tuesday 22, with 'no entries' listed for each date. A '+ ADD ENTRY' button is present for each date. A modal window titled 'Add Entry' is open, showing a 'Service' dropdown menu with the text 'Please select service...'. Below the dropdown are fields for 'Date In', 'Time In', 'Date Out', and 'Time Out'. The 'Date In' is set to 12/17/2020 and 'Time In' is 08 : 43 am. The 'Date Out' is set to 12/17/2020 and 'Time Out' is 09 : 43 am. At the bottom of the modal are 'ADD ENTRY' and 'CANCEL' buttons.

 **TIMESHEETS**



### 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			<a href="#">View Entries</a>
5/16/2020 - 5/31/2020	Provider	PODM0000989	2h 0m	2 entries			<a href="#">View Entries</a>
5/16/2020 - 5/31/2020	Provider	PODM0000989	2h 0m		\$ 20.00	\$ 17.72	<a href="#">View Entries</a>

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			<a href="#">View Entries</a>
5/16/2020 - 5/31/2020	Provider	PODM0000989	2h 0m	2 entries			<a href="#">View Entries</a>
5/16/2020 - 5/31/2020	Provider	PODM0000989	2h 0m		\$ 20.00	\$ 17.72	<a href="#">View Entries</a>



6

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

**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**

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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!

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